

**THE STORIES SUPERINTENDENTS TELL ABOUT GIFTED EDUCATION:
A STUDY OF THEIR NARRATIVES**

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This qualitative study suggests a unique advocacy strategy for improved gifted programming in public schools. A review of the literature reveals that in light of NCLB and other political and economic factors, gifted education is once again, as it historically has been, at risk. Advocacy efforts at the state and national levels have been sporadic and only partially successful because programming is primarily a local proposition. Further, the literature exposes a paucity of research attention toward public school superintendents who are key figures in their district's philosophy toward gifted learners and who control its financial and human resources. To address this omission, the study analyzes lived experiences of public school superintendents who were prompted to recall an encounter with gifted education in any of their personal or professional roles. The Critical Incident Technique (CIT) was used to examine the resulting narratives. CIT posits that selected memories, which have stood the test of time, are meaningful. The gifted education issues embedded in the recalled stories hold key experiential information and attitudinal data that, upon examination and interpretation, can guide the efforts of gifted education coordinators and others charged with the design and delivery of services. Eighteen superintendents were interviewed. Each of their stories was analyzed for perspective, setting, embedded gifted education issue(s) and overall positive or negative affect. Selected stories highlighted the attitudes, feelings or beliefs that resulted from the experience and that potentially could inform programmatic, professional development or advocacy activities at the local level. Additionally, the stories were analyzed collectively for patterns or themes that could contribute

to a professional discourse about the role superintendents play in the establishment, quality and maintenance of gifted programming in public schools. The superintendents' stories encompassed major issues in gifted education: identification, acceleration, curriculum, social justice concerns and program models. They were offered from a variety of personal and professional perspectives, from early childhood to the present, indicating the wide spectrum of memorable encounters with gifted education these leaders have experienced over their lifetimes – encounters that may reveal their mindsets toward gifted education, and potentially its fate in their districts and beyond.

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PREFACE

This dissertation is dedicated to the memory of Dr. Patricia Manning whose wisdom and persistence changed the course of my life. I am forever grateful.

1.0 INTRODUCTION TO THE STORIES

I noticed it soon after the start of my career as a teacher of gifted students. I had been a typical elementary teacher for many years, but now something was different in the way people approached me. Within a few minutes of learning my new occupation, the story spills out. Nearly everyone has one, along with a nearly irresistible need to be heard. A new neighbor, upon meeting me for the first time, sadly confessed that his daughter had “just missed being gifted by 3 points”. A friend complained that despite her daughter’s sustained love of writing, she had been denied the chance to contribute to her school’s literary magazine because it was the domain of the gifted program and she wasn’t an identified gifted child. But her son, a serious science student placed in the gifted program, wanted no part of fiction writing. An acquaintance lamented that her child loved the gifted program, but was only happy one day a week – the day she got to go to the gifted room – because she was bored and ignored the rest of the week.

Soon the stories were not only coming from friends and acquaintances – my professional colleagues began confessing their experiences with gifted education as well. During casual conversation, a high school principal quipped that if she could eliminate the gifted parents (and the cheerleaders), her job would be immeasurably easier. She said their persistent advocacy and high maintenance presence tried her patience and consumed more than their share of her time and energy. A colleague complained that her own active, athletic child was, in essence, punished for being gifted by having to stay inside at recess time to make up classwork missed while

attending the gifted program. A district level administrator told me he overheard a teacher tell a parent that she should investigate a local private school because she didn't think our public school could deal with a child as smart as hers. And one superintendent told me his daughter coasted through high school with high marks and little effort, and then, despite her gifted ability, nearly flunked out of college because she had never learned how to work hard and study.

The stories are always spontaneous, completely unsolicited, and appear to be somewhat cathartic. The need to tell them to me seems almost overwhelming. Stories involving gifted education are often passionate, poignant, and occasionally jaw-dropping about what was provided or what was denied. The perspective varies – how identification or programming (or lack thereof) impacted the storyteller as a child, as a parent, as a professional, or as a bystander – but it's always personal. The memory, whether positive or negative, can apparently last a lifetime. Bitterness, longing, frustration, injustice, entitlement, pride, and relief were only a few of the emotions attached to the words offered to me as a representative of this controversial field of education. After decades of listening to these narratives, and in several cases, using them professionally to design strong, administratively supported gifted programs, I began to think that they held some degree of psychological significance and practical utility.

Hence, I embarked on a mission to look at these stories through a researcher's lens, hoping to find implications and guidance useful for creating quality gifted programs, and perhaps inviting school leaders to contribute their thoughts toward strengthening them.

1.1 WHAT IS “GIFTED”?

Schools throughout the country are charged with preparing the next generation of adults to assume responsibility for the future of our nation and our world. Among the students served by the education system are students who exceed the norm in each, and sometimes every, domain. Who are they? Should these students be labeled at all, and if so, is “gifted” a word that describes who they are or what they can do? How do we best serve exceptional students in the public education system? Do they have unique educational needs that must be met or is it acceptable to assign a lower priority to students who will achieve anyway? Should they be kept in mainstream settings or should they be segregated and educated differently? For each of these questions, researchers and practitioners have provided a myriad of answers and a decided lack of consensus (Dai, Swanson, & Cheng, 2011).

In some countries, national policies define and govern the treatment of gifted children (Phillipson, Shi, Zhang, Tsai, & Quek, 2009). In the United States, there is a national definition describing who the gifted are and in general, what they need, but there is no specific directive or direction for educating them (Marland, 1972). Individual states have unique combinations of definitions and policies – some states are highly prescriptive, while others are nearly mute on the subject (National Association for Gifted Children [NAGC], 2008f).

In Pennsylvania, Chapter 16 of the State Code governs the parameters of gifted education, but no funds accompany the mandate (Special Education for Gifted Students, 2000). Compliance monitoring is procedural and increasingly infrequent rather than educationally substantive (Haney, 2013). A significant diversity in gifted programming models exists among its 500 districts, ranging from full-time programs to intermittent ones. Despite the presence of the prescriptive statute in Pennsylvania’s State Code, it is clear that interpretation and

implementation of gifted programming is locally determined and contingent upon a multitude of factors.

As a result, advocacy efforts are intense among parents and teachers charged with direct responsibility for gifted students as they make their case for resources and services. Organizations such as The National Association for Gifted Children (NAGC) establish standards, identify best practices, offer resources, and provide information. University researchers publish on the nature and nurture of gifted students, though what that means exactly is debated vigorously among the scholars of the field. However, when it comes to the actual day-to-day experiences of individual students, gifted education either does or does not take place at the local school district level, regardless of national definitions, state statutes, and regional advocacy efforts designed to influence it (Clarenbach, 2007; NAGC, 2008b).

Parental expectations; programming options; the existence of alternatives such as charter, cyber, magnet and special schools; staffing issues; competing priorities; and budget realities all factor into the formula districts use in attending to the needs of its most able pupils in whatever way they are identified or defined. Thus, many considerations are at work in determining if and how day-to-day services or programs are offered and delivered, as well as in the overarching philosophy guiding such decisions.

1.2 GIFTED EDUCATION IN THE UNITED STATES

Gifted education presents a unique challenge to educators, researchers, and policymakers, which is further exacerbated by a lack of consensus regarding identification of and programming for gifted students. Additionally, a number of complicated considerations exist when attempting to

implement effective gifted programming in public educational settings. To better understand the considerations and challenges in this realm of special education, it is useful to understand the history of gifted education in the United States.

In 1868, William Torrey Harris, the superintendent of schools in St. Louis, Missouri, instituted the earliest known systematic efforts to educate gifted students in public schools (Van Sickle, Witmer, & Ayres, 1912). In 1912, the United States Bureau of Education weighed in on the issue of how to educate exceptional students (Van Sickle et al., 1912). While this legislation addressed special education services for students with intellectual disabilities, it also included children who exhibited superior academic abilities (Van Sickle et al., 1912). In the discussion of the highly able, the federal government acknowledged the fairness and necessity in maximizing the abilities of each child:

Nevertheless, provision must also be made within the modern public school for training many children not as members of a group, but as individual or exceptional children. The social purpose of this kind of individualized educational treatment may be considered the keynote of our American civilization. Children are not born equal...but American education can see to it that every child has a fair opportunity to develop the mental capacities with which it is endowed at birth. The public schools may eliminate in large measure the accidents of social and financial position and the circumstances of the child's individual history as determining factors in its career. Every child should reach adult age with his brains developed to the full measure of their efficiency. This is recommended not merely out of sympathy for the child, but also because the community needs every bit of brain power available, whether this brain power appears in the family of a

Pennsylvania miner, a New England farmer, or a Pittsburgh millionaire. (Van Sickle et al., 1912, pp. 7-8)

As this statement illustrates, the government clearly intended that all children, including those who are academically advanced, were to be treated as individuals with the right to develop to their fullest potential.

Gifted education has had a long and erratic history as it has fallen in and out of favor with the public (see Figure 1). From Lewis Termin's landmark study of high IQ students, to the shock waves of the Sputnik launch, to the changing definitions of who the gifted are, and to the most recent rise of minimum-competency school reform under the No Child Left Behind Act, gifted education has endured; however, it has failed to thrive or grow as a field despite national reports periodically indicting public education for its failures concerning our nation's most capable students (NAGC, 2008e).

When the Javits Act, the sole financial resource specifically devoted to gifted education, was defunded in 2010, the last thread of support at the national level was cut and gifted education entered a new phase of irrelevance. Gary A. Davis, author of a popular gifted education textbook, reflected on the stagnancy in the development in programs for the gifted and talented:

I was invited to comment on recent developments in educating gifted and talented students. I did not wish to guess, so I began by comparing today's high-interest G/T topics with those of about 25 years ago. A quick comparison of journal article titles explained why major changes and differences did not quickly occur to me. With one exception, the central G/T topics and categories are about the same today as a quarter

century ago, given a touch of naiveté in some earlier articles. The one exception is an obvious scarcity of older articles concerning gifted minority children. (2009, p. 1035)

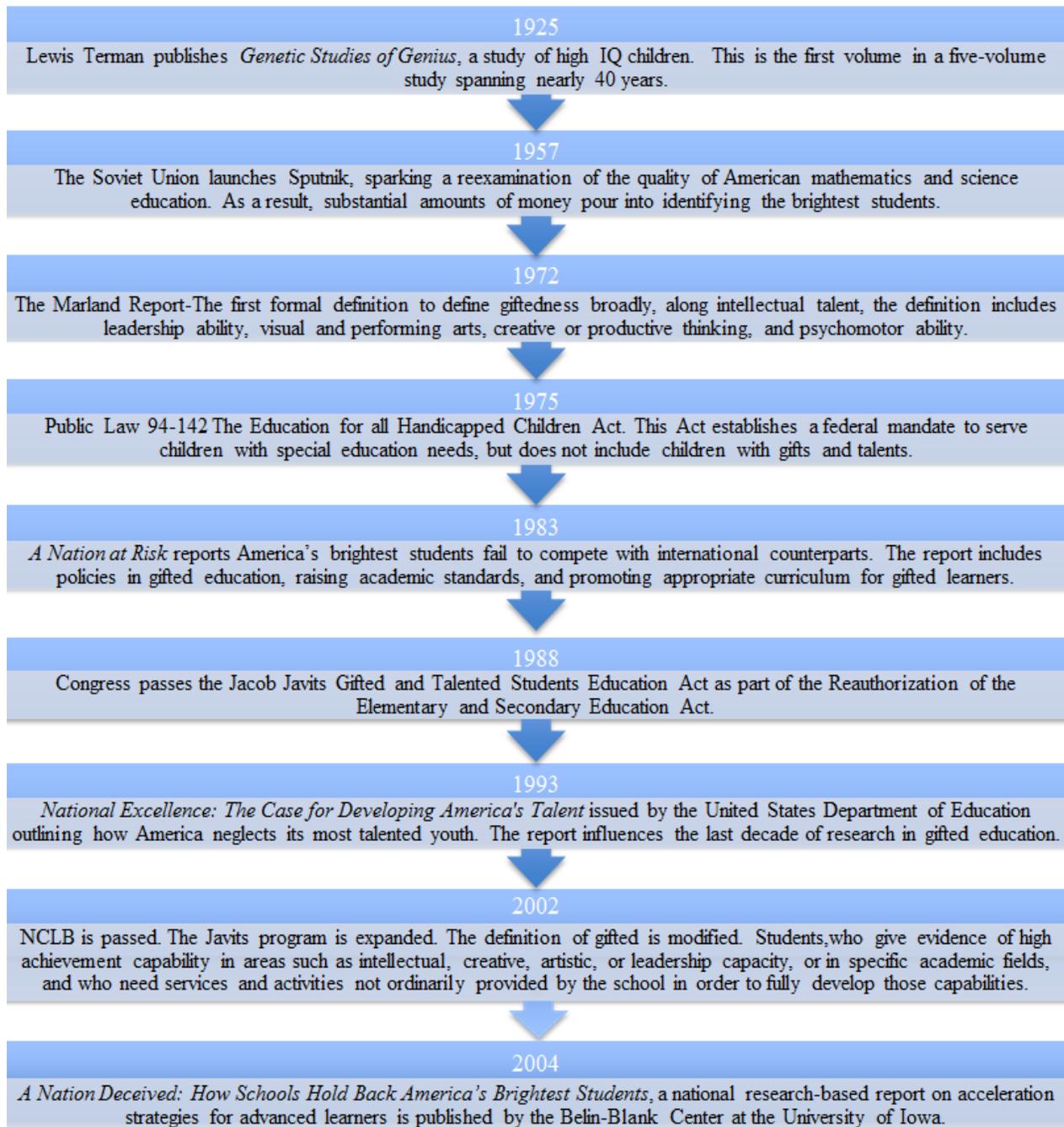


Figure 1. A Timeline of Gifted Education Milestones (adapted from NAGC, 2008e)

Clearly, at this point in history, gifted education had made little lasting progress in defining or solidifying its position as a legitimate player in the public education system. In fact, while there were nearly 3,000 records of publications on gifted education since 1998, Dai et al. (2011) stated that “the body of research overall does not evidence a systematically coordinated research agenda...gifted studies are a loosely organized field of research rather than a discipline, with researchers coming from different backgrounds, with different theoretical and practical interests” (p. 136).

1.3 CONTROVERSIES IN GIFTED EDUCATION

Whether it is due to the shifting concerns of society as a whole, discrepancies regarding the definition and application of the gifted label, or the implications of minimum-competency school reforms, one thing is certain: gifted education, for whatever reason, is controversial. Rarely is anyone’s position neutral when the topic is intellectual superiority (Herrnstein & Murray, 1994), and the discussion is populated with loaded words like elitism, discrimination, entitled, exceptional, and special. Frequently under siege from those outside of and even within the field, some even doubt the legitimacy of gifted education as a distinct field, viewing it more as a special interest group of like-minded enthusiasts (Shore, 2006). On the other hand, when schools in Montgomery County, Maryland considered eliminating the gifted label, the issue drew public battle lines between anti-label high school students who felt that formal identification limited the potential of other students and the State Department of Education, which had recently issued new recommendations for identifying children as young as three years old (Ujifusa, 2011).

Proponents see gifted support as a critical intervention best viewed in the tradition of special education, both appropriate and necessary for nurturing the nation's brain trust. Critics brand gifted programs as the socially unjust practice of bestowing educational "goodies" on the privileged, whose share of the academic resources is already excessive, not to mention, unearned. It seems that Tannenbaum's (1983) timeless statement is as applicable today as it was when originally written: "The cyclical nature of interest in the gifted is probably unique in American education. No other special group of children has been alternately embraced and repelled with so much vigor by educators and laypersons alike" (p. 16).

In addition to those directly involved in the educational debate surrounding gifted education, the general public also weighs in on the controversy, as news about gifted education frequently evokes intense reactions. In fact, an article appearing in the *Washington Post* about a district's gifted education model that emphasizes a continuum of services rather than formally identifying students as a prerequisite to them drew nearly 300 comments from readers (Mathews, 2010). The author reported in an earlier article, "Few issues inspire as much angry mail as changing gifted programs," yet another example that the topic of "gifted" draws a firestorm of interest from many directions (Mathews, 2009, DE16).

Despite, or perhaps because of, the passion that gifted education elicits, the field is perennially at risk (Adams, 2003). Additionally, the No Child Left Behind (NCLB) legislation and its pervasive emphasis on minimum universal standards and high-stakes grade-level tests, recent draconian budget cuts, and the lack of consensus among educators about what, if anything, is owed to the "gifted" have resulted in the downsizing or outright elimination of programs in many districts (Gentry, 2005). Coincidentally, the sole federal funding source specifically earmarked for this population of students was cut in 2010 (NAGC, 2008c).

Governor's School programs have been dismantled (Schackner, 2009), and nationally, only *two cents of every one hundred dollars* spent on education is directed toward programs for gifted students (NAGC, 2008f). The bottom line seems to be a resounding mantra of money is tight and what money is available should not be allocated to the best and brightest students, when others may need it more.

1.4 STATEMENT OF THE PROBLEM

As the states and the federal government continue their on-again, off-again relationship with gifted education, a beacon of hope for gifted students may begin or end with district leadership. Leadership at the local level is comprised of individuals who promote the philosophy of education underpinning the district's services and who control the resources contributing to those services. At the top of the school district's organizational chart is the superintendent, and the individual fulfilling this role is ultimately responsible for making decisions regarding the education of all of the students, including the most able.

During my 20 years of experience immersed in the literature of this field, I have noted a pervasive lack of attention to the role local school administrators play in promoting or denying gifted education in their districts. Yet, in each of my teaching assignments in multiple districts across several states, I have found administrators, particularly the superintendent, to be the most critical factor in the quality and quantity of services and resources supporting this population. Because the position of the superintendent plays such a crucial role in a district's gifted services, the question arises as to how advocacy efforts can be most effectively directed toward district leadership so that gifted programming is perceived as essential rather than expendable. Knowing

and understanding the attitudes superintendents have developed toward gifted education could be important and pragmatic to practitioners charged with program implementation.

1.5 PURPOSE OF THE STUDY

This exploratory study examined the narratives of current superintendents in Western Pennsylvania to identify underlying issues and attitudes toward gifted education among school leaders. The superintendents' memories of experiences and interactions with the field of gifted education as participants, parents, relatives, or friends, onlookers, and/or professionals are a source of information that may help to improve or reform gifted education at the site of service delivery. By examining these superintendents' stories, educators of the gifted may be able to better understand their own leaders and determine how to develop strategies for maximum and more immediate benefits to high ability students at the local level. In this study where I interviewed superintendents, two main questions were posed to determine the advocacy potential and possible effective strategies for use among chief executive officials in public schools of Western Pennsylvania:

1. What stories do superintendents tell about their experiences with gifted education?
2. What can we learn from these stories about gifted education program components or design?

1.6 CONCEPTUAL FRAMEWORK

This study explored the underlying attitudes toward and philosophies about gifted education by analyzing superintendents' experiences and recollections from their lives. As has been discussed, issues in gifted education have been contentious, to say the least, over many decades, with researchers clamoring to explain, clarify, or solve the ongoing controversies plaguing the field's component pieces. Starting with Renzulli's speculative account of the future of gifted education in 1980 (see Table 1), researchers have continuously debated the current state of and future directions for educating this population. The broad, yet fundamental concepts presented in Table 1 are at the heart of all gifted programming and are ultimately subject to local control, and superintendent influence.

Thus, the data collected from participating superintendents were interpreted through the lens of highly contended gifted education components (e.g., identification, programming, acceleration, etc.), with an eye toward identifying attitudes, concerns, and themes embedded in the stories. The intent of this study was to identify and to better understand long held beliefs and attitudes about these issues that have resulted from the early experiences or observations of school leaders. I then demonstrate how to use the insights gained from analyzing the superintendent stories to guide improved advocacy for gifted education programming.

1.7 ASSUMPTIONS, DELIMITATIONS, AND LIMITATIONS

Assumptions for this study included: (a) that an indirect method of soliciting information via storytelling is necessary to uncover what attitudes and beliefs are part of a superintendent's

history; (b) that experiences and memories solicited in this way are significant, and with anonymity and a lowered level of concern, are truthful; and (c) that the embedded gifted education themes in the story are valuable information for immediate program design and more effective advocacy.

Aside from these assumptions, this study was subject to several delimitations and limitations. The sample included only superintendents from schools in Pennsylvania where a prescriptive mandate for gifted education limits the freedom that schools would otherwise have to design gifted services at will. This limitation was mitigated by the choice to collect story data from the past, where attitudes and belief systems originate, rather than analyzing current philosophy or practices that would have to adhere to an interpretation of the law. The stories were also drawn from varying perspectives – the superintendents were free to select from any of their personal or professional roles, at any time in their lives.

Table 1. A Chronology of Studies Identifying Ongoing Issues of Contention in Gifted Education

Year	Researcher	Issues Addressed
1980	Renzulli	Discussed the identification, curriculum, and professionals who define and educate gifted children
1982	Treffinger	Addressed the “myths” of gifted education, focusing on identification, curriculum, programming models, and classroom practices
1993	Ross	Called for improvements in identification categories and populations, more rigorous learning standards, differentiation strategies, and grouping models
1996	Treffinger & Feldhusen	Questioned the conceptions of gifts/talents, methods of identification, and programming limited to selected students
1996	Morelock	Debated the schism in the field between the gifted child (IQ-based) and the gifted achiever (curriculum-based) methods of identification
2000	Gallagher	Asserted that challenges to gifted education must be confronted if the field is to survive, including questions around identification, social justice, personnel preparation, and programming models.
2003	Pfeiffer	Identified critical issues in the field as lack of consensus on how to define gifted and talented, lack of curricular depth, breadth and specificity
2004	Colangelo, Assouline, & Gross	Provided a comprehensive study of the research base and options for accelerating students
2006	VanTassel-Baska	Highlighted the major areas of gifted education in need of improvement (i.e., identification, curriculum, program design, staff development, parental involvement, assessment, and evaluation)
2009	Treffinger	Revisiting and reviewed the 1982 “myths” of gifted education including identification, curriculum, programming models, classroom practices, social justice questions, and the social/emotional aspect of gifted identification.
2011	Subotnik, Olszewski-Kubilius, & Worrell	Offered a new definition of and purpose for gifted education; confirmed that ability matters but is also dependent upon psycho-social factors; advocated domain-specific identification and programming designed around known trajectories in the talent domain
2012	Renzulli	Recommended programming based on the theorist’s conception of giftedness, delivery model, development of social capital, and non-cognitive character traits
2012	Plucker	Explored policy implications of the Subotnik et al. (2011) study to practitioners of the field including a focus on outcomes rather than identification
2013	Peters, Matthews, McBee, & McCoach	Examined programming without the gifted label, including alternative means of identifying students, grouping them and designing programming based on specific needs

A final limitation included the choice not to correlate the stories to their tellers nor explain how or why their stories impacted the gifted programming in their current assignments. While correlating the stories with the existing gifted programs in the superintendents' respective districts may have provided interesting insights in to how the superintendents' beliefs and attitudes had translated into practice, I decided not to pursue this route of inquiry for several reasons. First, such a comparison was beyond the scope of this study, which was to uncover the memories and underlying feelings, attitudes, and beliefs about gifted education through a narrative strategy. Additionally, such an intention to uncover connections to current practices could have biased the choice or form of the narrative provided by the superintendents. While the specific responses of these individual superintendents are not generalizable, they may be representative of the kinds of stories others may tell, thus still rendering them informative and illustrative. There is value in asking for the story and having a conversation about gifted education that is revealing, but less risky than other more direct approaches to gaining information for future advocacy efforts and program improvement.

1.8 DEFINITION OF TERMS

According to a recent meta-analysis of empirical studies aiming to distinguish gifted students from non-gifted students, no common definition as to the factors used to distinguish these groups was found, and the various methods of determining giftedness often were not adequately described in the studies (Carman, 2013). Problems inherent in this lack of consensus in the definition of giftedness for research purposes include lack of generalizability, inability to make

comparisons among research studies, and lower external validity (Carman, 2013). As described by Carman (2013):

Those identified under one definition of giftedness could easily be excluded under a competing, yet equally valid definition. Groundbreaking results from one study could end up having very little generalizability to other groups of gifted individuals, depending on the definition used to identify the gifted in the original research. (p. 53)

This lack of a unified definition of giftedness for formal study of the construct or for its practical usage is problematic for the field and is at the heart of much debate among practitioners as well as researchers.

For the purpose of this study, however, ambiguity in the term *gifted* is of no substantive consequence, as the solicited stories reflected the pragmatic definition experienced by each individual. Hence, a global meaning of *gifted* or how the labeled has been applied is not of specific importance – only the circumstance and its meaning to the people in the story has relevance for the current study.

In the text of this report, the term *gifted* is used to reflect the status of having been formally identified by a school official or psychologist by any means. The terms *high ability*, *high-end learner*, *academically talented*, *most able*, and similar words are used interchangeably to denote generally high levels of skill in learning and/or achieving in school. Such terms are used to differentiate those students who were not formally identified as gifted (but might have been in some other context and who share some or all of the same characteristics) from those formally identified as gifted. Additionally, the following terms are used throughout this study and defined in its context:

- *Identification*: the process by which students are assessed and formally labeled as gifted.

- *Programming model*: the school's organizational scheme for delivering services to gifted children. Common examples are *pullout* (i.e., gifted students are removed from the regular classroom for a period of time to receive educational services that address needs associated with giftedness) and *push-in* (i.e., teachers of the gifted work with gifted students within their regular classrooms).
- *Curriculum*: the collection of instructional materials and activities delivered to students in the course of their day to advance learning.
- *Acceleration*: any of a number of interventions where students advance through curriculum, courses, or grade levels at a pace faster than is typical.
- *Enrichment*: activities that enhance the educational experience of students that are beyond the scope of the regular curriculum such as field trips, special materials, games, and specialized assignments.
- *Social Justice*: a term to encompass the concepts of fairness, equity, and the equal opportunity to realize potential. In gifted education, this concept most often is connected to how, why, and to whom identification happens and what specialized services result from it, as well as to grouping, programming strategies, equity of opportunity, equitable representation of the wider student population in gifted programs, and cultural sensitivity.

1.9 SUMMARY

Gifted education is in quiet crisis as the country is mired in school reform efforts primarily directed toward struggling learners. The field of gifted education has been further hampered by inconsistencies among concepts as basic as *who* the gifted are or might be and by extreme

differences in *what*, *why*, and *how* things should be done for, with, or to high ability students. Despite the fact that gifted programming is primarily locally created and administered, advocacy efforts are often directed toward legislators far removed from the day-to-day workings of schools and toward parents and teachers, who are close to the action, but who have limited direct decision-making authority (Clarenbach, 2007).

In Pennsylvania, an IQ of 130 gains student admission into gifted education; however, the similarities among gifted programming across districts likely end with this distinction. Additional admission criteria and what happens once a student is identified and labeled is as varied as the 500 districts in the state. Because there are no formal standards or certifications for the teachers of gifted students in Pennsylvania and there is a scarcity of coursework and in-service training in the tenets of gifted education, identification and programming decisions are somewhat random and based on tradition, community expectations, “squeaky wheels”, or someone’s vision (or lack thereof). Often, that “someone” is the superintendent. What if that vision is distorted by negativity from prior experience or clouded by misinformation?

Because the field is poorly articulated and advocacy efforts directed toward parents or politicians often fall short of winning local support for best practices, a different approach is warranted. The impetus for this study was a need prompted by my direct experience, but the momentum was provided in a serendipitous newsletter statement from the president of the National Association for Gifted Children warning researchers that administrators had been neglected in both the subjects of study and in advocacy involvement (Robinson, 2011).

2.0 REVIEW OF THE LITERATURE

Despite the existence of expert, albeit conflicting, definitions, statutory regulations, research-based best practices and the presence of gifted, talented, and creative learners in every classroom in America, the decisions about who gets specialized attention and the approaches as to what that attention looks like are as diverse as the schools and students themselves. What or who then, pragmatically governs this area of education at the local level where curriculum is varied, where specialized certifications are rarely required and where funding is often uncertain?

This examination of the literature encompasses the status of gifted education at various levels of government in the No Child Left Behind Era, advocacy models and their effectiveness in addressing the perceived shortcomings or threats to the existence of gifted education, and the role of the public school superintendent in gifted education.

2.1 GIFTED EDUCATION IN THE NO CHILD LEFT BEHIND ERA

The Elementary and Secondary Education Act, commonly known as No Child Left Behind Act of 2001, has infiltrated every facet of education in America from curriculum to teacher evaluation. Gifted education, while not specifically addressed in the legislation, nonetheless, has not escaped this comprehensive reform movement as public schools implement its academic standards and comply with increased levels of accountability in student achievement.

2.2 GIFTED EDUCATION AT THE NATIONAL LEVEL

The public education system of the United States is not a constitutional function of the federal government, despite the dramatic changes at the national level initiated early in the 21st century. Historically, states, counties, and local communities maintained primary control over curriculum, teachers, attendance, funding, and all other day-to-day operations of the public school system. However, federal legislation and case law have influenced important societal issues such as racial segregation, the rights of the disabled, and most recently, financial incentives and sanctions for curriculum choices, student achievement levels, and teacher evaluation systems. Despite this increased federal role in regular and special education, the specific status of gifted education as a subset of public education has been omitted in these reforms. The status of gifted education at the national level is discussed in detail in the following sections.

2.2.1 A Lack of Legal Support for Gifted Education

In the United States, the federal government does not address gifted education in any formal or meaningful way, beyond several iterations of a definition for the construct of the gifted student (NAGC], 2008e). No federal statute governs gifted education, and no federal funds are dedicated directly to this segment of elementary and secondary education (NAGC, 2008e). Historically, however, the federal government has not been completely silent on the topic of high-ability students and their education (Stephens, 2011). Interest in and attention to gifted education has ebbed and flowed with changes in the political, economic, and social climate of our country and its place in the world. For example, in 1957, the Russian launch of the satellite Sputnik marked the beginning of a period of intense interest in developing America's scientific

talent, especially in mathematics and science (NAGC, 2008e). The tenor of the times was a deep fear that the United States was falling behind in its position among the world's super powers (NAGC, 2008e). As a result, intense interest in gifted students, especially in the math and science domains, led to an influx of funding and the passage of the National Defense Education Act in 1958 (NAGC, 2008e).

In 1972, Congress received one of the most significant federal publications dealing with the education of gifted children. The *Education of the Gifted and Talented* report, commonly known as the Marland Report of 1972, contributed several important concepts to the field of gifted education. The report concluded that gifted children were not being properly identified or appropriately served (Marland, 1972). Prior to the Marland Report, intelligence quotient (IQ) scores were the primary means of identifying gifted children, but in some writings, the identification process also involved more inclusive markers such as creativity and performance (Guilford, 1962). The Marland Report, however, further expanded the definition to include what specific attributes, beyond only general intelligence, were to be considered in identifying gifted children. The Marland Report identified gifted children as those displaying high performance or the potential for such in one or more of six separate domains: general intellectual ability, specific academic aptitude, creative or productive thinking, leadership ability, visual or performing arts, and psychomotor ability (Marland, 1972). Identified gifted students were further quantified as three to five percent of the school population (Marland, 1972). Previous definitions did not specify such guidelines for schools to limit the number of students identified as gifted.

Shortly after the Marland Report surfaced, the Office of the Gifted and Talented, housed within the U. S. Office of Education, was given official status in 1975 (NAGC, 2008e). Many school districts had adopted the Marland Report's definition of gifted children and while its

categories encompassed a wide array of abilities, the means by which to identify students proved problematic in that tests or benchmarks to measure children against these additional constructs did not exist for several of the domains. Neither the official definition of gifted children, nor the creation of an office to administer to this population, however, carried the weight of law, as did the statutes enacted to protect the rights of students with disabilities (e.g., the Education for All Handicapped Children Act of 1975). As a result, the lack of federal legal direction for and protection of gifted students as a distinct category in public education rendered gifted education programs far more open to state and local interpretation (and more vulnerable to extinction) than any other facet of K-12 education.

In 1992, Purcell conducted a study in Connecticut that highlighted the plight of gifted programs in a state without a mandate for them. Over a two-year period, the study attempted to differentiate among programs that were weakened, downsized, eliminated, or just on the verge of elimination. The researchers explained the difficulties in making these specific gradations of program demise, but the conclusions were clear:

Connecticut's non-mandated programs for students with superior abilities, which previously increased in number and expanded to service additional grades and special populations, are being threatened, reduced, and eliminated. The most significant factor contributing to their change is the fiscal climate of the nation, state, and local districts.

Connecticut is not alone in this crisis. (Purcell, 1992, p. 95)

Purcell concluded that the lack of a statutory mandate could lead to program vulnerability during times of economic strife.

2.2.2 A Lack of Fiscal Support for Gifted Education

The next significant federal voice on the topic of gifted children was the issuance of *A Nation at Risk* in 1983, in which the educational system of the United States was indicted for producing students unable to compete in the international arena. Eventually, Congress passed the Jacob Javits Gifted and Talented Students Education Act in 1988. The Javits Act funded research and competitive grants specifically earmarked for the education of gifted students, making it the first funding mechanism for the gifted education field (NAGC, 2008d). This funding led to the creation of the National Research Center for Gifted and Talented Education (NRCGTE), which was headquartered at the University of Connecticut with centers subsequently added at the University of Virginia, Yale University, and the University of Georgia (NAGC, 2008e).

Although financial support at the national level was a welcome addition to gifted education in general, no monies were funneled directly to public schools (NAGC, 2008d). In the 1989 fiscal year, the Act began to fund NRCGTE research and programs that specifically addressed the study of gifted children and their educational needs (NAGC, 2008d). Congressional appropriations for the Javits Act continued at widely varying levels that shifted with the political and economic state (see Figure 1), but in 2010, Congress defunded the Act (University of Connecticut, Neag Center for Gifted Education and Talent Development, n.d.).

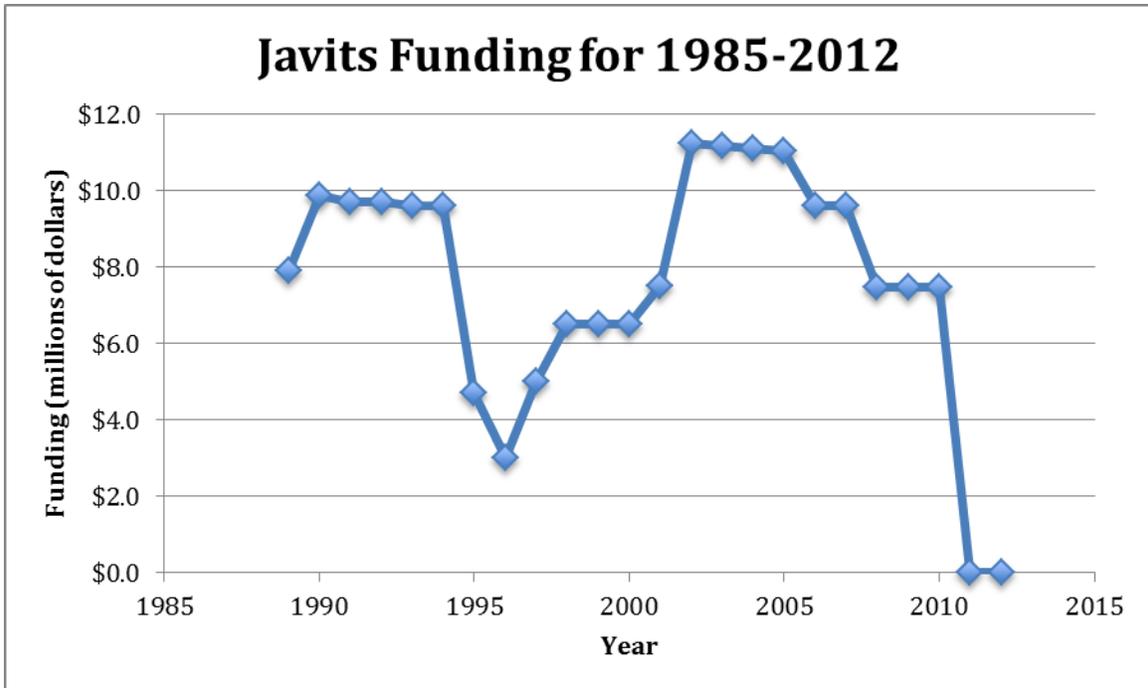


Figure 2. Javits Funding for 1985-2012 (NAGC, 2008c)

To date, no additional funding has been earmarked for gifted education, but there is still interest in examining tenets of this facet of public education:

In a related effort, the U.S. Department of Education commissioned the National Research Center on the Gifted and Talented (NRC/GT) at the University of Virginia to conduct a national survey for the purpose of developing a portrait of the current status of gifted programs and programming options at the elementary, middle school, and high school levels across the United States. (National Research Center on the Gifted and Talented, 2010, para. 9)

In addition to determining the status of gifted programming, the NRC/GT project aimed to provide valuable information to policymakers and gifted education advocates by identifying attributes such as mandates, funding, and teacher credentials (University of Connecticut, Neag Center for Gifted Education and Talent Development, n.d.); however, findings have yet to be

issued. The NAGC collected and published similar data during the 2010-2011 academic year in a report entitled *State of the Nation in Gifted Education: A Lack of Commitment to Talent Development*. The message of this document is clear: “while evidence of the neglect of our most capable students has increased, our collective resolve to address it in a comprehensive and meaningful manner has diminished” (NAGC, 2011, p. 2).

More than 20 years elapsed after the Marland report before another federal report addressed the status of gifted education. In 1993, Ross published *National Excellence: A Case for Developing America's Talent*, which outlined the “quiet crisis” in the education of top students:

Youngsters with gifts and talents that range from mathematical to musical are still not challenged to work to their full potential. Our neglect of these students makes it impossible for Americans to compete in a global economy demanding their skills. (Ross, 1993, p. 1)

Ross (1993) cited the following facts in this report:

- Gifted and talented elementary school students mastered from 35 to 50 percent of the curriculum for five basic subjects before the beginning of the school year;
- Most regular classroom teachers made few, if any, provisions for talented students;
- Most of the highest-achieving students in the nation included in *Who's Who Among American High School Students* reported that they studied less than an hour a day, suggesting that these students get top grades without having to work hard; and
- In the one national survey available, only 2 cents out of every \$100 spent on K-12 education in the United States in 1990 supported special opportunities for talented students. (p. 2)

The report briefly addressed positive achievements in gifted programming since the Marland Report, including public awareness and advocacy, an increase in the number of programs serving gifted children, additional state legislative support, and increasing expectations for all students by the presence of model gifted programs in some schools (Ross, 1993). However, educators were cautioned that U.S. students were not competitive with their international counterparts and that surviving the crisis will require a national effort (Ross, 1993).

In 1998, Landrum, Katsiyannis, and DeWaard completed a national survey as to the legislative health of gifted education and tracked progress on the recommendations offered by the National Excellence report. Results in the data were mixed, but curiously, it was noted that gains in gifted education programs occurred when legal mandates for gifted programming decreased (Landrum et al., 1998). No explanation was offered for this phenomenon.

2.3 GIFTED EDUCATION AT THE STATE LEVEL

Periodic efforts have been made to identify and categorize the many variations in gifted education across the fifty states (Zirkel, 2005). The NAGC and Council of State Directors of Programs for the Gifted [CSDPG] (2011) summarized a variety of attributes related to gifted education. This report addressed factors such as funding sources, government mandates, identification definitions, programs, accountability, and teacher credentialing (NAGC & CSDPG, 2011). Only two states (Massachusetts and South Dakota) have not established a definition for gifted students, though some states' definitions include terms such as "talented" and "high-ability" to refer to the gifted population. Definitions are not stable over time, as 24 have changed in the past 10 years. Forty-four states have some level of requirement for the

education of gifted students (Mcclain & Pfeiffer, 2012).

Variations in definitions, procedures, and the constant change among these requirements are problematic on a multitude of fronts:

Despite mandates...most states leave important decisions¹ to local districts. The result is a crazy quilt collection of services and inconsistency from district to district and even schoolhouse to schoolhouse within districts. While quality gifted education programs do exist, lack of accountability and the reliance on local funds makes these programs vulnerable to changes in local leadership and economic conditions. (NAGC, 2011, p. 3)

The NAGC/CSDPG report is the most recent comprehensive analysis of the status of gifted education attributes in each state. This report addressed state-level factors such as the structure, staffing, and funding methods of the agency charged with gifted education responsibilities (or lack thereof) and the means by which information about gifted education was (or was not) reported (NAGC & CSDPG, 2011). Furthermore, the report highlighted the source of authority and district-level accountability required by the varying state mandates concerning gifted education, and it included program-specific information for the states' gifted education services (e.g., student identification requirements and methods, programming and services categories, and grade levels served). Lastly, the report detailed professional staffing of gifted education and certification requirements or the absence of such requirements. Virtually no reporting category included responses from all 50 states, and the majority of the information was limited by the number of states providing data in each area of interest (NAGC & CSDPG, 2011).

In another study comparing five states, Brown, Avery, VanTassel-Baska, Worley, & Stambaugh (2006) analyzed differences between states regarding gifted education laws and the

¹ Decisions about how students are identified, what services are available to them, how they are delivered, and by whom.

place gifted education held relative to laws governing regular education. The study further identified inconsistencies between the states:

[we] revealed unevenness in gifted-education policy at the present time, emphasizing identification procedures over program development and personnel preparation concerns. The study also revealed an absence of connectivity to related state education policies affecting gifted learners such as content standards, No Child Left Behind, and secondary programming options such as AP, IB, and dual enrollment. (Brown et al., 2006, p. 22)

The presence of the state-level mandate thus did not ensure any degree of quality or consistency within or among the states studied. Pennsylvania was among the states examined in this study.

2.4 THE STATUS OF GIFTED EDUCATION IN PENNSYLVANIA

Pennsylvania public education consists of 500 individual and autonomous school districts governed by the state. Pennsylvania is viewed as a gifted-friendly state in the eyes of many gifted education advocates because a dedicated mandate for specialized services to clearly defined identified students exists, though the law and its funding, reporting, and compliance functions have changed over time.

2.4.1 Legal Support – Pennsylvania School Code Chapter 16

Pennsylvania is among the 26 states with a statutory mandate for gifted education, including both a legal definition of a gifted student and the procedure for developing a gifted individual educational plan (GIEP) for each identified student in grades K-12 (Special Education for Gifted

Students, 2000). The most recent revision of these constructs was passed into law in 2000 and represented substantial changes over previous versions originally written decades earlier. Chapter 16 of the Pennsylvania School Code contains language such as *free and appropriate public education* (FAPE) and *gifted individualized educational plan* (GIEP), terms that were modeled after concepts originally reserved for students with disabilities under the special education paradigm (Brown et al., 2006). Historically included under the special education statute (Chapter 14) in Pennsylvania, and prior to moving to Chapter 16, the term “mentally gifted” was the last in a list of specific exceptionalities in children, all of which otherwise dealt with handicapping conditions. Despite this obvious intent to treat high-ability students as similar to struggling learners in the need for specially designed instruction by listing mental giftedness among disability categories (e.g., blindness, specific learning disability, physically handicapped), specific identification methods, programming models, and curriculum for gifted students throughout the Commonwealth vary considerably (Special Education for Gifted Students, 2000). The statute included menus of example services districts were directed to use in meeting the needs of individual students. Districts were further directed to provide parents with a copy of their rights under the law. A system of due process hearings was included to handle complaints (Special Education for Gifted Students, 2000).

Gifted education advocates, primarily parent groups and the state advocacy group Pennsylvania Association for Gifted Education (PAGE), considered the transfer of gifted education responsibility to its own Chapter in state law to be a victory of sorts (PAGE, 2013a). Gifted students finally had a dedicated section of the education code where their unique needs could be addressed specifically and exclusively (PAGE, 2013a). Forms, instructions, and clarifications related to Chapter 16 of the Pennsylvania School Code were later revised and

disseminated statewide. The original legislative intent in the use of specialized vocabulary and similar wording for services to the gifted and services to students with disabilities was to carry equal philosophical weight in the eyes of the state, but reality stopped short of that ideal. Lacking the power and resources of the federal government to enforce its requirements, Chapter 16 of the Pennsylvania School Code offered few of the protections to gifted learners envisioned by its champions. However, in a few gifted hearings, the Office of Dispute Resolution has reaffirmed that gifted students are entitled to many of the same rights as students with disabilities (for a full description of these proceedings, see Karnes & Stephens, 2009).

However, Zirkel's (2004) analysis of gifted case law divided gifted litigation into two groups:

“*gifted alone*”, [emphasis added] designating students whose legal status is based solely on their gifted status, and “*gifted plus*”, [emphasis added] designating students who not only are gifted, but also have special legal status typically in terms of disability (i.e., “twice exceptional”) or race. (p. 309)

Disputes involving students whose only exceptionality is giftedness have been effectively limited to state laws and hearing officer decisions. In most states, the laws governing individual student entitlements have been weak, and districts usually have prevailed. In Pennsylvania, the gifted statute has been considered relatively strong, with individualized programming requirements and dispute resolution avenues. Cases center on eligibility issues, individualized plans, and compensatory demands; yet, “outcomes have tended to favor the defendant-districts, rather than the plaintiff-parents” (Zirkel, 2004, p. 311). In general, Pennsylvania has also set district-friendly limits, denying parent demands for tuition, attorney's fees, and curriculum beyond the scope of the school while limiting retroactive compensation should they prevail (Karnes & Stephens,

2009). Gifted students with protected exceptionalities (in addition to giftedness) have fared far better in the federal court system (Zirkel, 2004).

2.4.2 Lack of Fiscal Support

Currently, no state funds for school districts exist for gifted education in Pennsylvania. When gifted education was first included in Pennsylvania state law, districts were awarded funds on a per capita basis for each identified student (Pennsylvania Association for Gifted Education [PAGE], 2013b). Understandably, the incentive to label more students as gifted soon resulted in a revision in funding to block sums based on the state's funding formula for each district (PAGE, 2013b). Eventually, those funds dwindled until gifted education became another of the state's unfunded mandates (PAGE, 2013b). As further evidence of reduced funding, the Pennsylvania Governor's Schools of Excellence full scholarship, competitive residential summer programs established in 1972, were abolished in 2009 after decades of growth and successful operation in providing advanced programming for high ability youth (PAGE, 2013b).

2.4.3 Compliance and Sanctions

In addition to its status as law and the prescriptive nature of its mandate, the enforcement strength of Pennsylvania School Code's Chapter 16 resided in its compliance-monitoring program (Independent Regulatory Review Commission, 2007). Before moving to Chapter 16, gifted education compliance had been assessed on the same schedule as that of special education – a cyclical rotation that guaranteed periodic oversight of timelines and procedures (Independent Regulatory Review Commission, 2007). In recent years, staff attrition and budget cuts have led

to a reconfiguration of duties and responsibility for gifted education in the Pennsylvania Department of Education (Pennsylvania Department of Education, 2013). Duties for gifted education were transferred from a single director to administrators in two departments – special education and curriculum (Rules and Regulations, 2000). The compliance-monitoring budget was cut dramatically, resulting in spotty and sporadic oversight of the state’s 500 districts (Pennsylvania General Assembly, 2013). Because no state monies were contingent upon compliance, enforcement of gifted programming was of minor concern to school districts.

2.5 LOCAL PROGRAMMING IN PENNSYLVANIA

In Pennsylvania, gifted students are legally defined and have mandated individualized programs (Special Education for Gifted Students, 2000). The number of identified students as a percentage of school district total population ranges from a low of no identified gifted students to a high of over 20% (PA School Performance Profile, 2012). According to Chapter 16 of the Pennsylvania School Code, each of the 500 school districts has local flexibility in the following areas:

- identifying students who do not meet the IQ threshold of 130,
- the choice of test instruments used for screening and identification,
- the personnel assigned to educating and monitoring the gifted population², and
- the services offered to fulfill the Gifted Individual Educational Plan (GIEP) developed for each identified student. (Special Education for Gifted Students, 2000)

² Currently, there is no certification for gifted education – any valid Pennsylvania instructional certificate is permitted. This is not atypical as only 17 states require teachers of the gifted to have a gifted education credential.

In-service training is required for those responsible for the education of gifted students but the content, frequency, and source of the training is not specified under Pennsylvania state regulations, leaving these decisions to the local districts (see *Special Education for Gifted Students*, 2000). The state imposes strict timelines, however, in completing student testing and evaluation reports, notifying parents, and holding meetings to develop the GIEP documents (*Rules and Regulations*, 2000).

2.6 NCLB AND ITS EFFECT ON GIFTED EDUCATION

A decade before the advent of the NCLB era, gifted education experts Renzulli and Reis (1991b) warned of “the quiet crisis in gifted education” (p. 26) with respect to the educational reforms on the horizon at the time. Concepts such as abolishing ability grouping, the “dumbing down” of the curriculum, and falling test scores in comparison to foreign students were the themes addressed in this analysis of the poor quality of public education (Renzulli & Reis, 1991b). Recognizing a common criticism of gifted programs practices, the authors recommended “a change in direction: from being gifted to the development of gifted behaviors” (Renzulli & Reis, 1991b, p. 34) as an alternative to the traditional IQ-based formal identification of gifted students and as a way to address potential in all students. Their concern for the future of gifted programming was prophetic, but in the next decade, the educational reform movement was anything but quiet.

The No Child Left Behind (NCLB) Act of 2001 included the most recent revision to the Marland definition of gifted children:

The term 'gifted and talented', when used with respect to students, children, or youth, means students, children, or youth who give evidence of high achievement capability in areas such as intellectual, creative, artistic, or leadership capacity, or in specific academic fields, and who need services or activities not ordinarily provided by the school in order to fully develop those capabilities. (§70-7801)

This definition represents the sole word addressing gifted education in the NCLB Act of 2001. Because gifted education continues to be a function of state and local control, it lacks the protections afforded to children with other special educational needs. As a result, this population of students is more vulnerable when changes are initiated in the larger realm of school reform (NAGC, 2011).

Siemer (2009) captured the essence of much of the empirical literature on the intersection of gifted education and broader school reform. By exploring the historical context of gifted education practice and federal gifted education policy, Siemer (2009) engaged in a thorough analysis of the tenets of NCLB, and in doing so, noted many components that ignore and/or are detrimental to gifted students. For example, NCLB ignored gifted students as a subgroup when measured and reported student achievement: “Student achievement [is] broken down into subgroups by race, ethnicity, gender, English proficiency, economic background, and disability. Gifted students are not a reported subgroup” (Siemer, 2009, p. 552). The reason for this omission is not offered, but factors may include the lack of consensus on how a gifted student is defined, and variations in recognition of and attention to this population, however it is defined, among the states.

Additionally, NCLB (2001) required strict teacher credentialing. According to the legislation, teachers needed to be “highly qualified,” meaning that it was required for teachers to

have a bachelor's degree and certification in the subjects they teach (NCLB, 2001). NCLB (2001) dictated that core teacher competencies be proven by examination; however, these requirements did not apply to teachers who work in gifted education programs. Siemer (2009) indicated that "Congress is currently debating different possibilities for reforming and reauthorizing NCLB, but very little is being discussed that would modify the Act to better address the needs of gifted children" (pp. 552-3). Hence, Siemer (2009) concluded that NCLB was harming gifted students by neglect, but did more serious damage by diverting resources to other requirements that are underfunded and which result in significant consequences should states fail to meet them (e.g., levels of achievement mandated for Adequate Yearly Progress). "Thus, gifted education is not merely ignored by the Act, it is undermined" (Siemer, 2009, p. 557).

While Siemer's work was the first to determine that NCLB had detrimental effects on the gifted population, researchers had already heard these sentiments echoed by teachers in the field. In 2007, Hamilton et al. conducted a longitudinal study of the various positive and negative effects that the accountability movement had on elementary and secondary education. These researchers found that approximately half of the participating educators in Pennsylvania, Georgia, and California agreed or strongly agreed that the narrowing in scope and the level of challenge in the curriculum harmed high-achieving students (Hamilton et al., 2007). Some educators expressed concern that the focus on "bubble kids" (i.e., those students who were close to, but not yet at, the level of proficiency) were given increased attention in the drive for Adequate Yearly Progress at the expense of students at the upper and lower extremes of achievement (Stecher et al., 2008).

In 2005, Gentry outlined her concerns with the effects of NCLB on gifted education and highlighted seven specific consequences of the legislation as particularly onerous to gifted education: “a remedial, deficit-based emphasis, teaching what is tested, delivering a standard, one-size-fits-all education to diverse students, increased numbers of dropouts, educators afraid to teach, cheating, and unsubstantiated alternatives” (Gentry, 2005, p. 24). When invited to write a scholarly piece on NCLB, Gentry (2005) viewed the task as “creat[ing] an oxymoronic conundrum” for her (p. 24). In her view, “NCLB is a politically charged, top-down, hostile take-over of America’s schools” (Gentry, 2005, p. 24). Gentry elaborated on each of her seven points, accusing NCLB in strong, direct language as being responsible for “teachers afraid to teach and administrators afraid to let them” (p. 25).

From experts in the field and through research foundations, the message is clear that NCLB added a layer of complexity and a series of roadblocks to gifted education. Newspaper, magazine, and journal articles chastised leaders with titles such as *Don’t Leave Gifted Students Behind* (Spielhagen, 2012), *No Child Gets Ahead: The Irony of the No Child Left Behind Act* (Viggiano, 2005), *Unequal Educational Opportunities for Gifted Students: Robbing Peter to Pay Paul?* (Russo, 2001), and *Gifted Programs Go on Block as Schools Must Do With Less* (Gollan, 2011).

Critics noted the difficulty in finding fault with legislation purporting to help all children master basic skills. However, Gallagher (2004) characterized “the unintended consequences” to gifted education resulting from NCLB as significant. Gallagher (2004) viewed NCLB as comparable to the Economic Opportunity Act of 1964 (which established Head Start programming for at-risk students) and the Education for All Handicapped Children Act of 1975 (which established special education for students with disabilities) as half of the equation on

which American education is based – equity. The other component, excellence, has been a topic of greater controversy (Gallagher, 2004). As such, Gallagher (2004) argued for increased support for educators rather than sanctions against them if we are to expect and achieve more than proficiency in our students.

In a report by the Fordham Institute, Loveless, Parkas, and Duffett (2008) documented the first two studies in a five-part series that examined the decided lack of excellence in the progress of high-achieving students in the NCLB era. Pertinent findings included that the lowest-achieving students made substantial progress relative to the flat performance of the high-achievers, though this pattern is characteristic of accountability systems in general (Loveless et al., 2008). Teachers reported that their attention is necessarily devoted to struggling students at the expense of high-achievers despite their belief that all children deserve their time.

Loveless et al. (2008) cautioned that the research methodology did not prove a causal link between NCLB requirements and the disparate achievement levels between different ability learners or teacher behaviors. But despite the lack of a direct causal link, the authors asserted that the association between these events is clear (Loveless et al., 2008). Endorsing this sentiment, Stephens (2011) wrote the following about the impact of NCLB:

In combination with the United States' prolonged ambivalence toward gifted students, recent education policies have further directed emphasis away from excellence and the realization of one's full capability and toward the achievement of proficiency or minimum competency. As a result, schools have committed the majority of their attention and resources to underperforming students. Meanwhile, gifted students sit in classrooms and many of them appear to wait for relevant, challenging instruction tailored

to their educational needs—their progress toward fulfilling their potential stalled and perhaps even permanently extinguished. (pp. 306-307)

Stephens (2011) admonished that politics made the legislative advocacy work to be done for gifted students complicated and difficult, recommending, “with direct lobbying of Congress and the White House, continued grassroots advocacy at the state and local levels, and attention to engaging new partners with shared interests and goals, progress for gifted students can be realized” (p. 309).

Furthermore, Stephens (2011) asserted that the negative influences of NCLB on gifted students included its emphasis on proficiency of minimum competencies and its negligence of growth among students well above that standard. She proceeded to outline angles that advocates might examine, such as attempting to calculate the potential economic contribution gifted students with realized potential could make to the national bottom line. Perhaps in keeping with the “equity” flavor of the times, Stephens suggested that advocates could generate positive attention for high-ability students who have disproportionately limited resources and opportunities for growth. “While the recommendations from national reports have urged the nation to nurture its academic and intellectual resources, current federal and state policies in the era of NCLB continue to emphasize uniformity and proficiency” (Stephens, 2011, p. 316). This irony frustrates gifted education advocates and stymies their efforts. Simply arguing the point that equity should include growth among high achieving students as a subset of all students has apparently failed to remedy the problem. Research and expert opinion register concern that gifted education is acceptable collateral damage in the era of reform generated by NCLB.

2.7 ADVOCACY EFFORTS: ORIGINS AND IMPACT

As a distinct branch of public education, gifted education has experienced varying and constantly changing levels of philosophical, statutory, and financial support. Both national and state levels of government have offered inconsistent and inadequate attention to students who achieve at high levels, leaving concerned educators to yield to the current political and economic winds and/or to devise plans and solutions on their own. Advocacy efforts have involved a variety of approaches directed toward stakeholders from politicians to parents.

Gifted Child Quarterly devoted an entire issue to advocacy for gifted education and its students in 2003. This issue was published in the early days of NCLB when the impact of minimum competency high-stakes testing was as of yet unrealized. According to the editor, the purpose in collecting these studies was to “find exemplary instances of effective advocacy for gifted children and to present these together so as to illuminate the characteristics of successful advocacy” (Olszewski-Kubilius, 2003, p. 5). This special issue included an introductory statement by Ann Robinson, the co-chair of the National Association for Gifted Children’s (NAGC) task force addressing the status of advocacy efforts for gifted education. In this statement, Robinson (2003) spoke about her experience gathering information from advocates for gifted education:

We expected "a few good ideas" to roll in. Instead, we received more stories and more fervently told stories than we imagined our simple request could generate. Those first responses were the beginning of a fascinating journey into people, politics, and persuasion. (2003, p. 7)

In 2003, Ann Robinson and Sidney Moon, the other NAGC task force co-chair, completed an extensive, multi-phase study of gifted education advocacy. When conducting their literature

review, Robinson and Moon (2003) found few sources dedicated to advocacy methods; rather, sources alluded to the importance of advocacy and the consequences of its absence or discontinuation. Most efforts were directed toward the state level and parents figured prominently in the literature cited in their review (Robinson & Moon, 2003). Robinson and Moon (2003) lamented, “in contrast to its absence in the research base, calls for advocacy are plentiful” (p. 9). Primarily qualitative methodologies were employed as each case yielded stories unique to the individual situations described.

2.8 ADVOCACY MODELS

The literature about advocacy consists primarily of models or principles written by experts in the gifted education field. Potential advocates may find advice or strategies for successful campaigns and case studies of advocacy events in this body of work. Advocacy literature has been directed toward legislators at the federal and state levels to direct mandates and resources for the benefit of the entire field, toward district-level school boards to establish or enhance services to all the gifted students in a school system, and toward individual schools on behalf of individual students.

Gallagher (1983) defined advocacy for gifted education as “a set of activities designed to change the allocation of resources to improve the opportunities for the education of gifted and talented students” (p. 1). Gallagher’s emphasis on “changing the allocation of resources” presumed an increase in such resources and is at the heart of continuing efforts of gifted education advocates at federal and state levels who seek statutory regulations defining the gifted population and funding formulas supporting gifted programming. At the local level, however,

gifted education is dictated by the laws of each state through explicit statutory language (or an absence of it) and is financed through school district budgets, which combine grants or formulaic allocations from the state with local tax dollars in ways and amounts unique to each individual district (NAGC & CSDPG, 2011). All district resources earmarked for the day-to-day workings of gifted education (e.g., personnel hired, space allocated, time assigned, and materials provided) are local decisions determined by administrative choice and influenced by community expectations (NAGC & CSDPG, 2011).

Gallagher (1983) wrote that while advocacy was historically viewed as the domain of commerce and politics and as inappropriate behavior in the altruistic world of education, the realities of modern times indicated a need for revised thinking, especially in the field of gifted education. Additionally, Gallagher (1983) noted that Marland’s (1972) expanded federal definition of gifted and talented students was widely accepted in public education; however, this

Table 2. Gallagher’s Advocacy Model

Component	Question
Goals	What do I want to happen?
Targets	Who has the power to decide what happens?
Knowledge	What do I need to know about the goal, the target, other factors such as how are decisions made?
Message	What are the key elements I want to convey?
Delivery Mode	How will the message be communicated (from personal communication to use of mass media)?
Evaluation	Has the goal, or some parts of it been achieved? What progress has been made?

Note. See Gallagher (1983) for further information.

expanded definition had not resulted in increased funding for a presumably larger population of children. Essentially, Gallagher professed that gifted children had a public relations problem: unlike the public perception of handicapped or disadvantaged students, the perception of gifted children by society was not at all sympathetic, despite this population's needs being just as real. If resources to address the unique educational needs of the gifted population were to be realized, advocates would have to act in order to address "the curious reluctance of our society to do more for gifted students" (Gallagher, 1983, p. 3). Hence, Gallagher developed an advocacy model to aid those fighting for the gifted population (see Table 2).

Gallagher (1983) noted that the launch of the Russian satellite Sputnik in the late 50's, a watershed moment in the history of gifted education because of the panic that Americans felt at the prospect we were falling behind international competitors, taught advocates that while "fear can initiate motivation, it rarely sustains programs...advocacy requires persistence" (p. 5). Later, Gallagher advocated a stronger federal leadership role in gifted education, arguing for the following:

several types of catalytic activities; research, development, leadership training, dissemination, etc., that have been provided by federal sources in the fields of health, agriculture, and other areas of education (such as the education of handicapped children) that have resulted in higher and more consistent levels of program quality. (Gallagher, 1986, p. 43)

While over half of the states included gifted children under the category of exceptional students, the federal government did not, which prompted Gallagher (1986) to propose that a modest investment at the federal level would encourage increases at the state and local levels as it had for handicapped children.

In contrast to the components of Gallagher's model, Dettmer (1991) proposed an approach that rallied groups in increasingly outward circles of influence, effectively creating a ripple effect to build interest and support. By focusing efforts on collaboration among a wider group of existing and potential stakeholders, Dettmer (1991) believed that larger numbers of supporters with different perspectives directed toward a common interest wielded increased power. In describing this advocacy model, Dettmer (1991) listed 20 different potential stakeholder groups, explaining how they garnered support:

[They] have benefits to gain and support to give by advocating for gifted education. As the momentum of these combined groups speeds gifted education toward its fundamental goals, tinsel bandwagons and strident fanfares will not be needed. Advocacy-by-crisis will become an outmoded tactic, and gifted programs will be both expected and accepted routinely into the educational traffic. (p. 170)

The bandwagon concept of broadening appeal for improved services to gifted learners beyond parents and educators directly affected by the services was highly effective.

Yet another approach to advocacy was demonstrated by Kaplan (2003), who directed advice toward teachers. Kaplan (2003) wrote that using common pedagogical strategies such as motivation, scaffolding, and transfer were effective skills for advocacy activities. Later, she coined the 'spill-over effect' as a model for effective advocacy, proposing that advocates gather support for gifted education by reciprocity among educational programs:

The spillover effect reinforces the affiliation, rather than the isolation, of gifted education. This advocacy strategy evokes controversy, however. Some people argue that the spillover effect obliterates the distinctiveness of gifted education and diminishes its

value. Others argue that every specialized educational program can contribute to the education of all students under certain conditions. (Kaplan, 2004, p. 48)

The spillover effect was, in essence, a bandwagon filled with educational programs rather than groups of people.

In addition to the component model, the spillover model, and the bandwagon model, Schatz (1991) proposed a dissemination model. The model, devised in a Wisconsin advocacy effort, used a state conference of diverse stakeholder groups as a vehicle to propose components of a comprehensive statewide gifted education model, share exemplars, and disseminate findings through regional conference sites. Schatz (1991) described this design as “low cost and high energy” (p. 188).

Others have made the case for using existing strategies in public relations theory and methods such as the use of print and electronic media to garner support for gifted education at the local level. For example, Lewis and Karnes (2005) advised teachers to tout their own programs throughout the school and community via a well-orchestrated, methodical campaign to ensure broad exposure through media sources such as billboards, bumper stickers, new releases, and novelty items.

2.9 ADVOCACY ORGANIZATIONS

Gifted education has a long history of organized advocacy. Without any federal oversight or resources directed toward the educational needs of gifted children, advocacy efforts at the national level have consisted primarily of organizations such as the National Association for Gifted Children (NAGC) and the Council for Exceptional Children (CEC), both of which have

mission statements including formal advocacy efforts as a primary function of the agency. Founded in 1954, NAGC is gifted education's flagship advocacy organization, providing a wealth of information and resources on a wide range of topics supporting gifted education. NAGC's network of experts supplies testimony to Congressional leaders and publishes position papers to guide practitioners in the field. Additionally, NAGC is the publisher of one of the most widely circulated peer-reviewed journals of research in the field of gifted education: *Gifted Child Quarterly*. Similarly, the CEC is a national advocacy group devoted to children with special education needs, dedicating one of its divisions to gifted education (Council for Exceptional Children [CEC], 2013). NAGC and CEC have coordinated efforts on legislation and funding initiatives at the federal level.

In addition to advocacy at the national level, most states have affiliates to the national organizations that work more closely with local districts. Lobbying efforts are prominent in the activities sponsored by these groups. Many state associations, such as the Pennsylvania Association for Gifted Education (PAGE), maintain a helpline for parents seeking advice about public school services for their children and tips for local advocacy activities.

2.10 ADVOCACY STUDIES

A variety of advocacy efforts have established or improved gifted programming at the state and local levels, each with a unique focus and valuable lesson for current and future advocates. Both the mechanism for and the recipients of the advocacy events were situationally unique.

2.10.1 Renzulli and Reis's Economically Resilient Gifted Programs

In 1991, Renzulli and Reis investigated the different kinds of advocacy at the local level during a period of excessive budget cuts, focusing on why some programs survived and others did not. The authors discussed three avenues for local advocacy: program design, student productivity, and public relations. Program design advocacy resulted in expanded conceptions of who can benefit from differentiated experiences and included greater access to resources traditionally reserved for the formally identified student (Renzulli & Reis, 1991a). The student productivity component highlighted products that were high quality, authentic, and representative of the kind of work students can and should produce in opportunities designed for gifted students (Renzulli & Reis, 1991a). Lastly, Renzulli and Reis asserted that public relation activities were essential, emphasizing that these endeavors should be ongoing, rather than occurring only when gifted programs are in jeopardy. Renzulli and Reis (1991a) cautioned, “many educators of the gifted are concerned about the current emphasis on basic skills, competency-based assessment, and elimination of grouping” (p. 185). This sentiment was remarkably prophetic, given the study was completed more than a decade prior to NCLB.

Furthermore, Renzulli and Reis (1991a) stated that the perennial fluctuation of gifted education from necessary to expendable was affected by the amount and kind of information provided to the community about the program. In their conclusion, the authors identified eight key features common to programs that survived the economic crisis of the day: “longevity, *administrative support* [emphasis added], gifted program leadership, policy adoption, program design and organization, broad ownership and vested interest, positive evaluation reports, and sustained public relations efforts” (pp. 186-187). Of particular interest to this study is the idea of administrative support, which will be discussed in further detail later in this literature review.

2.10.2 The NAGC Advocacy Task Force

As a result of the scarcity of empirical studies to guide advocacy efforts, NAGC formed the Advocacy Task Force to conduct a massive, multi-phase study of advocacy efforts nationwide in 1995. The NAGC charged this task force with defining successful advocacy events and factors that contributed to positive outcomes. Consequently, *advocacy event* was then operationally defined as “the complex series of decisions, interactions, and so forth that culminated in the successful outcomes described by the advocates in their screening surveys” (Robinson & Moon, 2003, p. 12) and identified as the primary unit of analysis in the study. With the operationalization of the term advocacy event, the NAGC task force distributed a national survey to state directors of gifted education, affiliate organizations of NAGC, and collaboration school districts registered with the National Research Center on the Gifted and Talented (Robinson & Moon, 2003). A resultant 61 cases in 34 states were categorized as compelling, possible, or not applicable for further study because they did not fit the scope of the research, such as cases that focused on a single child. Follow-up interviews and visits to the sites deemed “compelling” resulted in six advocacy events selected for further analysis using a case study methodology. Several of these studies are discussed in the following sections.

2.10.2.1 Enerson’s manual for constructing a mandate. At about the same time that Robinson and Moon (2003) lamented the lack of documentation for successful advocacy efforts, Enersen was conducting an extensive case study and recording results in a document referred to as the *Manual for Constructing a Mandate* (Enerson, 2003, p. 38). Advocates representing a state association for gifted children successfully lobbied for a gifted education legislative mandate in an unnamed southern state. Using a bridge-building metaphor, Enerson (2003)

employed a phenomenological methodology to capture rich qualitative data about the experiences of those involved. This particular state was noted for its financial struggles, and thus, according to Enerson, was a less likely place for success of this magnitude. Yet rather than arguing solely in favor of gifted students per se, those involved portrayed gifted children as a subset of all children who were equally entitled to an appropriate education (Enerson, 2003).

Enerson's (2003) advocacy blueprint consisted of four phases ranging from planning to future maintenance. "The construction began with many *individual stories* [emphasis added] of teachers and children and parents" (Enerson, 2003, p. 39). One such parent became an outspoken leader of the charge and later became the president of the state's advocacy organization. Parents and their direct contacts with legislators and their staffs proved to be among the most effective bridge builders in the process (Enerson, 2003). While the group's goals included a mandate for K-12 gifted identification and programming, consideration for multiple talent areas, individualized plans, a state advisory panel, and all related services, they accepted a compromise reflective of financial and philosophical boundaries. This compromise included "a definition of giftedness, a mandate for services to intellectually gifted children in grades 2-6, with locally permissive programming for grades 7-12" (Enerson, 2003, p. 42). Fiscal issues also required a four-year phase-in concession, though advocates were grateful that the law was not repealed. The study ended with a "wish list" of work yet to be completed, such as a dedicated staff person at the state level (which seems to be a recurrent indicator of a state's interest in and commitment to gifted education), expanded services to additional grade levels, and specialized teacher certification (Enerson, 2003). One participant opined, "Superintendents and principals must feel a part of the trust factor, as well as a part of the responsibility. We need to 'court' them and give them as much of a role as they will take" (Enerson, 2003, p. 45). The

lack of studies conducted about and directed toward administrators indicates this advice was not followed.

2.10.2.2 Delcourt’s elements of successful advocacy groups. Advocates occasionally show awareness of the points of contention in gifted education. Delcourt (2003) completed a dual-site (east coast, west coast) historical study of state-level advocacy wherein each case participant was successful in securing legislation for increased funding and services specific to the gifted and talented. Unique to the east coast site was a statement from one of the advocates who, in describing their creation of the state’s association, noted, “the word gifted was purposely left out of the organization's name. It has served us well not to have gifted in the title because [the term] is so misunderstood" (Delcourt, 2003, p. 28). In summarizing the study, Delcourt identified key descriptors for successful advocacy groups: “passion, preparation, inspiration, perseverance, and the ability to take advantage of serendipity” (p. 33).

2.10.2.3 Kennedy’s elements of successful synergistic advocacy. Elements in this successful and collaborative advocacy event are unique. In 2003, Kennedy conducted a case study of a rural district in South Dakota in an attempt to expand gifted program services in the midst of a local budget crisis and decreased state funding. Prior to Kennedy’s study, South Dakota had one of the most entrenched, comprehensive, and prescriptive state gifted education mandates. In a single year and for reasons not identified, all state regulations were rescinded and gifted programs throughout the state were minimized or cut (Kennedy, 2003). Additionally, the state official for gifted education retired and was not replaced. Wrestling with a budget crisis of its own, the local district examined in Kennedy’s work began by dividing expenses into essential services and discretionary categories, where the gifted program had been listed.

Despite these clear markers of gifted program demise, the school board of the subject community voted to expand the program and hire additional teaching and clerical staff to support the coordinator/teacher who had previously been the only staff member responsible for the entire gifted population in multiple buildings (Kennedy, 2003).

Using extensive interviews with teachers, parents, and others, Kennedy (2003) sought to identify and explore the factors responsible for the feat of maintaining a gifted program during a financial crisis. Kennedy's study illustrated the importance of key people with different perspectives creating synergistic advocacy, concluding that advocacy efforts in this case:

...were, in a sense, in the right place at the right time, and their efforts were supported by a highly competent, experienced coordinator, *as well as by a superintendent who welcomed "healthy dialogue" about issues and who had a background in gifted education* [emphasis added]. Several board members also had children participating in the gifted program successfully. The convergence of these factors at a critical time might be seen as extraordinary luck. (Kennedy, 2003, p. 91)

Kennedy further expanded upon the fortuitous elements and highlighted four critical components that contributed to this highly successful advocacy event:

- a. a hard-working, competent, generally respected coordinator;
- b. a supportive and well-informed superintendent;
- c. a school board with several members who have close ties to the gifted program through their own children; and
- d. a history of a program that, although primarily in a pullout format, focused on IEPs tied to the classroom curriculum. (Kennedy, 2003, p. 92)

Additionally, the study included emotional stories from parents about how their children had languished in instructional settings far below their ability levels and of the indifference classroom teachers expressed regarding their plight. “Happy stories also surfaced, of IEPs that keep students challenged and accelerated classes that result in high achievement” (Kennedy, 2003, p. 89).

In this particular district, advocates educated themselves and others about the importance of high quality gifted education (Kennedy, 2003). Instead of fighting only for survival, these well-informed advocates saw an opportunity to improve and expand the gifted program (Kennedy, 2003). For example, one parent group created booklets including carefully selected articles on a variety of topics that represented multiple viewpoints for the school board. In discussing the advocates’ roles in raising awareness, Kennedy stated:

The impact of the dissemination of so much information is difficult to assess. At no time in an interview did a participant attribute an idea or bit of insight to a specific source. Yet, the school board member who was interviewed, as well as others in the community, made many comments reflecting a knowledge of gifted education that went beyond surface level. (p. 89)

Of significant interest in Kennedy’s study was the superintendent, whose background was unusual in that his early career had included training and experience in gifted education, no doubt contributing to a clearer understanding of its importance.

2.10.2.4 Herzog’s chronicle of an advocacy leader. Hertzog (2003) conducted an extensive case study in an extremely large, high performing, and relatively wealthy suburban school district that demonstrated how the powerful advocacy efforts of a local gifted association leader influenced a dramatic change in district policy and the focus of gifted programming in its

schools. Approximately 25% of this district's students were identified as gifted, and services to gifted students included math and science magnet schools and International Baccalaureate (IB) and Advanced Placement (AP) programs for high school students, subject-specific pullout programs for middle school students, and part-time centers for elementary gifted students (Hertzog, 2003). Administrative responsibility for gifted education was shared across five different departments in an expansive central office. The stated goal of this advocacy event was to improve instruction for gifted students in grades K-8 by addressing curriculum and assessment to ensure academic challenge (Hertzog, 2003).

Interestingly, advocacy efforts beginning with the association leader were eventually supported by a growing base of parents beyond those of the identified gifted, in part because the policy revisions impacted the regular classroom (Hertzog, 2003). Conversely, according to the association leader, central office personnel initially were not in favor of the resultant revisions to the gifted education policies of the district (Hertzog, 2003). Hertzog (2003) reported that in addition to becoming well versed in all issues in gifted education, the association leader also studied the tenets of effective advocacy and negotiation, utilized the freedom of information laws, and widely publicized his efforts in the media where he would publicly expose the resistance of some administrators. As can be seen through his behavior, this leader's tactics were both confrontational and conciliatory. Unfortunately, one dramatic publicity stunt backfired and caused a loss of credibility. The personality and drive of the association leader, however, was cited by nearly every participant interviewed by Hertzog as a strong contributor to the ultimate success of the initiative. His efforts, however, appeared to have been enhanced by a more subdued association member who sat on the Superintendent's Committee for Gifted and Talented

and was willing to work within system guidelines to sway administrative opinion (Hertzog, 2003).

In the chronology of the 3-year event, the gifted association drafted a proposed policy, and the district staff submitted a policy of their own (Hertzog, 2003). The school board reviewed both policies, and the groups were directed to redraft a consensus document. The association leader submitted the equivalent of a dissenting opinion, resulting in the final version of the policy representing a compromise (Hertzog, 2003). Major components of the revised policy included definitions and identification protocols for gifted students, mandated classroom differentiation and grouping strategies, addressing under-served populations, and of most importance, reporting progress to the school board (Hertzog, 2003). The changes were dramatic and resulted in deep cultural shifts in the way education for all students was addressed (Hertzog, 2003). Of greatest significance was the opening of services to all students capable of and willing to rise to the challenge of enriched and accelerated instruction (Hertzog, 2003).

In reflecting on the advocacy work done in the focal district, Hertzog (2003) identified the process of change as a complex one, consisting of many interrelated factors. Different constituencies characterized the process as political or power-related, citing that swaying the school board as critical (Hertzog, 2003). The influential association leader took aim at top district decision-makers, such as the Superintendent, using their desire to maintain a positive public image to his advantage (Hertzog, 2003). Teachers seemed to have played only a minor role in the gifted policy revision process. In fact, implementation of some components of the revised policy and staff resistance to accelerated mathematics plagued the district following the adoption of the revised policy, causing the association leader to view his work as a failure (Hertzog,

2003). Yet, this leader persisted in overseeing progress and ultimately developed a large following of supporters for continued advocacy (Hertzog, 2003).

2.10.2.5 NAGC's role of the champion. The NAGC Advocacy Task Force leaders conducted a cross-case analysis of the six case studies identified in their surveys and site visits (Robinson & Moon, 2003). Many of the conclusions offered by Robinson and Moon demonstrated theories discussed in established advocacy models; however, one finding that appeared to be crucial to success was conspicuously absent from the existing advocacy models: a champion. The champion was an individual (e.g., parents, teachers, coordinators, or leaders of advocacy organizations) whose leadership was expressed in a passionate commitment to the cause of gifted education (Robinson & Moon, 2003). The champion's leadership characteristics were summarized into three broad categories: all champions possessed motivation that was persistent and strong; a considerable knowledge of best practices in gifted education and effective strategies in advocacy; and skills in problem solving, communication, and public relations (Robinson & Moon, 2003).

2.10.3 Other Advocacy Studies

In 2011, Duquette, Orders, Fullarton, and Robertson-Grewal chronicled the journey of 16 Canadian parents of gifted adolescents, several of whom were diagnosed as twice exceptional (i.e., gifted and learning disabled). Parents of these twice-exceptional students sought accommodations for both exceptionalities. In Duquette et al.'s (2011) study, parents were recruited for participation via the website of a professional advocacy organization, the Association for Bright Children (ABC). Parents completed an extensive questionnaire with

open-ended questions and participated in a lengthy interview. The survey items and interview questions were based on a four-dimension strategy for advocacy originally used by parents of student with disabilities: becoming aware of the need, gathering information about the need, presenting the case for accommodation and monitoring implementation and progress (Duquette et al., 2011). At the time of the study, all of the students had been placed in appropriate programs or had graduated, and the researchers attempted to uncover how this success in advocacy had been achieved. Duquette et al. (2011) determined that the parents of gifted students in this retrospective study had successfully followed the advocacy strategies devised for use in special education.

In another parent-led descriptive study, Matthews, Georgiades, and Smith (2011) attempted to provide a blueprint for building a local advocacy association. The authors' mission was "to promote and support a high quality education for gifted students, to inform and unite parents of gifted students..." (Matthews et al., 2011, p. 30). This study offered sample products, discussed how they chose a name, a meeting schedule, and identified website creation and recruitment practices in a "how-to" piece directed toward promoting gifted education in a single district (Matthews et al., 2011).

2.11 ADVOCACY OUTSIDE OF THE GIFTED EDUCATION FIELD

Wickman's (2004) review of *The Academic Adventures of Laura Bridges: An Introduction to Educational Architectural Therapy* (Bridges, 1999) highlighted the importance of the parent perspective in advocacy for gifted children. This book (i.e., *Laura Bridges*) was written by a parent who shared his daughter's experience as a gifted student in the hopes of demonstrating

effective advocacy other parents of gifted children (Wickman, 2004). Wickman (2004) concluded that the parent perspective is insightful and valuable, as these parents stand as outsiders to the educational reality of their children. Wickman (2004) advised that “school counselors taking a developmental perspective such as the ASCA’s (American School Counselors Association) best practices are called upon to be student advocates and provide an alternate viewpoint to teachers and administrators, similar to the position taken in this book” (p. 379). Wickman (2004) concluded that this book offered a unique look at the successes and struggles of the kind of high achieving student that public education should view as ideal, but often does not.

2.12 SUMMARY OF ADVOCACY LITERATURE

Advocacy studies in gifted education appear to be highly varied and situational; yet, in each case, researchers clearly identified the factors and people that lead to success. Interestingly, all the studies were retrospective and selected, in part, because they were successful. While certainly helpful to know the results of the advocacy events and then to work backwards in analyzing the factors that generated positive results, questions arise. Which of these same success factors may have failed in unsuccessful advocacy efforts? It is logical to assume, given the precarious existence of some gifted programs, that advocacy does not always work. Is it that the elements that lead to success are absent from such efforts, or it is that even with all the right components, some advocacy efforts may still fail? Advocacy, in its usage here, is the process that describes efforts to secure additional resources, legal protections and improved services on behalf of gifted students and their education. Models, theories and case studies have been examined. Parents

and interest groups figure prominently in the examples from the literature. Still, gifted education lacks identity, cohesiveness, and permanence, and those charged with designing and implementing services lack definitive direction.

2.13 HOW ADMINISTRATORS VIEW GIFTED EDUCATION

At the time of this literature review, the National Association for Gifted Children's (NAGC) website prominently and uniquely featured the insight of a pioneer superintendent as the first event in the timeline of gifted education milestones.

Although people with exceptional ability have been celebrated across the ages, the use of the word "gifted" in an educational sense is relatively recent. In the late 1800s, Dr. William T. Harris, Superintendent of Schools in St. Louis, discussed a plan for the acceleration of gifted students so they would have more challenging work and not fall under the spell of laziness. (NAGC, 2008g, para. 12)

This admonition by a top district administrator about a population of students commonly believed to be effortlessly successful is significant and relatively rare in the literature (NAGC, 2008g). Harris' fear of gifted students underachieving from a lack of challenge is a consequence today supported by research (Reis & McCoach, 2000). It is especially interesting that this observation occurred over a century ago.

2.14 THE MISSING LINK

Curiously lacking in the literature describing the declining status of gifted education in the No Child Left Behind era and in the plethora of advocacy methods and studies to mitigate those effects is a focus on district level administrators. These chief executives and instructional leaders of public school districts are important but neglected contributors to the issues affecting gifted students. Problems in the field of gifted education (e.g., the lack of consensus in defining the gifted student, the patchwork quilt of state regulations and funding sources or lack of such regulations and funding sources, charges of elitism, the national focus on proficiency, etc.) have been explored and documented thoroughly. In a conceptual work that synthesized several advocacy models and studies, Christopher, Fowler, and Wiskow (2011) listed teachers, parents, gifted education coordinators, school boards, and the students themselves as key players in effective advocacy efforts in support of gifted education. Surprisingly, neither building nor especially district level administrators were mentioned (Christopher et al., 2011).

In 2006, VanTassel-Baska conducted a comprehensive evaluation of seven gifted education program components in 20 school districts across multiple states that represented a wide range of demographic attributes. VanTassel-Baska (2006) used a mixed-method approach to evaluation, with qualitative and quantitative methods that included a battery of surveys, focus groups, targeted interviews, and document analysis. After outlining the generic shortcomings of gifted education (i.e., lack of credibility as a field due to multiple and often conflicting identification and programming systems, limited research and evaluative data, and charges of elitism) compounded by the negative impact that NCLB's focus on basic proficiency has inflicted on the field, VanTassel-Baska (2006) uncovered dismal findings about the status of gifted programs. While the perception amongst stakeholders was that programs and services

were highly beneficial to student participants, there was a decided lack of data to support these conclusions. Accountability was minimal and political pressures forced districts into broadening services in the mainstream education, often at the expense of gifted needs. VanTassel-Baska concluded that many of her findings mirrored those in *National Excellence: A Case for Developing America's Talent*, a U.S. Dept. of Education report published in 1993.

To remedy both long-standing and new problems in gifted education, VanTassel-Baska (2006) recommended a two-tiered approach that would ideally include both improved services for gifted students and a partnership with general education for the benefit of all students. Unfortunately, the author lamented that inadequate funding and the absence of strong national and state leadership made improved services to gifted students the clear priority; hence, little, if any, funding and resources could have supported this expanded partnership between general and gifted education (VanTassel-Baska, 2006).

This study was typical of many in that the opening question of the survey's demographic section included five choices to identify the role of the respondent. Superintendent or district level administrator was not among them, nor the choice of "other". Thus, it can be presumed that their input was not solicited.

The most recent, national-level report on gifted education, *A Nation Deceived: How Schools Hold Back America's Brightest Students* (Colangelo et al., 2004), explored the practice of academic acceleration. As the title indicates, the report condemned public schools for their extremely limited use of the strongly empirically supported gifted education strategy of academic acceleration (Colangelo et al., 2004). Colangelo et al. attributed the infrequent use of academic acceleration to minimal or no training among teachers and administrators, the persistent belief in

disproven assumptions of social-emotional harm to students, and a general lack of awareness that research supports this highly cost-effective strategy.

When confronted with the title of Colangelo et al.'s (2004) report, a superintendent of a high performing public school district stated, "As a K–12 superintendent, the title of this report makes me kind of nervous. I believe most K–12 districts practice forms of acceleration, but I would agree that we probably don't look at it as much as we should" (p. 46). In fact, this superintendent reported that in a school of over 10,000 students, only two or three individuals were grade-skipped in any given year and that parents, rather than the school, always have initiated discussions about academic acceleration (Colangelo et al., 2004). This anecdote is the sole reference to a superintendent in the entire 272-page document.

Thus, advocacy models have made no specific mention of engaging superintendents, advocacy studies have made minimal use of their input, and even intensely studied and highly effective strategies for gifted learners that usually require administrative support (such as acceleration) have been underutilized, in part because by their absence in the literature, superintendents appear uninvolved.

2.15 THE SUPERINTENDENT SURVEYS

While superintendents were mostly absent in the selected studies discussed in the previous sections, they have been studied in other contexts. The research firm of Belden, Russonello, and Steward (BRS, 2005) examined the instructional leadership of district level administrators, specifically focusing on the superintendent. Researchers began by conducting interviews with 13 superintendents, and the information garnered during these interviews was used to design a

more extensive survey instrument. This survey was then administered to over 800 superintendents across the nation. The report stated:

A majority of superintendents report that in the last three to five years, instructional decisions in their districts are being made more at the district-level rather than by individual schools. The No Child Left Behind Act (NCLB) and the resulting call for more testing and greater accountability have spurred stronger direction from the district. Superintendents, however, do not see NCLB as the sole driver of greater instructional leadership from the district. (BRS, 2005, p. 3)

Most superintendents contended that a more prominent leadership role was increasingly necessary despite NCLB (BRS, 2005). Because of NCLB, data management and data analysis training were areas of increased scrutiny, as was instituting common curriculum, materials, and math and reading programs for maximum effect on student achievement (BRS, 2005). Superintendents listed the lack of funding and human resources as obstacles in their increased instructional leadership rather than “opposition by teachers and principals” (BSN, 2005, p. 4).

Reflecting the voices of superintendents, the conclusions of the BRS study focused on those factors viewed as having the greatest achievement impact on the greatest number of students. Questions concentrated on curriculum, data, induction and professional development, leadership roles, and assessment as it further informs instruction (BRS, 2005). The report did not include questions dealing with support programs for exceptional students of any kind.

Similar to the BRS study, Kellar-Allen (2009) examined superintendents nominated by professional associations familiar with the collaborative special education-regular education mindset of the selected subjects. “All of the participants indicated that their experiences, both professional and personal, helped to shape their beliefs about special education and the need for

collaboration with general education” (Kellar-Allen, 2009, p. 2). The study articulated these belief-shaping experiences from each participant and the lessons learned or reinforced because of them. The superintendents promoted collaboration and best practices such as co-teaching, common planning time, and professional development in differentiated instruction to improve achievement for all students, and all superintendents were enthusiastic about the common language and built-in collaboration of response to intervention (RTI) initiatives (Kellar-Allen, 2009). Five of the seven superintendents reported using hiring strategies to foster ongoing collaboration between regular and special education, including tactics such as questioning applicants about their belief systems, regardless of the position sought, and counseling out or dismissing teachers who fail to embrace the philosophy of collaboration (Kellar-Allen, 2009). Again, while this study was not about gifted education per se, the superintendents’ philosophical bent toward collaboration and the value of special education, their focus on progress for all students, and the use of each of their areas of authority (e.g., hiring, schedules, staff development, etc.) to lead their schools, have implications for gifted education, if gifted education was to become part of the discourse.

2.16 AMERICAN ASSOCIATION OF SCHOOL ADMINISTRATORS

In 2007, the American Association of School Administrators (AASA) publication *The School Administrator* devoted an entire issue to the plight of gifted learners under the NCLB legislation. The introductory message from the organization’s president alluded to the timeliness of the issue given the pending reauthorization of NCLB (White, 2007). White (2007) acknowledged the ambivalence of most educators to the struggles of gifted learners, specifically highlighting

problems with the overemphasis on identification mechanisms. When discussing the focus on identifying gifted students, White (2007) stated that this issue was “child’s play [when] compared to finding effective ways to teach, coach, or guide them. It is much easier to leave [gifted students] behind than it is to truly enrich, encourage, enlighten, and liberate them” (para. 8).

Similarly, Clarenbach (2007) summarized the dilemma facing gifted education, reiterating the lack of mandates, resources, training, and empathy for gifted learners; however, this article furthered the exploration of this dilemma by anecdotally introducing concrete benefits experienced by school districts that run effective gifted programs. Superintendents serving these districts spoke of multiple benefits in fostering high expectations for students. Serving gifted students well stemmed the flow of high achievers to private schools. They spoke of the benefits of fostering partnerships between local businesses and medical facilities to provide mentors and intern opportunities for gifted students to their mutual benefit (Clarenbach, 2007). These community partnerships were especially important given that the majority of gifted program funding is provided locally rather than by the state.

Aside from White (2007) and Clarenbach’s (2007) poignant discussions, the discourse in AASA’s special issue about the struggles facing gifted education contained numerous other authors who extrapolated on the struggles, services, and advocates of gifted learners. McCaw (2007) expounded upon the dangers of narrowing of the curriculum for all learners, supporting her points with warnings from experts in the fields of leadership and motivation (i.e., Daniel Pink, Steven Covey, Michael Gelb, et al.). Another article written by Sally Reis, a gifted education expert, offered a crash course in gifted education with dozens of options and strategies to prevent or alleviate boredom (Reis, 2007). Likewise, Smith (2007), an experienced

superintendent of four districts, including two large county school systems, offered additional advice for accommodating the needs of all students without the disruptive nature of a separate program for gifted students. Finally, Kenney (2007) called attention to the profiles four districts that managed to stem the tide of gifted program cuts. Kenney (2007) shared the NAGC's sentiment that these districts have one prominent feature in common: "school leaders who have gone to bat for bright students and communities that expect nothing less" (para. 8). Clearly, involved school leaders can produce successful results for gifted students.

2.17 ADDITIONAL ADMINISTRATOR STORIES

Few empirical studies examine the intersection of administrators and gifted education; however, several authors have provided anecdotal reports on this topic to illustrate the importance of school administrators. In an essay written by a southwestern Pennsylvanian superintendent on the topic of school reform, NCLB and Adequate Yearly Progress (AYP), there was no mention of gifted education (Sofa, 2008). While specific discussion regarding gifted education was absent in this article, Sofa (2008) did attribute major changes in instruction and programming to "bottom-up solutions more than top-down mandates" (p. 391). Clearly, Sofa's top-down comment referred to NCLB mandates. Sofa (2008) instead called for district-level solutions with a new type of leadership that embraced a more holistic set of locally derived standards, including "rigor, relevance, relationships, and reflection" (p. 393). Sofa's recommendation reinforced the claim that superintendents hold the key to any local programming priority. Substantive and lasting changes require leadership closer to the students.

The role of educational leaders was discussed in more detail by Olszewski-Kubilius (1998). This author indicated that administrative understanding was essential to such concrete and mundane issues as the awarding of credit. Summer and other out-of-school courses designed for advanced students are often dramatically accelerated and therefore administratively problematic. School leaders must decide how to grade and credit mentor or intern opportunities necessary for the development of extremely advanced talent domains (Olszewski-Kubilius, 1998). Gilson (2009) wrote from the perspective of a school principal, the building-level administrator. He discussed struggles common to gifted programs such as identification of students, staff development, and even college planning for the most able students in a school. Gilson (2009) balanced these challenges with the unwavering belief that maximizing students' potential is an absolute necessity if they are expected to compete with the world's best.

2.18 TAKING ACTION

In 2011, the newsletter of the National Association for Gifted Children (NAGC) contained a plea from its president (i.e., Dr. Ann Robinson) for members to right an historic wrong: the virtual exclusion of school administrators from the field of gifted education. Robinson (2011) described administrators as “gatekeepers or committed advocates” (p. 4), acknowledging their power over teachers, resources, program infrastructure, and policy. Robinson (2011) noted:

A review of the research literature, an examination of the current census of our association membership roles, or a critical look at our convention offerings over the last few years present a pattern of neglect (probably benign) and a failure to understand the concerns of school principals and superintendents (undoubtedly unintentional).

Nevertheless, neglect (however benign) and failure to take an administrator's perspective (however unintentional) reap a bitter harvest for gifted children, their families, and the teachers in the front line of service delivery. (pp. 1-2)

Clearly, the need for an investigation of superintendents and their interaction with gifted education had been confirmed.

In her leadership capacity within NAGC, Robinson announced the formation of an Administrator Task Force charged with inviting administrators into the fold of the gifted education field (Robinson, 2011). Burney, Robinson, Medina, Blow, and Greene presented the task force's work at the NAGC National Convention in November 2012. Results of Burney et al.'s (2012) study of administrators concurred with wider studies of educational professionals identifying the significant lack of specialized knowledge or training in the tenets and pedagogy of gifted education (e.g., Brown et al., 2006; Carman, 2011; Daugherty, 2010; Karnes, Stephens, & Whorton, 2000; Wood, Portman, Cigrand, & Colangelo, 2010).

The task force's conclusions resulted in a collection of white papers, research studies, short videos, and brochures designed to better inform school leaders about the nature and nurture of gifted students, housed in a single location on the NAGC website (see NAGC, 2008a). This resource is, without a doubt, a conveniently accessible, professional collection of the resources a busy administrator would need to be better informed about gifted education; yet, what is the administrator's impetus for seeking it out? While administrators may lack in-depth knowledge about gifted education, providing it conveniently may not solve the problem.

McHatton, Boyer, Shaunessy, and Terry (2010) searched for more direct ways to train administrators about gifted education. Specifically, McHatton et al. (2010) explored principal preparation programs that included special education and gifted education under the umbrella of

exceptional student education (ESE). In this study, researchers surveyed principals (though not superintendents) in a large metropolitan district to determine perceptions of their own readiness to administer specialized programming (McHatton et al., 2010). “While there is a growing body of literature related to leadership in special education, there is a paucity of research addressing principals’ knowledge and skills in gifted education” (McHatton et al., 2010, p.5). In fact, the majority of participating principals indicated no prior instruction in the tenets of gifted education at all.

While limited in scope and in generalizability, McHatton et al. (2010) uncovered yet another area of concern for the increasingly complex role of the public school administrator. Participants reported little formal preparation for the on-the-job demands of educating exceptional children; however, when specifically asked if they wanted professional development in this area, most said no. McHatton et al. (2010) offered several possible explanations for this apparent paradox (e.g., time constraints, competing priorities, and efficacy of on-the-job experience), but clearly, simply offering more information is not viewed as ideal or even necessary. The researchers acknowledged that several factors, such as frequent changes in legislation and the time required to remain current, rather than just inadequate preparatory programs, may explain the responses to the survey in this study (McHatton et al., 2010).

2.19 SUMMARY AND THE NEED FOR FURTHER STUDY

With so little consensus among experts in the field of gifted education, and minimal, if any, pre-service preparation, on what does the district’s administrative leader base his or her decisions regarding everything from identification methodology to programming options? The training or

information on which these leaders base decisions specific to gifted students is minimal; yet, they indicate no perceived need for more. As officers of the State, all superintendents must adhere to the laws, if any, of the state in which their districts are located. It is clear, however, that much variability exists among districts in the same state and even among buildings in the same district (NAGC & CSDPG, 2011; Nordheimer, 1992; Purcell, 1992, 1995). Successful advocacy models and cases exist, but the field's position in public education remains precarious. School leaders have been absent from the discussion. Given that superintendents are a constant in public education and are ultimately responsible for the instructional and executive leadership of their districts, it appears that they have been an untapped source of power as potential advocates for gifted education.

This examination of the literature has revealed gaps in advocacy efforts and only sporadic effectiveness. Studies and campaigns have explored attitudes among parents, teachers, and politicians, but the person in charge of leading educational programming at the local level has been virtually ignored. Studying the attitudes of regional superintendents toward gifted education individually and collectively offers a potentially valuable contribution to how gifted students are educated, especially at a time when the national and state focus is on helping struggling students reach an adequate level of academic competence and excellence as a primary goal is at risk.

3.0 METHOD

In the No Child Left Behind Era, attention and resources have been increasingly devoted to minimum competencies and struggling students (Gentry, 2005). “Closing the achievement gap” has been the mantra of the school reform architects (Gallagher, 2004). While growth models have attempted to include advanced students in the standards movement, programs and services for high ability students have been more vulnerable to cuts and even elimination (Camilli, 2008). However, opinions regarding the identification of and programming for high achievers have spanned a range with radical extremes. Specifically, the range has included those who feel that providing special services to already advantaged students threatens the egalitarian fiber of democracy to those who believe that failing to provide enrichment or acceleration of learning opportunities squanders the collective talents of our country’s youth and thus threatens the supremacy or even the survival of our nation (Colangelo et al., 2004). As a reflection of these disparate opinions, the available programming for gifted students has been multifarious. The array of possible programming models starts with a complete absence of programming and ends with the full-time segregation of identified students in special schools designed for their unique needs (Reis, 2006).

Though parents and teachers of this population of students are often vigorous advocates (Robinson & Moon, 2003), they are not the primary decision-makers in the school’s administrative hierarchy. This responsibility lies with district superintendents. As was

suggested by the literature review, little is known about how superintendents view gifted education. This study used a narrative analysis framework and the critical incident technique (CIT) as the methods by which this omission was examined and rectified. The research questions answered by this qualitative study are:

1. What stories do superintendents tell about their experiences with gifted education?
2. What gifted education practices, program components, or design choices are embedded in the narratives they offer?

3.1 PENNSYLVANIA AS A UNIQUE SETTING

In Pennsylvania, gifted programming is in a precarious position (Camilli, 2008). The statute addressing gifted education is highly prescriptive and based on a special education paradigm of formal identification and individualized programming (Special Education for Gifted Students, 2000), but few windows into the actual programming realities of individual districts have been opened (Maguire, 2008). Currently, no state monies are attached to gifted programming in Pennsylvania, making it an unfunded mandate (Pennsylvania General Assembly, 2013).

As a result, budget cuts threaten any educational services outside of the mainstream and those not protected by laws with stronger repercussions, such as those focusing more on learners with disabilities and those who have not reached proficiency on state tests. In order to help protect gifted education efforts, strong parent advocacy groups have arisen at the state level (i.e. Pennsylvania Association for Gifted Education, or PAGE), and many districts have locally established formal or informal parent groups who actively support specialized services to their children. However, parents, teachers, and middle-level administrators concerned with the

population of gifted students are limited in their ability to command services and resources (Clarenbach, 2007; Evans, 1994).

To be successful, advocacy efforts need to be tailored to the needs and culture of the district, as opposed to relying on a formulaic strategy (Hertzog, 2003; Robinson & Moon, 2003). These efforts must also address the issues, attitudes, and conceptions held by those district leaders with the authority to develop policy and devote resources (Robinson, 2011). Discovering what school leaders truthfully think and feel about the value in and/or need for attention to high-end or gifted learners in a time of competing priorities could potentially inform the field's advocacy efforts in the long term. This information could also have more immediate consequences for programming within single districts. While the district leader may be far removed from the gifted program teachers or coordinator level on the organizational chart, this position serves many influential roles within all school-related matters (Kelleher, 2008; Kowalski, 2005). As a case in point, the superintendent embodies the function of instructional leader, chief executive officer, public face of the district, local politician, liaison to the board of school directors (who control human and financial resources), and educator with a personal and professional history of experiences (Kelleher, 2008; Kowalski, 2005). As such, the superintendent's belief system and education priorities necessarily have both public and private dimensions.

Gifted education oversight activities for 500 districts are sporadic and audits are capped at ten per year (Pennsylvania General Assembly, 2013). Sanctions for compliance deficiencies are of limited consequence (Haney, 2013); nevertheless, if asked directly, most school leaders, as duly sworn officers of the state, would understandably declare and/or believe that the districts they lead are in full compliance with the letter of the law, and that all students are served

properly, regardless of their personal or professional belief systems regarding the constructs of gifted identification and gifted education. Alternatively, they may be so removed from the day-to-day functioning of the gifted programs in their schools as to be uncomfortable or unable to discuss specific issues, philosophies, and practices. While a direct inquiry soliciting a district leader's "philosophy of gifted education" would most likely yield a relatively neutral, conscious, and careful construction of professionally acceptable statements about all children's needs as equally important, and of Chapter 16 being followed, the stories these leaders tell about their own experiences with gifted education may provide a unique, insightful, and less scripted viewpoint.

3.2 NARRATIVE INQUIRY

Narrative methods add richness and dimension to the analysis of complex human experiences that cannot be fully explained by more traditional empirical strategies (Webster & Mertova, 2007). Gifted education is a complicated construct, filled with ambiguity and strong emotion, and the practice of gifted education is not a clearly delineated, well-defined collection of pedagogies or a straightforward, prescribed curriculum. Rather, gifted education is a culturally constructed field where experts in psychology, sociology, politics and education all contribute, but do not wholly agree (Subotnik et al., 2011). Thus, gifted education has been described both as an entity itself and as a set of things done to or with gifted students, who are themselves defined in a multitude of ways (Tannenbaum, 1983). Where regulations support or operationally define gifted children and gifted education, they vary by location, essentially leaving schools to improvise (NAGC, 2008b).

Gifted education proponents, including the professionals charged with designing, implementing, and administering programs, have been guided by a combination of the successful advocacy efforts of others and the relatively sparse collection of empirical studies that appear to show a persistent gap between theory and practice (Dai et al., 2011). As evidenced by their conspicuous absence in the academic literature, the voices of school leaders have been virtually ignored, despite the controversy spawned by decisions about gifted students and the vulnerability of gifted programs. This study holds that “narrative inquiry has a particular value to contribute, as it is well suited to addressing the issues of complexity and cultural and human centredness in research” (Webster & Mertova, 2007, p. 3). Surveys, questionnaires, and other larger scale or less personal means of attitudinal data collection are inadequate tools for reaching underlying emotion and deeply held beliefs that may harbor valuable information for gifted education advocates. Conversely, narratives are windows to underlying issues and assumptions unseen or undetectable by more traditional research approaches. Connelly and Clandinin (1990) claimed that in education, we learn much from telling each other stories about our experiences, thus making the narrative inquiry approach ideal for this study.

Polkinghorne (1995) discussed the distinction between narrative analysis and analysis of narrative. The former consists of understandings drawn from constructed narratives (e.g., case studies and biographies) that use data gleaned from personal narratives and other sources to explain the subject under consideration in a story format (Polkinghorne, 1995). Alternatively, analysis of narrative involves delving directly into the stories of respondents to uncover and understand patterns, categories, and taxonomies within and across the stories.

In this study, I discussed similarities across the collected stories and noted patterns in these stories; however, this exercise was not the primary research interest. Neither of these

analytical methods (i.e., narrative analysis or analysis of narrative) quite served the exact purpose of the study, nor was the pragmatic value of the superintendent stories fully represented by using these methods. Additionally, I opted not to seek an understanding the phenomenon of gifted education through the stories of multiple perspectives (per techniques described by Wertz et al., 2011) or to make sense of the lived experiences in extensive, complex narrative accounts of study participants (per techniques outlined by Riessman, 1993). Instead, I solicited *critical event* narratives (as presented by the critical incident technique outlines by Flanagan (1954)) – those experiences that have survived the passage of time, were deeply associated with the concept of gifted education, were accompanied by personal emotion, and were triggered by the word *gifted*. The selected analytical method also recognized and maintained the integrity and importance of the conceptual content in each distinct story.

3.3 IMPLICIT SOCIAL COGNITION

Narrative analysis as a method of inquiry offers a multitude of strategies for analyzing story, but the underlying construct of the psychologically significant choice of which story to tell and what embedded themes are portrayed finds its roots in social psychology (Fazio & Olson, 2003). Similar to the way that qualitative methods uncover a richness in human interaction that is not easily captured via quantitative methods, psychometric testing and other similar measurement tools cannot capture the entirety of human thought or motive:

Psychological interest in individual stories moves in another direction. ...narratives in this case are viewed as windows on inner life rather than on social worlds. Eschewing methods such as projective techniques and psychoanalysis, ordinary life stories are taken

to reveal “who we are” as persons; they are the way individuals construct their identities as active agents of their lives. (Gubrium & Holstein, 2009, pp. 7-8)

Social psychologists Greenwald and Banaji (1995) introduced the term “implicit social cognition” for describing cognition outside of awareness or conscious control in relation to social psychological constructs such as attitudes, stereotypes, and self-concepts. Each of these constructs intersects the idea of giftedness. “Implicit measures attempt to capture psychological causes of social perception, judgment, and action that may not be accessible through introspective experience or be reported when asked, even if the respondent could report them accurately” (Nosek, Hawkins, & Frazier, 2011).

Because the concept of giftedness appears to be such a polarizing issue and inquiring about it directly can elicit cautious or calculated responses, it is plausible that recalled stories, which come to mind when prompted, whether personal, professional, first or third person, or heard about through another source, are more significant and telling. These stories may be representative of underlying support, admiration, contempt, neglect, or ignorance toward gifted education (McAdams, 2012). Contentious and common issues in gifted programming are evident in personal statements such as “I missed getting in to the program three times” (i.e., the issues surrounding the identification of gifted students) or “my son would have quit school if the gifted program hadn’t saved him” (i.e., the issues of programming and its impact on students). By asking school leaders to tell me a story about “gifted”, I was able to uncover and analyze the embedded predominant issues or themes that could inform practices and contribute to the field’s efforts to survive.

3.4 SUPERINTENDENT STORIES AS CRITICAL EVENT NARRATIVES

With the overarching methodological framework housed in narrative inquiry, the current study focused on the identification of *critical events* revealed in the experiential stories of superintendents. The study of critical events, referred to originally as critical incidents, began in aviation psychology in the 1940s. John Flanagan, a psychologist, developed a method called the *critical incident technique* (CIT), which involved observing specified incidents for targeted behaviors in activities such as combat leadership and disorientation in pilots (Flanagan, 1954). Observing behaviors eventually led to soliciting and examining reported incidents and eventually to questioning specific recalled incidents. The technique was used to examine perceptions and procedures in a large range of occupational venues, several at the University of Pittsburgh and in the immediate area, from studies at the Pitt School of Dentistry to interviews with industrial foremen at Westinghouse plants.

Over time, use of the method expanded to disciplines in the social sciences, medicine, business, information sciences, and education (Kain, 2004; Wertz et al., 2011). In the original format, Flanagan's CIT consisted of five steps:

1. Determining the general research topic,
2. Planning,
3. Data collection method,
4. Data analysis, and
5. Interpreting and reporting.

As its utility in explaining complex human behaviors grew, the data collection method evolved to include accounts of actions or reports of behaviors as narratives. While Flanagan (1954)

outlined the five steps of CIT, he cautioned that these steps were more along the lines of general principle rather than steadfast rules:

It should be emphasized that the critical incident technique does not consist of a single rigid set of rules governing such data collection. Rather, it should be thought of as a flexible set of principles, which must be modified and adapted to meet the specific situation at hand (p. 335).

While keeping in line with Flanagan's initial technique, some researchers have expanded and modified the CIT steps to enhance data analysis and to add a component for participant reflection (Hughes, 2012). Over time, the terms *critical event* and *critical incident* have been used interchangeably (Butterfield, Borgen, Amundson, & Maglio, 2005).

In CIT, narratives take center stage. Recalled "stories feature critical events and are the mechanism by which the most important occurrences are transmitted to listeners. People distill those events that are most important" (Webster & Mertova, 2007, p. 72). In critical event theory, these events carry weight as they have "stood the test of time and retained a place in living memory, where many other details have faded not to be ever recalled" (Webster & Mertova, 2007, p. 73). Other narrative analysis techniques, such as narrative sketches which describe event, character, and structure (as per Connelly & Clandinin (1990)) are not precluded by critical event analysis, but too deep of a descent into the components of the narrative risks missing or distorting the essence of the event's impact as a whole.

Webster and Mertova (2007) define a *critical event* as having some of the following characteristics relative to the storyteller: impact on professional performance, a traumatic component, excessive public or media attention, and/or risk of personal exposure or

consequence. Most importantly, however, is the event's impact on the storyteller in hindsight. Critical events cannot be predicted or planned, as they are always in the past:

The longer the time that passes between the event and recall of the event, the more profound the effect of the event has been and the more warranted is the label *critical* event.... Over time, the mind refines and discards unnecessary detail and retains those elements that have been of changing and lasting value.... The critical event is likely to have changed their (the storyteller's) experience and understanding, informing future behavior and understanding. (Webster & Mertova, 2007, p. 74)

In addition to having a lasting impact on the storyteller, critical events can carry an overall positive or negative affective value. Thus gifted education stories recalled from long ago are likely critical events of significance to the superintendents telling them.

3.5 PARTICIPANTS

The first step in this study was the decision to study school superintendents' attitudes toward gifted education through their narratives. Following Flanagan's CIT principles, the second step involved the selection of participants and the means by which to collect the stories. I used a purposive criterion sample (see Patton, 2002, p. 243) where all participants were current superintendents, the leaders of their school districts. Respondents were recruited from members of the Forum for Western Pennsylvania Superintendents, a diverse group of 50 chief executive officers from some of the several hundred public school districts in the western Pennsylvania region. Membership in the Forum is determined by invitation, application, and evaluation by the Forum's Executive Board. Applicants must include a letter of endorsement and pledge of

support from their respective school board presidents and must commit to attending a biannual professional development retreat. This commitment to ongoing professional growth and networking signals a more active leadership mindset and thus, a greater likelihood of cooperation in submitting to the research interview.

At the time of this study, the Forum consisted of 50 active (sitting) superintendents and other educational leaders, including retired former superintendents and local university professors. The members of the Forum represented districts with a wide range of demographic characteristics. Member superintendents represented rural, suburban, and urban district locations. Student populations ranged from a few hundred students to many thousands. The economic levels of member schools ranged from significant poverty to substantial wealth. While all the districts were located in western Pennsylvania, the membership area covered over a third of the state west to east and nearly the entire distance north to south. In addition to the variation in district characteristics, the Forum members themselves were quite diverse. They varied in age and experience, represented both genders, and included minority representation.

The unit of analysis for this study was the story each superintendent told, but the diversity of this specialized group added richness, variety, and utility to the data. While generalizability is not a characteristic of qualitative studies, the number of superintendents and the variety of their attributes enhances the potential applicability of the findings as readers may identify with similarities to their own schools and school leaders. With story, the goal is understanding rather than prediction: “What distinguishes narrative inquirers is their understanding that understanding the complexity of the individual, local, and particular provides a surer basis for our relationships and interactions with other humans” (Pinnegar & Daynes, 2007, p. 30).

The target sample size was 20 participants. A formal letter explaining the study and the request for volunteer participants was cosigned by the Executive Director of the Forum and was mailed to each of 48 superintendents. This letter can be viewed in Appendix A. Included with the query letter was a participation form (see Appendix B) with the choices of “yes”, “no”, or “maybe (more information needed)” along with my research affiliation and contact information. A self-addressed stamped envelope was included to increase the likelihood of a response. I chose the formality of regular mail over email for the initial contact to further stand out in the myriad of communications that cross superintendents’ desks each day.

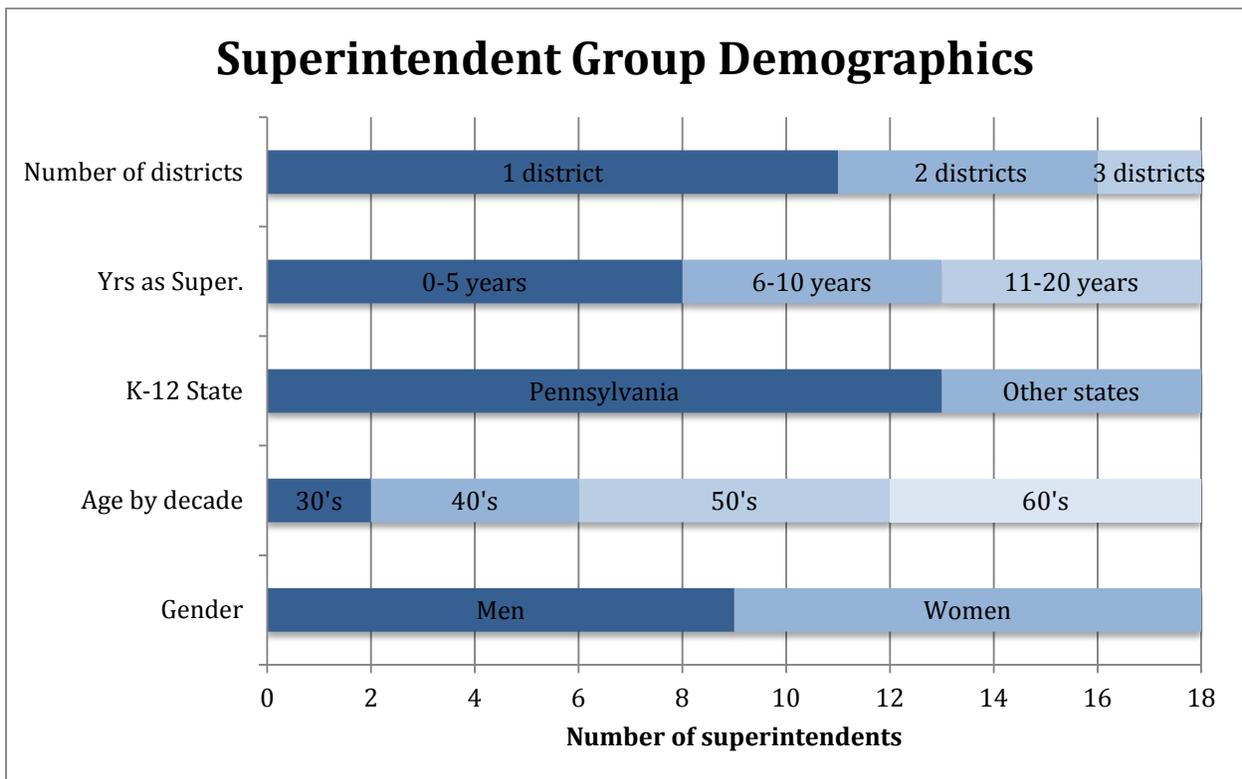


Figure 3. Superintendent Group Demographics

Thirty members responded to the request for participation: of these, seven declined; two requested additional information; and 21 positive respondents were contacted via email to set up

a convenient time for the interview. Eighteen total respondents were interviewed, and the sample's general demographic information is displayed in Figure 3. These respondents were all current superintendents at various stages in their careers with a wide range of experience, several having served as superintendent in two or three different districts, though most had served in just one. The demographics of the group were what one might expect from a group of chief executives with regard to age (though several were unusually young), years of experience, and the number of schools in which they had held the top professional role. The group was evenly divided between men and women, and the majority had spent their own youth in Pennsylvania schools. Participants led school systems ranging from small populations of several hundred students in grades K-12 to districts with several thousand students. Collectively, these 18 superintendents had the power to affect many thousands of students and teachers and managed hundreds of millions of dollars. To safeguard the identity of the respondents, no identifying information about them or their districts is associated with the individual stories.

Additionally, the majority of superintendents had some degree of training in the tenets of gifted education, mostly in the form of conferences or district or regional in-service programs. However, less than half of the sample reported formal training or coursework in gifted education. Of the superintendents who indicated this more formal training, most were in concert with principal preparation programs and focused primarily on the legal aspects of gifted education specific to Pennsylvania, rather than the nature and nurture of gifted children. For those superintendents whose background was in special education or educational psychology, giftedness was addressed in conjunction with other exceptionalities. None of the superintendents had taken a course dedicated solely to gifted learners or gifted education.

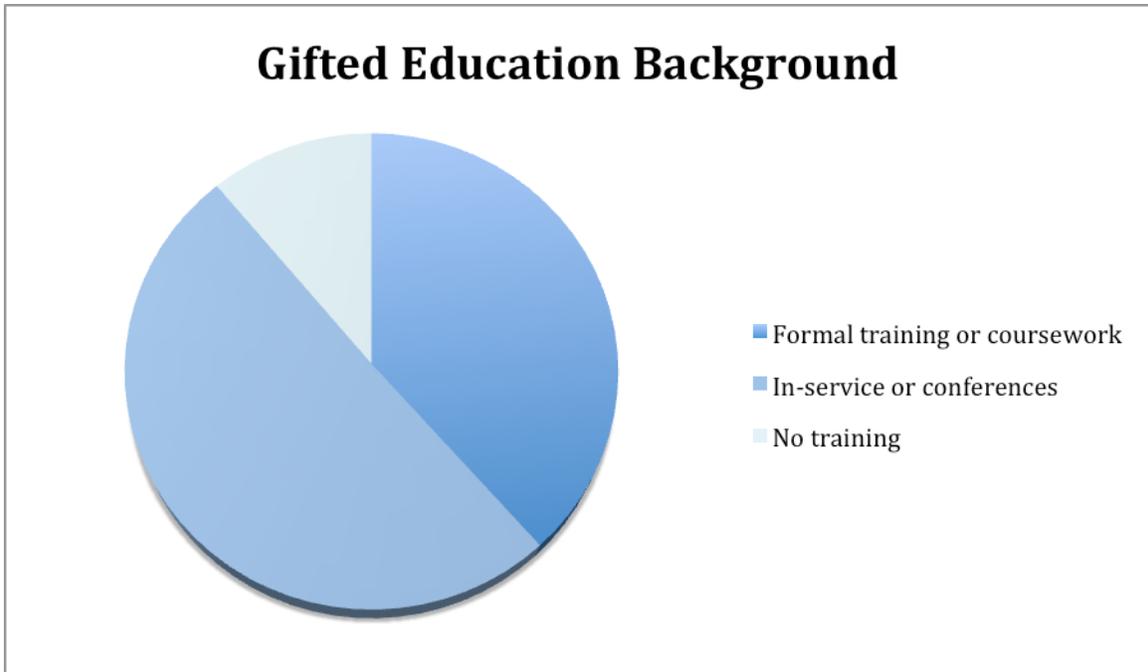


Figure 4. Gifted Education Background of Participating Superintendents

Finally, I inquired as to whether or not the superintendents were also parents, and if so, if any of their children had been involved with gifted education. Of the group of 18, only three were not parents. Of the 15 parents, eight had a child of their own involved with the gifted program at the schools their children attended, which may or may not have been in the same district in which the superintendent worked. Of the seven participants who had none of their children labeled gifted, one superintendent made an unsolicited case for the fact that although his son had not qualified, he was certain that his son would have benefited from many of the program components.

3.6 RESEARCH DESIGN: SOLICITING THE STORIES

In his landmark publication *Thought and Language*, Vygotsky asserted “every word that people

use in telling their stories is a microcosm of their consciousness” (as cited in Seidman, 2006, p. 7). As such, stories are imperative to the CIT technique as a research method, because “social and educational issues are abstractions based on the concrete experience of people” (Seidman, 2006, p. 7).

The third step in Flanagan’s (1954) CIT was planning for and establishing the means of data collection. To complete this step, I constructed a semi-structured interview protocol and introductory script to solicit the stories from each of the 18 participating superintendents (see Appendix C for final protocol). When planning the interviews, I was especially aware of the possibility of response effect bias, or the possibility that respondents will offer what they think the researcher wants to hear (Butin, 2010). Because I am a practitioner working in the gifted education field and the superintendents are public figures working in a state where gifted students and gifted programming are legally defined and prescribed, it was especially important to neutralize the potential for response effect bias. I tried to reduce this bias by using words and wearing an expression that established a climate of acceptance no matter the subject matter or tone of the story offered.

Seidman (2006) also advised interviewers to strive carefully for the “inner voice” of the participant as opposed to the public voice that often is signaled by careful and more positive word choices, such as “challenge” instead of “struggle.” Should the interviewer suspect public voice, Seidman (2006) recommended probing further, carefully encouraging greater clarity without triggering defensiveness. This seemed especially important given the high level of visibility of these public school figures and the caution with which they must speak.

The protocol prompted each superintendent in the same way, allowing for open-ended responses as each told his or her story. According to Corbin and Strauss (2008), sensitizing

questions enable researchers to stimulate thinking in storytellers. It is also important to remember that active listening “requires that, for a good part of the time, we quash our normal instinct to talk. At the same time, interviewers must be ready to say something when a navigational nudge is needed” (Seidman, 2006, p. 79). Thus, I planned to ask follow-up and clarifying questions as was appropriate based on the content of the interviews.

Although participants had been apprised of my request for a story about their experience with gifted education via the solicitation letter, I prepared follow-up prompts to alleviate potential embarrassment or discomfort should no personal story come to mind. In fact, Seidman (2006) warned, “not everybody is comfortable with being asked to tell a story. The request seems to block people who may think they do not tell a good story or that storytelling is something other people do” (p. 87). Hence, I included a follow-up prompt indicating that the participant was free to offer someone else’s story with the theory that if it was memorable enough to have been recalled, it was worthwhile for the purpose of this study.

Next, background demographic questions were constructed in order to expand the interview, bring the respondent back to the current gifted education climate, and offer other insights into the kinds of information talking to one’s superintendent may yield beyond what issues are imbedded in the critical event story. I inquired about any specialized training the participant had experienced then gave each superintendent the opportunity to elaborate on his or her current gifted education mindset by asking where he or she currently stood on a philosophical continuum (see Appendix C), which was described to the participant during the interview. In addition, a question was posed asking how the prevailing state budget crisis has affected gifted education in their districts to determine if this population of school chiefs ran schools that were cutting programs or services, as the literature had indicated.

Finally, general demographic questions were posed regarding the participants' age, years of experience and number of districts served as superintendent, size of their school districts, the state in which they had spent their own K-12 educational years, whether they were parents, and if they were parents, whether their children had been or were currently involved in gifted education. I planned to conduct all interviews in person at the district office of each superintendent and was able to do so for all but three of the participating superintendents. The others were interviewed by phone. Each superintendent's story and responses were recorded on a digital voice recorder with a cell phone as a back-up device. Audio files were transferred to my personal computer for storage until transcription, and then all files were erased.

3.6.1 Pilot Study

A pilot study was conducted to test the effectiveness of the prompt and interview protocol. The pilot study was limited to interviews with five former and current superintendents familiar to me who were not included in the full study of members from the Forum for Western Pennsylvania School Superintendents. The interviews were conducted at the professional offices of the participants, recorded on a single device and erased upon transcription with no identifying information maintained. One interview was lost due to a software crash, but the others were recorded with a different device without issue.

In the pilot, the participants appeared at ease, openly and freely offering thoughts well beyond the scope of the questions. Had the stories offered by the test participants proven to be measured, biased, or less than forthcoming, a different approach might have been necessary.

As a result of the pilot study, several follow-up and demographic questions were added to the protocol and one question was rephrased to increase the potential benefits of the study data

and conclusions. This final protocol can be viewed in Appendix C. The pilot stories collected were characteristic of those anticipated from the participants. Detailed analysis and coding was not completed for the pilot, but I did informally note that these pilot interviews reflected familiar themes. Two stories featured children of the storytellers and two were about the storytellers themselves. Gifted education issues included problems with inadequate curriculum at odds with individual needs, punitive practices by regular education teachers, and educational treats reserved for identified students only.

3.7 DATA ANALYSIS PLAN

In step four of Flanagan's (1954) CIT, the researcher plans for and conducts data analysis. In order to analyze the superintendent narratives, I looked at the stories both individually for the important information at the heart of the story and collectively to identify whether or not *like events* are evident in the stories of other superintendents. Like events "further illustrate, confirm, and repeat the experience of the critical event" in other people (Webster & Mertova, 2007, p. 79). Topics or issues common across stories may prove important to the field at large whereas each story's issue(s) of concern is relevant primarily to the leader and his or her school district, and as illustrative models for other practitioners to examine and potentially emulate.

In addition, I planned to look at the quality of the information in the interview. Connelly and Clandinin (1990) used the terms "broadening" and "burrowing" to gauge the quality of the narrative. Broadening refers to the analysis across events for generalization purposes. Broadening is considered of lesser importance than burrowing, which emphasizes drilling down into the details of each event and "exemplifies the nature of the complexity and human

centredness of an event as seen through the eyes of the researcher in collaboration with the people involved in those stories” (Webster & Mertova, 2007, p. 87).

After taking into consideration the best practices for analyzing these narratives, I first classified each critical event study in four ways according to a hierarchical system devised by Reighart and Loadman (as cited in Webster & Mertova, 2007). Each story was analyzed and coded according to:

1. Type of experience (personal, parental, professional);
2. Type of event (setting of story);
3. Category of event (gifted education issue(s) at the core of the story); and
4. Affect associated with the event (positive or negative outcome or feeling tone)

This more holistic analysis maintained the cohesion of the superintendent’s experience while allowing it to illustrate issues that resulted in its critical nature. Superintendents were invited to offer stories from any perspective (i.e., personal, professional, or bystander perspectives), and no limits were placed on the story’s setting or timeframe. As the prompt was bounded by a link to gifted education, the superintendents’ stories each addressed issues inherent in gifted identification or in programming components.

While the experience perspective, setting, and overall affect of the stories were fairly straightforward, a data coding approach was necessary to determine the category/gifted education embedded issue for each story. This study fit the typological strategy as described by Hatch (2002):

Data analysis starts by dividing the overall data set into categories or groups based on predetermined typologies. Typologies are generated from theory, common sense, and/or research objectives...Studies that rely on interviewing as the sole or primary data

collection tool are often undertaken with a fairly focused purpose, a fairly narrow set of research questions, and a fairly well-structured data set in terms of its organization around a set of fairly consistent guiding questions. When the study was designed, the researcher had as his or her goal, to capture the perspectives of group of individuals around particular topics. (p. 152)

This was precisely the description of my intent, using as typologies the major themes or issues of gifted education as determined by the research literature and essays of the field, as well as my own experience. After each story was analyzed individually, the data were analyzed collectively for like events – stories that portrayed the same type of central issue – to determine which, if any, were the most prevalent of the identified embedded issues, and any other patterns or themes that might be illuminating.

3.8 SUMMARY

As discussed earlier, gifted education is once again at a crossroads. Funding cuts, school choice and competition, a focus on struggling learners, and the increased emphasis on teacher accountability have challenged the field to explore new ways of advocating for and meeting the needs of high-end learners. The gifted education proponents and professionals have generated a multitude of studies and resources directed toward parents, teachers, policy makers, and occasionally, principals, but superintendents have been absent from this discourse (Dai et al., 2011). Virtually no studies of top school leadership and gifted education exist in the literature, a finding confirmed by Dr. Ann Robinson (2011), former president of the National Association for Gifted Children and active university researcher. As a result, Robinson created a task force to

study the situation, and to develop ways to engage school administrators in a renewed effort to attend to gifted children. By soliciting critical event stories from active superintendents and analyzing the stories for embedded themes, this study responded to Robinson's call to action by examining these school leaders directly to find what kinds of issues, attitudes, misconceptions, or information deficiencies should be addressed by advocates for and professionals in gifted education.

4.0 RESULTS: INDIVIDUAL STORIES

Each superintendent offered one or more stories in response to the prompt asking for whatever came to mind when thinking about gifted education in any role, personal or professional. As per Flanagan's (1954) critical incident technique, these stories were the unit of analysis for this study.

The following sections report and analyze data collected in response to these research questions:

1. What stories do superintendents tell about their experiences with gifted education?
2. What gifted education practices, issues, program components or design choices are embedded in the narratives they offer?

Each story was analyzed and categorized according to this protocol:

1. Type of experience (personal, parental, professional);
2. Type of event (setting of story);
3. Category/kind of event (gifted education issue(s) at the core of the story); and
4. Affect associated with the event (positive or negative outcome or feeling tone)

Each participating superintendent offered a unique perspective on gifted education, and their stories were helpful in illuminating how local advocacy efforts in gifted education might be formulated and strategized to address the needs and concerns of these superintendents. In the following sections, the 18 superintendent stories are presented in random order. Names and any

potentially identifying details have been changed or omitted to protect anonymity. All superintendents are referred to by pseudonyms.

4.1 SUPERINTENDENT AMBERG

Superintendent Amberg selected a story from his experiences as a first-year teacher. In this story, he was confronted with the dilemma of what to do with a student who had previously been identified as gifted. This student had abilities that were so significantly beyond the other students in his class and their grade level work that his attempts to differentiate her curriculum via packets of tasks he created by consulting with teachers above grade level were not enough to keep her engaged or challenged. “She was so advanced in what she was doing that I thought she could actually skip a grade and go into the next one.” After consulting with the student, her parents, and other teachers from the upper elementary grades, Amberg consulted his principal who:

“...was pretty, uh, she was taken aback but she wanted to see some evidence and I showed it to her. Of course, she already had a gifted IEP [individualized education plan] so they had an IQ, rating scores, and everything on her so, again, after some meetings and looking over some evidence, she agreed that it was fine. She really put a lot of it on me and the parents and our recommendation.”

This superintendent, as a first-year teacher, was successful in placing his second grade student in fourth grade, a radical acceleration well beyond the more typical single grade skip: “We looked at her maturity – there were different factors...we looked at socialization, maturity, and her academic prowess. And she hit all three, even the maturity part and the social interaction.”

Praise from the student's parents reinforced his initial assessment of her extraordinary ability and his resolve to find a solution for her: "her parents were very, always very complementary, thanked me for the effort I put through, but I felt like it was my job; like I had to because she wasn't getting, she wasn't getting what she needed instructionally."

The conclusion of the story confirmed its positive affect in the eyes of Superintendent Amberg:

"That was quite a while ago, and how she ended up, I wonder about it, but I know that she flourished in fourth grade. She got very good grades and the teacher who was taking her on was a veteran teacher who was very skeptical about it, but by mid-year, end of the year, she was totally immersed in and fine with it and she didn't have any questions about it."

Thus, Superintendent Amberg was proud to have had an early, highly successful, and empowering positive experience with a student's gifted education need. His role in facilitating a bold and atypical solution by radically accelerating this young child is evidence of a willingness to use acceleration as a gifted education strategy. According to Colangelo et al. (2004), acceleration is a grossly underutilized, yet research-proven strategy. Misconceptions and fear, as demonstrated by the receiving teacher's skepticism about gaps in instruction, social/emotional harm and disruption to the smooth functioning of the school, prevent its appropriate utilization, making this first year teacher's actions all the more extraordinary. Only nine states currently have policies that permit acceleration, while an additional 22 states leave such decisions up to local school districts, where superintendents guide policy development (NAGC, 2011). Lastly, Superintendent Amberg's understanding of and attention to all aspects of the student's development and use of data and differentiation strategies in combination with his careful

consultation with parents, other teachers, and his principal served as important indicators of his highly successful experience with one of gifted education's best practices.

4.2 SUPERINTENDENT COFFMAN

Superintendent Coffman offered two significant stories that clearly illustrated his position on several contentious issues in gifted education. The first of these stories was a long-standing, recently resolved incident that occurred during his current tenure as a superintendent and involved an identified gifted student who had been accelerated in mathematics only:

“We had a particular young man who was identified as gifted when he was in elementary school, early elementary school, which I believe it was too early in his career to have been tested at that point. His IQ at that time was, it was good, but not significantly high. In fact, it was like maybe 126-127, but at that particular point in time, they identified the kid as gifted. And to me, if you come from an educated home - and his father was a teacher and his mother was an educated individual as well - I think most kids in Kindergarten, first, second grade, they're going to shine just because of the environment in which they lived. But, be that as it may, having a gifted...diagnosis, for lack of a better word, with an IQ at that level, this student was really no more gifted than a lot of other students we have in the classroom.”

Embedded in this brief statement were issues of identification (i.e., testing too early, cut-off scores that define gifted eligibility) and issues associated with social justice (i.e., coming from an enriched household, being unremarkable relative to other students in the classroom).

Educational intervention based on the gifted label was not portrayed in a positive light. Superintendent Coffman showed strong negative attitudes toward several common gifted education scenarios. More problems arose, however, later on. Coffman continued:

“The family made a number of requests where they wanted the student to be advanced. We basically did every accommodation that we could when the student was going through elementary school, going into middle school, and by the time they got to high school, then it became kind of a nightmare, because then they wanted advanced courses. You know you only have to have so many math courses to graduate from high school and then it got into, well, “we want to be involved in college-level courses” and again, I’m not opposed to that. I mean, I think that, if you think of a particular individual, who is truly, truly gifted, and has a *great* amount of ability and they go ahead, ok, fine, advance them and let them move as quickly as they can. But when you’re dealing with an individual that has a gift, I guess, in one area...but, this particular young man had poor social skills. He really needed to be around students of his own age and just being this [gifted and accelerated] prompted his going into a high school level when he still should have been in middle school and going to the college level when he still should have been with his high school friends, I really think that it was a detriment to this particular young man. You know, the student is no longer with us – he graduated – but I do believe that he will have social issues his entire life as a result of this. And it was primarily pushed by parents that believed that there was something there that really wasn’t there. And I just found that to be very frustrating for us as a staff, and frustrated for our special ed department, and I believe it was very frustrating for the young man, and I think ultimately he did suffer from them. That’s one of the stories about gifted education that just because

you get tested early, and I've never been a promoter of that, you may qualify, but you're really not gifted.... He was successful in the area in which he was advanced, because he *did* have and was an exceptional student in that area – I can't say that he wasn't – but not any more exceptional, I mean we had many other students who took SAT scores just as well. We had other students that took AP exams and did just as well, so, I mean, we're not talking about a Rain Man here, who just really had really, really exceptional...he was a bright young man.

I asked at this point whether or not the student had eventually graduated early and learned that he had graduated ahead of his same-aged peers. Further, to clarify the exact source of the superintendent's visible irritation at the memory of a student who left school sooner rather than later, I asked for greater detail about the student's acceleration and his area of exceptionality relative to other students. Superintendent Coffman continued,

There were other students that were just as good in that particular area as he was, in fact, they were good in *all* areas, whereas he wasn't. In fact, most of them were not labeled at all as gifted. As I said, it was really frustrating for us. All we did was try to slow the family down. You're making an error in your judgment, here, but they couldn't see that.”

This narrative spoke volumes about the aggravation Coffman felt regarding this particular situation and the embedded issues portrayed in his story. Parental pressure to accommodate the student's need and Superintendent Coffman's belief that the parents ignored the social and emotional aspects of acceleration were pitted against the frustration level of the staff and the duties of the school to provide prolonged above-level instruction for a student viewed by this educator as “really not gifted.”

As if to further solidify his stance regarding premature identification and serious concerns about academic acceleration, Superintendent Coffman offered a second story. This story predated the first story and emerged from his perspective as the parent:

“I have a son who is a gifted young man and who was identified. And truly, I'm not being just a father bragging, but when my son was tested, he was, like, probably like close to a 160 IQ, so I mean he was...we never promoted or pushed him to go above and beyond, we never demanded that. He did not graduate as valedictorian. My wife and I were both teachers and we wanted him to do well but we never pushed, we never prodded. We had teachers come to us and say he needs to skip a grade and we'd say, no, we're not doing that. I don't believe in that, I truly don't. I think that there were probably times when he would come home to me and say, because he was also a student in the district I was principal, assistant superintendent, superintendent (Superintendent Coffman had served all in all three capacities over his years in that district). He'd come home and say “Dad, why do you even employ this person?” “They are the worst teacher, they don't even know anything!” But you know, I just, like I said, I make the comparison with this other family. They had a bright kid, but he really wasn't gifted, and they were pushy, pushy, pushy, and they made our lives truly miserable. And then I look at *my* son, who I believe truly *was* gifted, and he just did the average stuff and he went to school and did what all the other kids did and he was a good athlete and a good all-around kid and got involved in all kinds of activities and I don't really think because you're gifted, I don't think that you need to have exceptional benefits provided to you or extra things...if you have it in you, you're going to do well. And he went on to college and did fine, and graduated

from college and he's in a great career and he did all of that without any special treatment from anybody.”

This comparison of two exceptional students and the superintendent's interpretation of the decision-making of their respective parents is telling. In a tone that emphasized this contrast, the superintendent spoke proudly of the choices he and his wife made not to invoke privilege or special consideration for their child, who was, according to him, superior, both intellectually and in his social and emotional development. His demeanor was one of self-righteous indignation. In contrast, the other parents pushed their child ahead, seemingly to his detriment, while causing a “nightmare” for the school and staff. It is a significant statement that Coffman equated services to intellectually advanced students with unnecessary extras that are troublesome to the staff and potentially harmful to students, thus expressing a decidedly negative and resentful stance. Gifted education services for both the student and the son were viewed as unnecessary and essentially more trouble than they were worth. These were powerful ideas held by a powerful leader in this district and they present quite a challenge to the educator responsible for gifted education there.

4.3 SUPERINTENDENT COOPER

Superintendent Cooper began her story by identifying the issue in gifted education that she found the most problematic and distasteful: informing a student and his or her family that the student does not qualify for gifted services. Cooper's story was told from her professional vantage in her current role as superintendent. Cooper recounted her experiences in meetings where the resolution was to finalize identification and during which school staff and family members

discuss the student's academic and behavioral data as delivered to the group in a report authored by the school psychologist:

“It’s just...*sigh*...regardless, [of the meeting’s outcome] you’re dealing with high achieving, oftentimes advanced students who clearly understand that they can run ahead of the pack. And from their vantage point in a school system, once you label, those kids become the label, unfortunately, regardless of how you program and include and whatever. Those kids become the label. So, these high achieving students make the assumption – they see what these [identified gifted] kids are doing – and say, “I can do that” and it looks like pretty neat stuff that they’re [the identified gifted students] doing, that others may not be doing and so [they think] “I want to do it” and “why can’t I? It’s just a tough message to deliver. You’re very smart; you’re a high achiever; we think you’re wonderful; we’re glad you’re with us, however...you’re not gifted. I’ve engaged in some really lengthy meetings with families who have brought in all kinds of evidence of gifted and talented and [speaking as the parent] “how can you say this, and I pulled this off the internet, and this is the definition of gifted, and you can do what you want to do”... More recently, “you’re the superintendent...you can say they’re gifted and let my kid have those same advantages.” So, *that* to me is the hardest part.”

Superintendent Cooper spoke at length in generic terms about this situation but upon prompting, settled into a specific story about a fifth grade student that she described as “painful”:

“I had one very recently, and it was, to me, very heartbreaking because for the kid, because the family’s response to it, was, to me, somewhat extreme, in that we had *four* meetings. I went through a lot of paperwork that was submitted, none of which was another psychological exam – it was just evidence of this child’s talent – a very high

achieving, very creative child. I kept saying, the district doesn't set the criteria, it's 130 IQ, you know, it's got to be like that, just like students aren't eligible at the other end of the spectrum because they may be low achieving students, they may have some barriers and challenges, but they don't fit the criteria of special education! That case was a very difficult case. Painful. It was painful for me because I saw how much it meant for the family and I thought, hmm, this is going to be tough for this kid because it's tough for the mom; it's tough for the dad. They just couldn't resolve this issue; that this child did not qualify for gifted. I even got family lineage, where they went to college, and to me, the root cause wasn't that the kids didn't make gifted, it was deeper, and again, for me it was just this kid isn't going to handle this well because our goal is never to make a child feel "less than" whether they qualify for a special service or not."

Cooper went on to explain that not only was it difficult for this child and his family, but she also knew that this event would spread to the community at large and negatively impact the district. She explained that that this family was politically connected, and while the family did not quite threaten to use these connections, Cooper felt that the possibility was implied. She said it was apparent that their entire family's self-concept was vested in obtaining a gifted label for their son. She felt that by denying them, the child was likely destroyed, and the family had not been back since. She feels like they were "bad-mouthing the district all over the community."

Clearly, Superintendent Cooper was troubled by her interpretation of the specific identification rules established by the state, especially because of her belief that parents find no consolation in the fact that many services are available to the students anyway, and in her reassurance that the detailed assessment data uncovered through the eligibility process would be used by classroom teachers to improve their child's classroom instruction. From her point of

view, the focus on getting the label was paramount, unfortunately, in the eyes of some families and this one in particular. She appeared to deeply regret the impact that the bestowing or especially denying of the label inevitably has on children and their parents.

Superintendent Cooper went on to offer additional stories in a more generic format. She identified three other problems with gifted students in her district. First, she gave examples of high school students who began to resent the “extra work” that the gifted label required of them. Next she addressed a few students, also at the upper grade levels, who began to manipulate their grade point averages by taking easier courses against the advice of teachers and counselors. Lastly, she returned to expressing concerns over the perception of students carrying the gifted label:

“The third piece, I guess, is not just the student/family perception, but the educator’s perception of the gifted kid, because I’ve had meetings, you know, where people will say, ‘that kid’s gifted and he or she’s making a C in my class – they don’t deserve to be gifted’ and that’s a whole different problem. You don’t punish kids ‘cause they’re not making...I understand their argument, but, again, that’s part of the gifted persona. If you’re not really fulfilling that kid’s educational needs, they’re going to shut down just like any other kid. They’re kids! You know, so, I’ve been in meetings where families are upset and they want it in the IEP that they can’t get less than an A or B because they’re gifted (laughter). No! And that doesn’t mean they’re gifted in every single thing they do but I think it’s a burden for those kids to carry. It’s not a bad one to have, if you have the right attitude and you’re doing the best you can, but that, and I guess the fact that they do process information a little more quickly, they get there sooner than others, their work ethic and maybe study skills may be down. This is where these kids hit the

wall, when they come up against a subject they truly have to dig deep and work at it and learn it. If they hit the wall at all, that's where they hit it. For some of them it's not until they get to college and then they don't understand, 'wait a minute, I could study an hour a night and I was at the top of the rankings in my high school' but guess what, you have thousands of kids that did that now and you have to do a little more in college – up the ante, you know. That ante goes up every time you move up so, and I've heard from some of those kids who are having some difficulty adjusting to that now that you really have to put time in and study.”

In each of these cases, Superintendent Cooper pointed the finger at a student's formal and public gifted identification as the heart of the counter-productive strategizing, deteriorated work ethic, and false sense of confidence or over-confidence. In Cooper's experience, teachers have expressed frustration that “undeserving” students who earn poor grades have and keep it, almost as if the gifted label was being viewed as some type of award that could and should be revoked with poor performance unbecoming to a gifted student. Superintendent Cooper's stories portrayed many negative aspects of gifted education. Her emotions ran from regretful and resigned to frustrated and uncomfortable with the status of gifted education in her district.

4.4 SUPERINTENDENT DROVER

Without hesitation, Superintendent Drover dove enthusiastically into her story and presented an interesting perspective. She reported from the vantage of an elementary building principal about a positive experience observing two teachers: a classroom teacher and a gifted support teacher. She expressed surprise upon entering a second grade classroom for a clinical observation that

these teachers had planned and were co-teaching an interdisciplinary unit on the solar system. She thought that the interdisciplinary lesson she watched was presented in a highly creative fashion and was delighted with the variety of activities and the high levels of engagement among the students. She learned that the students had been involved in several days of lessons covering all subjects, including writing:

“They had to write about the experience and what they learned, and how they made the Jell-O molds that represented the planets, but then they also had to work together in teams, so there was the cooperative learning piece, with the language arts, the mathematics, and the science. But we had two teachers working together, and that was a powerful revelation, too. At that particular time, I’d say it was in the early 90’s, before such things were in vogue.... They just did it on their own – I was surprised...pleasantly surprised, because wow, every child benefited and when I listened to the children present, what their role was, in these Jell-O molds, and what they learned, I really could not differentiate who was a star student, so to speak, or who was a student who needed more reinforcement.”

This experience demonstrated Superintendent Drover’s approval of inclusive programming (as opposed to a pullout model) and her endorsement that gifted students were indistinguishable from other students. She noted that cooperative learning was featured and that all children had access to the classroom teacher, the gifted support teacher, and the interdisciplinary curriculum the two had co-developed. Drover viewed this arrangement with surprise, but clearly as desirable. This egalitarian concept speaks to the social justice issue in gifted education and was viewed by the superintendent as a positive development the school where she began her

administrative career. Her story appeared to satisfy her quite thoroughly as she believed she had witnessed fairness and equity in gifted education.

4.5 SUPERINTENDENT ANDREINI

Superintendent Andreini began our conversation with statements about gifted philosophies and definitions, requiring redirection to the initial story request. Andreini's story was from the vantage of her own childhood. She was enrolled in Kindergarten early, as a self-taught reader, and her teacher quickly noted her advanced skills. Without much fanfare, her teacher sent her to first grade where the instruction was more appropriate to her needs. At the time, the plan was for Andreini to continue the following year in the second grade, despite her young age, because her reading skills were so well developed. Unfortunately, her parents enrolled her in a different school the following year where she was promptly demoted to first grade "because that was how things were done there"; however, the first grade placement lasted only two weeks before she was moved to second grade, she assumed, at the request of the first grade teacher. Laughing fondly at the memory, Superintendent Andreini concluded her story by stating, "So, my own personal experience from that is the idea of someone who at a certain period in their lives had some talent or ability that was recognized in the education field."

Although Andreini took a detour back to educational philosophizing, another story soon came to mind that illustrated a positive move by observant teachers doing what they believed to be best for a student. This time, Andreini told her story from her perspective as a principal. A teacher in her building came to her on appeal because a student in her class had not met the criteria to be labeled as gifted, but the teacher saw in him an intense interest and significant

ability in science, despite the fact that he often failed to complete assignments. The teacher told her, “I actually think he’s bored because his abilities are so much greater than we think they are.”

Superintendent Andreini concluded her story by reinforcing the same theme:

“He didn’t meet school criteria for being labeled as a gifted student, but instead, he was a young man who needed to be enriched in this area because of the experiences he had. So we took steps to do that, really because of the teacher who initiated it and saw that in a child.”

Both of Superintendent Andreini’s stories were positive in that they recounted actions on the part of teachers to assess ability and take steps to provide appropriate enriched or accelerated instruction based on demonstrated need, rather than on formal identification. In the first story, acceleration occurred despite policies to the contrary. In the second story, enrichment was considered as a viable option for a student who was not completing assignments due to boredom. In both cases, despite obstacles, including the gifted eligibility requirements, teachers made child-centered decisions. This gifted education issue is one of matching appropriate curriculum and instruction to student learning needs, a relatively straightforward concept that is sometimes lost in programming paradigms and policies based on formal identification as a prerequisite to services. Responding to student need directly as was illustrated in this story is the antithesis of the one-size-fits-all gifted pullout programs or a separate, pre-determined gifted curriculum. Superintendent Andreini displayed pride in the appropriate responses of teachers and discounted the role of formal identification in favor of “kid-watching” and professional judgment.

4.6 SUPERINTENDENT O'FARRELL

Superintendent O'Farrell also told a story about himself as a young child, but his tale had less laudable outcomes. He explained that by the time he entered the intermediate grades, he had become quite skilled in mathematics. Little, if anything, was done to encourage or develop O'Farrell's talents in elementary school until "one year, his teacher decided that he had already mastered all of the concepts and skills in the grade level math curriculum." Instead of having him repeat work unnecessarily, she made him her teaching assistant. Young O'Farrell's job during math class each day was to help the teacher by grading the papers of his classmates. He admitted that at the beginning, he was happy with the arrangement because "it was a real power thing when you're in fifth grade." Later, however, he realized that "I wasn't learning any more math and it got to be boring just doing what she needed me to do. I began to resent it."

Apparently, no other words were necessary because at this point, Superintendent O'Farrell abruptly began speaking about his daughter who entered school reading at an advanced level relative to her age and the curriculum in Kindergarten. When O'Farrell asked the teacher what her plan for his daughter was so that she could continue to learn, the response was "we do letter recognition here." The confused look and somewhat dismissive statement caused O'Farrell to raise his voice incredulously. His anger and frustration over such an inadequate and unsatisfying answer, and over what appeared to have been a wasted year so early in her academic career, were visible, even after so much time had passed.

O'Farrell's two stories shared the dual themes of inadequate curricular options for students functioning above grade level and inappropriate teacher responses to the dilemma of what to do for such students. The practice of using high achieving students to help as classroom aides or to work with other students is not uncommon, nor is strict adherence to grade level

curriculum, despite advanced need (S. M. Reis et al., 1993). This superintendent viewed these memories as very negative and apparently the years had done little to alleviate the intensity of his feelings. Certainly such responses would be ill-advised in the district he now supervised.

4.7 SUPERINTENDENTS GARRITY AND HENSLEY

Of the 18 interviewees, Superintendents Garrity and Hensley were the only two respondents who said they could not recall a single personal or professional story about gifted education, even after multiple prompts and encouragement. However, Superintendent Garrity did discuss the pride she had in her district's gifted support services, especially regarding their policies on acceleration. After describing her district's practices for both grade and subject acceleration, she was able to relate a short narrative about a co-worker's second grade daughter:

“Her daughter was tested and identified gifted and they promoted her - just skipped second grade! She's in third grade and they've been very satisfied. She's not had any social or emotional issues, she's doing fine academically, and I guess that's a story I can tell you.”

Garrity said that she could tell other similar stories, but could not produce any unique additional examples. Though her views about gifted education were limited to acceleration, clearly they were positive and she viewed this gifted education strategy with favor.

Superintendent Hensley was far less positive in her assessment of gifted education. She lamented that both as a parent and as an administrator, she had expected (though was not willing or able to produce) something more from gifted programs:

“Gifted programs that we have here, for our students, and in other schools where I’ve worked, would have been more...private – I guess I’m trying to think of the right word I want to use...individualized...for the child. My thoughts were that some type of a gifted program would be specific for each child and that’s what I’m not finding to be true. They are more of a program, a pullout where students who are identified as having gifted abilities are taking a problem-solving course – something maybe a little more in-depth, I would expect, but I’m not seeing the level of individualization I thought the program would be and as I would expect it to be. I’ve worked in several different districts. In a district I’ve worked in the past, as an administrator, new to the district, coming in and meeting everyone and learning about the programs, I had witnessed a principal of a building who basically explained that the gifted program, one tenet, one hallmark of being gifted was that you are invited to attend any or all field trips that were offered in the building. That’s probably an example of what I do not believe the gifted program should be. That’s a glaring example for me.”

Interestingly, both Superintendent Garrity and Hensley oversaw programs that provided the same response for all gifted students. In Superintendent Garrity’s district, that service was acceleration and she viewed it as successful. In Superintendent Hensley’s school, the traditional pullout model of special field trips was the answer to all gifted concerns, and she viewed it as disappointing and inadequate. While more philosophical than narrative, Hensley’s concerns about gifted programs as she has experienced them point to a belief in individualized plans based on the unique needs of each child. This represents a positive view toward the construct of gifted education in principle, following a negative experiential background and a caveat against programming that is group activity-oriented and one-size-fits all.

4.8 SUPERINTENDENT IVANCO

Like several of his colleagues, Superintendent Ivanco wasted no time in diving into his story. He disclosed that his story was auto-biographical, setting the scene with a smile, as having attended “a very nice, little Catholic grade school, but everything had to be the same for everybody, all the time.” He explained that the school soon discovered he was “scoring off the charts on reading tests”, and he was given the opportunity to go to the next grade level for his reading class each year. According to Superintendent Ivanco, this arrangement was the extent of the gifted program. He explained that the reading class switch “began in fifth grade where he went to sixth grade for reading, and in sixth grade to seventh and in seventh grade to eighth,” but when he was in eighth grade, there was nowhere to send him as the school ended in grade eight. “I had to sit through the eighth grade reading class again!” He laughed at the memory, though went on to opine that such a practice “typifies a lot of gifted education that I see.” He explained further:

“If you do it right, it comes close to fulfilling our mission that every child reaches their full potential, but very few people do it right and it costs money, it costs time, and you know that those kids are going to be alright anyway, so it’s very easy to look the other way and say, they’ll be ok; you’re not harming their education and you can convince yourself, and so sometimes it gets put aside.”

In general, Ivanco’s story appeared to be a bit of a mixed bag of appropriate curricular differentiation via acceleration to accommodate his advanced readiness and a bureaucratic dead end of what to do with an accelerated student when the building’s standard grade levels ended. Ivanco’s personal experience culminated in a ridiculous situation where a very bright student in need of above-grade level instruction not only failed to receive it in grade eight, but also repeated a year of grade-level curriculum, thus losing two years of growth potential. While Ivanco

laughed at the absurdity of his own personal experiences, he essentially adopted a “no harm, no foul” philosophical stance regarding gifted education, weighing a gifted student’s need and opportunity to reach full potential against the costs and effort involved in implementing appropriate gifted education interventions.

Superintendent’s Ivanco’s last statement was very indicative of how his own experiences with gifted education impacted his current stance on the matter: “Those kids are going to be alright anyway, so it’s very easy to look the other way.” This concluding remark seemed to build on the fact that his own gifted education was botched; yet, he survived, seemingly unscathed. Additionally, Ivanco’s experience with accelerative intervention was cost free until eighth grade, at which point it would have either required time to create specialized materials and someone to provide instruction or the financial cost of transportation to a ninth grade classroom. Ivanco’s musings about the cost effectiveness of gifted education clearly reflected current financial concerns that were reinforced by his lived experiences. This stance could have important consequences for the gifted in his district in an era of shrinking resources.

4.9 SUPERINTENDENT YOUNG

Superintendent Young spoke at length using Seidman’s (2006) “public mode” about educational philosophy and history and his ideas on meeting students’ needs. With prompting, the conversation shifted to an illustrative story that he warmed to quite quickly, smiling broadly at the memory:

“My oldest was identified in Kindergarten...as gifted. And having gone to Catholic schools, she was eligible and the teacher recommended she be [identified] and they tested

her, and it was one of those – it was clear cut that she was, and the way the Catholic schools accommodated her was, and we laugh at this all the time, [an indication that the story was now part of the family’s folklore] the second grade teacher gave her Laura Ingalls Wilder books to read and told her “when you finish that you get to read this [next one in the series] because you’re gifted now” and we did the whole process with the pullout programs and so forth, you know can you do the egg drop³ and how many times can you do the egg drop and so forth.”

Young recalled that his daughter eventually lost interest in these kinds of activities, but as she grew older, opportunities for competitions, enriching experiences, and “leveled courses” (i.e., ability grouped courses that are often reserved for identified gifted exclusively in some schools) were made available to her as a gifted student. Superintendent Young attributed his daughter’s gifted status as having influenced her admission to an honors program at college as well as to her continued academic success with regard to her credit load and double majors.⁴

Without pause, Superintendent Young went on to describe the very dissimilar experience of his youngest child:

“We were going in knowing we were dealing with problems with him getting out of his seat. Staying in his seat drove him crazy, because you know in a Catholic school, everyone sits with their hands folded, and we found out that he was bored. If you attack his interests, he’s a whole lot better, and we had him tested thinking there was a learning disability and they said, no, he blew the scale off. They put him in the gifted program

³ Egg drop is a common problem solving activity, often used in gifted pullout programs, where students build protective containment structures to prevent an egg from breaking when dropped from a pre-determined height.

⁴ While her resume of experiences as a result of gifted opportunities may have contributed to a favorable admission outcome, it is a common misunderstanding that gifted *status* directly impacts college admission. There is no section of a college application that solicits this information and the inconsistent policies among the states makes the gifted label relatively meaningless in light of other admission data.

and that was all he needed to find out what he was interested in and with him, and boys, you know sometimes boys are a little bit slower than girls, which we've seen. He didn't come into his own giftedness, probably until after he got out of college but it was a matter of what sparked him, his interest. Very talented, a matter of how you sparked it along the way."

At this point in the interview, Superintendent Young began speaking from the vantage of his professional role as a principal, concluding that to "advance [gifted students] a little bit maybe in math, or in reading, provide for or meet those needs or resources that connect them with some outside interest, that's more important to me as far as gifted education is concerned." Although it was unclear from the context as to what the comparison "more important" referred to, a reasonable assumption would be a comparison to a more formalized program, as his words seemed to signal that meeting student needs is not difficult or complicated. The successful strategies Young alluded to in his stories were the use of interest-based enrichment and advanced classes to meet the needs of his children. For this superintendent, identification itself did not occupy a central role in the stories, only the means by which appropriate and beneficial opportunities were made accessible to his children. From Young's perspective, appropriate curriculum based on need and/or interest was paramount in gifted education efforts. His stories and concluding statement illustrated a positive and accommodating, albeit casual mindset toward these gifted education experiences.

4.10 SUPERINTENDENT FORD

Superintendent Ford's story began with the end of her gifted education experience as she proclaimed, "I was in the gifted program until eighth grade, when I decided it wasn't doing anything for me." What Ford recalled most from her own gifted education was the chance to do creative, interesting, and fun things, such as exploring the mysterious innards of an old computer and creating unique art projects with stained glass and wood-burning tools. Ford expressed that she enjoyed these activities; yet, she admitted that even then, she knew they had nothing to do with what she was learning in her classroom.

Ford's summation of her experience in elementary school gifted education was the prelude to a comparison of what her niece experienced decades later. As Ford segued with the statement "now my niece, she's a high flyer," I expected a discussion centering on differentiated curriculum or accelerated learning. Instead, the crux of Ford's story was that nothing has changed:

"She's in 5th grade and she's complaining to her mom that she's bored and she wants to get into their GATE program, but it's not about being bored, it's about wanting what others have and in fifth grade, oftentimes it appears that it is better, it appears that it's something special. *Everybody wants to be special.* I never saw other kids, when I was little, other kids who wanted to be like me and go to gifted, but they may have. I don't know that. It was just called "gifted." In my niece's school, it's called GATE, and she wants to be special like them. And then I think about what we're doing here, and I think that every kid should have access to the special things! And there have to be parameters and ways to get there and it has to meet their needs, but it shouldn't be the elitist group

that I suspect it was when I went to school and what it is from a fifth grader's perspective, in the middle of Pennsylvania, an elitist group that she's held out of."

This story illustrated one of the most common issues with pullout models of gifted education – elitist participation and curriculum that can be interesting and engaging, but incongruous relative to the academic needs of the participants, in addition to whatever damage results in the students who are excluded.

While Superintendent Ford enjoyed the gifted activities of her childhood (and no doubt, her niece would as well), she questioned the fairness, appropriateness, and benefit of such programs billed as gifted education. Ford's experiences were positive, but her view of her niece's experiences, why she was having those experiences, and the content of what passes as gifted education were decidedly negative. Ford explained at the end of the interview that her niece is being denied the opportunity to join GATE by her parents' choice – since she is doing well in her classes, her parents take the stance of "she doesn't need that right now." Additionally, her niece's parents concurred with Ford's questioning of the academic quality of "gifted experiences" and the injustice behind providing special activities to only some of the children, especially when the majority of those activities, according to Ford's experience, are completely appropriate for and would be enjoyed by many children. Unfortunately, this ethical stance and line of reasoning is difficult for a 10-year-old to understand and accept.

4.11 SUPERINTENDENT PALMIERI

Superintendent Palmieri prefaced his story by identifying the kind of gifted program he inherited as he began his tenure as an elementary school principal, calling the program “elitist” and describing its most prominent feature with a touch of sarcasm in his voice:

“Our gifted program was purely about creating outside opportunities for kids. They would have Olympic Days and on Olympic Days, the gifted students would work on projects a lot of times along with their parents – oh I’m sorry, not Olympic Days, International Days – and so they would parade the kids across the stage in front of the whole student body and everyone would clap and they would give a two or three minute speech on their country and culture and that would be the end of it. But it was really a sort and select. They would have a gifted education picture in the yearbook and so forth and so on.”

Palmieri went on to explain that among the first things he did upon assuming his job was to eliminate both the International Days extravaganza as well as the distasteful habit of photographing the gifted students for the yearbook as though the group was an extra-curricular club that only a privileged few could join:

“I said I wouldn’t take the special education students and say, aw, this is the autistic support classroom and put their picture in the yearbook, and so we’re not doing gifted students, either, because it’s not about mom and dad and it’s not about yearbook pictures – it’s about learning.”

Palmieri continued by explaining his philosophy of meeting gifted needs via enrichment and acceleration in the vein of special education students’ needs for remediation and additional

support, stating “it’s not about the IEP” as he emphasized a preference for attending to what students need rather than in what category they have been placed.

At this point in the interview, Superintendent Palmieri resumed the account of his principal experiences with an unexpected turn:

“So we changed it from an International Day, to a Humanities Day and what we would have was gifted students who participated and helped facilitate groups of all students, and so students were classified as gifted as well as along that continuum working on projects around themes. So maybe one group would take something along Pennsylvania history and study those different pieces and kids would have roles and gifted students would help facilitate those groups and be actively engaged. And then we would have days where the fifth grade group might be studying colonial America and all the other grade levels would be rotating through so it’s a learning opportunity for all kids - gifted students obviously develop that creativity, they develop an in-depth study, some of them may be problem-solving, and leadership capacity in working with the other groups.”

This change in the focus illustrated the embedded issues from Palmieri’s story dramatically. Instead of an alternative that would more appropriately individualize gifted education as a response to student need, the original “gifted event” of International Day changed to one of inclusion, where the gifted students were in charge of organizing groups and assuming leadership roles. While this arrangement may have addressed the gifted students’ leadership and academic strengths and minimized the elitism of the previous International Days activity, it spoke to Superintendent Palmieri’s endorsement of (or hesitancy to eliminate) a school tradition, albeit with a more egalitarian twist. However, Superintendent Palmieri concluded the interview by elaborating on the additional services that should be available to gifted children:

“And so, essentially that experience, even though it’s not new to education, had guided my thoughts around gifted education. It drove my belief that gifted education is about extension and enrichment and advancement and that we should be providing those opportunities for kids within our school system – whether that involved partnerships with universities, corporations, businesses, community agencies and those partnerships getting these kids involved in higher level thinking, higher level problem-solving, realistic, relevant activities that extend their thinking and it involves them moving through grade levels in terms of providing more difficult work, compaction of curriculum. Those are things that need to be happening and we need to be guiding our decisions on what are the needs of those students.”

Though no part of his story illustrated any of these gifted education strategies, Palmieri believed them to be part of his recommended repertoire for gifted programming in his school. Although his view of gifted programming from his story was negative, Superintendent Palmieri’s attitude toward gifted education done well was more encouraging as he focused on how such changes should look. He readily embraced his power to change things to suit his views, as he had done with the International Days; however, the proclamation of “those things that need to be happening” sounded as though Palmieri felt that he had not yet succeeded in his transformation of gifted programming.

4.12 SUPERINTENDENT CARROZZI

Superintendent Carrozzi's story⁵ was quite detailed and was offered from the perspective of a parent about her own children. Her son was identified as gifted in the second grade. Identification qualified him for program offerings, but because he attended school in a rural area, opportunities were extremely limited, especially when compared with the county in which Carrozzi worked as an educator. The impact of the lack of resources became more acute when her son needed to accelerate in mathematics instruction. The school was accommodating, but on his accelerated trajectory, he would need AP level instruction in high school. Carrozzi explained that those courses were not available to him in this district:

“At the time, in my current school district, [AP instruction] was a program that we had. I was able to offer them information regarding Calculus AB and Calculus BC, and fortunately they had a mathematics teacher who was very energetic and was willing to really embrace the ideas as well. And so, we were able to move forward in helping the school district [to start the program] not only for my own son, but also for students to come.... They have been flourishing, they have full classes and they've created an Advanced Placement program for the district now, so that's kind of a success story.”

In this story, Superintendent Carrozzi demonstrated her concern that core instruction be made available to meet her son's needs, but she understood that persuading a district to begin a program or to add Advanced Placement courses to its curriculum was more likely to succeed if it was designed to serve more than a single student. Carrozzi expressed gratitude that the district

⁵ Superintendent Carrozzi was the only participant who was unable to schedule a time to meet in person; yet, she expressed a great deal of interest in contributing to this research project. Hence, Carrozzi's interview was conducted via phone.

was willing to accept her help rather than resist the changes necessary to meet the needs of her son as well as those of other students.

Superintendent Carrozzi's second son followed a different path, and her tone changed rather abruptly from one of pride and satisfaction to one of resentment and frustration. Carrozzi was silent about the details surrounding Sam's gifted identification, other than to say he had not been identified, as "no one had recommended him and we didn't push it", likely a reference to the not uncommon scenario of persistent and determined parents who challenged the identification process. Her tone was slightly indignant as she described his facility with mathematics, his disdain for the routines of school, and the passion he had for music:

"Sam cared very little about memorizing in subjects such as social studies and so forth and regurgitating information back to others on the test. Sam could have missed math assignments and it wouldn't have bothered him, but he would sit and play the piano for eight hours at a time. Sam was not identified as gifted at school; no one recommended him for that and we didn't push the issue, because, quite frankly, we accelerated a lot of our own learning. My children were able to attend computer classes in the summer, and they attended arts programs and they had piano lessons and we did other things with them that I felt they had opportunities with or without the gifted program at school."

Carrozzi admitted that her older son had enjoyed opportunities through the gifted program that perhaps he would not have otherwise experienced, somewhat dismissively stating that this situation "was fine, too."

As Carrozzi continued her narrative, she became more expressive about her experiences with the school district and her second son:

“I had to really work very hard with the school district – same school district – to get them to understand that where his talents lie; it was not necessarily in a particular classroom. Sam is highly capable in his work and he is also very gifted in math – he just did not like the mundane routine of school. We were able to finally get his schedule consolidated when Sam was about 13 years old, that he would be able to complete his classes and we put him on an abbreviated schedule and we would provide transportation to and from, but he went to [a university music program]. And, again, because we had a positive relationship with the school, we were able to make that happen. Sam didn’t have a [gifted] IEP and to the school district’s credit, they were willing to work with us as opposed to against us, but there were several people who didn’t really think that should happen and my son ended up majoring in piano performance and business. He has his own company at this point in time and he’s doing exceedingly well. And piano opened many doors for him. He ended up going to [a prestigious music program] at school and that was not an education that school district could provide and so I think we need to be cognizant of where gifts lie in children and how can we enrich all students, not just gifted and talented students.”

Superintendent Carrozzi finished her story with a tone of indignation. Clearly, she was upset and frustrated by the memory of her struggle to have her younger son’s talents (and, in her view, his different kind of giftedness,) validated and accommodated. With a somewhat triumphant and self-satisfied voice toward the end of this story, Carrozzi seemed to feel vindicated by her son’s later successes in life. She sounded proud that her advocacy efforts were responsible for at least a part of this victory over the traditional gifted paradigm of identified students being served with

relative ease whereas talented or less academically inclined students were likely ignored or dismissed without significant parental intervention.

Superintendent Carrozzi's choice to share both a positive and negative account of her experiences with gifted education was important. The embedded issues of identification with her youngest son, curriculum with her oldest son, talent development for both of her sons, and advocacy for different kinds and levels of success clearly occupied a central role in her attitudes toward gifted education practices. Neither story alone would have yielded the important information or change in demeanor that was unveiled by their sequence. Carrozzi's stories and the way in which they were told revealed a great deal about her experiences with gifted education from a position of relative powerlessness for a person whose professional life involved high powered decision-making for many years – successful advocacy for her sons required negotiation with and permission from others. She believed that the cooperation she had developed in the win-win scenario of helping the school and her first son to access Advanced Placement mathematics had set the stage for the much more individualized requests that her musically talented second son required. Unfortunately, these requests were not met by the school with the same enthusiasm or level of cooperation she had anticipated; yet, in her mind, Sam's needs were just as great, and perhaps more dire, since he was less engaged in “the mundane routine of school” than her more academic older son. Carrozzi expressed, with a degree of irritation and indignation, that she had to “work very hard” to gain the school's recognition that talent areas were as important to nurture and enrich as academic strengths.

4.13 SUPERINTENDENT PECORA

Superintendent Pecora was somewhat apologetic as he began his story, informing me that the story that stood out most to him was his own. Once he was assured that others, too, had shared personal accounts, he appeared more comfortable and warmed to the task. Pecora shared that he had been identified as gifted in elementary school. He explained that while some schools at that time ran separate, special, classes for the gifted, similar to those for special education students, “that wasn’t the case at my school, but I was, to use a colloquialism, I was cut away from the herd, anyway. I was given my own reading book, and so forth.” He indicated that he and one other student:

“...were the only two in our class that were in our reading group and if I look back on that at the elementary levels, it probably hampered more than helped because we got very little direction, the expectation was ‘you’re gifted, so you can direct yourself’, and I liked to play sports and chase squirrels and I wasn’t interested in reading short stories that I didn’t know anything about. So I needed direction.”

This anecdote illustrated a misperception among teachers who have limited or no training in the needs of gifted students and often inappropriately expect gifted students to be better behaved, more independent and mature, and superior in all academic areas as compared to other students.

The problem with this perceived lack of direction persisted as Superintendent Pecora entered the secondary building in seventh grade, explaining that “they knew I liked science, so I was handed the eleventh grade chemistry book in the seventh grade, and in eleventh grade they didn’t have to give me a book when I took chemistry.” Pecora drew his own conclusions and summarized his experience with gifted education as:

“...negative from a personal standpoint and quite honestly, what that created for me was, to bring your story around to the superintendency, was kind of a bias against gifted programs. I guess I might be one of those people who might see them as sort of an elitist thing and I joke that the way we could solve all our gifted problems is to make an announcement that every Thursday at 11:00, the following students are gifted and then everybody would be happy because, you know, we’ve tried to work with differentiated instruction and individual projects and so forth but it seems that pullouts and special programs are what people tend to want if they don’t really understand what giftedness is and how it works. So, I guess my own story biased some of my feelings.”

Superintendent Pecora’s description of his feelings toward gifted education and the source of this attitude was a remarkably candid summation and the only one to have stated such a direct connection between his past experience and his current beliefs; however, as he elaborated on his background, other issues became apparent, indicating a much more child-centered and thoughtful stance. Superintendent Pecora explained that his unusual background and skills enabled him to “see giftedness in all kinds of different ways,” a clear reference to high ability in multiple talent areas outside the realm of schoolhouse academics.

Furthermore, Pecora expanded upon his thoughts regarding the realization of talent and the opportunities offered to all students, regardless of status or identification:

“There’s a mindset in education, and at first I thought this was great, but we take really good care of the top 5% and we take really good care of the bottom 20% but those 70-some percent in the middle...there’s giftedness spread all through that spectrum and I would love to see us individualize enough to find the giftedness in a wider variety of kids and not just the truly intelligent, the highly intelligent. I realize that we have to have

criteria and everything else, but I guess those are just my feelings. I really feel like it is important. I think the individualization of gifted is important, just as it is in the special needs realm and unfortunately, I think that individualization should spread to all kids, we just don't have the resources to spread it to all kids."

Superintendent Pecora's musings about finding and developing talents in all children indicated a view characteristic of the more liberal among gifted education experts, revealing a softer, more considered stance than was evident earlier in his story.

Pecora ended his conversation with the humorous caveat that "having been gifted in school, I don't mean any negativity toward gifted programs by saying that." His story was negative in that his own experience with gifted education was ill conceived and inadequate to meet his needs, not to mention his interests. Additionally, Pecora's assessment of what should be versus what appears to be the popular preference in gifted programming portrayed a decidedly negative attitude toward all of his experiences with gifted education to date, both as a student and now as a superintendent: "We've tried to work with differentiated instruction and individual projects and so forth but it seems that pullouts and special programs are what people tend to want." While Superintendent Pecora readily identified talent recognition and development for all children as the ideal, he appeared resigned to the fact that his ideas will remain unrealized. Doing what seems best, to him, is surely an uphill battle with little chance of success.

4.14 SUPERINTENDENT BULLINGTON

Superintendent Bullington was eager to respond to the introductory prompt. She shared that upon receipt of the recruitment letter, she immediately thought about her experiences with one

specific student named Jeffrey. She explained that Jeffrey had arrived at her district's high school with a history of emotional and disciplinary problems, including one incident where he set off a small bomb on a neighbor's porch. At the time of Jeffrey's admission, the school did not have a program or special room for students with emotional and behavioral disorders; however, one was created for Jeffrey. After numerous angry outbursts and consistently failing grades, Bullington investigated Jeffrey's history in greater depth. She was astounded to discover that he had an IQ of 150, well into the highly gifted range. To further complicate matters, Jeffrey should have been a senior; yet, his earned credits placed him in the freshmen class. Bullington explained, "we tried to get his behaviors under control, and I kept going back to the building principal with 'let's try this...', and one day he called me and said, 'how many times do we have to go back to the drawing board for Jeffrey?' and I said, 'until we get it right.'"

At this point, I inquired as to what position she occupied at the time of this experience, expecting her to have been a teacher or counselor. I was very surprised to learn that during this incident, she was actually the district superintendent. I commented that this level of involvement with an individual student was unusual for a superintendent, to which she replied, "I have a tendency to get really involved, especially with special cases in the schools."

Superintendent Bullington then returned to telling Jeffrey's story, recounting her experimental "mission to get to the bottom of Jeffrey's problems":

"I had a meeting with Jeffrey. We just talked casually and you could just tell how brilliant he was. I said, 'You know what Jeffrey? We're going to put you in advanced classes. We're going to try you in some chemistry and physics.' Then, I had to go back to the teachers and of course, what I got was, 'but he hasn't taken these courses.' But I said, 'if he can take them and take the test and pass them, maybe we need to exempt him

from some courses, or test him out!’ And that was back in the 80’s, so you just didn’t do things like that. We did, and I had one math teacher that just fought me the entire time, but actually at the end, Jeffrey came through, he got a diploma, and he was going to college. So, I had another meeting with him. I asked him to come to my office. He came in and he said, ‘I just really, really want to thank you for my education, for getting me where I need to be.’ And I said, ‘Jeffrey, what are you going to major in?’ He said, ‘I’m going to major in chemistry.’ And I sat there for a while and I said, ‘Jeffrey, you’re not going to create something and blow up the world, are you?’ and he said, ‘No, no, I’m going to use it, you know, in the right ways.’ So I followed Jeffrey through college. He did graduate, really, with honors, and has a great job.”

Superintendent Bullington lost track of Jeffrey in the intervening years, but remembered with satisfaction that she was able to see beyond his problem behavior is to address his strengths. Her story was remarkable on several fronts, not the least of which was the highly unusual level and kind of intervention prompted by a superintendent. Embedded in her experience were multiple issues in gifted education, including twice exceptional (2E) students (i.e., students who are both gifted and challenged or disabled in some way), curriculum choices and placement, and paradigmatic and bureaucratic barriers to meeting individual needs (e.g. Bullington’s statement that “back in the 80s you just didn’t do things like that”). It was especially interesting that Bullington recalled having to “fight with a math teacher” when presumably (as superintendent) she was his boss. This encounter confirmed just how unusual a path this superintendent took on behalf of a student and how dramatic the intervention.

Interestingly, Superintendent Bullington was among the participating superintendents who reported having had more extensive training in gifted education. As indicated previously

(see Figure 4), fewer than half of the study participants had received a formal level of training in gifted education. Regarding her experience with Jeffrey, Bullington concluded that gifted students do not always fit the mold of the high-achieving, well-mannered stereotype commonly adopted by novices to gifted education, a perspective that was likely influenced by her formal training in the field. Bullington's narrative was a powerfully positive experience from a superintendent who was quite proactive and ultimately successful.

4.15 SUPERINTENDENT BACCO

Superintendent Bacco insisted that in his mind, the word “gifted” was inextricably linked to the Chapter 16 regulations outlined in Pennsylvania's State Code (see *Special Education for Gifted Students*, 2000), and he quickly began telling the story that helped to explain this strong association. Bacco's story was set in the early days of his career as an elementary teacher. He had a young Latina student named Holly, who he described as one of the “brightest students I have ever met.” After witnessing her academic behaviors and strong classroom performance, he recommended that she be “tested for gifted, and as a result, she came in somewhere around 126 or something of that nature.” He explained that he believed it to have been the second time she had been evaluated and, thus, the second time she “came in below the 130 mark...and wasn't invited to be in gifted.” Superintendent Bacco further expounded upon the situation:

“...[it was] really interesting to me, because here was a young lady who truly was, in her daily work, her daily activity, showed that she was gifted - and in many ways, above her peers. The way she was analyzing work and evaluating work and the high creativity she was putting into her writing projects and things of that nature, but yet, she didn't cut the

mustard with the exam. And I thought, I remember having a number of talks with the guidance counselor and I kept fighting for her to be labeled as gifted, and they stood fast on the regulations, the numbers, the matrix. She did not hit the matrix, and therefore she was not gifted.”

His voice was wistful as he continued with the story. He said he kept thinking that there had to be other ways to be considered gifted, stating that he had explored the concept with the staff in charge of conducting the evaluation but to no avail:

“We had talks about gifted and talented and things of that nature and the difference between the two and all, but I remember that...and I don’t know how to classify what I felt, but I really felt that there was a line and she was not allowed, she was not considered gifted because she didn’t cross that line, and even with the teacher input, there was more attention paid to the metric than there was to my professional judgment and her performance.”

This last sentiment was particularly telling – as a young teacher, Superintendent Bacco was offended that his assessment of this student and her daily behaviors were discounted in favor of policy and that a single test trumped all. Also, Bacco was concerned for the student’s emotional health in that this was the second time she had been evaluated and denied.

The primary issue embedded in Bacco’s story related to the school’s identification policy and its adherence to what he felt to be an unreasonable and arbitrary standard⁶ that could not be overcome or appealed. This story was also interesting in that Superintendent Bacco’s recollection did not include what the student would have experienced “in gifted” had she been accepted and admitted, only that she was denied access to the label and its benefits, whatever

⁶ The margin of error of some popular IQ tests is plus or minus 5 points.

they might have been. The experience was decidedly negative and clearly connected to Pennsylvania's state regulations for gifted programing. Although these state regulations place heavy emphasis on the 130 IQ threshold, they do allow more inclusive flexibility at the local level than Superintendent Bacco's school had permitted, as evidenced by the student's two close, but unsuccessful attempts to qualify.

4.16 SUPERINTENDENT DOWD

Clearly indicating that he had already reflected on the topic of the interview, Superintendent Dowd announced emphatically that he had two stories to share. Dowd started with a speech that had a child's name attached to it; the child may have been involved in the frustrating situation he presented, but the scenario sounded more philosophical than narrative:

“One [story] involves Sarah, and it's translated in my work here. It's looking at gifted as a resource for all kids and using it as an opportunity to compact, accelerate, and change curriculum and adapt and individualize the instruction...not making it a field trip, club-based activity. And I think the story that sticks out in my mind is the resistance from parents when you start to shift that way. You have the conversation in an IEP meeting and the parents verbalize that they want a more academically rigorous program for their child, and often make accusations that you don't deliver, particularly at the middle school level. I had middle school and high school attached, and I was the principal at both of them and the middle school parents often advocated for a more accelerated program, academically enriched program. High school took care of itself with AP, to a certain extent, or college in high school courses, but yet, when push came to shove, they really

didn't want to give up the social activities; they felt the socialization of the gifted kids was important, but it really was almost like it was a badge of honor, within the community. They were very clear to make sure that not only were their kids in gifted activities, but why are we not recognizing our gifted kids for being successful in competitions or whatever the case may be? So you know, that club-based kind of piece to it sort of grabs me.”

Dowd's story highlighted his frustration with gifted elitism and the need for special attention with little attention to academic need. In general, there is an understanding among most parents and professionals that gifted education should be more about education than about “being gifted.” However, identification is usually the primary prerequisite to all that follows, and the status connected to the word is nearly impossible to downplay. The motivation to be a member of the “club” is strong (Borland, 2005). In fact, several superintendents used the word “club” in conjunction with issues related to identification and social justice.

Superintendent Dowd's second story was far more personal, and he struggled to find the words that would accurately describe the problem tactfully. With this narrative, Dowd shifted his perspective from that of a superintendent to that of a parent, proceeding to describe the delicate and extremely frustrating situation he encountered with his son and gifted education:

“Now on the flip side, my nine-year-old child has been identified as a gifted student and my story there is one of frustration, because the program there is academic...but...what I find is...(nervous laughter)...boy this is...not identifiable, this is...well, sometimes the gifted teacher is one who was not successful in the regular classroom so they move the teacher there because it will be a smaller group and easier to work with, but the other thing is, she's a very nice person...but she doesn't get gifted, in the sense that gifted

doesn't look the same for every child, and just because you get 100% on every spelling test, or you do every math problem correctly, does not make you gifted. My son's...he did...obviously he did well enough to be identified on measures, but his real gift is problem solving - manipulation and thinking things through in a way that often manipulates the situation, so he had his gifted teacher played within a month of being placed in that room to the point that she asked for him to be removed, and he's refusing to do the work."

Dowd's situation was indeed a delicate one involving a teacher quality problem intermingled with his son's disciplinary issues. For Superintendent Dowd's son to be "removed" from the gifted program would require, according to Pennsylvania state regulations, a comprehensive reevaluation where the data would have to support the contention that the child was not gifted and not in need of specially designed instruction (Special Education for Gifted Students, 2000). This scenario is difficult to prove when a child has been legally identified as gifted; yet, in the case of Dowd's son, the child clearly was not benefiting from a scenario where he did not want to participate in the instruction. Superintendent Dowd's narrative was not yet finished, as he explained what happened next:

"I got the phone call...I said, son, why aren't you doing this work? 'I'm not doing it because it's not on my report card and I don't need it to pass to go to second grade'...and [the teacher] couldn't get around that, she said that if he doesn't want to do the work, he shouldn't be in that room. The hard part with him is, so I said just put it on his report card...She said it's not in the computer...I said well just hand write it in and tell him it has to be on his report card, I don't care, it's an elementary report card, c'mon (laughter) Aw, yeah, it was just funny, you know. The other phone call I got from her, it was just, they

were doing basic fractions and I think it was second grade at this point, but anyway, four sections they had to do on a math test, they were doing in the regular room and, uh, he did the first three sections fine. The fourth section had pizzas, you know a half of pizza is equal to one half, three quarters is equal to three fourths, you know, you tell up how much of the pizza is in fractions. He didn't do it. He just left it blank. And so he got like a 75 on the test. She called and said we're pulling him out of math for acceleration since he only got a 75 on the test. So I said, son, why did you not do this last section? He said, one, he didn't want to get pulled out for acceleration and two, 'cause I got 75 and that's passing, so he did his fraction like a real smart aleck, (laughing) you know, but the problem is that by not addressing that he was playing her and manipulating her and she doesn't understand gifted children, doesn't understand the psychology behind it, doesn't understand the manipulation behind it. He is falling, he's going to fall behind in basic skills at some point because he's playing the system too much already, where you have to push him in a different way, you have to hold him accountable.

The continuing frustration Superintendent Dowd expressed over this teacher reinforced the theme that in his mind, "gifted" just doesn't work. While Dowd's first story highlighted that parents said one thing (i.e., a desire for rigor) but behaved in another (i.e., the elitist mindset), his second story illustrated his frustration with inadequate instructors for gifted students. He felt that the academic focus of the gifted program was for naught if the instructor was unable to motivate the children and manage behaviors not atypical of very bright students who are not particularly interested in playing the school game by the teacher's rules.

Superintendent Dowd concluded his story with a shaking head and an expression of resignation:

“No certification⁷. I am an advocate for it and I think they need to develop a career program for people already in it, but I am an advocate for certification for people who are in gifted, because I don’t think folks get it. I don’t think many gifted teachers get it. I think some of that lends to the over-identification or the encouragement of over-identification. Where I was the assistant superintendent, every second grade teacher nominated every kid who got an A in their class in reading and math to be gifted because if they got a 100% on their spelling test they must be a gifted child – it’s a rote response to measurement. I sort of like the idea, I know you sort of have it gifted for all so to speak where everyone, you try to get them as soon as possible, and I’m fine with that since we’ve destroyed the label so much, but this is one or two percent of the population. Truthfully, I’m not even sure my own child is truly gifted, you know, I don’t get that sense, but his needs weren’t being met in the regular classroom so he needs additional help so you know there’s got to be a continuum, and I think that’s the other piece that’s really missing. The unspoken thing in budget cuts and reduction of resources is enrichment’s disappeared. There’s this gap...either you’re regular or you’re gifted and nothing in between. If the resources existed for an enrichment program, I think the drive for that gifted label might end particularly if many of the social activities were encouraged in the enrichment room.

Dowd’s summary tied together the prominent themes embedded in his stories and provided additional insight into his attitudes toward gifted education, including commentary on teacher quality issues, problems with identification and finally, the importance of matching gifted programming to the actual needs of the students with more options than are currently available.

⁷ This references the problem teacher discussed in the story and the lack of credentialing in Pennsylvania for teachers assigned to implementing gifted programs.

Superintendent Dowd's narrative indicated a virtual wish list as to this leader's views on how services to high-end learners should be conceived and implemented. It was particularly telling that Dowd viewed the gifted label as "being destroyed" as a result of "over-identification" (perhaps a reference to the tendency in schools to include more students as a defense to charges of elitism or indefensible criteria, often negating or diluting appropriate services to intellectual or academic outliers when a single program serves all identified students); yet, he pondered the idea of more students gaining access to what they might individually need with favor. Dowd's view of the gifted as "one or two percent of the population", which excluded his son, and his ideas that enrichment is the appropriate intervention for the larger number of students below the top percentages, was a powerful statement of his interpretation of giftedness and how programming might look. While Superintendent Dowd was candid and forthcoming, it was evident that his ideas extrapolated from his experiences rather than from any academic literature or formal training. He recognized intuitively, but saw no immediate solution to, the conundrum of individualized programming for many students with widely differing needs versus a one-size fits all program that identified students are either in or not in.

4.17 SUPERINTENDENT PARK

Finally, Superintendent Park had two stories to share from two completely different, and seemingly unrelated perspectives. In her first story, Superintendent Park reflected on her experiences as an elementary teacher of gifted students and a science teacher. She began by explaining that in the state where she began her career, "the term gifted and talented was the way it was expressed and a student could be gifted playing the saxophone, which was talent, of

course, and still be in the program.” This definition differs from the one prescribed by Pennsylvania state code in which talents in music and the arts are not addressed (Special Education for Gifted Students, 2000). Park’s choice of the words, “still be in the program” were clues to a focus on identification as a gatekeeping function and “talent” as perhaps an alternate (to IQ) entrance key in her earliest experiences.

But Park’s opening story was from the vantage of being the teacher under these programming rules, not that of a student. Smiling at the memory, Park told her story:

“I had a pullout class every Friday with 7th and 8th graders – I was the teacher of the gifted. I was a science teacher. That was quite an experience because I had a lot of the...it was the first time I’ve ever lived in the community in which I taught, so my neighbors, my gifted little neighbors would stop by every evening to show me something they’d found in the yard or something they found of interest and would say, “can I come in and talk to you about it?” because I was the teacher of the gifted, which was great fun.”

Almost as though she couldn’t allow her brief introductory and pleasant memory as an insider of the gifted education paradigm to stand alone, Superintendent Park quickly began her second story from her perspective as a mother:

“Personally, my children were tested for the gifted program...a funny story about my daughter – she was taking a math assessment and the question said, what time will this clock, you know it had a picture of a clock - a typical testing booklet - what time will this clock say two hours from now, and the choices were, you know, the typical choices. She chose, “it will be the same” and the teacher who administered it told me when afterwards, when they talked to her about it, that she had said, “well it’s on a printed page, of course it’s going to be the same two hours from now!” But it was wrong! So I think those kinds

of examples often eliminate children like the Bill Gates and the Steven Jobs and some of the inventors from programs because they don't think in the same way and so we just think of gifted kids that they're just a little smarter than the average kid. We don't go that curiosity/creativity route that we should and we don't have a way to capture that.”

Superintendent Park did not elaborate on whether her children were ultimately identified as gifted, but it was obvious from her story that she had concerns about the validity of the testing used in the process. It seems unlikely that in this educator's entire professional and personal experience, a single item on a single test decades past would stand so prominently in her memory, but it is illustrative of the larger issue of tests; what they measure and how, but most importantly, in the consequences of them. Further, Park's assertion that creativity is an essential component of giftedness was an important clue into her beliefs about assessment of and programming for giftedness. Identification methods are foundational to the gifted education paradigm and are among the most controversial and consequential practices of the field (Carman, 2013). The place that creativity and other factors beyond IQ occupy in the gifted construct is equally contested among experts (Subotnik et al., 2011), but it was clearly important to this leader.

Interestingly, although Park appeared amused and entertained by her memories, the words and substance of her experiences were fundamentally negative. She had little to say about her science background and the once-a-week pullout program, making it appear as though more substantive teachable moments occurred outside of school in her off-hours as children brought science to her doorstep. Additionally, although the amusing incident involving Park's daughter may have had significant consequences in her evaluation for the gifted program, it prompted Park to consider what clever children may achieve as adults if their creativity and unusual ways

of looking at the mundane are recognized, evaluated, and accommodated properly. The distinction she made between children who are “just a little smarter than the average kid” and “inventors” represents a fundamental belief system in her conception of giftedness and what gifted education should mean and accomplish.

4.18 SUMMARY

Each superintendent told a story or stories filled with experiential data representative of most, if not all, of the major controversies in current gifted education practices. Clearly, the emotion and memories that define a critical event were present and the stories strongly suggest implications these leaders’ experiences may have for their local districts in the philosophical decisions and programming choices they make about gifted education. A combination of narrative inquiry and the critical incident technique provided the framework for analyzing the data, which yielded rich examples of superintendents’ personal encounters with the major themes of gifted education gleaned from the literature and are summarized in Table 1. A myriad of perspectives were represented in a variety of settings. Both positive and negative experiences were portrayed. The data collected from the 18 superintendents are summarized in Table 3. While the number of superintendents interviewed was modest, the major issues of the field were represented in the data collected. Several stories will be revisited individually in Chapter 6 as models for their use in local gifted program improvement.

5.0 COLLECTIVE ANALYSIS OF INTERVIEW DATA

The superintendents responded enthusiastically to the invitation to share a story about gifted education without hesitation, regardless of whether the story portrayed their encounter in an overall positive or negative light. This fundamental emotional temperature, however, is a potential indicator of the innate acceptance or rejection of the gifted education paradigm as constructed and perceived by each superintendent. It is impossible not to notice, though, trends, similarities, and differences among this collection of chief executives, all of whom shared a memorable story on the same topic.

The critical incident technique (CIT), as applied to the social sciences, uses some of the strategies of narrative inquiry, focusing on each story as the unit of analysis (Webster & Mertova, 2007). CIT, however, originally involved amassing a number of events from a group with some common experience and looking for patterns and conclusions across the incidents in a collection (Butterfield, 2005). So, while each superintendent's story can be a valuable window into the kinds of *local* gifted education decisions to be made within his or her own district, and the strategy of speaking to superintendents in this way suggests an advocacy route for others to follow, it is also beneficial and true to CIT, to consider what can be learned collectively from a diverse group of eighteen individual superintendents who have focused their attention on providing an illustrative episode about a single aspect of public schooling – in this case, gifted

education – in a candid and low-risk manner. In an examination of 50 years of CIT use, Butterfield et al. (2005) stated that:

Flanagan stressed that in a CIT study, the sample size is not determined by the number of participants, but by the number of critical incidents observed or reported and whether the incidents represent adequate coverage of the activity being studied. There is no set rule for how many incidents are sufficient...The crucial thing here is to ensure the entire content domain of the activity in question has been captured and described. (p. 479)

Though diverse, the participating superintendents did not constitute a statistically random or representative sample of any larger group; therefore, resulting conclusions are not generalizable. These accounts are, however, descriptive, informative, and thought provoking, and considering that several of the superintendents provided more than one incident, were sufficient in number to have addressed the major issues of gifted education in public schools (acceleration, curriculum, identification, social justice, program models, etc.), as identified by the literature (see Table 1). Their scope and number allowed for an exploration of patterns and themes. Additionally, the selected analysis scheme provides an appropriate framework to examine those parameters across the group.

5.1 SUMMARIZING THE SUPERINTENDENTS' STORIES

As a review, each of the superintendent's stories was examined and coded according to the following four-part analysis plan:

1. Type of experience (personal, parental, professional);
2. Type of event (setting of story);

3. Category of event (gifted education issue(s) at the core of the story); and
4. Affect associated with the event (positive or negative outcome or feeling tone)

Table 3 summarizes the application of this analysis to the narratives of the eighteen participating superintendents. What follows is an examination and interpretation of the collective data for each criterion of the analysis scheme.

Table 3. Summary of Superintendent Interview Data

Superintendent	Storyteller Perspective	Story Setting	Embedded Issues	Gifted Education General Affect
Amberg	First-year teacher	Elementary school	Acceleration, advocacy	Positive
Coffman	Superintendent; Parent	High school	Identification, fairness, acceleration, parent advocacy	Negative
Cooper	Superintendent	District office meeting room	Identification	Negative
Drover	Principal	Elementary school	Social justice	Positive
Andreini	Self; Principal	Elementary school	Acceleration, curriculum	Positive
O'Farrell	Self; Parent	Elementary school	Curriculum, programming	Negative
Garrity	Bystander	Elementary school	Acceleration	Positive
Hensley	Parent; Administrator	Multiple districts	Curriculum, programming model	Negative
Ivancho	Self	Elementary school	Acceleration, curriculum, social justice	Negative
Young	Parent	Elementary school	Curriculum, programming model	Positive
Ford	Self; Family member	Elementary school	Social justice, programming model, curriculum	Negative
Palmieri	Principal	Elementary school	Social justice, curriculum	Negative; Positive
Carrozzi	Parent	K-12 school	Curriculum, talent development, identification, parent advocacy	Positive; Negative
Pecora	Self	K-12 school	Training to understand gifted children, curriculum, talent development, identification, programming models	Negative
Bullington	Superintendent	High school	Twice exceptional, training to understand gifted children, curriculum, placement, bureaucratic constraints	Positive
Bacco	Teacher	Elementary school	Identification	Negative
Dowd	Principal; Parent	7-12 school, elementary school	Programming options, social justice, teacher credentialing, identification	Negative
Park	Teacher of gifted students; Parent	Middle school then elementary school	Identification and testing, creativity as a gifted component	Negative

Note. Data in cells within the Embedded Issues column are sorted by their prevalence within each interview. Issues that were most prominent are listed first.

5.1.2 Group Findings: Perspective

In this relatively arbitrary group of public school superintendents, the stories they told encompassed a remarkable variety of professional vantages (first-year teacher to superintendent) to the personal perspectives of self and parent. The representation of so many different roles speaks to the pervasive and memorable nature of encounters people have with gifted education and their potential impact at any point and place in life.

It was interesting that, unsolicited, more than a third of the members of the group offered stories from more than one perspective, comparing and contrasting their experiences as a child, then as a parent, or as a professional and then as a parent. In fact, most of the dual-storytellers included the role of parent as one of the two, drawing comparisons that reinforced one of the embedded issues of the first story or confirming the overall affect or lasting impression about gifted education. The literature on advocacy highlights the central role parents often play in seeking appropriate services for their gifted children (Duquette, Orders, Fullarton, & Robertson-Grewal, 2011; Matthews, Georgiades, & Smith, 2011; Wickman, 2004).

Most of the parent-vantage stories among this group of superintendents were negative. Superintendent O'Farrell shook his head as he related the negative, inappropriate curricular responses to which both he and his children were subjected. He appeared almost incredulous that events 30+ years apart were so similar in their inadequate reaction to student need – both his and that of his children. Superintendent Park also related her negative personal experience and followed it with a similarly frustrating situation involving her child. While this pattern of parent negativity may be germane only to this group, it is likely that gifted education miscues are

especially galling to educational professionals turned parents, particularly administrative leaders who know what could or should be.

It was intriguing that three of the 18 stories were from the vantage of superintendent, a role that most often occurs later in life, though it can span many years. While the purpose of this study is to solicit information from and recognize the importance of superintendents for the improvement of gifted education both locally and as a field, superintendents generally are not, in my experience, present at gifted IEP meetings nor directly involved with the students. This was not the case among these study participants. Superintendent Coffman was entirely aware of and involved with the identified student whose acceleration needs had been problematic for his staff. Superintendent Cooper was literally at the table for identification decisions in her district and Superintendent Bullington was directly responsible for a successful intervention with a gifted, yet behaviorally challenged student. In these diverse districts, the superintendents' attitudes toward gifted education were obvious in their actions and their critical incidents were relatively recent. In all the other districts, however, belief systems of superintendents that stem from long ago events may not be as unmistakable or as easily visible to staff.

5.1.3 Group Findings: Setting

The superintendents were invited to tell their stories from any perspective, personal or professional and in any place. It is unsurprising, however, that the setting for twelve of the eighteen stories involved an elementary school. As elementary school incidents are early ones, Webster and Mertova's (2007) words bear repeating:

The longer the time that passes between the event and recall of the event, the more profound the effect of the event has been and the more warranted is the label *critical*

event.... Over time, the mind refines and discards unnecessary detail and retains those elements that have been of changing and lasting value.... The critical event is likely to have changed their (the storyteller's) experience and understanding, informing future behavior and understanding. (p. 74)

Formal identification, and thus initial experience with gifted education, most often occurs during the elementary school years. Stories in the elementary settings throughout the study encompassed all of the gifted education issues under discussion. Possibly, the earliest encounters with gifted education were the most memorable, but it is also possible that they were the most egregious. During the elementary grades, the separation between the gifted program and regular education is at its widest and most obvious point. Students engaged in gifted-only services generally leave the classroom frequently, or for extended periods of time. Departure is obvious. In some cases, such as in the yearbook photos of the gifted students in Superintendent Palmieri's school, the segregation is publicized! Young children are especially sensitive to and curious about what is fair or different and this could explain why many memorable stories are likely to originate during those years. If elementary schools are the places where positive or negative attitudes toward gifted originate and are lasting ones, perhaps an increased focus on how gifted education is designed and carried out during these years is warranted as a priority.

5.1.4 Group Findings: Issues

Words associated with each gifted education construct were coded to determine the predominant issue(s) in each story and the patterns of issues in the collection of critical events. While each superintendent's story was unique and the embedded issues were idiosyncratic to the particular situation, they illustrated fairly comprehensively the controversies that appeared in the research

literature of the gifted education field (see Table 1 for a review of these issues). Though several issues were often portrayed and were interrelated within each individual story, I determined the predominant issue discussed by each participant. A perusal of the group summary table indicates that acceleration, identification, and curriculum were each the predominant embedded issue in four of the superintendent stories. Social justice issues such as fairness, elitism, special treatment and equal access to educational privileges were identified as the dominant theme nearly as frequently as the acceleration, identification, and curriculum issues, as they were the themes in three stories. Lastly, issues focusing on twice exceptional students, teacher training, and programming models were each mentioned by one superintendent as the predominant embedded issue. Because these issues are at the philosophical epicenter of gifted education, they are discussed separately below.

5.1.4.1 Acceleration Issues

Acceleration was the predominant issue in four stories, three of which were positive and affirming events. Considering that acceleration is one of the most researched and effective strategies among gifted education best practices, it is not surprising that several participants reported it as a successful and positive intervention. Implemented properly, acceleration solves many of the issues associated with the ability of some gifted students to acquire and retain content and skills with greater speed and facility than others. Advanced students thrive when placed with their intellectual rather than chronological peers for the majority of their instructional time (Colangelo, Aussoline, & Gross, 2004). As the research has already overwhelmingly supported this conclusion, perhaps the value to the field in this narrative data lies in its memorable and successful portrayal of acceleration and such stories should be more

widely publicized and disseminated to counteract the persistent negative myths associated with this practice (Colangelo et al., 2004; Fiedler, 2002).

Superintendent Ivanco's experience, however, where he was accelerated until the last grade level in the building and then required to repeat eighth grade because other options were either not considered or were rejected, is extreme, but the dilemma of what to do with students whose instructional solutions are found in another building is unfortunately not uncommon, and is most often prohibitive. Transportation costs, supervision, enrollment details, age, maturity, and even size all factor into the decision to have a younger child attend class in a building with older students. It is not surprising, then, that some leaders might conclude that it is simply safer and much easier to ban, discredit or ignore acceleration as an option. In addition, there is a pervasive fear among many educators that acceleration is harmful to students' social and emotional health, despite contradictory findings in the research (Colangelo et al., 2004; Siegle, Wilson, & Little, 2013). It is interesting to note, however, that none of these consequences was mentioned in Superintendent Ivanco's story (though I was left to wonder what the social implications of what must have appeared as a grade retention might have been for him). There was simply no provision for him to access curriculum at his level of instruction. In the decades since his story originated, technology now exists that may hold a viable solution for the problem as it was presented. Surprisingly, despite the capacity for technology to alleviate some of the logistics associated with acceleration, no superintendent in the study mentioned the use of technology in any story or follow up discussion.

5.1.4.2 Identification Issues

I expected identification to be the more predominant issue overall, as it is by far the most fundamental and contentious in the field. How to define and select the intellectually superior or

predict potential in children and young people is at the heart of the gifted education quagmire. Researchers, psychologists, educators, attorneys, sociologists, anthropologists, and politicians, not to mention parents and their children, all have a stake in the definition of a gifted child and in the means by which they are measured for program eligibility and participation. There is some consensus around the construct of IQ as an essential element and an IQ measure of 130 is a common (but not uncontested) line of demarcation, as is the case in Pennsylvania, but the debate about what else (if anything) constitutes giftedness and how to determine it rages on. The discourse spans a spectrum from those who believe that any formal, static identification as a prerequisite step to services or accommodations is wrong and unnecessary to those who seek a different measuring device(s) for multiple kinds and dimensions of ability. Further, just as whom to count as gifted is debatable, so is the total number of students as a percentage of the general population who can claim inclusion, a point of dissent.

Though the prevalence of identification among the issues in the stories was not as frequent as expected, its effect on the storyteller was predictably negative in all four stories. Drawing lines and sorting children into categories such as “gifted” and “not gifted” is difficult for many educators, but being on the excluded side of the line can be devastating to children and families, as illustrated most poignantly by Superintendent Cooper’s story about the reaction of parents whose child was deemed ineligible for the gifted program. Interestingly, Superintendent Coffman was equally unhappy with identification, but for a completely different reason. He believed the child in question had been identified too early and unnecessarily. As the construct of gifted identification is foundational, pervasive, and fraught with emotion and controversy, gifted education scholars must resolve both the lack of philosophical consensus and the practical problems created by its seemingly arbitrary rules.

5.1.4.3 Social Justice Issues

Social justice emerged as a dominant issue in three stories, all of which were in elementary school settings. Social justice ideas as applied to gifted education involve equity and fairness in students' ability to access and benefit from gifted education programs and services. It is essentially an overarching concept inherent in all other issues, from identification to the programming model. The concept of social justice is often a battleground between egalitarian and democratic ideals and the nature and nurture of exceptionality, which is by definition, deviance from the norm. It is not, therefore, surprising that the stories were positive and negative. While few would dispute that being fair and equitable is a desirable objective in a public school, many would argue that equal does not mean the same, equating the practice of providing the same education to every student as equivalent to giving each the same sized shoes. Some point to the controversy over identification and the resultant gifted education eligibility as an example of injustice; others view it as an indispensable lifeline for students who are intellectual outliers. Schools have exhibited a range of responses to this dilemma, such as the team teaching (gifted education and regular education teachers) concept endorsed by Superintendent Drover, the pullout model rejected by Superintendent Ford, and the school-wide inclusive activity of International Days crafted by Superintendent Palmieri, each of which would have critics and supporters in the field. Superintendents in this study deal with social justice issues from the vantage of adult professionals in positions where they could reflect on and evaluate gifted education choices. Perhaps it is through the social justice lens that the field could engage the interest and enlist the support of school leaders. Recent essays have suggested as much by promoting gifted education strategies for use by all students (Johnsen, 2013).

5.1.4.4 Twice Exceptional Issues

Twice exceptional (2E) is the term used to describe students who have exceptionalities that include giftedness along with a disability or learning difference. Educational decisions made for these students are generally more complicated than addressing either exceptionality alone. This issue was specifically exhibited in one story, but indirectly referenced each time a superintendent referred to “the other end of the spectrum” or to special education students in a way that suggested giftedness and special education needs or learning differences are mutually exclusive. The field is replete with studies that challenge this misconception and guide educators toward greater understanding of the 2E phenomenon and the ways in which it manifests in children (Baum, Cooper, & Neu, 2001; Foley-Nicpon, Assouline, & Colangelo, 2013; McCallum et al., 2013; Willard-Holt, Weber, Morrison, & Horgan, 2013).

Eligibility of twice exceptional students for gifted programs is an issue that has become increasingly public as gifted educators respond to charges of elitism and students with protected categories of handicapping conditions seek access to gifted opportunities. In Superintendent Bullington’s story, the student’s academic failures and negative behavior were so outrageous and pervasive, all his other attributes, especially his intellectual abilities, were ignored until she intervened. Her story was the only case where a superintendent seemed aware of the coexistence of giftedness and disability. Specific learning disabilities, neurological, physical or emotional handicapping conditions can interfere with or negatively impact the identification mechanisms – tests, rating sheets, observation checklists, teacher recommendation, grades, etc., and thus exclude students who could benefit from some or all of the gifted program components. While much research and resources have been produced to advance understanding of 2E children and their characteristics, educators continue to view gifted (and disabled) students in a very

stereotypical way, denying overtly or subtly the possibility of simultaneous but conflicting conditions (Treffinger, 1982, 2009). This issue intersects the problems surrounding identification and social justice as the field defends against charges of elitism and the underrepresentation in gifted programs of atypical learners, including those students who are English language learners, students who are culturally different, students from low socio-economic groups and ethnic minority students.

5.1.4.5 Other Issues: Teacher Training and Programming Models

While several of the stories took place in an era before the current gifted education paradigm of formal identification and programming began, it remains curious that only one story specifically mentioned the teacher of the gifted. The story offered by Superintendent Dowd, however, touched upon an issue of serious concern to the field, that of specialized training and state certification for those working with gifted students. His description of the gifted support teacher as “not getting” his young son spoke to the concern among gifted education experts that most educators have had no specialized training for recognizing and differentiating instruction for gifted learners, including those teachers whose primary responsibility is implementing the gifted program in his or her school.

Superintendent Dowd experienced the frustration of dealing with a teacher in charge of his son’s specialized needs who appeared unable to motivate and manage his very bright but challenging youngster. Superintendent Young also addressed the issue of the teacher charged with gifted education knowing what to do. His daughter, who needed little more than advanced reading materials was fine under her charge, but his son, who was less easily engaged, required a teacher far more familiar with and willing to use interest-based activities.

The importance of teachers' understanding the unique needs of gifted children was also a theme in Superintendent O'Farrell's stories, both in his own frustration at being his teacher's assistant and in the inadequate response to his daughter's need for more advanced reading instruction in a class where the teacher was prepared to teach only letters and their sounds.

Superintendent Pecora's story echoed the lack of understanding in teachers charged with his education. While he did not identify the gifted program teacher specifically, he described a scenario of being segregated from others in his class and expected to orchestrate his own education at an age when he most decidedly needed adult direction. An inappropriate expectation for independent learning and minimal attention to his instructional needs as a youngster left Pecora wondering about the quality of gifted programs and the teachers in charge of them. In a state where the statute requiring gifted education is viewed as among the most prescriptive in the nation, it is both ironic and problematic that the teachers charged with meeting its requirements have no specialized certification. In several cases, however, positive stories illustrated teachers doing the right things: noticing the need for acceleration and vigorously pursuing it, team teaching a lesson so that all students benefited from the interesting and engaging activities, and programming for a child who needed differentiated curriculum despite missing the gifted identification cut-off score.

Lastly, several superintendents voiced concerns over programming models, particularly about the scarcity of attention to the individual needs of the students participating. Though lacking a specific story, Superintendent Hensley summarized the essence of the problem, lamenting that her expectation in several positions had been that gifted education would address each child's strengths. Instead, she saw generic activities and enrichments such as field trips, which may have been both educational and enjoyable, but were not individualized. Although

several programming options were described through the stories, none seemed to be viewed as ideal.

Superintendents Pecora and Dowd made similar interesting and insightful observations about programming models. They indicated that they knew what quality, gifted programming should look like and that they had made several attempts to move their schools in the direction of individualizing and differentiating services. Unfortunately they relented, because “people [parents, students, teachers] wanted pullout” and other special, exclusive activities, despite the fact that these things were inadequate, elitist, and contrary to best practices that recommend providing high ability students with challenging, engaging, rigorous and individualized work.

5.1.4.6 Summary of Issues in the Superintendent Group

Collectively, the stories offered by the 18 superintendents addressed virtually all of the issues plaguing gifted education, both historical and current. Despite the fact that the superintendents identified themselves as having only minor amounts and kinds of specialized training in gifted education, their stories were remarkably comprehensive in identifying the salient issues of the field, in both positive and negative lights.

5.1.5 Group Findings: Affect

Of the 18 participating superintendents, ten portrayed gifted education in a decidedly negative light, six addressed only positive experiences with gifted education, and two superintendents related stories that contained elements that were both negative and positive. In categorizing these stories, I evaluated the second story’s affect as the predominant feeling tone, deciding that the

more recent of the experiences was likely to reflect the superintendent's predominant current attitude toward gifted education.

Interestingly, certain embedded issues appeared to be associated with either a positive or negative affect. Identification issues tended to be associated with negative overall affect whereas acceleration was associated more with positive overall affect. Because identification is arguably the most contentious and emotionally charged issue in gifted education, it is not surprising that the resulting emotion is negative. Being evaluated and deemed not up to whatever standards were set is unsettling at best. Further complicating the issue is the lack of consensus about those criteria and standards and the resulting labels. Acceleration, on the other hand, is supported by research as a viable option for gifted learners, and presented by these superintendents as positive experiences, yet in the wider debate, stories of damaged social and emotional growth persist and acceleration is not universally embraced (Colangelo et al., 2004; Siegle et al., 2013). Personal experience is reality.

Curriculum issues presented an even split in overall affect, and the emotional outcome seemed to depend on whether the specific topic, activity or instructional design was a good fit or a mismatch with respect to the needs of the student in question. Because the most effective gifted education practices are those that are tailored to the specific needs of the student, one-size-fits-all programs and generic curricular responses are often disappointing and inadequate. Differentiated opportunities, however, are extraordinarily helpful in bridging the divide between advanced ability or talent and the standard fare of regular education. Engaged students are generally happy students.

Among the group of negative stories, the overarching emotion would best be described more specifically as frustration. In each case, the superintendents seemed to know or suspect

that there was a better response or a best practice for the situations they described, but their stories portrayed a sense of powerlessness that gifted education could be improved. I wondered if this frustration on display in the stories was exacerbated by the fact that they were looking back from their current vantage where they are far more knowledgeable and powerful, and able to direct resources and make other policy decisions with the highest administrative authority.

I noted a significant amount of misinformation and common myths about gifted students among the negative stories (Treffinger, 1982) and a lack of information on each topic of contention. For example, in Superintendent O'Farrell's story where he was the teacher's assistant in a math class that was below his instructional level, the teacher likely assumed there was no harm in this arrangement. Superintendent Ivanco's tale of repeating eighth grade reading as though his need for growth stopped at the end of the building is another example of the myth that gifted children will be fine regardless of the poor instructional choices made on their behalf. But even in a positive story, such as Superintendent Palmieri's use of the gifted students as group leaders for the revamped Humanities Days, his expectation that this was appropriate for them may or may not have been based on their actual strengths as leaders. These scenarios are similar to the assumption of misinformation or the lack of knowledge among administrators made by the NAGC Administrative Task Force that resulted in the creation of a resource toolkit. Behind these negative attitudes (and perhaps some positive ones as well) may be a genuine lack of understanding. Practitioners with gifted expertise should recognize the opportunity to more directly provide the localized staff development that the superintendents identified as their primary source of training in gifted education. Such training could specifically target issues uncovered in gifted education stories.

In the positive stories, the emotional focus seemed to be on the pride superintendents felt as successful actions were taken rather than on knowledge of theory or philosophy. As the superintendents related things that worked, their stories portrayed satisfaction, and in some cases, gratitude. Perhaps an additional lesson is that results matter and are less critical than a primary focus on formalized policy and procedure.

5.2 RESULTS OF THE FOLLOW UP QUESTIONS

Following the storytelling, I asked each superintendent several questions designed to gather additional information about their background and to bring them back to the present with regard to gifted education. Their answers were enlightening. In some cases, they led to additional stories that further illuminated their positions on gifted education in the same vein as their earlier narratives. In other cases, their more formal, constructed statements about gifted education were clearly a return to the more official nature of their public positions.

5.2.1 Placing Participants on the Gifted Education Continuum

Participants were asked to describe their philosophical position regarding gifted education on a continuum with polar opposite views. At one end was the contention that gifted programs are elitist, flawed, and unnecessary, and at the other, the belief that gifted programs are essential to maximizing potential in our nation's brain trust (see Appendix C for the full text of the prompt). As the superintendents moved from reminiscing about their roles in the past and returned to discussing prominent issues in their current role of chief executive, the superintendents' word

choice and demeanor slipped into Seidman's (2006) public tone, though most appeared and sounded entirely sincere. All participants spoke about the importance of meeting the needs of every student (including the gifted), thus positioning themselves closer to the "essential" end of the gifted education continuum. Not surprising, many started their answers by stating that they were "in the middle" of the continuum. Several participants spoke of elitism as avoidable through the more thoughtful design of the gifted programming, and one elaborated on the need for all students to feel special.

Superintendent Coffman's remarks were especially interesting and illustrative of the need for an indirect method of determining truthful underlying attitudes and belief systems. Despite his extremely negative attitude toward the student he portrayed, Coffman admitted he was successful in the accelerated mathematics classes his parents had insisted be made available. Despite the fact that the student's early graduation was clear proof of academic prowess and need, Coffman persisted in his contention that the accommodations were excessive, unnecessary and problematic. Yet his stated position on the gifted education philosophical spectrum was similar to the others – all students deserve a good education, to have their needs met, to enjoy opportunities, etc., and that gifted education was a necessary component of public education. It was unclear whether Coffman noticed this apparent contradiction, because the story he told and the answers he gave to the follow up questions were equally emphatic. This dichotomy between attitudes derived from a memorable story versus those professed in response to a direct question points to a need for further research on which attitudes translate into programming reality.

Regardless of their professed position on the continuum, some superintendents seemed unable or unwilling to "take on" the gifted program. A recurrent conundrum surfaced during the interviews: several superintendents appeared very aware that they influenced gifted education in

their current role and mentioned that they were working on aligning gifted education practices with their visions for it. Others, however, seemed to accept how gifted education was practiced in their districts as the status quo. Some seemed fatalistic about it, while others did not appear to place it high enough on the priority list to tackle the task of disrupting it. Several referenced the time and cost involved in investing in a different model. Others who mentioned the individualization of instruction, tailoring gifted programming for talent development, and/or more inclusive practices, seemed wistful, as if these desirable ideas were in a distant view but were not practical, realistic, or attainable. These antithetical inclinations may reflect differences in leadership styles and behaviors that are worthy of further study and that could have a significant impact on services in an individual district or the field at large.

Overall, in answers to this question, there was overwhelming verbal support for gifted education as a concept, though presumably, the devil was in the details.

5.2.2 Superintendent Perspectives on the Effects of Budget Cuts

Because the literature was clear on the vulnerability of gifted education programs nationwide, I asked these Pennsylvania superintendents what effect recent budget cuts have had on gifted education in their districts. Surprisingly, only two superintendents of the 18 admitted to changes in gifted education as a result of budget problems. One of those two superintendents lamented the excessive attention to proficiency and the resulting difficulty with maintaining a focus on excellence as a result of the No Child Left Behind Act. He specifically expressed resentment over the more sympathetic feeling tone of this unofficial name for the Elementary and Secondary Education Act. Although his feelings toward the consequences of NCLB were clear, this individual did not confirm the ultimate status of gifted education in his district. The other

superintendent stated cuts had been made and responsibility for gifted education had been “assigned to someone” but did not elaborate on the details of what sounded like an involuntary duty. In both cases, there was a distinct change in the tone of the interview and I felt it unwise to press for more information.

The majority of superintendents reported no change in their gifted education programs or that recent changes were for the better, a finding at odds with the literature. Superintendents reported that during their tenure, they have worked on improvements in philosophy and delivery modes such as better alignment to the regular program, increased opportunities opened to more students, and changes in staffing that improved relations with regular education teachers. It appears that in Pennsylvania, the existence of a gifted mandate in Chapter 16 may be an effective counterbalance to this aspect of NCLB’s collateral damage and the precarious state of gifted education indicated by the literature.

5.2.3 Who is Responsible for Gifted Education?

As a result of a discussion I had with one of the participants in the pilot study, I decided to specifically ask the superintendents who was responsible for gifted education in their districts. I wanted to elicit a sense of personal responsibility for gifted education locally - an acknowledgement of the superintendent’s power and authority to initiate and sustain changes in gifted education and culture. This attempt failed, however. In the study’s pilot, three of the five superintendents had claimed ultimate, personal responsibility for gifted education as they did for all other facets of the educational programs in the districts they had lead. When interviewing the members of the Forum, however, all but two superintendents named another person whose position on the organizational chart indicated primarily responsible for gifted education. Most of

these positions held some variation on the titles of “Director of Pupil Services” or “Special Education Coordinator”. Rewording the question might have produced responses that were more indicative of the acknowledgement of power and responsibility I was looking for than the more pragmatic organizational assignment they identified for me. It is equally plausible, however, that they don’t see themselves as functionally responsible for gifted education in their districts or are unaware of their influence in determining its ultimate potential or fate.

The tone of many superintendents during this part of the interview seemed more resigned than empowered. Participants, such as Superintendent Hensley, who lamented that gifted programs in her experience were always disappointing, recognized existing flaws, inconsistencies, unfairness, and other problems with the gifted program; yet, they were remarkably tolerant, or perhaps resigned, as if they felt that change was not possible or that the effort would be overwhelming. Several, such as Superintendent Pecora, alluded to the influence parents of the gifted students and others had over any attempts to alter program components: “We’ve tried to work with differentiated instruction and individual projects and so forth but it seems that pullouts and special programs are what people tend to want.” Statements along these lines caused me to sense acquiescence to the status quo and a reluctance to spend political capital on this issue.

5.3 SUMMARY

Superintendent responses to the more direct questions produced a much different profile than those of the stories. The solicited stories demonstrated a wide diversity in perspective, a comprehensive range of embedded issues, various settings and clearly positive or negative affect,

whereas answers to the direct questions were highly similar in many cases and appeared to be more constructed and rehearsed, thus confirming the value and utility of story in gaining access to less guarded beliefs and feelings. The pragmatic value and implications of these data will be further discussed in Chapter 6.

6.0 IMPLICATIONS FOR ADVOCACY AND IMPROVEMENT

To fill a void in existing empirical literature and to contribute to the survival and advancement of a beleaguered segment of public education, I investigated the perspectives of district superintendents and their early experiences with gifted education. By combining the qualitative strategies of narrative inquiry and the critical incident technique, I was able to contribute to the challenge posed by leaders at the National Association for Gifted Children (NAGC). Researchers were charged with inviting school administrators into the academic discourse about gifted education by catering to their informational and training needs (NAGC, 2008a) and including their habits and views in research endeavors (Robinson, 2011). In order to do so, I posed the following two research questions:

1. What stories do superintendents tell about their experiences with gifted education?
2. What can we learn from these stories about gifted education program components or design?

Rather than investigating superintendents' philosophical stance toward gifted education more directly, I instead requested that the participants share their personal life intersections with gifted education in the form of a recalled story. These narratives, in keeping with the theories behind the critical incident technique and the psychological concept of implicit social cognition, provided a unique insight into the beliefs, attitudes, and experiences that have undoubtedly influenced or contributed to the participants' foundational stances on gifted education, and in the

process, highlighted potential avenues, both for advocacy and areas for of improvement within a particular superintendent's district. The following sections will discuss the utility of these stories - how they can be used by practitioners in the field and their potential to inspire further research with school leaders.

6.1 REVIEWING WHAT'S WRONG WITH GIFTED EDUCATION

Americans have had an inconsistent and contentious relationship with gifted education. The history of gifted education has been mired in controversy, interspersed with periods of intense interest and substantial neglect (Gallagher, 2000). At the national level, no legislative or financial supports protect a population of students described by dozens of different state-specific definitions (NAGC, 2008f). No Child Left Behind has exacerbated the precarious place gifted education occupies in schools because of its emphasis on testing, accountability and reforms that focus on helping all learners to reach grade level proficiency rather than on excellence (Gentry, 2005). The latest reform movement, adoption of the Common Core Standards that are purportedly more rigorous than the state standards they replace, is a double-edged sword. Gifted education experts support more demanding standards that strengthen the curriculum, yet express concern for the increased teacher time required to assist struggling learners in achieving those higher benchmarks and the exclusive use of assessments that are limited to grade level content and skills. Federal statutes protect exceptional students with handicapping conditions and require districts to accommodate their special needs. However, this protection is not offered to high ability learners, who often need instruction beyond their grade level or other curricular interventions to maximize their potential.

At the state level, gifted students have been defined in numerous ways and gifted programs funded either fully, partially, or not at all. In Pennsylvania, gifted students are defined and services to them are mandated, but these services are not funded. Teachers are not required to be specially trained to work with gifted students and the decisions about programming model, staffing and services provided or denied are left to local discretion with minimal oversight or enforcement (Pennsylvania General Assembly, 2013). Despite the participating superintendents' assurances of program stability in the face of decreasing resources, there remains among many of them, a persistent undertone of dissatisfaction and tolerance rather than an embracing of the policy and practice that comprise gifted education in their districts.

Recent studies have addressed the ongoing lack of consensus and direction. A new theoretical paper advocated a four-part approach to talent development and a thorough reexamination of the role of gifted education in schools (Renzulli, 2012). Other theorists have recommended a new direction in gifted education based on psychological science and the pursuit of eminence as the goal of gifted education (Subotnik et al., 2011). Additionally, Dai and Chen (2013) discussed three major paradigms in gifted education in an attempt to bring greater clarity to research and practice and to demonstrate relationships between the theoretical and pragmatic applications. Each of these intriguing new perspectives is worthy of consideration, as they attempt to assuage the debate as to who the gifted are, what should be done with or to them, how recommended interventions should be accomplished or delivered, and ultimately, why gifted education is necessary. In other words, these prominent researchers seem to be pondering the very existence and purpose of their own field: what is the ultimate purpose of gifted education? It remains to be seen which, if any, of these latest attempts to unite and move forward will proceed, or whether all will remain frozen in a state of existential quandary.

The stories I have collected and analyzed will not solve the ongoing dissent at the theoretical level, but they do serve several purposes. First, they shine a light on memorable, emotional, and potentially critical experiences in the lives of public school decision makers and illuminate the possible origin of their attitudes toward gifted education. In addition, they acknowledge the leadership role superintendents hold and their position of power in making decisions about gifted education policies and resources at the local level, where services and funding most often originate and are consumed. Lastly, they model a way to start a conversation between leaders and practitioners about local gifted programming while inviting administrators into the discourse of the field.

As the educational conscience of the nation remains preoccupied by the many pressures and consequences of NCLB and the experts continue to seek common ground, school is in session, and gifted students, however defined, are present. To prevent their status from worsening in such a tumultuous climate, gifted education advocates remain active and vigilant, guarding what resources they have and holding to practices often not embraced or even supported by others. Existing literature was silent on the topic of school leaders and gifted education, but it is in this climate that the teachers and coordinators who work with the children must navigate the turbulent waters of the field.

6.2 POSITIVE DEVELOPMENTS IN GIFTED EDUCATION

Recently, NAGC published program standards for gifted education and evidence-based programming models currently exist with training available for teachers and coordinators (Peters, Matthews, McBee, & McCoach, 2013; Renzulli & Reis, 1994; Treffinger, 2004). After decades

of “dumbing down” the curriculum (Renzulli & Reis, 1991a), the national discourse includes the word “rigor”. In the current study, several superintendents recognized subject and grade acceleration strategy as a viable and cost effective intervention for meeting the needs of academically advanced students. Acceleration works (Colangelo et al., 2004) and the positive stories from the superintendents who spoke about it confirm its utility and effectiveness. Most importantly, all participants acknowledged (in the question phase after the storytelling) the duty of schools to meet the diverse needs and to maximize the potential of all students, including the gifted. A number of superintendents reported engaging in active revisions of their gifted programming models, including progressive changes in staffing and curriculum. Such positive developments support the viability of gifted education and the need for quality, workable programs, at least in the schools represented in this sample. However, with so much work required to improve services and mitigate charges of elitism, problems with identification, labeling, non-aligned or competing gifted and regular educational programs, and the lack of formalized training for gifted coordinators, knowing where to start is daunting and the task seems overwhelming.

6.3 HELP FOR LOCAL GIFTED EDUCATION ADVOCATES

The job of superintendent is complex with competing responsibilities and priorities, accountability to a wide range of stakeholders, and the need to remain mindful of the public nature of the role (Polka & Litchka, 2008). Like top leaders in other fields, superintendents speak to and for many and must be aware of the potential implications of what they say. They create a public record in doing business and they are in charge of children. For all these reasons,

the narrative approach implemented in this study was an ideal method by which to garner less scripted or guarded accounts of superintendent's beliefs, attitudes, and experiences involving gifted education.

According to critical incident theory (Webster & Mertova, 2007) idiosyncratic attitudes expressed in critical event experiences with gifted education can be analyzed to better design and implement programming, thus linking the current research to its utility in practice. To best represent the range of emotion (i.e., positive and negative affect) and issues (i.e., identification, curriculum, and social justice) when discussing the possible implications of the stories, I selected five narratives to demonstrate how the underlying elements in the superintendent stories might help to inform gifted programming in his or her district. It is important to note that in the story analyses, the suggested responses to the embedded issues are generic, and reflect general best practices, but are based on the limited, outsider vantage of the researcher. These specific examples are not generalizable but illustrate the process and principles of CIT such that:

- Stories are low-risk entry points to powerful attitudes toward gifted education issues, which are often emotional and significant.
- The embedded issues in the stories of any superintendent in any school are clues to potentially effective local advocacy and can point savvy gifted coordinators hired by these superintendents in directions more likely to be met with support rather than resistance.

The following five analyses illustrate possible approaches to and ramifications of stories by coordinators who may find themselves faced with the responsibility of working for each participant superintendent and leading the design and/or implementation of gifted programming in their districts. The first two sections revisit stories with opposite affects: one reflecting a

positive overall attitude toward gifted education as a result of an early encounter and one exhibiting a primarily negative stance as the participant's foundational experience. In the following three examples, I explore the impact and potential responses to stories portraying the embedded issues of identification, curriculum, and social justice, as the predominant topics in the narratives.

6.3.1 Revisiting Superintendent Amberg: Approaching a Positive Affect

Superintendent Amberg had a highly positive and very unusual experience as the first-year teacher of an extraordinary student, taking all the right steps to accommodate the high level of academic talent he witnessed. In his district, Amberg was willing and able to include acceleration as an option for gifted students. He viewed data (previously collected solely for the purpose of formal identification) as valuable evidence that could be repurposed to support his recommendation for a grade skip. Most importantly, Amberg did not behave as though this identified student's unmet gifted needs were not his responsibility.

However, it was curious that Superintendent Amberg did not mention the gifted support teacher, who apparently was not a factor in the event. In my personal experience, when schools employ the pullout model of gifted education, the teacher for gifted students is often fully scheduled with groups cycling through their periodic time in the gifted program classroom and is not available to assist in the intervention for a single child who is grade levels beyond the class. In this situation, some classroom teachers believe that their duties lie with their other students because the needs of all the gifted students are presumably addressed and remedied by the gifted program teacher. As a young teacher, Superintendent Amberg took responsibility for his student, attempting minimally disruptive strategies first. When these lesser interventions proved

insufficient, Amberg kept searching a solution that would work for his student. This resolve demonstrated an appreciation for empowerment, taking the initiative to solve a problem. He used a team approach, lining up support and evidence before approaching his principal to accomplish the goal of placing the student in a higher grade. The advocacy implications from data in this story are extremely encouraging.

A gifted coordinator, making a case for programming best practices in Amberg's school district would be effective by emulating his procedures and modeling this active problem-solving behavior with classroom teachers. With acceleration, a major cost-effective strategy for meeting extreme academic strengths easily put into place in a school lead by Superintendent Amberg, the coordinator would be able to move on to expanding services to students who may need only subject rather than grade acceleration – often a more difficult intervention to navigate. Additionally, this superintendent would likely be open to using available resources to foster talents in other areas with appropriate evidence to support whatever recommendations are made. He may expect proactive and creative solutions to student needs and value initiative in implementing them. Gifted education advocates in this district are likely to find success in making their case and should strategize with confidence to increase and improve services to students across a variety of high-end needs.

6.3.2 Revisiting Superintendent Coffman: Approaching a Negative Affect

Unlike Superintendent Amberg, Superintendent Coffman's experiences with and attitudes toward most of the key components of gifted education were decidedly negative. He believed that the student in his story was identified too early and unnecessarily, that he was accelerated beyond grade level improperly and that the services provided to him were stressful to the staff and

detrimental to the student's social and emotional development. Conversely, by not demanding consideration for his own gifted child, he modeled what he believed to be admirable restraint and better parental decision-making. The advocacy implications from the data in these stories are significantly more challenging.

A coordinator in this district would find it enlightening and very helpful to have heard this story and as a result, become aware of Coffman's tainted vision of gifted education. Advocacy efforts toward moving gifted education forward here would necessarily focus on foundational strategies such as addressing academic needs through differentiation in the classroom to lessen reliance on formal identification and to enable students with mild to moderate needs to be accommodated without major disruption to staff. This superintendent would likely prefer a coordinator to assist teachers rather than make demands of them. A pullout model that did not impact regular education likely would be better tolerated than a collaborative model, though the individualization of services required by Chapter 16 would be the ultimate goal. The coordinator would be wise to focus on triaging high end needs so that student recipients of specialized services are obvious to everyone as deserving of them. He or she would need to cultivate a sense of duty to such children to counteract the negative culture of burdensome entitlement. It would likely be necessary to move slowly, offering staff development opportunities on the nature and nurture of gifted students, presenting research and how-to assistance on supported practices such as pretesting, curriculum compacting and other such strategies that are effective in accommodating academic strength with less disruption, and maintaining a lower profile. Changes in this school would most likely need to be made first with willing classroom teachers. A gifted education teacher working for this administrator would need to address issues of fairness regarding what constitutes a need in gifted students, and how

services are made available to them. Teachers should be praised for their input and cooperation, and as they occur, successful interventions with sympathetic students should be highlighted to begin to modify the culture where accommodating needs of this kind has been viewed as an unfair and unnecessary burden to the staff.

Working with the school psychologist, the coordinator should address some of the fundamentals of what IQ measures, how that information should be used and when identification assessment should be done. Superintendent Coffman's strong belief that schools not provide college level courses is supported by judicial decisions in Pennsylvania (Haney, 2013), but must be tempered by the increasing availability of school choice and the explosive growth in the online environment. The negativity exhibited in both stories would make acceleration difficult or unlikely, though working with staff to alleviate their resistance and earn their support might be a good place to start. A coordinator in this district faces multi-faceted issues and must be patient in working toward improvement.

6.3.3 Revisiting Superintendent Cooper: Addressing Identification Issues

Describing them as both heartbreaking and painful, Superintendent Cooper's story expressed a decidedly negative affect regarding her experiences with gifted education. Her story involved the difficulties with saying no to a student who failed to meet the gifted program entrance criteria. Yet, as she elaborated in her stories, there was no sense of negativity toward meeting the needs of high ability students. Rather, Cooper's issues were primarily with the identification guidelines dictated by Pennsylvania's state code, which require that students should have an IQ of 130 and be in need of specially designed instruction to qualify for the gifted label (Special Education for Gifted Students, 2000). While a team determines the need for a gifted IEP (GIEP),

the IQ threshold is a fairly standard entrance criterion (NAGC, 2008b, Pennsylvania General Assembly, 2013).

However, the Pennsylvania statute does provides for an alternative route for eligibility if other measures have indicated gifted ability when the student's measured IQ is lower than 130. These other criteria are not specified within the statute, and furthermore, it remains unknown as to whether Superintendent Cooper was fully aware of this alternate route to gifted eligibility. While she found the statute's rigidity distasteful and difficult to communicate to hopeful families and young children, she nonetheless drew the line at the recommended IQ score. Because schools in Pennsylvania design gifted education with significant variety, it seems likely that Cooper might have some idea of the discretion allowed under the law, but perhaps she is unwilling to invite the kinds of debates and appeals that would result from more flexible eligibility criteria. Unpleasant as it may sometimes be, perhaps she prefers the rigidity of the IQ threshold to the more ambiguous criteria involved in the alternative route as the lesser of two evils. A coordinator working here should attempt to determine the source of her beliefs by acknowledging the dilemma of formal identification and exploring other possibilities (Borland, 2005; Peters, 2013). Should she prove unaware of the flexibility built into Chapter 16, bringing this fact to her attention would be a good first step and her reaction to the news would be key information in moving forward. The advocacy implications of the data from this scenario are quite hopeful. A coordinator working with identification problems might start to blur the line between complete service and no service by providing differentiated materials and activities to classroom teachers and encouraging their use. Cooper mentioned that the student who fell short of entrance to the program would still be able to benefit from some of the same services as identified gifted students. A coordinator should ensure that this indeed is so. He or she might

also establish different criteria for participation in different activities, to encourage more diverse participation dependent upon the nature of the activity and the interests of the students. Simultaneously working toward reducing the number and kind of “gifted-only” opportunities offered in the school would help alleviate the identification conundrum as would the visible use of the student’s gifted evaluation data in designing instruction for the classroom.

Superintendent Cooper’s follow-up stories enumerated several issues embedded in the undesirable behaviors of older identified students, which again, related to the problems inherent in labeling students as gifted. A coordinator in this district should examine each scenario in the story: the grade manipulation, the underachievement and the false security as work gets harder, and begin to address how to minimize the effect that “being gifted” has on poor decisions students make. Partnering with guidance counselors and parents, the coordinator should advise gifted high school students on individualized decisions that focus on enhancing their future. Solutions to these problems have been implemented in other Pennsylvania schools, and in fact, Cooper was trying to actively address some of these issues in her district by exploring practices elsewhere. For example, Cooper tried to control the number of students identified by the stringent application of the IQ threshold; yet, while this strategy of fewer students limits these types of behavioral problems, identified students still need assistance in overcoming them. Because the overarching affect of this leader was directed toward program improvement, a coordinator working for Superintendent Cooper could likely expect support for initiatives that alleviate her concerns and better address the needs of high ability students.

6.3.4 Revisiting Superintendent Carrozzi: Addressing Curriculum Issues

Superintendent Carrozzi's story illustrated her strong opinions on what should be done with students based on their academic abilities and artistic talents. At the heart of her stories was the overarching goal to provide each of her children with the specific curricular responses that would enable them to fully engage in school and maximize demonstrated strengths – one in math and one in music. It was especially significant that this superintendent chose to juxtapose the stories of each of her sons to make the point that she advocated for both of their unique, individual needs. For one of her sons, (implementing an Advanced Placement Calculus course) this process was relatively easy, but for the other, she believed it was unnecessarily difficult.

Carrozzi's belief that school "didn't fit" her second son was an opening to a belief system that cannot be underestimated – talent development. Complications with formal identification, school bureaucracy, and the very nature of what gifted education should or could be, altered the specific means by which the students' needs were successfully met, but matching opportunity to the unique talents of each child was clearly her focus. The dichotomy of identification versus curriculum and the order in which they occur is at the heart of much controversy in gifted education (Gallagher, 2000). The implications of the data in Superintendent Carrozzi's story are complicated.

A coordinator working in Carrozzi's district would need to be mindful that while navigating identification in Pennsylvania is required, it does not preclude working toward increased opportunities for talent development by expanding the curriculum in general and/or by working on alternative pathways for individual students demonstrating strong talents, creativity or motivation. State law does not require that schools establish curriculum for gifted students beyond what exists in the established scope and sequence (Haney, 2013) or that schools

accommodate abilities in the arts (Pennsylvania General Assembly, 2013) however, it also does not preclude a school from doing so. As a parent, Carrozzi was successful in securing both. Her story included a *quid pro quo* expectation (recall that she had worked to install Advanced Placement Calculus in the district as her older son's needs dictated and, as a result, had expected in return a more favorable reception for her younger son's musical strengths) that may prove helpful in garnering support for curricular initiatives as negotiations among teachers, parents, and administrators for specific policies and services are often necessary in this area of public school education. Clearly, Superintendent Carrozzi viewed students as individuals, and having experienced such differing scenarios with her own children, she may be quite willing to expand gifted education beyond the limiting rules of the state's somewhat prescriptive model. A coordinator in this district could likely expect support for advanced curriculum additions and talent development initiatives beyond traditional academic prowess.

6.3.5 Revisiting Superintendent Palmieri: Addressing Social Justice Issues

Superintendent Palmieri's story demonstrated the importance of listening quietly until the story ends. As he was deriding his inherited gifted program's International Days' very public exhibition, I had expected the embedded issue to be curriculum and the story's resolution to involve activities in the gifted program to be more aligned with the regular program's standards or connected to individual student interests rather than the requirement that all gifted students participate in the public extravaganza. Certainly, curriculum was a prominent feature, but the primary concerns embedded in Palmieri's story were connected to fairness and inclusion.

Superintendent Palmieri was not concerned with the content of the program, as evidenced by the minor change in title from International to Humanities Days. Instead, he chose to explain

his contempt for the practice of taking a yearbook photograph of the gifted program participants and how the improved Humanities Days were far more inclusive and characteristic of a school-wide celebration of learning than the previous arrangement had been. It was not clear whether his reported use of the gifted students as group leaders in the activities was an endorsement of the need to develop leadership skills in the gifted students or a political strategy to maintain the sense of specialness among them (and perhaps their parents). Regardless, Palmieri introduced a more inclusive tone to his school's gifted education tradition, but the overriding need to diminish the elitism of the past was obvious in his words and in the enthusiasm with which he remembered the story. The implications of these data are multi-dimensional.

In Superintendent Palmieri's district, a gifted education coordinator would be wise to expand participation decisions to include non-identified students for components previously reserved for gifted students only whenever possible. One persistent complaint about traditional gifted programs is the indefensible practice of requiring formal gifted identification as a prerequisite for attendance or participation in activities such as field trips to museums that would arguably benefit any child (Peters et al., 2013). Superintendent Palmieri was respectful of school tradition, and recognized the need to maintain visibility of the gifted program, yet found a way to mitigate the blatant unfairness of having the gifted students perform as others watched a learning activity that he believed had benefit for many more students. A gifted advocate working with this administrator might capitalize on the consultant teacher model where staff development in unit planning might involve activities that are differentiated and engaging to all students. This superintendent does not appear to value activities where gifted students are segregated and are the sole beneficiaries of higher-level instruction.

In addition, improvement in this school would involve closer attention to the curriculum offered to gifted students, its alignment with the regular program and its level of rigor, to avoid limiting high ability students to programming that is fun and educational, but isolated from other learning.

6.3.6 Implications for the Use of CIT for Local Advocacy

While as a researcher, I formally requested and received access to willing superintendents to collect their stories about gifted education, the underlying utility of this study was to demonstrate the value of these critical incidents for effective advocacy and program improvement. The question remains: how might a subordinate of these leaders accomplish this goal in a more typical setting rather than that of a formal research study? Recall the scenario established in Chapter 1. The need to share gifted experience stories appears almost universal and somewhat irresistible. The invitation by either a newly hired or veteran coordinator for administrators to tell their stories would be a non-threatening, highly informative and completely appropriate conversation. Many administrators, more used to fielding “official position” questions, might welcome the opportunity to share a story presumably outside of anyone’s job description or official duties, thus somewhat off-the-record, and uncritical of the current programming. Embedded issues along with storyteller affect, setting and perspective are rich and useful information sources applicable to program improvement and gifted education advocacy. Connelly and Clandinin (1990) suggest that narrative, operating in educational inquiry, generates a new agenda of theory-practice relations. [They] point out that researchers need to tell their stories, too. In the telling of researcher stories, the stories of the participants merge with the researcher’s to form new stories that are collaborative in nature. I have suggested as much, in

the coordinator advice offered for each superintendent story scenario in this section. I recommend that gifted education coordinators talk to their superintendents about stories in the field, telling their own and those collected as they actually work with the district's gifted children, as a valuable information *sharing* tool for them as well as the data collection tool it has proven to be!

6.4 BROADER IMPLICATIONS FOR FUTURE RESEARCH

The earliest uses of the critical incident technique essentially involved asking a number of respondents to identify events or experiences that were “critical” for the purpose under study. These incidents and the lessons learned from them individually were then pooled for group analysis about components of the event and commonalities among the incidents (Butterfield et al., 2005). In this smaller study, there was no clear front-runner among the types of problems and embedded issues experienced in the gifted education event, suggesting that the problems inherent in gifted education are diverse and ubiquitous. As such, solving these issues pragmatically requires an individual approach to each school district, using the superintendents' experiences as a map of sorts for working through local problems. While a larger number of interviews may have indicated a more definitive predominant issue, the diverse perspectives in this study reflected the disarray in the field at large (e.g., the lack of consensus in definitions, the variations in rule and practice among and within states, the paucity of resources devoted to gifted education at all levels, and the lack of a united and national effort). Several themes and patterns emerged in the data examined across the group, however, that yielded additional information

each individual story could not. This phenomenon would only be improved with additional stories providing data about what experiences superintendents have had with gifted education.

Additional research studies are needed to better illuminate the place that administrators hold in gifted education and to reach conclusions about them in informing advocacy efforts. This study supported the need for additional research directed toward school administrators in general and superintendents in particular concerning their views on gifted education and the implications of those views. Further, it pointed researchers in several important directions for future study.

First, the experiences each superintendent had with gifted education were highly individual and personal. Much could be learned from studying how previous experience actually translates into current practices. In addition, this study's method of soliciting a story and deducing strategy from the imbedded themes could be tested in a case study model or as action research by a coordinator charged with program design or revision. Should such stories be solicited at the very onset of the search for a new direction in a school's gifted program, valuable time and resources could be saved and committees prevented from traveling down a deserted road or taking a wrong turn, one perhaps at odds with the superintendent's views.

The opportunities to learn and seek direction from the leaders of the schools where gifted education actually takes place are many and substantial. With such strong conviction among both supporters and critics of gifted education, it would seem prudent to solicit these stories locally to support advocacy efforts and to conduct the critical incident technique as advocated originally, using larger numbers of collected events to look for prevalent patterns to be addressed on a larger scale. As evidenced by this study, superintendents have strong, deep, and often emotional experiences with gifted education that provide insight into their willingness (or not) to

improve it or make it more of a priority. Bringing superintendents and other administrators into the conversation as they propose the policies and make the resource decisions for districts small and large is a strategy advocates for gifted education can no longer afford to ignore as education evolves across the United States.

APPENDIX A

RECRUITMENT LETTER

Dear -----,

I am writing to request your help with research related to my doctoral dissertation at the University of Pittsburgh. The purpose of my study is to learn about Superintendents' encounters with gifted education in any of your roles – personal, parental, or professional. I am collecting stories as my unit of analysis and would appreciate the chance to listen to one of yours.

Dr. Jerry Longo, a member of my committee, suggested that I contact members of the Forum for Western Pennsylvania Superintendents to assist with my study.

If you are willing to participate in this study, I will schedule a time to meet with you. I'll ask you to tell me a story about someone who comes to mind when the topic is gifted education – your own story, that of your child, a student or someone else. I will record your story and ask some general demographic information, none of which will identify you. The interview should take about half an hour.

There are no foreseeable risks or benefits to your participation. Responses will be maintained in confidence and no identifying information will be used other than to describe the characteristics of the aggregate group sample (age range, gender representation, years of experience, etc.). The stories will be recorded and upon transcription, the audio files will be erased. Your participation is voluntary and you may withdraw from the study at any time. This study is being conducted solely by me.

Enclosed is a participation form. Please return it to me in the enclosed stamped envelope. If you agree to participate, I will contact you to schedule a meeting. I will follow-up this letter with an email reminder. Thanks in advance for your willingness to help with my research.

Sincerely yours,
Linda Conlon
R. Gerard Longo, Ph.D.

APPENDIX B

PARTICIPATION FORM

Superintendents and Gifted Education

_____ I am willing to participate in this research study to explore Superintendents and gifted education. I understand that responses are completely confidential, no identifying information will be maintained and that there are no risks or benefits to my participation. The interviews will be recorded, but erased as soon as the content is transcribed.

_____ No, thanks.

_____ Maybe. I need more information.

Name: _____

District: _____

Phone number: _____

Email: _____

Researcher: Linda Conlon
Secondary Academic Specialist – Quaker Valley School District
University of Pittsburgh Doctoral Candidate
Phone: 412-749-6042 (office)
Email: conlonls@gmail.com

APPENDIX C

INTERVIEW PROTOCOL

Introduction:

Gifted education is a practice in public schools that usually evokes emotion. People are rarely neutral on the topic and nearly everyone has a story about the joys or evils or idiosyncrasies of gifted programs.

Some people think gifted education is unfair or elitist; others think it's as important as special education. Some think it's fluff; others think it's literally rocket science. They're probably all right, in some ways.

*When you hear the word "gifted", what comes to mind? Tell me a story about "gifted". It could be about yourself as a child or an older student, an experience as a parent, as a teacher or an administrator (or in any of your professional roles.) It could be about something or someone you observed as a bystander, neighbor, or a relative.... or now as a superintendent – **what story about "gifted" stands out in your mind?***

Wait time.....

If none is forthcoming, say: think of a story someone has told you that you remember or something you've seen or read that stuck in your mind.

Background:

In your career as an educator, have you had any specialized training in gifted education? (Course work, conferences, in-service?)

At one end of the spectrum there are educators who believe gifted education should be abolished – that it's elitist, that it's unnecessary, that in tight times it's a luxury we can't afford and that these students will be just fine with no additional attention. At the other end of the spectrum,

there are educators who believe the education of gifted students should be a priority, that these children are our future's best hope and that they should have specialized opportunities to maximize their potential and their value to society. What do you think? Where do you fall on this continuum?

During recent years as budgets have shrunk and competition and tuition to charter schools has impacted public schools, how has gifted education in your district changed?

Who is responsible for gifted education in your district?

Demographics:

Gender?

What is your age?

In what state(s) did you spend most of your k-12 years?

How many years have you been a superintendent?

In how many districts have you served as a superintendent?

What is your approximate district enrollment?

Are you a parent?

Have your own children ever been involved in a gifted program of any kind?

Thank you so much for your time and help with my study.

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