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Perspectives on Equity in Gifted Education

Karen A. Kraeger
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Perspectives on Equity in Gifted Education

Karen A. Kraeger

A Dissertation
Presented in Partial Fulfillment of the Requirements for the
Degree of Doctor of Education
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ABSTRACT

Increasing pressures of accountability in education and calls for equity make gifted education a controversial topic. While much has been written about certain aspects of equity, such as underrepresented groups in gifted education, little research has examined a more complex view of what makes a gifted education program equitable. More specifically, there was no research combining perceptions of the different aspects of equity in gifted education-access, participation, and benefit.

This qualitative study used grounded theory to establish a coherent understanding of the current perspectives on equity in gifted education. Drawing on gifted specialists at the local, regional, and state level, this study explored the perceptions of the elements of equity, needs of gifted learners, and barriers to meeting those needs. These perspectives provided the building blocks of a theory of equity in gifted education within the context of programs in four states. Analysis revealed the elements of the equity theory included access, participation, benefit, leadership, funding, and belief in excellence, which must all be present to ensure equity in a gifted education program.

Keywords

Gifted education, best practices, equity, access, service delivery, participation, benefit, identification, underrepresented populations, and talent development.
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Chapter 1: Introduction

Since its inception, gifted education has been seen by some as elitist and unequalitarian, serving a very small number of children. Impressions are subjective, especially when not based on fact. The fact is, there are between three and five million gifted learners nationwide (Council of State Directors of Programs for the Gifted, 2013). Although the number of gifted learners is only about half of the six and a half million students with disabilities that are served by schools in the United States (Scull & Winkler, 2011), they still represent a significant subgroup of the student population. While no one would argue the necessity of meeting the needs of students with disabilities, not all agree on the importance of serving the learning needs of gifted students. This is evident in the wide variation of laws and funding across the country with regard to gifted education (National Association for Gifted Children, 2013). One part of the issue of serving gifted learners is a concern for equity. Equity in gifted education is complex issue needing further exploration.

Gifted education is well represented in the research with over 1,000 studies focusing on some aspect of gifted learning (Rogers, 2002). Recently, there seems to be growing interest in examining conceptions of giftedness, identification, and purpose of gifted education. In a particularly significant monograph, Subotnik, Olzewski-Kubilius, and Worrell proposed, “outstanding achievement or eminence ought to be the chief goal of gifted education" (2011, p. 3). The thoughts in this monograph represent an evolution in
gifted education toward a more equitable and economically defensible foundation. The authors recommend following the lead of other widely accepted talent development models such as sports and music where early support and encouragement of talent, as well as psychosocial coaching, is widely accepted (Subotnik, Olszewski-Kubilius, & Worrell, 2011). By taking this perspective, gifted education can diminish the calls of elitism. A well-rounded approach to talent development also creates a higher likelihood of gifted children attaining eminence in their field of interest during adulthood (Subotnik, Olszewski-Kubilius, & Worrell, 2011). The economic imperative behind this approach is that talent development of future creative producers and innovators is financially prudent because of the potential return on investment through gifted individuals’ eventual creation of new inventions, technology, medical advances, and solutions to society’s most troublesome problems.

Ziegler and Phillipson (2012) agree that the purpose of gifted education is to develop excellence in students. Their work extends this initial idea to a recommendation of a paradigm shift for gifted education—moving from a mechanistic view based on the components of giftedness to a systemic view that calls for an interaction between the individual needs of talented students and the learning environments they inhabit (Ziegler & Phillipson, 2012). Their proposal in some ways removes the identification and equity dilemmas that have diminished support for gifted education. Because the model focuses on providing initial enrichment opportunities to many students, standard gifted identification processes are not a part of this system. The model requires cycles of learning opportunities followed by evaluation of talent development to assess need for more specialized learning pathways. This continues throughout the student’s educational experience. In many ways,
this model is similar to Renzulli’s Schoolwide Enrichment Model (2010). Indeed Ziegler and Phillipson recommend using existing gifted program models with modifications to create a richer learning experience for talented students. The key change is the ongoing monitoring of specific learning needs of each child and the resulting adjustments in the learning pathway provided to encourage continued development of the child’s talents (Ziegler & Phillipson, 2012). While provocative and potentially influential, Ziegler and Phillipson’s work fails to address the need to examine the new factors influencing gifted education today and does not address potential inequities that could still exist, even with a broader inclusive framework. There is still the possibility of programs meeting the learning needs of high ability students not being offered in fair and consistent manner in all school districts, thus perpetuating inequity. It also does not take into account the massive need for professional development necessary for classroom teachers to be partners with gifted teachers in creating a wide scale talent development model.

Problem Statement

Despite the variety of available program models and service delivery, there exists inequity in the services gifted learners receive depending upon many factors. Some of these include community type, identification methods, mandate for gifted education, funding for gifted education, teacher training, and service delivery models. These factors may be influenced by economic constraints on local school district budgets, proliferation of technology in the classroom, increasing calls for equitable learning opportunities, and a renewed focus on accountability for student performance. The relationships needed to be examined so that educational researchers, policymakers, and gifted specialists can respond
to the underlying issues impacting education for gifted learners. This study examined the topic through a new lens: equity in gifted education service delivery.

Equity is a commonly used term in many fields. The common usage is *something that is fair and just*. This concept is rooted in Aristotle’s work (Aristotle, 350 B.C.E.) that equity is “a kind of justice whereby men suspend the law in order to do justice in the cases that do not fall under the universal rule” (Nichols, 1987, p. 167). Frasiere, Garcia, and Passow use a similar definition of equity in their work on identifying minority gifted students, “Equity is defined here as providing fair, just, and impartial access to appropriate educational experiences” (1995, p. 3). These definitions recognize that gifted students have learning needs that are different than other children. In many ways, they face similar situations at school as students with disabilities. Without special education services, students with disabilities would spend their school days in learning environments that do not meet their needs. Nobody would support the idea of students with exceptionally low mental ability learning in the regular education classroom without modification. Yet, this is the prevailing sentiment for many in regards to gifted children. If the children at the lower end of the mental ability range deserve specialized educational support, then the same argument holds true for students at the opposite end of the spectrum. Educational equity would mean that each child should have a learning environment that meets his or her needs. Ford’s work (1996; 2003) echoes this idea of equity combining fairness, justice, and excellence in school programs. Sapon-Shevin (2003) provided a description of the components of equity in gifted education: “equality of access, equality of services, and equality of outcome” (p. 132). In later work, Ford and Whiting (2010) use the terms *recruitment* and *retention* to describe two key components of equity in gifted education.
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These terms are used in a way that is consistent in meaning with Sapon-Shevin’s descriptions of access and services. More specifically, equity would entail access to specialized learning situations, participation in those learning situations, and benefit from those learning situations. DeVillar (1986) provided convenient terminology for these terms of equity components as access, participation, and benefit. These terms will be operationally defined for this research, later in this chapter. For gifted students, equity extends beyond theory, to practice. Creating access is but one part of this equation. According to Ford, Frasier, and others, even with laws and practices that support equality in identification procedures to receive gifted education, there still exists inequity for some students because of unequal access to quality gifted education services, barriers to participation, and difficulties with student retention in gifted programs (Ford, Grantham, & Whiting, 2008; Ford & Whiting, 2010; Frasier, Martin, Garcia, Finley, Frank, & King, 1995; Gentry & Yoon, 2009; Olszewski-Kubilius & Clarenbach, 2012; Plucker, Burroughs, & Song, 2010; Richert, 2003; Wyner, Bridgeland, & Diiuilo, 2007). Equitable learning environment should be available no matter the state, the funding, the mandate, the identification practices, the nationality, socio-economic status, or primary language of the gifted student. From the data presented in the State of the State of Gifted Education report (Council of State Directors of Programs for the Gifted, 2013), it is apparent that opportunities for gifted learners vary dramatically across the nation. This will be explored further in Chapter Two. A situation of obvious differences across the nation demands a closer examination to see where equity exists and how that equity might be operationalized.
Purpose Statement

The purpose of this qualitative research was to explore gifted specialists’ perspectives on equity in gifted education. For this research, the components of equity include access, participation, and benefit (DeVillar, 1986; Sapon-Shevin, 2003). The study examined the intersection of service delivery with access to gifted education, including identification practices and availability of appropriate services, as well as benefit from, and participation level in gifted education. The theories and understandings uncovered in this study may result in a more coherent and sustainable model of gifted education comprised from a richer menu of options allowing local schools or districts flexibility to better serve the learning needs of their gifted and high ability students. In addition, innovative identification practices and cutting-edge service delivery could possibly be combined to offer a more complete framework of service for gifted learners, instead of the piecemeal approach that some schools or districts use out of lack of knowledge of possibilities or economic constraints.

Rationale and Significance of Study

Researchers have studied a broad array of topics within the realm of gifted learning. There have even been recommendations made about the efficacy of different program models and the impact of various gifted education services. Some models, such as the School Wide Enrichment Model (Renzulli J. S., 1977) and Cluster Grouping (Gentry, 1999) have been widely promoted and used based on their application in a variety of school settings. Other gifted education strategies, such as acceleration, have not been as widely accepted even though research supports their efficacy with little to no cost for implementation (Rogers, 2002 and Steenburgen-Hu & Moon, 2011).
Recently, the gifted education world has been inundated with discussion of whether the more challenging Common Core Standards will eliminate the need for gifted education services (Ash, 2013; National Association for Gifted Children, 2013 and VanTassel-Baska, 2013). This harkens back to calls for equity in education by attempting to raise the academic challenge for all students. It is clear that while the new standards promote higher level thinking and deeper learning, they do not meet needs of gifted students for accelerated pace (Ash, 2013). The fallout of Common Core Standards remains to be seen. If the CCSS impact on gifted education is similar to that of NCLB, the results could be devasting for gifted learners. It is vital to assess the potential effects on funding, testing, and equity issues for gifted education.

Within the existing research, there are calls for continued examination of effectiveness or benefit of gifted education programs (Ziegler & Phillipson, 2012; Shore, 2010; Garces-Bascal, 2010). In the words of a participant in a research symposium, “We need to know what works, with whom, when, and in what doses” (Olszewski-Kubilius & Clarenbach, National Summit on Low-Income, High Ability Learners, 2012, p. 21). This process must begin with a thorough overview of current practices in gifted education and how those practices vary by state, educational level, and funding models, as provided in State of the State of Gifted Education (Council of State Directors of Programs for the Gifted, 2013).

This study was significant because there is a dearth of research examining how access, participation, and benefit interact to influence perceptions of equity in gifted education. By exploring the impact of community type, funding constraints, identification concerns, student participation, and prevailing attitudes and biases concerning service
options this study attempted to bring a new level of understanding about equity in gifted education.

After completing a preliminary literature review, as recommended by Charmaz (2013), Creswell (2013), and Glaser (1978), it became clear that while there was existing research about some of the aspects of equity, particularly access, there was a lack of research about the larger construct of equity (access, participation, and benefit) in gifted education. Even during data analysis when conducting the evolving literature review, the research encountered addressed only selected portions of the equity construct, never the whole picture. Therefore, this topic appeared to be an area full of possibilities for further study.

**Research Questions**

Based on the stated purpose of this research, the following research questions guided this study:

**Major Research Question:** What are gifted specialists’ perspectives on equity in gifted education with regard to service delivery?

**Subquestions of this study include:**

- **RQ1** - What are the perceived needs of gifted education service delivery?
- **RQ2** - What are the visions associated with the attainment of the perceived needs?
- **RQ3** - What are the barriers associated with the visions of the perceived needs?
Definitions

**Acceleration:** Students move through a subject or grade levels more rapidly. Methods can include: grade skipping, early entrance to kindergarten or college, credit by examination, and acceleration by content areas such as Advanced Placement or International Baccalaureate coursework or telescoping or compacting the curriculum.

**Access:**

**Identification**-Description of percentage and types (gender, ethnicity, race, SES) of students receiving gifted education services in relation to the aggregate number of students and the percentages that each majority/minority student group comprises.

**Availability**- Access to gifted education services that meet the student’s learning needs

**Belief in Excellence:** The conviction that the potential for outstanding achievement or performance exists in students (Subotnik, Olszewski-Kubilius, & Worrell, 2011).

**Benefit:** Outcomes, as stipulated by the various Gifted Education programs or perceived by Gifted Education administrators, related to participation by students in gifted education services.

**Cluster Grouping:** Gifted students are assigned to one or two classrooms rather than being equally dispersed among all classrooms on the grade level. The rest of the students in the cluster-grouped class are typically average or high average students.

**Community Type:** The type of community in which a school district is located. This consists of Urban (dense population, mostly multi-family housing, high concentration of businesses) Suburban (moderate population density, mostly single family housing, business activity is scattered and moderate) and Rural (low population density, single family housing on large plots of land, farms, sparse business activity).
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**Equity**: The combination of access, participation, and benefit (DeVillar, 1986; Sapon-Shevin, 2003).

**Funding**: Money or other resources set aside for the purpose of gifted education services.

**Leadership**: Support for gifted education from state, regional, or local district level gifted specialists, which may take the form of creating policies/legislation, collaboration with gifted education experts, training educators, and creating and finding service options (Council of State Directors of Programs for the Gifted, 2013).

**Participation**: The type, duration, and frequency of gifted education services within which students of majority and minority groups are enrolled

**Problem based learning**: A learning environment that uses open-ended complex problems to allow students to work at their own level of depth and complexity, as well as allowing for individual pacing (Swicord, 2011).

**Pull-out or Resource Room**: Students are pulled from the regular classroom to work with other gifted children in a class taught by a specially trained teacher. The frequency and duration of resource programs can vary from an hour per month to several hours each day.

**Summary**

The development of this research topic began with the concept of equity as defined by Sapon-Shevin (2003) to include access, participation, and benefit. More specifically, this research focused on equity within gifted education. Although there is research on the components of equity in gifted education, there is no research examining the intersection of all three of these topics. Furthermore, there has been no work examining the perspectives of gifted specialists regarding equity in gifted education. Because of a lack of research on
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this topic, research questions were formulated to examine the perspectives of those working in this field, gifted specialists. It is these perspectives that this research attempted to analyze.

Dissertation Overview

The remaining chapters are presented in order to meet the requirements for a dissertation and also to guide the reader through the exploration, analysis, and theory development of this topic. This chapter provided a brief introduction, so the following chapters can more fully consider the research problem and questions. Chapter Two provides a brief literature review. It is common practice in most types of research to include an exhaustive literature review prior to beginning the research. Grounded theory, however, typically begins with only a minimal foray into the existing literature on the topic. The logic behind this process is that grounded theorists are attempting to build theory from the data, not use existing research as a lens through which the data analysis and theory development is filtered. Such a lens could create bias towards an existing theory rather than keeping the focus on findings emerging from the data (Charmaz, 2006; Creswell, 2013; Glaser, 1978).

Chapter Two begins with a brief overview of the current condition of gifted education in the United States. It also includes a discussion of current identification methods and concerns regarding this topic. Following that is an in-depth analysis of the most recent research concerning growing trends in gifted teaching and learning, including discussion of access, participation, and benefit with regard to various service models.

The dissertation continues with Chapter Three--the research methodology of the study. There is a thorough discussion of grounded theory methodology providing an
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understanding of key terms and ideas. This chapter also delineates the researcher’s approach to grounded theory with the steps taken and the rationale for those decisions.

Chapter Four proceeds with the analysis of the data. The discussion includes how discoveries were made through interviews, theoretical sampling, memo writing, constant comparison of the data, and coding results. In Chapter Four, the fractured data is reassembled into a new, meaningful whole resulting in emergence of a theory. To aid the reader in following this process, the chapter contains data, coding, memos, and demographics. In addition, there are several figures and tables to illuminate the journey from data and ideas to theory.

The dissertation concludes in Chapter Five with a discussion of findings, implications of the research, areas for future research, and reflections. The intent is for the reader to be informed on the topic, as well as believe that the theory is credible, valid, reliable, and most importantly, useful to the field.
Chapter 2: Review of the Literature

Current Status of Gifted Education

When beginning any research it is important to study the relevant literature to discover what has already been revealed through research, and what questions remain unexplored. Researchers using a grounded theory methodology face an additional challenge, balancing the need to remain open to new theories as they develop from the data and the strength of having a thorough understanding of the issues from studying the existing literature. According to the grounded theory methodologists, "literature review should be conducted after the data collection and in support of the data analysis, not before" (Glaser, 1978, p. 32). Furthermore, Charmaz recommends, "In conventional grounded theory practice, researchers develop their analyses first and then return to the literature, whether to position their studies or to use the literature as data" (2013, p. 321). Some final wisdom on the use of literature in grounded theory research,

The researcher may incorporate the related literature in the final section, where it is used to compare and contrast with the results (or themes or categories) to emerge from the study. This model is especially popular in grounded theory studies, and I recommend it because it uses the literature inductively (Creswell, 2013, p. 27).

To that end, this preliminary literature review will provide the reader information about the main components of equity—access (including identification practices), participation, and benefit, as well as an overview of common service models that will be discussed later.
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In this dissertation, there will be an overview of the current status and practices in gifted education programs across the nation. The intention here is to provide the reader with enough information to assist understanding of the relevance of participants’ comments and the themes and theory that will be discussed in Chapters Four and Five. Additional support from the literature will be incorporated in Chapters Four and Five as needed within the discussion of data analysis and findings.

Current Status of Gifted Education

When examining any phenomenon it is important to investigate the current status of the practice or situation to decide what questions remain unanswered. Gifted education has certainly evolved since Terman (1925) began to study it. Much research has been done, and many changes have been made over the years. To facilitate understanding, this review will begin with more recent changes that have impacted gifted education.

Impact of No Child Left Behind Act. The No Child Left Behind Act (2001), provided for all students to meet minimum proficiency standards in all basic subjects with penalties for schools that did not meet adequate yearly progress (AYP) in these areas. Because the gifted are not a subgroup measured in NCLB, their adequate yearly progress was of little concern to policy makers. As a result, teachers were directed to tailor instruction to make sure all children pass the tests leaving little time or energy to focus on meeting the needs of those capable of surpassing basic minimum standards. The lack of a gifted subgroup also impacted program decisions regarding gifted education. For example, some schools chose not to support acceleration as an option for gifted children because the resulting loss of strong scoring children in the current grade levels might result in schools not making AYP.
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Potential impact of the TALENT Act. Change may be on the way with the TALENT Act which would amend the Elementary and Secondary Education Act of 1965 “to require state assessments of student proficiency to be vertically scaled and capable of measuring student proficiency above the grade level in which the student is enrolled” (National Association for Gifted Children, 2011). This law has the potential to undo a decade of negative impact of NCLB, which caused erosion of learning standards, expectations, and academic support for providing gifted learners a free and appropriate public education.

Innovation in gifted education. With many states obtaining waivers to NCLB and designing alternate measures of meeting standards, combined with adoption of Common Core Standards, the country is beginning to realize the educational focus must change. Energies have concentrated on developing students who could pass tests of basic minimum proficiency in a few subjects. However, when we look at our students in comparison with those from other industrialized nations, American students don’t measure up (Fullan & Hargreaves, 2009). Ann Robinson, former president of the National Association for Gifted Children, believes that the way forward is through focusing on innovation in gifted education (2012). She mentions that even the President of the United States believes that gifted education is a crucial part of focusing our larger education system on developing human capital and fostering innovation (U.S. Department of Education, 2010). Indeed other current thinkers and researchers such as Daniel Pink (2005) and Sir Ken Robinson (2006) agree that creativity and innovation are the necessary skills for success in the future. Robinson states, “We know that today’s gifted children and adolescents are part of tomorrow’s Creative Class, but only if we can provide the right educational trajectory for them” (2012, p. 4).
Frameworks for Gifted Education

This section of the chapter will build a foundation of the meaning of the equity components that are examined in this research. The first section will discuss access to gifted education, focusing on identification. That will be followed by a brief overview of topics related to participation in gifted education. Benefit of gifted education is the remaining component of equity to be explored. Finally this section will share some of the existing literature on commonly used service models in gifted education.

Equity. The common definition of equity is fairness or justice in the way people are treated. This broad definition applies well to the issue of equity in gifted education. Upon examination, though, this issue requires more detailed descriptors in order to make sense of how the concept is realized in gifted education. After reviewing the literature (Ford D., 2003; Ford D., 1996; Sapon-Shevin, 2003), a three-part definition of equity seemed the best fit. The components are Access, Participation, and Benefit (DeVillar, 1986; Sapon-Shevin, 2003). Each of these components will be discussed later in this section.

Now that the meaning of equity, as used in this dissertation, has been shared, it is time to explore how equity fits into gifted education. While equity in education may seem to be a goal everyone supports, there is an ongoing debate over priorities. The words of Camilla Benbow guide the way for gifted educators and researchers, “We can't forget excellence in our effort to achieve equity” (Colangelo, Assouline, & Gross, 2004, p. 39). This warning is important given the ongoing cycle of prioritizing equity for all students versus striving to offer opportunities for excellence for the most capable learners. Advocates for gifted children stress the need for appropriate learning experiences for these highly able learners. Meanwhile, others in education deem these specialized learning opportunities for
gifted students as unfair to other students. Brown (2008) describes a tug-of-war between advocates for equity and excellence over scarce educational resources. This began in the early 1900s with the end of one-room schoolhouses across the country which led to prescribed grade level curriculum, instead of the more flexible model of each child moving through learning at his or her own pace. Other developments in education such as Dewey’s (1938/1997) work on progressive education and Terman’s (1925) landmark studies of giftedness shifted the balance back and forth again between equity and excellence. Over the years, events and legislation continued to change the focus between equity and excellence (Brown E. F., 2008). Furthermore, even within gifted education, there are issues that impact equity, which will be discussed below. It is important to note that without access and participation, there can be no benefit from gifted education. Therefore, discussion of access and participation will be featured more prominently, both in this literature review and also in Chapters Four and Five. A note to the reader, while participation will be examined in this chapter as a distinct concept, it is also a relevant component of service delivery models and will be interwoven in that section also.

**Access.** Within gifted education, access refers to the permission to use available appropriate services. As shared in the definitions in Chapter One, this includes first identification as a gifted learner, and then access to available appropriate services. Identification will be discussed first, with overviews of several types of appropriate gifted education service models in the next section.

**Identification.** Gifted identification processes have been a subject of discussion, debate, and research for over a century for good reason. The traditional method of identification came from Terman’s (1925) early work and focused on a strict cutoff score of
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130 on a mental abilities test to determine giftedness. This identification method remained fairly standard in schools until the federal definition of giftedness was published in 1972 (Kaufman, 2012). The new definition of giftedness was part of the Marland Report (Marland, 1972), which significantly broadened the definition of giftedness to include academic and creative aptitudes. According to Borland (2007), Terman’s seminal study about gifted children has widespread impact even today.

It is important because of Terman’s lasting influence on the thinking about the children who are the focus of our field. If the foundation of our knowledge rests on the study of high-SES mostly White children with high IQs, this knowledge will be translated into practice. For example, authors of teacher checklists will reproduce these findings as “characteristics of gifted children,” and children chosen for gifted programs will, to a greater degree than otherwise might be the case, resemble Terman’s sample racially, ethnically, and socio-economically. In other words, I am suggesting that, nearly a half-century after his death, Terman’s sample is being replicated in a number of gifted programs across the country. (2007, p. 183)

Since the 1970s, gifted education has been generally accepted as a component of educational programs throughout the country.

*Underrepresented groups.* The literature on gifted education is filled with references to underrepresented groups in gifted programs, specifically children who are culturally and linguistically different, have disabilities, or are from low socio-economic status homes (Borland, 1994; Cantu, 1998; Coleman, 1994; Renzulli, Reis, & Smith, 1981; Richert, 2003). This topic has been a touchstone for student advocates and educators for many years. Frasier’s (1991) work was foundational in describing the reality and impact of
gifted identification practices on culturally and linguistically diverse and economically disadvantaged students, as well as students with disabilities. These barriers to equitable identification opened the eyes of many in the field. Looking more closely at the four barriers:

- **Attitude**—the deficiency view that gifted students would not come from backgrounds of economic disadvantage, cultural or linguistic diversity or have disabilities.
- **Access**—limited opportunity for enriching or accelerated educational experiences.
- **Assessment**—the identification process is inequitable because of test bias, screening procedures, lack of advocacy, or poor referral process.
- **Accommodation**—the needs and interests of the students are not considered when designing or choosing curriculum or learning experiences (Frasier M., 1991).

Identifying these obstacles was the first step in the work of trying to overcome them. Ford’s more recent work (Ford, Grantham, & Whiting, Culturally and linguistically diverse students in gifted education, 2008) continues themes of underrepresentation in gifted education that she has researched for over 20 years. In this article (Ford, Grantham, & Whiting, Culturally and linguistically diverse students in gifted education, 2008), the authors contend that while some small improvement in more equitable access to gifted education has occurred, there is still much work to be done. They see a need for improvement in: teacher referral process, selection of testing instruments, procedures and policies surrounding student labeling and placement, and social and emotional factors of black and Hispanic students and their caregivers surrounding gifted education participation (Ford, Grantham, & Whiting, Culturally and
linguistically diverse students in gifted education, 2008).

Others (Borland, 2007; Gentry & Yoon, 2009; Plucker, Burroughs, & Song, 2010; Richert, 2003; Wyner, Bridgeland, & John J. Diulio, 2007) have recognized how language, exposure, and cultural differences can significantly undermine gifted identification for talented students from economically disadvantaged or culturally or linguistically diverse homes. This statement below explains the reality of using rigid standardized methods and procedures to evaluate students from disparate backgrounds.

It is also worth noting that a student with scores at or above the 90th percentile from a home with limited educational capital may be more suited for a gifted placement than a student from a home with substantial educational capital and the same scores, as the former is demonstrating greater use of available resources. (Worrell & Erwin, 2011, p. 328)

More recent research and writing indicates under-representation of these groups should remain a focus for gifted education (Courville & DeRouen, 2009; Ford, Grantham, & Whiting, 2008; Gentry & Yoon, 2009; National Association for Gifted Children, 2011).

The Jacob K. Javits Gifted and Talented Students Education Act was a strong source of grant funding to research and develop more equitable gifted identification practices (Borland J., 2007 and Frasier, Martin, Garcia, Finley, Frank, & King, 1995). This work has resulted in some progress towards better representation of children of color and poor children in gifted programs (Council of State Directors of Programs for the Gifted, 2013).

Borland (2007) offers some suggestions that could improve identification practices. The major change he recommends is increased use of nontraditional identification
methods. These methods include the following: curriculum-based assessment, portfolio assessment, dynamic assessment—carried out using Vygotsky’s (1978) Zone of Proximal Development open-ended teacher referrals rather than checklists, case study approach, and a long term identification process (Borland, 2007). Borland (2007) also suggests that perhaps the entire identification process should be eliminated and the gifted education model restructured. He acknowledges that this would be a huge paradigm shift that would be immensely disruptive to the field, but believes that the educational outcomes would be positive for many more students than the current model. Discussion of this proposed revolutionary shift is beyond the scope of this paper.

**Participation.** Within the realm of gifted education, participation carries a similar meaning to its common uses of the term. As explained earlier, participation is enrollment in a gifted education program. Some aspects of participation, such as type, duration, and frequency, overlap with the discussion of service models. This section of the dissertation will attempt to discuss factors involved in the act of taking part in gifted education and leave exploration of service models for later.

While there is much research on recruitment for gifted education (Ford, Grantham, & Whiting, Culturally and linguistically diverse students in gifted education, 2008; Frasier, Martin, Garcia, Finley, Frank, & King, 1995; Gentry & Yoon, Racial and ethnic representation in gifted programs: Current status of and implications for Asian-American students, 2009; Kaufman, 2012; Olszewski-Kubilius & Clarenbach, 2012; Richert, 2003; Worrell & Erwin, 2011; Wyner, Bridgeland, & John J. Diiulio, 2007), there is little in the literature about retention in gifted education. This topic is a byproduct of the increasing attention given to underrepresentation of certain groups in gifted education, as already discussed. A few
researchers have realized that identification or recruitment is only part of the equity picture for underrepresented groups. The other part is getting identified children to enroll and continue to participate in gifted education programs. There is some research about underachievement in gifted children. That topic is not exactly what is called for here. The focus here is students choosing to drop out of gifted education programs or never to enroll in programs after being identified as gifted. Although there is little in the research about this topic, this section will explore some of the important factors influencing participation in gifted education.

_Social and emotional factors._ In the few pieces of literature concerning retention in gifted education, social and emotional factors were a strong focus. Ford, Grantham, and Whiting (2008) share the importance of multi-cultural education of gifted teachers in order to fully address the academic, social, and emotional needs of CLD (Culturally or Linguistically Different) gifted students. Further, they call for increased attention on monitoring gifted education data to research developing trends related to recruitment and retention barriers.

Because African American students are the most underrepresented in gifted education of any CLD group, much of the existing research has focused on them (Ford & Whiting, 2010). According to the authors (Ford & Whiting, 2010), African American children and their families may choose not to participate in gifted education programs, including AP courses because of negative peer pressure and concerns about being separated from their African American peer group. Further, these students may fear non-acceptance from the White students in the gifted classroom. Ford and Whiting (2010) discuss the implications of negative peer pressure for African American students in
reference to Brown and Steinberg’s (1990) study of 8,000 high school students by highlighting that “none of the high-achieving African Americans surveyed in the Brown and Steinberg study were willing to be considered part of the ‘brain’ crowd” (p. 134). They go on to emphasize the importance of multi-cultural counseling and mentoring for addressing the complex social and emotional needs of students struggling to balance two identities—gifted and African American (Ford & Whiting, 2010). In addition to incorporating counseling and mentors, the authors echo earlier work calling for multi-cultural education for regular and gifted classroom teachers to help address negative peer pressure and social and emotional concerns of gifted African American students (Ford & Whiting, 2010).

Twice-Exceptional students. Much of the literature regarding twice-exceptional students focuses either on issues with identification of these students for gifted services or program modifications that can increase the benefit of gifted education for these students. There is some research, however, that discusses ways to improve the learning experience for gifted students with disabilities potentially increasing participation. Some often mentioned strategies include offering extra emotional and social support through counseling and teaching compensatory strategies to capitalize on student interests and strengths and minimize the impact of disabilities (Baum S., 1990; Colangelo, Assouline, & Gross, 2004).

Benefit. It is common sense to expect any educational program to have benefit for the students. Dewey (1938/1997) believed that the quality of learning was essential and that not all educational experiences would provide benefit to the learner. This is true of gifted education, just as it is for regular education and special education services. The expectation is that students will be better off in some way for having participated in the
educational experience.

There is a larger benefit from gifted education that goes beyond the students participating in gifted programs. Practices such as interdisciplinary studies, student portfolios, performance assessment, cross-grade grouping, and authentic learning tasks such as Problem Based Learning, widely used within gifted education, have been introduced to the regular education classroom benefiting all students.

Within the topic of benefit, there will be discussion of two of the most common benefits of gifted education followed by an examination of the types of learning experiences with their relative benefit to gifted students.

* Talent development. * This model is built upon the foundation that all children have talents in varying areas and to varying degrees. Much of the work in the gifted education research suggests that students with high degrees of ability can benefit from educational services designed to maximize these talents (Feldhusen, 1996; Gagne, 1985; Renzulli, 2005; Sternberg, 1991).

Indeed, Renzulli’s (1977; 2005; 2010) work is based on the concept of gifted education as talent development. Through the widely used Schoolwide Enrichment Model (Renzulli, 2005), all students are exposed to introductory enrichment activities. These promote higher student engagement resulting in increased achievement in the associated curricular areas. According to Renzulli, “Special services should be viewed as opportunities to develop gifted behaviors rather than merely finding and certifying them” (2005, p. 82). From here, students demonstrating increased levels of ability, interest, or achievement in a particular area are offered more targeted enrichment experiences. Finally, students demonstrating the highest levels of ability, interest, and/or achievement in an area are
offered highly focused talent development experiences under the guidance of a gifted specialist (Renzulli, 2005). Ideally, this form of talent development would continue throughout a student’s K-12 educational experience. At that point, talent development would be under the student’s control, as he or she seeks out experiences that will allow for growth in areas of ability, interest, and/or achievement.

**Eminence.** There are some gifted researchers and educators that believe talent development is not sufficient. They contend that student attainment of eminence such be the benefit of gifted education programs. Subotnik, Olszewski-Kubilius, and Worrell (2011) assert that outstanding achievement or eminence should be the primary goal of gifted education. Their view is talent development as only the first step in gifted education. Talent development encourages competency and expertise, but gifted education must continue to support high ability learners to fully maximize their talents to achieve eminence in a given (Subotnik, Olszewski-Kubilius, & Worrell, 2011). Furthermore, the authors suggest that gifted children who fail to reach high levels of achievement and contribution to society in adulthood should not be classified as gifted adults (Subotnik, Olszewski-Kubilius, & Worrell, 2011). The authors go on to say the overarching goal of gifted education is to develop talent of gifted children to such a degree “in order to maximize those individuals’ lifetime contributions to society” (Subotnik, Olszewski-Kubilius, & Worrell, 2011, p. 23). While some may argue that some aspects of this model are narrowly focused, the component of maximizing contribution to society is one that would be widely accepted and perhaps limit the cries that gifted education is elitist.

**Relative benefits of various gifted education methods.** While gifted education as a whole has been proven to benefit students, the research shows that different methods
provide varying types and levels of benefit to gifted learners (Gentry, 1999; Kanevsky, 2011; Kulik & Kulik, 1984; Reis, 2010; Renzulli J. S., 2010; Rogers, 2002; Steenburgen-Hu & Moon, 2011; Swicord, 2011). This section will provide a brief discussion of notable differences with more detailed discussion of particular service delivery methods and their benefits in the next section.

Of all gifted education methods, acceleration has the most support for benefiting gifted learners (Colangelo, Assouline, & Gross, 2004; Kulik & Kulik, 1984; Rogers, 2002). This agrees with Roger's (2002) findings that the most important determiner of academic benefit to gifted students is an appropriately accelerated pace of instruction rather than focusing on greater depth of learning. Although enrichment models may well be the most widely used method of gifted education within and outside the regular education classroom, there are few formal evaluations showing strong academic benefit to students (Subotnik, Olszewski-Kubilius, & Worrell, 2011). When enrichment models include opportunities to learn at an accelerated pace, benefits increase (Rogers, 2002). This does not mean enrichment is not beneficial to gifted students, but only that more research is necessary to determine the strength and ways to maximize benefit. Some empirical studies involving enrichment service models will be discussed in the next section.

**Service models.** There are many ways to provide educational opportunities to gifted learners. In order to provide the reader with the necessary understanding for the discussion to follow in Chapters Four and Five, this section of the literature review will discuss the most common types of gifted service models. In addition to describing the basics of each model, research concerning the efficacy of each will also be shared.

**In class differentiation.** There are several alternatives for methods of offering
differentiated learning for gifted students within a regular classroom setting. One distinct benefit to these models is that they increase participation because there is no formal identification process necessary; the opportunities are available in the regular classrooms. There are benefits from each of these alternatives, which will be discussed below.

**Student preferences.** In many schools across the country, teachers use differentiation as a daily way to reach the gifted learners who are in regular education classes. This method is the least costly and easiest to implement because it requires no additional personnel, however, it may not always be the best answer to meeting the needs of the gifted. An additional positive outcome of this approach is the potential increased benefit of daily participation of all gifted students, identified or not.

Kanevsky (2011) investigated differentiation from the students’ perspective by examining the types and strengths of differentiation preferred by gifted and non-gifted students. This article also touched on the concept of benefit of gifted education, as seen from the perspective of the gifted student.

Using a quantitative method, the author studied 646 students in grades 3-8 from two suburban schools, one Canadian, one American. The samples were evenly distributed for gender and cultural diversity among the gifted (n=416) and non-gifted (n= 230) groups. The author used repeated field-testing to develop a 110-question Likert Scale instrument, *Possibilities for Learning*, measuring preferences on features of learning experiences. To maintain granularity, responses were analyzed individually (Kanevsky, 2011). This type of analysis provides more specific data on the meaning of preference selections, making the results more powerful for practical use.

The author found some types of differentiation favored by all students, specifically
self-pacing, choice of topics, and choice of workmates. The results indicated significant differences in degree of preference, rather than type of differentiation between gifted and nongifted participants. Gifted students more strongly preferred learning about complex, authentic topics, choosing the topics of their learning, learning at an appropriately rapid pace, and completing work without asking for teacher help (Kanevsky, 2011).

The author’s empirical approach added a substantial piece to the body of literature regarding curriculum choices for gifted education. It shows that gifted students perceive benefit from self-paced work that involves challenging concepts and student choice, regardless of service model. This research could have been strengthened by investigating the impact of age on the importance of peer relationships. Even so, the study provided several clear directions for further research including empirical examination of the intersection of self-determination and differentiation with student interests and passions.

*Acceleration.* As noted in the literature, acceleration is perhaps the most effective, but most underutilized strategy for gifted learners (Steenburgen-Hu & Moon, 2011). It is effective because it can meet the need for a faster learning pace that allows gifted students to thrive (Rogers, 2002). Since acceleration places students into already existing classes, either at an advanced grade level or at the college level, it is highly cost effective because it requires no additional teachers, special programs or equipment, or special curriculum to implement. In addition, this approach carries the same potential benefit to gifted students as in-class differentiation—daily service of gifted learning needs. If all of this is true, then the question is: Why isn’t acceleration used more? According to Steenburgen-Hu and Moon (2011), in the past, a lack of evidence about the long-term impact of acceleration on gifted students may have caused parents and educators to be overly cautious about trying this
gifted learning model. As a result, the authors saw a need for an updated meta-analysis to determine what the recent research shows about the academic and socio-emotional impact of acceleration for gifted learners.

For this analysis, Steenburgen-Hu and Moon (2011) included studies from 1984-2008 that focused on academic achievement and socio-emotional factors in association with acceleration programs for gifted students. Their analysis examined moderating factors, publication bias, and effect sizes using a multi-step process. The findings suggest that all effects of acceleration are positive including increased academic achievement and good socio-emotional impact for gifted learners from kindergarten through college (Steenburgen-Hu & Moon, 2011).

**Pullout models.** This type of gifted program can range from a monthly one-hour small group meeting to enrollment in a specialized school that serves gifted learners. Many pullout programs use the “resource room” model, where gifted students receive specialized instruction from a teacher trained to meet their learning needs. These classes can be as intensive as several periods each day to one full day per week to single subject enrichment on a daily or weekly basis (VanTassel-Baska & Brown, 2007). Several types of pullout resource models have been shown to be effective at increasing achievement in gifted learners. These would include Renzulli’s School Wide Enrichment Triad, Feldhusen’s Three Stage Model, Sternberg’s Triarchic Model, and Van Tassel-Baska’s Integrated Curriculum Model (VanTassel-Baska & Brown, 2007). The findings of this analysis support the current practice in many school districts of using pullout models as the main form of gifted education. A potential downside to pull out models is the decreased level of participation when the frequencies of class meetings or total contact hours are low.
Residential schools. Another way to use the pull out model is the specialized residential school for gifted learners, mostly serving only high school students. While uncommon, there is some research examining the impact of such learning environments on gifted students. Cross and Swiatek (2009) investigated the long term effects of a residential gifted learning environment on highly able eleventh and twelfth graders. The authors examined three main socio-emotional factors among the participants: denying giftedness, peer acceptance, and social interaction (Cross & Swiatek, 2009). Participants were given social coping questionnaires prior to enrollment at the academy, during their first year, and in their second (senior) year. Based upon thorough analysis of the data, Cross and Swiatek (2009) found that denying giftedness and peer acceptance increased with time at the academy, while social interaction decreased after a year at the academy. The authors were consistent with other research (Marsh, Hau, & Craven, 2004) on denying giftedness and peer acceptance within a homogeneous setting. Their interpretation of these findings was different, however, because they did not see a negative effect of denying giftedness in their participants. They believed that “students became slightly more humble about their academic ability when in the company of highly able classmates, but did not drastically change their self-perception in this domain” (Cross & Swiatek, 2009, p. 31).

Overall, the study showed positive social coping among students in this residential gifted program, indicating a benefit to gifted learners (Cross & Swiatek, 2009).

Technology. While not a curriculum approach or grouping model, technology has become increasingly more important in program design decision making because of the support it provides to other interventions. In some cases, such as distance learning, technology has not only supported the learning model, but also completely re-imagined it.
This section of the paper will focus on an overview of the impact of technology on gifted education and then move on to discuss a specific technology-based instructional model.

*Distance learning and gifted students.* Technology has revolutionized distance learning so dramatically that it is now called online learning, forming a new way to reach gifted learners. This is especially true for those highly gifted students who could benefit from access to college level coursework. Online education meets that need by increasing access to appropriate learning experiences, even for gifted students isolated by geography or insufficient school resources (Olszewski-Kubilius & Corwith, 2010; Subotnik, Olszewski-Kubilius, & Worrell, 2011).

*Empirical research about online learning and gifted education.* Thomson (2010) examines the benefit of online learning for gifted students through a mixed methods study of instructors and students participating in an online gifted education program through a large Midwestern university. She reviewed the research on the learning needs of gifted students, especially the need for advanced content, accelerated pacing, and complex problems (Rogers, 2002 and VanTassel-Baska & Brown, 2007). Thomson (2010) continues with a description of how the particular characteristics of online learning: individualization, greater access to above level content, accessibility (even in remote areas), opportunity for development of mentor/mentee relationships, varied format of learning materials, ability to customize courses based on interests, and access to high level experts, can closely match the learning needs of gifted students. This model may be especially suited to the divergent learning needs of the highly and profoundly gifted because it offers freedom to follow the pace, interests, and ability level of those students.

Relevant findings included the ability for online learning to meet the pacing and
individualization needs of gifted students. Teachers and students agreed that online learning offered more one-on-one attention for gifted students than traditional learning situations (Thomson, 2010). Both students and teachers indicated that good communication was essential to positive learning experiences, and that online learning was an effective way to develop critical thinking and problem solving skills. Finally, participants agreed that high quality interactions between students and teachers and students and content are key to successful online learning, while student-to-student interactions had little importance for this group (Thomson, 2010).

This study was an important addition to the research base because it included the student perspective. Considering that gifted learners are usually very self aware and knowledgeable about their preferred learning styles, gaining their input was crucial to a well-balanced examination of this topic.

Problem based learning. Problem based learning (PBL) has been around for many years, beginning in the medical field with training programs for prospective doctors. Soon, researchers (Renzulli J. S., 1977) in gifted education found that the challenges of PBL were a perfect fit for the learning needs of gifted students. Problem based learning uses open-ended complex problems to allow students to work independently and collaboratively to create a meaningful solution (Swicord, 2011). Gifted students function like experts to quickly tap into a broad base of knowledge, delve deeply into the conceptual aspects of an ill-structured problem, and to use their metacognitive skills to monitor and use problem-solving strategies effectively. PBL also allows for the independent pacing that is so crucial for satisfying learning in gifted students. Moreover, through PBL, students are exposed to real problems that raise relevant moral and ethical questions to move beyond merely
learning the concepts based on state or national standards (Swicord, 2011). All of these factors contribute to the potential benefit of PBL for gifted learners. One significant challenge of PBL is finding or creating rich, engaging problems that simultaneously meet the requirements of standards-based education, while offering extended higher-level learning. Technology has assisted with the collaboration and discovery process of developing PBL units, which hopefully will make this learning strategy more accessible to teachers of gifted students. Despite the potential drawbacks, PBL offers opportunities for students to develop skills that will allow them to be successful problem solvers and innovators in the future making it irresistible for educators that really understand gifted learners and their needs.

**Overview of Current Practice in Gifted Education**

No investigation into gifted education directions would be complete without a synopsis of current practice in gifted education. The timing of this writing is fortuitous because the National Association for Gifted Children recently released their biennial *State of the State Report* (Council of State Directors of Programs for the Gifted, 2013). This report summarizes findings from a nationwide survey on the prevailing practices in gifted education.

**Mandates.** Several themes emerged from this report. The best place to start is mandated services for gifted learners. Of the 44 states and territories participating, 32 have mandates for identification, service delivery, or both. Eleven states have no mandate relating to gifted education. Eight of the states with gifted education mandates do not provide funding for services. Within this topic, forty states have defined giftedness in
statute or regulation, with thirty of these states requiring school districts to follow the definition (Council of State Directors of Programs for the Gifted, 2013).

**Identification.** Although identification of giftedness has been discussed earlier in this paper, the *State of the States Report* (Council of State Directors of Programs for the Gifted, 2013) provides details as to the current identification practices across the nation. Thirty-eight states mandate that schools use specific criteria and/or methods to identify gifted students. In eleven of these states, the criteria/methods are fully or partially determined at the state level (Council of State Directors of Programs for the Gifted, 2013). Most states (25 of 38 reporting on this topic) use a multiple criteria model of identification including the following: IQ scores (18 states), achievement data (16 states). Along these lines, states have procedures relating to reciprocity of identification. Two states require reciprocity of gifted identification with other states, and thirteen states require local school districts to recognize gifted identification from other LEAs in the same state (Council of State Directors of Programs for the Gifted, 2013).

**Funding.** Despite nationwide cutbacks in education spending due to lingering economic pressures from the Great Recession, there was an overall increase in state budgets for gifted education services. More specifically, of the 36 states reporting about funding levels, twelve increased gifted services budgets, nine held funding constant, six decreased funding levels, and fourteen reported spending $0 for gifted education for both the 2010-11 and 2012-13 school years. Gifted education budgets varied dramatically from several states that allocated $0 to Georgia with the highest funding level of $367 million. Among the states responding, 32 reported that funding for gifted education was a highly important area of attention (Council of State Directors of Programs for the Gifted, 2013).
Program monitoring and evaluation. Of those states that specify standards in
gifted education there is variability in the level and detail of program monitoring and
evaluation. Twenty-two states reported having at least one full-time staff member
assigned to gifted education. Twenty states have a part-time staff member designated for
gifted education and two states have no workers assigned to gifted education. In 24 states,
the staff members are splitting their time between gifted education and other matters.
Further, 16 of these states are utilizing this staffing structure with only a part-time staff
member. Monitoring and/or auditing local school district gifted programs is not standard
across the nation, since 16 states reported no activity of this kind. States either have no
information on gifted students (11 reported this) or very little with 17 reporting no
available demographics of gifted students. More specifically, the available demographics
varies across the nation with reported information from states on student gender (20
states), race/ethnicity (17), English learner status (26), socio-economic status (27), and
information on gifted students with disabilities (24) (Council of State Directors of
Programs for the Gifted, 2013).

A small number of states (ten) publish an annual report on the state of gifted
education. Slightly more (15) report the number of identified gifted students on report
cards. This tells us that there is little information available to compare gifted education
offerings among states.

Service models. Types of service models vary according to policy mandates,
funding levels, community type, and local school district decisions. Many states leave
program model decisions up to the local education agencies (LEAs). Although 26 states
mandate gifted services, the categories of service vary to include: intellectual, specific
academic areas, general academic, visual or performing arts, creativity, or leadership. Most states, 17, require service to begin in pre-kindergarten or kindergarten and continue through grade 12. Four states don’t require gifted services until a later grade level and two of those end service requirements before grade 12 (Council of State Directors of Programs for the Gifted, 2013). The type of program delivery models is specified in only a few states as follows: “differentiated instruction (12), contact time (10), social-emotional support (7), academic guidance and counseling (6), or content-based acceleration (6). Finally, the delivery method for gifted services varies according to grade level. In elementary schools, the pullout resource classroom is the most commonly used model. Honors classes or advanced coursework was the most widely used model in middle schools, while high schools mostly used Advanced Placement courses. The second most common method of gifted service delivery was the regular classroom from elementary through middle school (Council of State Directors of Programs for the Gifted, 2013).

**Policies.** Most often, local school district policies determine components of gifted education with respect to acceleration, proficiency-based promotion, and dual enrollment in either middle school/high school or high school/college. In the case of acceleration, only nine states regulate it by state policy with 32 states allowing local school districts to make these decisions (Council of State Directors of Programs for the Gifted, 2013). Dual enrollment decision-making is handled by local school districts in 28 states for middle/high school level and 29 states for high school/college level (Council of State Directors of Programs for the Gifted, 2013). State level decisions are made in 17 states for middle/high school enrollment and 30 states for high school/college enrollment. Policy regarding proficiency-based promotion is almost equally split between local school district control
(19 states) and state level control (20 states), yet three states specifically forbid it. Early entrance to kindergarten is the exception to mostly local decision-making. Eight states allow early entrance to kindergarten, while 16 states prohibit this practice. In 18 states the decision is left to the local school districts (Council of State Directors of Programs for the Gifted, 2013). On a different topic, ten states include gifted students in the Response to Intervention framework, while 30 states leave this decision up to the local school districts (Council of State Directors of Programs for the Gifted, 2013).

Some policy issues are related to funding, as with gifted education models including residential public high schools, virtual schools, and summer honor’s programs. Fourteen states fund residential public high schools for students gifted in math or science, while seven states provide residential high schools focusing on the fine or performing arts. Virtual high schools serving gifted learners are funded in 14 states. Moreover, ten states fund summer honor’s programs (Council of State Directors of Programs for the Gifted, 2013).

Participants viewed federal policy as having a significant impact on gifted education. More specifically, 30 of the responding states reported a negative view of the lack of recognition of gifted learners in federal policy. Furthermore, “nearly all the respondents (39) indicated that federal policy could benefit gifted students because it would increase accountability for GT student learning (32 responses), or improve teachers’ capacity to differentiate curriculum (27 responses)” (Council of State Directors of Programs for the Gifted, 2013, p. 7).

**Professional development.** Even though regular education teachers are relied upon to deliver a significant amount of gifted education service, many have little to no
training in gifted education best practices. Indeed only one state requires general education teachers to have pre-service training in gifted education, and only four states require general education teachers to have gifted education training at some point in their career. Eight states report less than five percent of their general education teachers receive annual professional development in gifted education. Only four states reported that more than 50% of their teachers receive annual professional development in gifted education practices (Council of State Directors of Programs for the Gifted, 2013).

Training for gifted specialists is a bit better, according to the states reporting. Seventeen states require a certification or endorsement in gifted education for their specialists. However, only five states require gifted specialists to have annual training in gifted education. Common core standards are impacting gifted education training or curriculum planning in 25 states, which is a positive effect (Council of State Directors of Programs for the Gifted, 2013).

While training in gifted education seems to show some improvement, many respondents are still highly concerned about funding for professional development. They see great funding needs in training for pre-service teachers, general education teachers, and professional development for gifted specialists (Council of State Directors of Programs for the Gifted, 2013).

**Summary**

Taken as a whole, the picture of current practice in gifted education is a complicated one. This study intended to gather information that clarified how gifted specialists perceive equity. The intersection of equity, service delivery, community type, funding, and mandate for service was of particular interest. This intersection helped to develop a theory
of perceptions of what creates equity in gifted education. Such information could be helpful, since it is clear from the NAGC State of the Nation 2013 report that “few states are employing strategic plans regarding the education of their advanced learners” (2013, p. 2). Indeed, other research supports this statement showing that improvements in equity in gifted education are poorly understood indicating: “either little state-level policy work is helping the situation, and/or policies are widely inconsistent within states. Available evidence suggests that both explanations may be valid” (Plucker, Burroughs, & Song, 2010, p. 33). It is clear from the huge variations in funding, identification, mandate, services provided, and areas for further development shared in the State of the State of Gifted Education report (Council of State Directors of Programs for the Gifted, 2013) that there is a need for research to explore equity in gifted education.
Chapter 3: Methodology

Design of Study

This study employed a qualitative design based on a grounded theory framework. This method involves gathering data, which is used to shape theories about the topic in question. Grounded theory methodology entails the researcher working to interpret and make sense of the phenomenon through the comments and perspectives of the participants interviewed. Creswell (2013) explained the importance of using an interactive model in qualitative research. Careful planning of the research design should include attention to goals, conceptual framework, research question, validity, and methodology. He also stated that the research questions and goals should be well aligned with the chosen methodology (Creswell, 2013). Choosing to pursue a grounded theory methodology for this study was not an easy decision but one that best fit the questions being explored and the desired outcomes of the research. Incorporating authentic perspectives of the participants who are actively involved in the day-to-day practice of gifted education brings a new level of understanding to the topic of equity. The goal of integrating their perspectives with support from district and state gifted program documents and existing literature to discover a theory of equity in gifted education clearly pointed to use of a grounded theory methodology. Because the process would entail a high degree of constructivism, methodology was strongly based on the work of Charmaz (2006) with foundational support from Glaser (1978) and Strauss (1967).
According to Glaser and Strauss (1967), grounded theory research involves studying processes as they occur in the field, while simultaneously collecting and analyzing data. Meanwhile, the researcher is using the constant comparative method and developing and modifying categories. The analysis and checking of developing theories is ongoing and thus influences the subsequent data collection and resulting analysis and theory development.

As grounded theory has evolved from the more structured approaches of Glaser and Strauss (1967), a new variation arose, Constructivist Grounded Theory. This method (Charmaz, 2006) builds upon some of the coding methodologies of Glaser and Strauss to a more interpretive reality of the phenomenon created by participants and researchers through the research process. The researcher becomes thoroughly engaged in the world she is examining, leading to an intimate knowledge of its details and correspondingly well-informed data analysis. “Rather than aiming for theoretical generalizations, constructivist grounded theory aims for interpretive understanding” (Charmaz, 2013, p. 305). The goal is to make implicit belief systems explicit. Further, this method typically results in substantive theory—that which refers to real-life situations. Because a substantive theory is more specific it is correspondingly more useful to practice. “Grounded theory is particularly useful for addressing questions about process, that is, how something changes over time” (Merriam, 2009, p. 30). When done well, it is an iterative process that may end up somewhere completely different than the initial tentative categories may have suggested. This back and forth activity is possible because the analysis and data collection influence each other (Charmaz, 2013). By continuing to ask questions and compare the data to existing categories, the researcher maintains interaction with the data. It is this interaction that makes grounded theory so powerful (Charmaz, 2013). This methodology
was chosen in part because existing theories of gifted education have not fully addressed equity issues. In addition, perceptions of equity and solutions to attaining equity are not universal, but are relative to the context of the educational setting. Any understandings of equity perceptions and solutions must also be closely tied to the context of the educational setting, in order to be authentic. According to Ziegler and Phillipson (2012), when a new theory is developed, the following must be considered before a theory is adopted:

1. Although a previously accepted theory provides an acceptable explanation of a phenomenon, the new theory must give the same results.
2. The new theory should explain something that the previously accepted theory either got wrong or, more commonly, did not apply [to current situations].
3. The new theory makes a prediction that is later verified.
4. The new theory is elegant or has an aesthetic quality that exudes simplicity, power, and universal symmetries.
5. The new theory provides a deeper insight or link to another branch of knowledge. (p. 141)

Since the study involved investigating many factors in gifted education in order to develop a cohesive paradigm for effective practices, grounded theory best fit the purpose of this research study.

**Setting**

The study was situated within the context of gifted education in the United States. According to the *State of the States in Gifted Education* (Council of State Directors of Programs for the Gifted, 2013), state and district-level advanced learner policies vary
significantly across the country and even between states. In response to the unevenness of policies and programs, every effort was made to include states and school districts from representative areas of the country.

**Recursive Nature and Methods of Grounded Theory**

Grounded theory is, by its very nature, a recursive method with “data collection and analysis occurring simultaneously, with each informing the other” (Lapan, Quartaroli, & Riemer, 2012, p. 41). As such, my research methods included a preliminary literature review, interviews, memos, constant comparisons, theoretical samples, multiple coding methods, peer reviews, member checking, and a progressively more focused literature review. These methods are discussed more fully in the following pages.

**Participant selection.** The study used purposeful sampling, choosing participants that will lead the researcher to a better understanding of the research problem and questions (Creswell, 2013). This entailed finding participants who offered varied experiences with gifted education. The participants were chosen based upon several factors. Care was taken to include participants from different school districts and state levels within the education system, increasing the potential knowledge base and differences in perceptions among the participants. A second factor considered was the potential of the participant to offer an unbiased, well-reasoned opinion about program models and service delivery in gifted education. Ideal participants had a broad range of experience in gifted education, including leadership and decision-making about program models and offered viewpoints about gifted education that were independent of the political, social, or economic conditions in their school, district, or state.
In order to gain a full perspective on major influences on program models, many of the participants were selected based on the information in *State of the States in Gifted Education* (Council of State Directors of Programs for the Gifted, 2013). It was revealing to include participants from states that publish their own annual report, since that indicates a strong level of support for gifted education. More specifically, the participant selection process attempted to include representatives from states that encompassed the array of diverse program models. Another key factor was the selection of participants from states that are focusing on equity in gifted education, particularly in terms of underrepresented populations, as reported in the *State of the States* report (Council of State Directors of Programs for the Gifted, 2013). This factor resulted in the selection of four states: Georgia, Florida, South Carolina, and California. California represents another key idea in the study because gifted services are not mandated or funded at the state level. This differs from the other three states included in this study. It was important to compare these two groups of states (funded vs. nonfunded and mandated services vs. nonmandated services) to examine the potential impact of state mandates and/or funding on equity in gifted education service delivery.

Furthermore, when possible, participants from each state were selected from each of the community types: rural, suburban, and urban. In South Carolina, no truly urban areas exist, so only participants from suburban and rural areas, as well as a participant from the state level were included. Including participants from each of the community types allowed comparison of potential differences in perceptions of equity in gifted programs.
It is crucial to point out that although the participants from California were not
district gifted specialists, they were regional gifted educator representatives. They were
included for two reasons. Since California has no state level gifted specialist because gifted
education is not state mandated, these regional educator representatives provide high level
experience with gifted education issues, policies, and political decision-making process
representing large regions of California. Due to the large size of many of California’s school
districts, each region is made up of only a few districts. Consequently regional educators
have both an intimate knowledge of local school district gifted programs and also a broader
view of larger issues regarding gifted education, policy, and advocacy efforts. Given this,
including local district gifted specialists in this research was redundant. was extremely
difficult and was not possible given the time constraints of doctoral research. Because
California represents a unique perspective being the only state selected that does not
mandate or fund gifted education at the state level, the decision was made to include the
perspectives of these participants. Excluding these participants in favor of only local gifted
specialists would have eliminated their broader regional and state level perspective. They
provide a crucial perspective because they work both at the state and local district levels.
As a result of this decision, the main research question was revised to include the
perspectives of “gifted specialists” rather than “gifted program directors”.

Table 1 below, shows the list of participants, representing a variety of experiences
in gifted education.
### Participants’ Demographic and Educational Experience

<table>
<thead>
<tr>
<th>Participant Number</th>
<th>Participant State, Community Type, &amp; Current Role</th>
<th>Education</th>
<th>Years in Education</th>
<th>Other Roles in Education</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>California-Urban/Suburban District Gifted Educator representative</td>
<td>M.Ed.</td>
<td>10+</td>
<td>Classroom teacher, Gifted Researcher</td>
</tr>
<tr>
<td>2</td>
<td>California-Suburban/Rural District Gifted Educator Representative</td>
<td>M.Ed.</td>
<td>20+</td>
<td>Parent Advocate, Classroom teacher,</td>
</tr>
<tr>
<td>3</td>
<td>Florida-Urban District Gifted Program Coordinator</td>
<td>EdD.</td>
<td>20+</td>
<td>Gifted specialist, classroom teacher,</td>
</tr>
<tr>
<td>4</td>
<td>Florida-Suburban District Gifted Program Coordinator</td>
<td>M.Ed.</td>
<td>20+</td>
<td>Classroom teacher, Gifted Consultant, Board member FL Assoc. for the Gifted</td>
</tr>
<tr>
<td>5</td>
<td>Georgia-State Gifted Program Director</td>
<td>Ed.D.</td>
<td>20+</td>
<td>County Gifted Program Director, Gifted Classroom Teacher,</td>
</tr>
<tr>
<td>6</td>
<td>Georgia-Suburban District Gifted Program Coordinator</td>
<td>Ed.S</td>
<td>20+</td>
<td>Principal, Instructional Math Coach, Assist. Principal, Classroom teacher, Gifted Program teacher</td>
</tr>
<tr>
<td>7</td>
<td>Georgia-Urban/Suburban District Gifted Program Coordinator</td>
<td>M.Ed.</td>
<td>20+</td>
<td>Gifted Classroom Teacher, Instructional Lead Teacher,</td>
</tr>
<tr>
<td>8</td>
<td>Georgia-Rural District Gifted Program Coordinator</td>
<td>Ind. Study w/ Mary Frasier, M.Ed. with Torrance, PhD.</td>
<td>30+</td>
<td>Classroom Teacher, Gifted Program Teacher, District Gifted Program Director, State Gifted Director, Board member NAGC</td>
</tr>
<tr>
<td>9</td>
<td>South Carolina-State Gifted Program Director</td>
<td>EdD.</td>
<td>10+</td>
<td>Gifted Program Teacher, Gifted Lead Teacher, Assistant Principal,</td>
</tr>
</tbody>
</table>
Participant selection and theoretical sampling. Although the initial participant selection was based on data from the *State of the States* report (Council of State Directors of Programs for the Gifted, 2013), later participants were added as a result of snowball sampling through recommendations from the initial participants. In snowball sampling, participants provide recommendations or referrals to others they know who may be helpful to the research (Creswell, 2013). This sampling technique allowed me to find additional highly qualified participants, meaning those who would provide useful insights or perspectives on the research questions. (Charmaz, 2006). These later participants served to meet the needs of theoretical sampling, which was used to test emerging theory. Theoretical sampling is about “seeking and collecting pertinent data to elaborate and highlight categories in your emerging theory” (Charmaz, 2006, p. 96). Not only did the later participants add valuable information, their responses also served to fully saturate certain categories. As data emerged, theoretical sampling helped move the research forward by pointing out areas for further investigation using additional questions in follow-up interviews. The process of moving back and forth between data collection, analysis, and the writing of reflective memos allowed me to better see emerging themes. These themes were shared with participants when possible, serving as a form of member checking, as well as a stimulus for useful information during the later interviews. In this
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member-checking, the researcher informally shares emerging themes with participants to elicit their opinion or reaction. This is valuable for two reasons. First, member-checking allows the researcher to test the plausibility of the theme. Second, the researcher may gain additional comments or perspectives about the theme from the participant (Charmaz, 2006)

Taken in totality, this participant selection process included representatives from local and state education levels functioning in different capacities with regard to decision making. Their collective qualifications make them a valuable knowledge base, lending credibility to the findings. To date, no existing research combines these perspectives with a focus on equity. This study provided a more comprehensive complete picture of factors influencing perceptions of equity in gifted education across the nation.

Research Question

What are Gifted Specialists’ perceptions of equity in gifted education service delivery?

Subquestions of this study include:

RQ1- What are the perceived needs of gifted education service delivery?

RQ2- What are the visions associated with the attainment of the perceived needs?

RQ3- What are the barriers associated with the visions of the perceived needs?

Data Collection

Interviews. The data collection process began with interviews of participants. The process was a conversation focused around the research questions. There are three types of interview questions: structured, semi-structured, and unstructured. This study used
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semi-structured questions. According to Merriam (2009), structured interviews contain questions in a pre-determined order with no deviation in wording of the questions. Unstructured interviews use open-ended questions in no particular order. This type of an interview is more like a conversation about a particular topic. Semi-structured interviews allowed me to have a general focus to the conversation, with enough freedom for the participants to openly express their thoughts and opinions on the topic and related areas (Merriam, 2009).

Questions for the interviews ranged from more general, such as the participants’ professional background in gifted education and thoughts about the needs of gifted students, to more specific, such as the ideal program for gifted students. The interview questions were designed to closely relate to the research questions by targeting all three components of equity: access, participation, and benefit. Furthermore, questions 9, 10, and 11 were included to investigate possible differences among school levels (elementary, middle, and high school). Finally, potential relationships between equity aspects and service delivery were addressed in questions 3, 6, and 8. The research questions and interview questions are provided in Table 2 below:
Table 2
*Matrix of Research and Interview Question Alignment*

<table>
<thead>
<tr>
<th>Research Questions</th>
<th>Interview Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are the perceived needs of gifted education service delivery?</td>
<td>1. What are the most pressing needs of gifted students?</td>
</tr>
<tr>
<td></td>
<td>2. What does access mean to you with regard to gifted education?</td>
</tr>
<tr>
<td></td>
<td>3. What are your thoughts about how access in gifted education may interact with service delivery?</td>
</tr>
<tr>
<td></td>
<td>4. What are your thoughts about how access to gifted education in your district/ state meets the learning needs of gifted students?</td>
</tr>
<tr>
<td></td>
<td>5. What does participation mean to you with regard to gifted education?</td>
</tr>
<tr>
<td></td>
<td>6. What are your thoughts about how participation in gifted education may be impacted by service delivery?</td>
</tr>
<tr>
<td></td>
<td>7. What does benefit mean to you with regard to gifted education?</td>
</tr>
<tr>
<td></td>
<td>8. What are your thoughts about how benefit from gifted education may interact with service delivery?</td>
</tr>
<tr>
<td>What are the visions associated with the attainment of the perceived needs?</td>
<td>9. How would ideal access to gifted education look at elementary, middle, and high school?</td>
</tr>
<tr>
<td></td>
<td>What are the barriers/challenges in reaching/obtaining this ideal access?</td>
</tr>
<tr>
<td>What are the barriers associated with the visions of the perceived needs?</td>
<td>10. How would ideal participation in gifted education look at elementary, middle, and high school?</td>
</tr>
<tr>
<td></td>
<td>What are the barriers/challenges in reaching/obtaining this ideal participation?</td>
</tr>
<tr>
<td></td>
<td>11. What are the perceived benefits to gifted learners of the ideal gifted program at elementary, middle, and high school?</td>
</tr>
<tr>
<td></td>
<td>What are the barriers/challenges in reaching/obtaining this ideal benefit?</td>
</tr>
<tr>
<td></td>
<td>12. How might technology interact with access into gifted education?</td>
</tr>
<tr>
<td></td>
<td>13. Are there any students/types of gifted students whose learning needs are not being met? If so, in what ways?</td>
</tr>
</tbody>
</table>
Before the participants were interviewed, the questions were tested in pilot interviews with other gifted specialists. This process helped clarify the questions and uncover additional areas to explore with the participants. Another step in question development came during the initial data analysis phase. The data from some of the early participants showed an emerging theme about needs of gifted middle and high school students. A question addressing this topic was added as a probe in later interviews, if the participants did not initially address the topic.

During interviews, participants provided responses from their own perspectives regarding equity and its components without the influence of standardized definitions for the equity terms being studied. This method allowed for greater exploration of the equity construct from a variety of contexts. Allowing participants to define and discuss these terms in their own language provided thick, rich, descriptive data to use in coding, analysis and later theory development.

**Procedures.** Prior to each interview, the questions were emailed to the participants allowing them time to organize their thoughts. At this time, participants were informed about the interview process and gave consent for note taking and recording of the conversation. All interviews were conducted by phone. The participants were information rich, however, many were located far away. In order to create a consistent interview procedure, all participants were interviewed by phone, not only those located in distant places. This helps to establish creditability in the research (Creswell, 2013). The conversations were recorded via audio recording software and then transcribed by the researcher. During the interviews, the researcher read the questions (See Appendix) beginning with the first introductory question to establish a rapport with the participant.
The researcher asked additional probing questions for more details as needed during each of the interviews. Throughout each interview, the researcher paraphrased the participant’s responses to check for clear understanding of intended meaning. At the close of each interview, the researcher offered to share the transcript and findings with the participant. This additional member-checking further strengthens the creditability of this research. All participants expressed interest in learning of the findings. When any unclear responses were discovered during the transcription process, clarification of participant responses was conducted through email. Any of the early participants, who had not discussed the themes in question, were interviewed briefly a second time to explore themes that had emerged during the data analysis.

**Confidentiality.** Several measures were employed to safeguard the confidentiality of participant data. For the interview responses, code numbers were assigned—no participant names were recorded on the data. All data were kept secured in a password-protected computer at home in a locked house when not in use. Responses were recorded electronically and coded for data analysis. No identifying participant information was included in the written analysis, since all participants were assigned numbers. Participants could withdraw from the study at any time. These confidentiality measures were implemented according to the process described in the approved IRB application for research.

**Documents.** This study included data in the form of program documents for gifted programs in Local Education Agencies (LEAs or school districts) and statewide gifted program documents. These documents included existing district and state policies
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regarding eligibility criteria for gifted service, program types offered for different school levels, required learning standards, and student evaluation criteria.

**Literature.** Because observations were not an appropriate data source for this study, the final source of data collection to assist with triangulation was the existing literature on gifted education. More specifically, some of the literature included in the data analysis involves empirical studies of the effectiveness of various approaches to gifted education. The *State of the States in Gifted Education* (Council of State Directors of Programs for the Gifted, 2013) was an invaluable source in understanding current practices across the nation. In addition, additional literature discussing equitable identification processes and service delivery models were discovered during the interview process and used to support theory development. These are interwoven in the discussion of findings in Chapter Four.

**Data Analysis**

The data consisted of interviews transcribed verbatim and documents, including program documents for LEAs and state level program recommendations. During the transcription process, I wrote reflective memos detailing emerging questions, areas to explore, and connections between interviews. Data entry was an ongoing process throughout the interview and data collection period. This allowed the grounded theory method to fully operate with constant comparisons, revision of interview questions, and ongoing memos to document the evolution of the analysis. As data from early interviews were entered and analyzed, additional question probes were developed to explore the themes that were emerging. These questions were used in later interviews to gain additional rich data. An example of one such question was: “Do you see any particular
unmet needs in the gifted middle schoolers?” This theme emerged from early interview data, so the question was added into later interviews. Data sources were entered into Atlas Ti, a data analysis software tool, for better organization and management. This software tool is especially helpful in facilitating the constant comparative method because all data and memos are integrated in one place allowing a thorough analysis as themes emerged in the data (Merriam, 2009).

**Memo writing.** Memo writing is an integral part of the grounded theory method, especially Constructivist Grounded Theory (Charmaz, 2006). Memos allow the researcher to record her thoughts and then interact with those ideas throughout the data analysis process. Not only do research memos make the analysis process more transparent, they also enhance credibility by adding to the audit trail, while moving theory development forward (Lapan, Quartaroli, & Riemer, 2012). It is this iterative process of writing, examining, and thinking that helps the researcher to analyze concepts to explore, coding decisions, category development, and emerging themes. (Charmaz, 2013). My early memos were less detailed, focusing on pragmatic details and analytical questions moving from the literature into the actual data. In memos, the researcher asks questions of the data providing direction for follow-up questions during interviews. During this study, after three participants had identified a similar need for middle and high school gifted students, the research memo “Do participants in other states/community types perceive this need as well?” The question prompted follow-up interviews with earlier participants to determine their thoughts regarding the needs of middle and high school gifted students. This question was also asked, if needed, in all further interviews. As the research continued, the memos became more conceptualized and theoretical. The utility of memo writing continued as
analysis wound up, leading to translating findings into theories. According to Charmaz, “Memo writing is the pivotal intermediate step between data collection and writing drafts of papers” (2006, p. 72).

**Coding.** More specifically, the data analysis process included entering the first transcript into Atlas ti. Coding methods used were a combination of the work of Glaser and Strauss (1967) and Charmaz (2006). Using both methods allowed for the strengths of each to support the analysis process. More specifically, Charmaz (2013) advocates for use of gerunds in coding to show action and facilitate generation of theory. This process will be discussed more fully in chapter four. After initial coding with gerunds, Glaser and Strauss’s (1967) method of coding families was useful for moving the analysis process forward. While their specific theoretical codes did not fit this analysis, the idea of coding families was helpful. Details of this method are included with examples in chapter four.

**Line-by-line coding.** Once each transcript was entered into Atlas Ti, it was initially coded using a combination of open coding processes including line-by-line and chunking the text to facilitate development of hypotheses for the grounded theory method (Merriam, 2009). Charmaz explains line-by-line coding as, “the initial grounded theory coding with gerunds, is a heuristic device to bring the researcher into the data, interact with it, and study each fragment of it” (2013, p. 309). Examples of some of these codes included: opening access to gifted services, increasing equity in identification, recognizing diversity in gifted learners, and creating/finding service options. Occasionally, the concepts expressed by participants weren’t well described by gerunds, so other terms were used such as: mandated/nonmandated service, funding sources, benefit of services, underrepresented populations, cluster grouping, resource model, and collaborative
teaching. The coding process at this level provided the opportunity to develop the first critical ideas that later were deemed insignificant or worthy of further exploration. This process was repeated for remaining transcript data. While this process was occurring, documents were being collected. These program documents, including webpages, presentations, and documents were entered into Atlas Ti and coded in the same manner as the transcript data to support development of a grounded theory. The interviews and programs documents were coded for school level and community type (rural, suburban, and urban) to facilitate exploration of those factors related to the research questions. Literature was not coded using Atlas Ti, but by hand.

**Axial coding.** The next step in the coding process was axial coding to relate the categories that developed during the initial coding process and refine the category scheme (Merriam, 2009). This round of coding revealed certain categories. Memos were used to detail decision-making regarding the collapsing of codes and development of categories. These categories were evaluated to determine their robustness, and determinations were made whether to include them as enduring categories (Lapan, Quartaroli, & Riemer, 2012). Research memos during this phase discussed data indicating that opening access was strongly represented in various codes. This became an important category throughout the remainder of the research process. Ongoing memo writing ensured that the constant comparative method was implemented with fidelity leading to deep reflection on the evolution of categories into themes. Memos at this point indicated a commonality around perception of needs of middle and high school students for integrated learning experiences. Later interviews confirmed this theme as worthy of continuation. It was a constant process
of fragmenting the data and reassembling it in new ways as a result of changes in perspective.

**Focused coding.** Finally, focused coding was used to integrate and refine the theory in order to develop hypotheses about gifted education (Merriam, 2009). Here, Strauss’ (1987) idea of the core category joins the analysis. The existing categories (families) were scrutinized for commonalities that could result in a core category. There was examination of the data for strands running through the interviews and program documents relating to the interview topics: access, identification, equity, participation, service models, ideal programs, and learner needs. Throughout the study, ongoing memos created during the analysis process helped narrow the data and revealed commonalities among the different data sources (Merriam, 2009). By constantly referring back to the data to develop theories, the researcher is guaranteeing theory that is grounded in the data.

**Theoretical sampling.** Throughout the process of data collection and coding, and memo writing, theoretical sampling was used to validate (or invalidate) ongoing development of categories, themes, and theory. Using theoretical sampling allowed for inclusion of participants who could answer questions revealed through continuing data analysis and memo writing and review. Additionally, previous participants were contacted again for follow up on these new questions. The participant responses were combined to test the validity of new themes and emerging theories.

**Analysis of program documents.** The analysis of the state and local school district Gifted Education Program Documents followed a similar course to the analysis of the Participant Interviews. These documents included information about the gifted education programs, their vision and mission, available services, identification process, and expected
outcomes. Some state and/or local program documents also included historical information about the policy decisions and research behind development of gifted education program. A few local school district program documents provided educator training on gifted identification processes and best practices. The analysis process began after the analysis of participant interview data was completed. This analysis is described below in order to make the research process transparent to the reader.

After locating existing program documents for each state and school district included in this research, analysis began with reading each document. This is the same procedure that was followed for the participant interviews. Reading the document carefully is recommended to gain an overall understanding of the content before beginning analysis (Charmaz, 2006).

Although the participant interview data were analyzed with the assistance of Atlas Ti software, the program document data were analyzed by hand without the use of this software. This decision was made because of the variety of formats in the program documents. Atlas Ti has the capability to handle text documents, images, and PDFs. A few of the program documents were outside of these formats, making use of the software a cumbersome procedure. Since the analysis process had already been established with the participant interview data, the same process was continued by hand with the program document data. The main difference was that the code counts and frequencies were tallied by hand. The resulting counts were entered into spreadsheets in order to analyze data patterns and construct tables or graphs as needed.

Following the first reading of the documents, initial coding was done. The codes involved were the same codes used with the participant interview data. The next step was
axial coding to determine the strength of the support for each of the categories that were in evidence. Because categories had been revealed in the earlier analysis of the participant interview data, these categories were used here. This allowed for a true test of the category strength because the counts of this new data could be compared with the code counts of the earlier data. Another important step was examination of the codes in this data to see whether any new categories had emerged. The axial coding revealed that all codes from the program documents fit into the already-established categories. The focused coding combined all sources of data, participant interviews, program documents, and relevant literature, and was discussed in the preceding section under analysis of the participant data.

**Peer review.** Throughout the research process, peer review proved to be a useful tool. Initially, peers in the doctoral program were helpful in providing feedback on the choice to use grounded theory, as opposed to another methods. Later, several faculty specializing in gifted education at various universities assisted in selecting types of participants to target, as well as providing contacts for potential participants. Some of the previously mentioned faculty were asked for reactions to ongoing work including codes, memos, theories, and even graphic representations of developing theories.

This advice and input helped to move the research process forward in a productive way. Several peers provided invaluable advice during the process of pulling seemingly disparate themes into a cohesive theory. Their comments and suggestions improved the validity of the work and confidence that the developing theory was well grounded in the data.
Saturation. In the original proposal, the interview plan included a state gifted education director, and gifted specialists at the district level for each of the four focus states. Table 3 below shows an overview of participants by state and community type. The table also indicates the existence of and participation of a state level gifted specialist. A checkmark indicates a participant in that category, while NA indicates that the category does not apply for that state.

Table 3

*Participant Overview by State and Community Type*

<table>
<thead>
<tr>
<th>State</th>
<th>State Level Gifted Specialist</th>
<th>Community Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Rural</td>
</tr>
<tr>
<td>California</td>
<td>No State Level Gifted Specialist</td>
<td>✔</td>
</tr>
<tr>
<td>Florida</td>
<td>Deferred participation to local school districts</td>
<td>✔</td>
</tr>
<tr>
<td>Georgia</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>South Carolina</td>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>

Ideally, the gifted specialists would have filled the categories of community types: urban, suburban, and rural. In reality, California didn’t have an identifiable director of gifted education, and Florida’s State Director deferred research questions to the local district level. The researcher made significant efforts to recruit participants in each of the categories for each state. Through existing contacts, the researcher was able to gain interview access to an urban and suburban district gifted specialist in Florida. Repeated efforts to gain access to a rural district gifted specialist in Florida were unsuccessful. Furthermore, South Carolina did not have a typical urban school district. Therefore the
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research was confined to a rural district with a higher percentage of students of lower socio-economic status and culturally/linguistically diverse students and a suburban district with a more mixed socio-economic status and less cultural and linguistic diversity. Both groups are typically underrepresented in gifted education making inclusion of this rural district important for exploring equity perceptions. Consequently data gleaned from state and local gifted program documents supplemented interview data to saturate categories. Reaching out to include two participants from states outside the research study parameters served to confirm the reliability and credibility of the new theory.

**Researcher disclosure and reflexivity.** In Grounded Theory, data will necessarily reflect the historical, social, and situational contexts of the participants and researcher. This can lead some to question the data as incomplete and biased. “These concerns involve constructivist grounded theorists in reflexivity throughout inquiry as an integral part of the research process” (Charmaz, 2013, p. 305). From the researcher’s role, this meant not ignoring experience, existing knowledge, and opinions, but acknowledging them and referencing them—as an instrument of the research. Sometimes, my role as an instrument of the research came out in the additional probing questions during interviews. The questions were not part of the original interview protocol but came as a result of the constant comparative method, especially memo writing and researcher reflexivity. While these questions may have influenced participants’ responses, this influence was examined through member checking, peer reviews, and validation by colleagues ensuring responsible use of grounded theory methodology. Throughout this process, the researcher highlighted the thinking and decision-making surrounding research purpose, interviewing, participant selection, data analysis, and theory development. Some of that is discussed below.
As a teacher who has worked with gifted students in the regular classroom for many years and now in a gifted classroom setting, I bring a set of experiences and first-hand knowledge that impacted my thinking about gifted education. Based on this, I saw a real need for gifted education programs to continue into the future. There can be immense benefit for gifted learners when fair identification practices pair with good availability and participation level in gifted services. In my experience, the truly gifted student cannot reach his or her potential in a classroom setting that is appropriately challenging for the average learner. My research (Kraeger, 2012 and Kraeger, 1985) and reading (Renzulli, 2010; Tomlinson, 1999; Weinbrenner & Rimm, 2001) over the years supports the veracity of this statement.

As an elementary educator, I examined the data with a keen eye for support of the youngest gifted learners. Recommendations that minimize the importance of developing the potential of young gifted learners are insufficient in my opinion. As a parent of gifted children myself, I am also concerned with the social and emotional aspects of growing gifted learners. I have intimate knowledge of the positive and negative impact educational settings can have on gifted learners, even if that knowledge is only anecdotal and not necessarily generalizable to the larger population of gifted children.

**Reliability and Credibility**

Good qualitative research results in findings that are consistent with reality. There is much debate over the validity of qualitative research itself, and even definitions of terms relating to validity, credibility, and reliability (Merriam, 2009). Because of these circumstances, I took extra precautions to maintain the credibility of my research. According to Creswell (2013), qualitative validity entails the researcher checking for
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accuracy of the findings by using established procedures. Table 4 details Creswell's (2013) procedures and the ways they were used in this research.

Table 4

*Creswell’s eight strategies and researcher response*

<table>
<thead>
<tr>
<th>Creswell’s Strategies</th>
<th>Researcher Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Triangulation</td>
<td>Throughout the research, interview data was triangulated with other participants, program documents, and through literature.</td>
</tr>
<tr>
<td>Use of rich, thick description to convey findings</td>
<td>Interview participants were eager to share, not only detailed answers to questions, but also stories of their own experience that supported the concepts being discussed. Because the interviews were recorded, all comments are available to be included in the analysis and reporting of findings. Both supporting and contrary comments will be included in this research, when appropriate.</td>
</tr>
<tr>
<td>Member Checking</td>
<td>During each interview, care was taken to reflect comments back to the participant to ensure accurate understanding of meaning. Transcripts and reports of findings were offered to all participants. Several participants agreed to follow-up calls or emails to clarify interview comments or to explore new questions. Emerging themes were also shared with participants to elicit their opinions on these ideas.</td>
</tr>
<tr>
<td>Researcher Bias</td>
<td>Researcher experience and bias was fully disclosed in the above section on Researcher Disclosure and Reflexivity. The information about researcher perspective strengthened transparency of the analysis process.</td>
</tr>
<tr>
<td>Perspective/Method</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Present discrepant information</td>
<td>Contrary evidence was tracked for inclusion in analysis and discussed in findings where appropriate. This type of evidence was pursued through follow-up questions with participants, theoretical sampling, peer review, and evolving literature review.</td>
</tr>
<tr>
<td>Prolonged time in the field</td>
<td>The researcher has been in the field of gifted education for more than 25 years.</td>
</tr>
<tr>
<td>Peer Debriefing</td>
<td>The research was discussed with fellow doctoral students, colleagues in the researcher’s gifted education department, professors, and conference attendees.</td>
</tr>
<tr>
<td>External Auditor</td>
<td>Conversations with professors outside of the researcher’s university and local gifted specialists took place to review the research process. These people asked questions and encouraged the continuation of the evolving research process.</td>
</tr>
</tbody>
</table>

Careful attention to research design ensured the use of all of Creswell’s eight strategies, in addition to some of the specific Grounded Theory methods. One extremely helpful Grounded Theory method was the ability to be flexible with the interview guide. Making changes to the interview guide as the analysis proceeded, allowed new interview data to test emerging theory. Charmaz (2013) discusses the importance and relationship of the elements of grounded theory. She emphasizes the importance of using the comparative approach as part of the iterative process that keeps the researcher going back and forth between old data, to new data, all the while writing reflective memos to detail the ongoing thinking process (Charmaz, 2013). Keeping the researcher actively involved with the data
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is crucial to uncovering the essence of the emerging themes. Moreover, Charmaz (2013) believes in the importance of abductive reasoning. She explains that grounded theorists use abductive reasoning when they encounter a contrary finding, at which point they consider all theoretical explanations. New questions or hypotheses are formed, resulting in subsequent testing of the explanations with new data (Charmaz, 2013).

Reliability in qualitative research is defined differently than in quantitative research. In the traditional meaning of the word, reliability is the belief that if the study were repeated the results would be the same (Merriam, 2009). That is problematic in the world of qualitative research because human behavior is constantly changing and interpretations of the meaning of those behavior are subject to great variation. Therefore, the qualitative researcher aims for outsiders to agree that the given data are consistent with the research findings (Merriam, 2009). Strategies that increase reliability include triangulation, peer review, researcher reflexivity and an audit trail. The first three strategies have been detailed in Table 3. An audit trail is another name for a researcher log. Part of the ongoing data collection and analysis methods included a detailed researcher log describing the process of developing the research questions, creating the interview guide, conducting interviews, collecting documents, and coding and analyzing the data. These notes made the research process transparent, thus increasing the reliability of this study.

Limitations

Any form of research has limitations. This is particularly true of grounded theory since the method relies so heavily on analysis and interpretation of the data without the support of pre-existing theories. Researcher-as-instrument can make this interpretation prone to bias, unclear thinking, or skewed perceptions (Merriam, 2009). Knowing that the
researcher's lens is so important to the entire process means staying open to all possible
theories; this concept is crucial to validity. Although researcher reflexivity can be an asset
in constructivist grounded theory, steps must be taken to ensure reliability of the findings.
Charmaz (2006) recommends extensive use of member checking and peer review to guard
against researcher bias in data analysis and theory development. In keeping with this
recommendation, I was meticulous with incorporating member checking and peer review
of emerging categories, themes, and theory throughout the interview and analysis process.
These measures, along with constant comparison with the literature, helped to ensure
reliability of findings (Charmaz, 2006).

Another potential limitation of the study was the conflict between what the gifted
specialists know as research-based best practices and the economic and political realities
of education. Their recommendations may have been impacted by today's realities.
Because of the typical dissertation timeline, the study focused on only four states. The
limited number of states may impact the transferability of the findings because readers
may not find similarities between their educational setting or situation and those in this
research (Lincoln & Guba, 1985). While this is true, there are several target audiences that
may find worthwhile connections between this research and their own research interests.
These interest areas could include other equity-focused issues such as Gentry and Fugate's
(2012) work concerning gifted Native American students, and reform gifted education
programs in other states with high populations of underrepresented students. In addition,
input from California local school district gifted specialists may have provided useful or
possibly different data than that of the California regional gifted educator representatives.
Delimitations

The scope of the research was limited to examining recommendations for gifted education for students in kindergarten through twelfth grade in four states. Participants included only local or regional district gifted specialists and state level directors, not students, teachers, or researchers in gifted education.

Chapter Summary

This chapter has described the grounded theory methodology used to study perspectives on equity in gifted education. The research process included semi-structured interviews, peer review, theoretical sampling, coding, memo writing, and constant comparative techniques to stay true to the grounded theory method. Axial and theoretical coding were combined to bring the splintered data back together to develop theory. Review of researcher reflexivity, study limitations and delimitations helped readers of this work understand all concerns about this research.
Chapter 4: Results, Analysis, and Key Findings

Introduction

Chapter four illuminates the path of discovery from this research. The reader will gain a first-hand view of the generation of results and data analysis that revealed key findings. Chapter Four provides a detailed account of the analysis that led to creation of the grounded theories proposed later in this chapter.

Restating the Dissertation Focus

This chapter includes interview findings and the coding methodologies that led to development of theory. The purpose of this research was to gain a better understanding of the perspectives on equity in gifted education from the viewpoint of gifted specialists at the state and local district levels. This was accomplished by using interviews and program documents to collect data, which was splintered, analyzed, and reassembled to reveal two theories. While grounded theory is not a linear process, this chapter is organized in a linear manner to aid the reader’s understanding. With that in mind, events are presented chronologically when possible, with grounded theory methodology integrated as needed to support the discussion of findings. In addition, elements of the evolving literature review are woven throughout this chapter to provide a more complete view of theory development. Figure 1 is included here to remind the reader of the initial research focus.
Participant Overview

It will be helpful to include Table 5, an overview of the participants. This will aid the reader in understanding the discussion of participant voices and resulting themes. This information was taken from Table 1, which appeared in Chapter Three of this dissertation.
Table 5

*Participant List by State and Community Type*

<table>
<thead>
<tr>
<th>Participant</th>
<th>State and Community Type of School District</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>California-Urban/Suburban District</td>
</tr>
<tr>
<td>2</td>
<td>California-Suburban/Rural District</td>
</tr>
<tr>
<td>3</td>
<td>Florida-Urban District</td>
</tr>
<tr>
<td>4</td>
<td>Florida-Suburban District</td>
</tr>
<tr>
<td>5</td>
<td>Georgia-State Gifted Program Director</td>
</tr>
<tr>
<td>6</td>
<td>Georgia-Suburban District</td>
</tr>
<tr>
<td>7</td>
<td>Georgia-Urban/Suburban District</td>
</tr>
<tr>
<td>8</td>
<td>Georgia-Rural District</td>
</tr>
<tr>
<td>9</td>
<td>South Carolina-State Gifted Program Director</td>
</tr>
<tr>
<td>10</td>
<td>South Carolina-Suburban District</td>
</tr>
<tr>
<td>11</td>
<td>South Carolina-Rural District</td>
</tr>
</tbody>
</table>

**Grounded Theory Approach**

Brief discussion of grounded theory will be interspersed throughout this chapter for several reasons. First, parts of different methods were combined to suit the purposes of this research. Second, it will be helpful to discuss how the data analysis process that was used fits into the grounded theory framework. Finally, grounded theory is a flexible research methodology. It was chosen for this research for that very reason. With that flexibility comes freedom to explore emerging themes, combine variations on grounded theory methods, and break new ground with theory development. That same freedom carries with it the responsibility to build the data analysis on a solid foundation of well-reasoned decisions regarding coding, category development, and theory evolution.
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Decision-making is partially based on the researcher’s theoretical sensitivity. When the researcher has a thorough understanding of the concepts of a field, this helps develop theoretical sensitivity—the quality of being able to discern subtle interactions, effects, meanings, and implications based on knowledge of the field (Charmaz, 2006). The decision making process must be not only strongly linked to the data, but also transparent to the reader. The reader should be able to follow the decision making process and agree that the theory generated makes sense, given the data provided. Without that, the research loses much of its reliability (Charmaz, 2006).

While there are several methods of grounded theory, Glaser, Strauss and Corbin, and Charmaz are acknowledged as the thought leaders of this research framework (Creswell, 2013). Because of the variation among the methods, the researcher may choose one or the other that best fits the purpose of the study. Sometimes, a combination of methods best serves the research goals and the researcher's individual preferences for steps in the data collection and analysis process (Creswell, 2013). Combining methods proved to be the best approach for the goals of this research since it allowed for an evolving process of discovery. Thus, this study used some of the methods of the aforementioned theorists combined with other aspects of qualitative methodology:

1. Coding methods of Glaser, Strauss, and Corbin; and Charmaz
2. Memo writing, as described by Charmaz (2013)
3. Theoretical sampling (Merriam, 2009)
4. Constant comparison of previous data with new data until saturation was reached (Charmaz, 2013)
5. Additional data collection from literature and program documents as emerging themes were identified in memos (Charmaz, 2013)

6. Peer reviews with other members of the researcher’s doctoral class, colleagues in the education field, and researchers in the field of gifted education (Merriam, 2009)

Evolving Literature Review

Support from existing gifted education research and literature is interwoven throughout this chapter along with participant responses to further validate the findings while providing additional data points for theory development. As new themes emerged, additional literature was reviewed to search for both support and opposition of these ideas.

Program Documents

It is important to discuss how the state and district gifted program documents factored into this data analysis. After coding the documents and examining them more closely, it was apparent that there were many commonalities between the codes, categories, and themes present in the program document data and the participant interview data. In every case, the mission and vision for gifted education shown in the program documents was in agreement with the perspectives shared by participants. In fact, the program documents showed strong support for all of the emergent themes revealed in the analysis of participant interviews. Program document findings will be addressed later in this dissertation within the section for each theme. While citations for state level program documents has been included in this dissertation, local program documents have not been cited to protect the anonymity of the participants.
Interview Process

Each interviewee graciously not only agreed to participate, but also shared their personal journeys with gifted education along with detailed responses to the intended questions. During the ongoing interview process, frequent reflection and memo writing kept the focus on following up on questions or hunches that emerged.

Knowing that educators’ days are always packed with responsibilities, every effort was made to respect their busy schedules and keep interviews to less than 45 minutes. Most of the interviews lasted about 30 minutes with two that lasted 45 minutes. This minimal time commitment helped with participant agreement to be interviewed. Sending the interview questions to participants in advance helped maintain this interview time limit. In most cases participants took advantage of this opportunity and were well prepared for the interview. Because they knew the focus of the questions, the conversations proceeded rather smoothly. As conversations go, however, however, some digressions from the planned questions occurred. Some of these revealed unexpected information about differences in gifted education among states, which led to some follow-up questions in later interviews. In some cases, earlier participants were contacted by email for follow-up on themes that had emerged. One follow-up contact was a short phone interview yielding valuable support for the emerging theories.

Later participants were eager to hear what had been discovered so far with several asking whether others had agreed with their responses. In fact, some of the participants reacted positively to hearing their ideas validated by those from previous interviews. This support of their comments during our phone interviews encouraged
them to elaborate on these ideas providing greater detail leading to the thick, rich data that is crucial to qualitative research (Creswell, 2013).

The interview design was created in response to data gleaned from the *State of the States* report (Council of State Directors of Programs for the Gifted, 2013) combined with suggestions and feedback from the dissertation committee. Without these suggestions, the research focus would have been too broad in scope, missing some of the important elements of equity. The narrowing down process guided development of interview questions to include all three main components of equity, access, participation, and benefit (DeVillar, 1986), with service models and school levels. The detailed nature of the questions kept the interviews tightly focused resulting in significant amounts of useable data from each interview.

**Participant Reactions and Reflections**

There was some doubt, at the outset, that participant information would be meaningful and relevant to the research questions even given the tightly focused interview questions. This doubt was erased during the first interview with a participant whose career in gifted education has included local, state, and national work spanning over 30 years. Her every response was on-point, getting to the heart of the question and delving more deeply into the issues behind the questions. Passion for gifted education was evident in everything the participant said. This passion for gifted was a common thread in all the interviews. Many of the participants seemed reluctant to end the conversation at the close of the interview. Several asked for follow-up information after the study was concluded, with one offering ongoing collaboration “I
would love to keep in touch with you to see what you’re doing with gifted education” (Participant 10).

In order to maintain a constructivist framework in this research, key equity terms were not defined for the participants prior to the interviews. As a result, several participants asked for clarification during the interview when responding to the first question about each of the equity terms (access, benefit, and participation). When encouragement of his/her interpretation was offered, each participant proceeded to share his/her thoughts without hesitation. Access was the most complex concept, but for this research, it was operationally defined in Chapter One as a combination of:

- **Identification**- Description of percentage and types (gender, ethnicity, race, SES) of students receiving gifted education services in relation to the aggregate number of students and the percentages that each majority/minority student group comprises

- **Availability** - Access to gifted education services that meet the student's learning needs.

The initial instinct to include both of the concepts as related to access proved to be invaluable, since several of the participants suggested meanings of access that included one or both of the terms. “Access means that everybody should be able to qualify” [meaning all gifted students should be able to qualify for services] (Participant 4), “For access, I think the key is that it’s something that should be made available to all kids who are identified gifted” (Participant 1), “Access means being identified as gifted and placed into a program to meet the needs of the child” (Participant 8). There were similar commonalities in the participant interpretations of benefit: “Students reaching their potential because of participation in the gifted program” (Participant 8), “The benefit is the high intellectual engagement, high academic rigor, acceleration of content
toward big understandings, acceleration of content toward critical thinking/creative thinking, depth of understanding of content, independent/interest based work...every kid learning at their own capacity level” (Participant 1). None of the participants offered definitions of participation as they did for the terms access and benefit, however, some mentioned the choice of some students to enroll or not enroll in gifted education programs.

At the close of each interview, all participants offered to provide any additional information needed with several asking if they could do anything else to assist. This was the point at which some of the snowball sampling occurred. As the participants discussed issues in gifted education, they readily recalled colleagues that could offer a unique perception around some of those issues. This was very helpful in moving toward theoretical saturation, where new data do not result in additional themes (Charmaz, 2006).

In addition, most participants were eager to see the results of this research. When discussing needs of artistically gifted students, one state level director said,

We just need to find out what’s being done across the nation, some innovative approaches, try to find ways to secure funding that can help with this. I know that somewhere, someone is nailing this and doing a great job. We just need to sit at their feet and learn. (Participant 9)

During the interview process, several commonalities among unmet needs were discovered. These areas of shared concern included the following: needs of middle and high school gifted students, recognizing and serving the artistically gifted students, meeting the social and emotional needs of gifted students, recognizing, identifying, and serving the
twice-exceptional students, improving access for populations who are underrepresented in gifted education, and finding creative ways to offer and fund gifted education. These concerns, along with the connections among them, will be discussed in greater detail later in this chapter.

**Data Analysis with Atlas Ti**

Although some qualitative researchers prefer to immerse themselves in the data by hand coding and organizing it, this research relied almost exclusively on the power of Atlas Ti to conduct the data analysis. The program has a multitude of features that can be used in many ways. The main reason for its use in this study was to manage the large number of interview transcripts, program documents, and associated articles gathered in the research. With 30 different texts to code, Atlas Ti was the most suitable solution.

Atlas Ti facilitated the coding by making it easy to see code lists as they evolved. The program makes it simple to edit codes, renaming, combining, or eliminating as needed throughout the ongoing data analysis process. Atlas Ti also offers many other features that support the fracturing and reconfiguring of the data that is necessary for the constant comparative method. In addition, the views of the data can be quickly changed to analyze evolving relationships between categories. Another convenient feature was the search function for the quotes taken from interviews, program documents, or other sources. This proved invaluable, both in the analysis and in the writing process. Specific uses of this software during the analysis process will be discussed as each topic unfolds in this chapter.

**Initial Coding Using Gerunds**
“In short, the logic of grounded theory involves fragmenting empirical data through coding and working with resultant codes to construct abstract categories that fit these data and offer a conceptual analysis of them” (Charmaz, 2013, p. 295). So, the best place to begin this work is at the beginning—fracturing the data using codes. The use of gerunds helped to define the actions, which resulted in more easily seeing the developing relationships. Table 6 presents truncated data coded using Charmaz’ (2006) gerund method.

**Discarded themes.** The highlighting in the first five rows of Table 6 indicates topics that participants mentioned, but had little relevance to larger themes that developed during the analysis. These topics include:

- **Funding-State or Local:** This was used as a coding mechanism to analyze whether a relationship existed between funding level and any of the equity topics. Funding source appeared to have no influence on the participants’ perspectives of equity, including the subtopics of equity.
- **Use of Problem Based Learning or Impact of Common Core Standards:** These were mentioned only twice by participants, and so were deemed as non-relevant to equity factors.
- **Mentoring, Cluster grouping and collaborative teaching:** These were both service models that were mentioned by only one participant and mentioned only a few times in any of the Program Documents, so they were dismissed as non-relevant.
- **Acceleration topics:** Creating objectivity, creating bias against, and increasing acceleration were linked to the comments of only two participants, with only a few
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mentions in some of the program documents, thus this topic did not support any of the ongoing themes.

- Meeting the needs of the profoundly gifted was mentioned only twice by participants, so it was dismissed from further review in the analysis.

Table 6

<table>
<thead>
<tr>
<th>Raw Data from One Interview</th>
<th>Charmaz-Gerunds</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is a matter of our will and our creativity that if every penny of weighted funding were gone tomorrow, I don't think we would change one thing that we're doing for bright kids in this district.</td>
<td>Funding-State, Funding-Local</td>
</tr>
<tr>
<td></td>
<td>Using PBL/Integrating Common Core</td>
</tr>
<tr>
<td></td>
<td>Mentoring, Cluster Grouping, Collaborative Teaching</td>
</tr>
<tr>
<td></td>
<td>Acceleration: Creating Objectivity</td>
</tr>
<tr>
<td></td>
<td>Creating Bias</td>
</tr>
<tr>
<td></td>
<td>Increasing Acceleration</td>
</tr>
<tr>
<td></td>
<td>Refusing acceleration</td>
</tr>
<tr>
<td></td>
<td>Meeting the Needs of Profoundly Gifted</td>
</tr>
<tr>
<td>If we believe that gifted youngsters need an opportunity to work with mentors in their field, we can do that. That and the connection to mentors and other gifted kids.</td>
<td>Balancing needs-challenge vs. socio-emotional</td>
</tr>
<tr>
<td></td>
<td>Giving affective needs more attention</td>
</tr>
<tr>
<td></td>
<td>Recognizing needs other than academic</td>
</tr>
<tr>
<td></td>
<td>Growing counselor capacity</td>
</tr>
<tr>
<td>Their needs are much greater than traditional academic challenge. We tend to forget the social emotional needs, the continuing need for gifted kids to be together. That and the connection to mentors and other gifted kids.</td>
<td>Creating /finding service options</td>
</tr>
<tr>
<td></td>
<td>Using AC model</td>
</tr>
<tr>
<td></td>
<td>Using Resource model</td>
</tr>
<tr>
<td></td>
<td>Creatively meeting gifted needs</td>
</tr>
</tbody>
</table>

It is a matter of our will and our creativity that if every penny of weighted funding were gone tomorrow, I don't think we would change one thing that we're doing for bright kids in this district. We'd probably have larger class sizes just because of the weighted funding that we pull in. If we believe that gifted kids need to be grouped with other kids who are achieving at similar levels in a content area so they can really fly and move at their pace, we can do that. I really think we have the power in our hands to do the right thing by gifted kids and it doesn't always take a whole lot of extra money. It takes creativity and it takes will and it takes belief. Elementary level, it would be very broad based talent
development. By upper elementary level, I'd like to see the program expanded from the resource and talent development opportunities into advanced content. Flexibly probably, in cluster groups or collaborative as kids begin to distinguish themselves along content lines. Middle school, I'm sitting here drawing in the air, I see those two components begin to balance out. I think Middle School continues to be a place where kids need to explore and find their strengths, but we also by middle school are beginning to see kids distinguish themselves as superstars, in particular content areas. I see an increase in the acceleration opportunities through middle school, but certainly not doing away with the rich exploratory types of resource activities and interest based activities. In high school, you can envision my little scale, is that the majority of gifted services in HS do begin to look like acceleration options. Kids have demonstrated their readiness for AP, IB, mentorship and dual enrollment. I think the caution we need to make at the high school level is not to think that these are only traditionally schoolhouse gifted kids just because they can do AP calculus at 10th graders, they still need the opportunity for seminar type activities and exploration and time together. I do think the balance tilts somewhat as they go through the K-12 trajectory, but I think the components are always there: Opportunity to move ahead in content areas as they show their readiness, opportunity to find and then develop their interests, and time to be together.

It is a matter of our will and our creativity that if every penny of weighted funding were gone tomorrow, I don't think we would change one thing that we’re doing for bright kids in this district. We'd probably have larger class sizes just because of the weighted funding that we pull in. If we believe that gifted kids need to be grouped with other kids who are achieving at similar levels in a content area so they can really fly and move at their pace, we can do that. I really think we have the power in our hands to do the right thing by gifted kids and it doesn’t always take a whole lot of extra money.

Funding Gifted Education

Determining what is appropriate education
Enforcing FAPE
Recognizing gifted as a special population

It’s just that folks do recognize them as a special population. It begins with the recognition that these children are different, initial access begins with teacher recognition of their needs and then access to appropriate services. Because just like other areas of exceptionality, it brings it to the forefront, and we need to do it with law and rule, these are special needs children. I hope someday we talk all the time about identifying kids’ advanced learning needs. I identify the “screaming gifted” when it becomes so clear that this kid is going to stay on this trajectory or is likely to.

Use it as an incubator, as a talent development program and sometimes we see things in those kids that we never would have seen if we did not get them into those types of creative programs that match their strengths. I think that it is a dangerous thing to stick permanent, semi-permanent labels

Creating successful enrichment experiences
Engaging gifted learners
Growing talents
Impacting underachievement
on 5,6, or 7-year old children. Very broad based talent development programs where those kids who are already excelling and are way above their age-mates are given an opportunity to be together and do advanced level things. Equally as important is the talent development phase because of the disparity of development. We know that scores are all over the place until kids are about age 8. Give lots of children opportunities to show what they’ve got. School-wide enrichment model for that idea for the elementary level. I think we have to be very cautious with that too though, so schools don’t start saying, “We have an endorsed teacher here, so everyone in third grade better be gifted in math because that’s what we’re giving them.” I joke about subversive teaching, but I’m not really joking. When they’re making movies and websites, rather than the traditional boring 3-panel board or traditional paper, it encouraged them.

I’ve gotten to the point where I think there are not as many barriers to doing right by gifted children as we sometimes think there are. I think sometime we hide behind that like: I don’t have enough endorsed teachers or I don’t have enough money, or whatever

I don’t think it’s either identification or some other way, I think we need to continue both. Someday, we won’t even talk about identifying kids because to me that brings with it the implication that there are some right kids that we can with a straight face identify the truly gifted and the others aren’t and I don’t think that’s so. So I do think we need to continue with constantly improving formal identification. You know you think about how hard we work in Georgia to have a flexible, equitable identification rule. I think we need to constantly improve formal identification mainly to keep us in the game as a special needs population.

I also don’t think we do a very good job, and it may be a cultural value, of recognizing and serving kids who are gifted in the arts. I think there are individuals and I think there are individual programs where the gifts of children who are in the visual or performing arts, musically gifted kids are being met, but we’re not doing it in a system-wide or programmatic way. I think we’ve pretty much forgotten the need for the arts, except in those rare places where there’s just a super star drama teacher or chorus teacher.

Recognize the great variety of gifts that individuals have, different ways that those might be manifest depending on the background, language, culture and social and emotional needs. I think in addition to those we typically talk about those speaking English as a second language, kids living in impoverished homes. Certainly, we haven’t solved the riddle of under represented population either

Identifying Barriers to Meeting Needs

Identifying Gifted
Improving identification process
Restricting services because of testing/ID policies

Recognizing artistically gifted
Serving artistically gifted

Recognizing diversity in gifted students
Considering socio-cultural context when looking at needs
Identifying more culturally and linguistically different students
Identifying more students from lower SES
Increasing equity in
Access is huge! You've really created opportunity and access for kids who need challenge for kids who need it in certain areas or all areas, but maybe have not been identified by our current measures. Where we've said that we're not going to limit high quality challenging services only to those who've already finished the paperwork. That we can actually use these types of programs and in no way water down for those kids who are already eligible. Because then you're giving wider access, but still making sure you're catching those kids. Think how many times in the past, a kid misses whatever magic cut-off we've established by a point or two and they get nothing that changes in their instructional program, and that makes no sense to me.

I know that we're living in Camelot here with the leadership we have. We're being given the opportunity because our superintendent is so visionary and so courageous and thankfully we have a board that believes in what we're doing. It's a matter of that leadership and that belief.

Technology in general can open the world for all kids. We don't have textbooks for example. They're opening up access to advanced resources, just in time sorts of resources. For gifted kids who are growing up in isolated, rural areas, it opens up a world like we've never seen before. Their research was done through some very high level technology and their products were done with those 21st Century Learning skills and technology. When they're making movies and websites, rather than the traditional boring 3-panel board or traditional paper, it encouraged them. Using technology as one of those appropriate differentiation tools that allows for greater depth and higher quality and professional level products for our gifted kids. The way we're able to teach them, the way they're able to demonstrate their learning, the way we're able to connect them with other kids and professionals-they're wonderful opportunities for gifted kids.

Table Details

The codes were grouped along related themes. There were other equally valid groupings, but these seemed to clearly organize the participant's comments. Furthermore, the participant's comments were grouped according to the category that best fit. Often, each comment was associated with several codes, some of which belonged to different categories. A few times, the same participant comment is repeated in two categories of this
PERSPECTIVES ON EQUITY

chart. This was done to illustrate the strong connections between the comment and each of the categories.

There were several codes that were not included in this table because they were not gerunds. These codes were highly relevant to the data analysis, but did not fit as gerunds. They are as follows: Benefit of services, Underrepresented Populations, rural, suburban, and urban. The latter three codes were used as a grouping to examine relationships between equity factors and community type of the school. Using Atlas Ti, reports were run to search for any differences among the equity factors depending on the community type of school. After studying that report, it was clear that there were no differences in the number of times participants discussed Access, Participation, or Benefit whether they were from rural, urban, or suburban school districts. Thus, Community Type of School was not a theme worthy of further exploration.

The interview included in Table 6 was chosen because of the high quality of the participant’s comments. It is evident from the multitude of comments in each of the code categories that this participant was highly knowledgeable about gifted education and had put considerable thought into responses for the interview questions.

From Table 6, many of the gerunds are related to access, identification, diversity of gifted learners, recognizing and meeting needs. Even from this initial interview, it was obvious that themes were developing. The many comments related to Creating/Finding Service Models and Meeting Needs in Creative Ways revealed this as a strong theme that would need additional exploration in the subsequent interviews. Other themes that showed promise, even from the initial interview included: Funding and Opening Access.
Memos

The memo writing process began in earnest during and after the first interview. Initial memos highlighted researcher impressions, follow up items, and areas of interest. These are shown in Table 7 below.

Table 7

<table>
<thead>
<tr>
<th>Memo Items</th>
<th>Researcher Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Memo: After Participant 8 interview</td>
<td>Participant was thoroughly prepared. Shared many ideas on almost all topics. Was passionate about creatively meeting needs of gifted and high ability learners. Believed funding should not be a barrier to meeting needs. Surprise comment about need for more integrated AC courses at MS/HS level.</td>
</tr>
<tr>
<td>Follow Up Items/Action Items</td>
<td>Be sure to ask other participants about MS/HS academic &amp; social needs to see if others have the same perspective.</td>
</tr>
<tr>
<td>Emerging Themes</td>
<td>Funding source is not key, creatively meeting needs is.</td>
</tr>
<tr>
<td></td>
<td>Opening access to gifted programming</td>
</tr>
<tr>
<td></td>
<td>Need for MS/HS integrated AC coursework</td>
</tr>
</tbody>
</table>

After each interview, similar memos were created. This practice helped to focus thinking, direct future actions, refine developing theory, and move the analysis process forward. Each memo was an opportunity to ask questions like: What is the next step? Did this interview stand on its own? Did it validate or invalidate previous findings? Was this interview similar to others or different in some important way? What themes were supported? What new themes emerged for consideration? Was the theory strengthened or weakened by the participant’s comments?

Using Atlas Ti for memo writing proved to be very helpful, since all memos were in one convenient place. Moreover, within the program, the memos can be associated with specific quotes, program documents, codes, or categories. Atlas Ti allows for automated
and in-depth indexing of content and search capability to facilitate theory development. This process created an ongoing emersion in the data, keeping the close connection between research and data alive. In addition, the memos help to establish an audit trail because they illustrate the thinking behind the analysis process. Some of the memos were also based on observations during the interviews, as in Table 7 above. These observations were included in the analysis process as a further method of testing the emerging theory.

Later memos during the coding process revealed the need to collapse some of the codes, and create codes to assist with the analysis. See Table 8 below.

Table 8

<table>
<thead>
<tr>
<th>Ongoing Memo Related to Coding</th>
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</thead>
<tbody>
<tr>
<td>Researcher Notes</td>
</tr>
</tbody>
</table>

I added the ES, MS, and HS codes for elementary, middle, and high school levels. I also added the rural, urban, and suburban codes. I think this may reveal some interesting differences in priorities, barriers, challenges, and solutions among different types of districts.

I need to add the state codes to see if this reveals any patterns in challenges, barriers, priorities, and solutions. I’ll also add mandated and non-mandated, and state funded, local funded. Same types of information may be revealed by using these codes and analyzing differences.

I’m seeing the need to collapse some of the codes. There are too many that are similar, making it difficult to stay on track when coding documents. I think this will create a stronger reliability in my coding because it will be more consistent as I progress.

I combined decreasing underachievement, examining underachievement, and impacting underachievement into a new code: impacting underachievement. I think this will create a stronger category and simplify the coding process. After all, the underachievement issues all revolve around attempts to decrease it.

**Focused Coding and Ongoing Memo Process**

After the first interview, coding and interviewing were ongoing simultaneous parts of the data collection and analysis phase. This became helpful as the data set grew and themes began to emerge. Themes were identified using Atlas Ti to look at the data in
different ways. One of the views allows the researcher to see *the groundedness* of each code. This refers to the number of times a code is used within the data set. Watching the groundedness change allowed themes to emerge, which became categories—*Families* in Atlas Ti. Figures 2 and 3 show both the codes and their groundedness.

![Table of Codes and Groundedness](image)

*Figure 2. Codes, Groundedness, and Code Families.*
<table>
<thead>
<tr>
<th>Code</th>
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<th>Code Family</th>
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<td>Increasing equity in identification</td>
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<td>Increasing opportunities for high ability students</td>
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<td>Local vs. State control</td>
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</table>

*Figure 3. Codes, Groundedness, and Code Families-Continued.*

It was easy to see that *Identifying Barriers to Meeting Needs, Recognizing Gifted as a Special Population, Increasing Access, Recognizing Diversity, Identifying Gifted, Determining What is Appropriate Education, and Supporting Gifted Ed-District/State Leaders* were highly grounded in the data. This indicates a high number of comments were associated with each of these codes. Using the “Cloud View” in Atlas Ti was another way to visualize the groundedness of the codes. *Figure 4 shows that view.*
Figure 4. Cloud View of Code Groundedness.

Codes that were deeply grounded received further attention in the analysis process, most of these emerged as themes. It is not sufficient, however to examine only the groundedness of the codes. It is possible that one participant made numerous comments that were associated with a particular code, but that few or none of the other participants addressed this topic in their comments. To check the validity of the developing themes, it is helpful to look at the “representativeness” of the codes (Charmaz, 2006). By generating a report of the occurrences of codes by primary document (interviews), it is possible to see the distribution and frequencies of the codes. This information is illustrated in Figure 5 below.
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Figure 5. Groundedness and Representativeness of Codes by Primary Documents.
The chart includes the codes and participant interview transcripts used in this analysis. Along the top of the chart, the primary documents appear. Each one was an interview with a gifted program director. They were labeled according to the state and community type (rural, suburban, or urban). The chart was color-coded ranging from dark green indicating the highest counts for the code to palest yellow indicating no occurrences of the code in that primary document (interview). This means the number of times participant comments were labeled for each code.

It is evident from this chart that several codes were highly grounded (showing mostly green or dark yellow) and also highly representative—appearing consistently across all or most of the primary documents (interviews). The codes with the highest groundedness and representativeness have been shaded green on the code list at the left side of the chart. These ten codes were as follows: Creatively Meeting Gifted Needs, Determining What is Appropriate Education, Identifying Barriers to Meeting Needs, Identifying Gifted, Improving Identification Process, Increasing Access to Gifted Education, Increasing Opportunities for High Ability Students, Recognizing Diversity in Gifted Students, Recognizing Gifted as a Special Population, and Supporting Gifted Ed-District/State Leaders. Other codes with moderate groundedness and representativeness were highlighted in pale yellow. Several of these codes were closely related to the more strongly grounded codes mentioned above and were later included in developing themes.

These emerging themes appeared in memos that directed additional questions in later interviews. Table 9 shows memo writing of the progression in thinking surrounding the emerging themes. At first, the notes show recognition of themes that are developing. Later notes indicate deeper analysis of existing themes, including an idea to connect to
relevant literature. Finally, there is a suggestion to create a chart for the organization of codes into categories. These categories appear as “Families” in the rightmost column of Figures 5 and 6. By examining the emerging themes, it was possible to create categories representing higher-level concepts. These are sometimes referred to in the literature as focused codes. Focused coding allows for explanation and synthesis of larger sections of data (Lapan, Quartaroli, & Riemer, 2012).

Table 9

<table>
<thead>
<tr>
<th>Ongoing Memo about Emerging Themes</th>
<th>Researcher Notes</th>
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<tbody>
<tr>
<td>Opening Access is emerging as an important theme.</td>
<td></td>
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<tr>
<td>Coding is revealing need for integrated coursework for MS/HS.</td>
<td></td>
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<tr>
<td>A few participants have mentioned artistically gifted as an unmet need. CA-Urban, GA-Rural, SC-Rural. Existing literature supports this as an unmet need.</td>
<td></td>
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<tr>
<td>From the interviews coded so far, several participants expressed the vision for opening access to gifted learning situations. These learning situations would be available to students with high abilities/achievement/motivation, but without testing requirements.</td>
<td></td>
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<tr>
<td>Coding is revealing that creatively using resources can overcome funding issues.</td>
<td></td>
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<tr>
<td>In addition, there is a perceived need/vision for service at the MS/HS levels to be more integrated and less focused on discrete AC/AP classes in each subject area. This vision is designed to meet the gifted students' needs for connected learning experiences and integration with real world.</td>
<td></td>
</tr>
<tr>
<td>Coding is revealing that funding may not be the make-or-break that some think it is. Creative use of resources is one way to make keep gifted education alive.</td>
<td></td>
</tr>
<tr>
<td>Create a category chart- Funding, Opening Access, MS/HS Needs. This would be helpful for analysis and also would illustrate theory development for Chapter 4.</td>
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</table>

By this time, several categories had emerged from the coded data.

“Theoretical codes emerge from the data as a theoretically sensitive researcher analyzes the data, through coding, memoing and sorting the memos, or possibly through developing a schematic model [conceptual map] of the substantive codes” (Hernandez, 2009, paragraph 13). The theoretical codes or categories used in this research are not based on Glaser's (1978) classic list of codes, but upon conceptual
terms widely used in discussing gifted education. It is important to note that several codes are associated with more than one category because of the interrelatedness of the concepts represented by the codes. Interrelatedness makes the analysis more complicated, but in this case, it represents the actual conceptual relationship of the codes. The grounded theory literature supports the researcher’s ability to associate codes with more than one category or to have overlapping categories (Charmaz, Personal Communication, 2014; Glaser, 1978). These were Access, Benefit, Learning Needs, Identification, Affective, Service Delivery, Community Type, and School Level. The last two categories were created to assist with data analysis to look for important relationships or patterns between either of those categories and the other six categories. It is helpful to explain that Access, Learning Needs, Identification, and Service Delivery consisted of many codes, while Benefit and Affective had fewer associated codes. This is a direct result of the participants’ comments. The codes were derived from their responses, which included a greater quantity and more detailed information about that Access, Learning Needs, Identification, and Service Delivery than Benefit and Affective. The higher number of different codes led to the natural formation of categories to organize the codes. Benefit and Affective didn’t need subcategories, since there were not as many different codes in these categories. The next section will discuss each of these categories in more detail.

Categories and Themes Moving Forward

The emerging categories of Access, Benefit, Learning Needs, Identification, Affective, and Service Delivery formed the basis for development of themes. In addition, three higher-level themes, not identified as categories in the coding,
emerged later—Funding, Leadership, and Belief in Excellence. Coding of the Program Documents supported these emerging themes as well. Figures 6-8 are included below to show the code counts for each of these themes within the Program Documents.

Figure 6. Code Counts for Access from Program Documents.
Figure 7. Code Counts for Participation from Program Documents.
Each of these main themes will be explored in this section. Within the main themes, there are subthemes that will be examined in more detail. To aid the reader, each section will begin with a summary chart including code totals from participant interview data and program document data.

**Access.** The first part of the theory that emerged was the importance of access to advanced learning experiences and gifted education itself. There are many meanings of access, including the working definition included in Chapter One—a combination of identification and availability of appropriate advanced learning experiences. Since every participant mentioned multiple factors related to access, it
quickly became clear that it was a key theme in this research. Figure 9 is included
below to provide the reader more detail regarding the code counts for Participant
Interview and Program Document data.

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<td>Refusing Acceleration</td>
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<td>Using technology</td>
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*Total (excluding codes with low representativeness or groundedness)*

This category was the most grounded and represented across the data of any of the
categories. This topic took many forms in the participants’ comments and in the Program
Documents, with all of them including the topic of access in multiple ways. Within the
category of Access, there are also subthemes of Impact of state mandate and community
type, Barriers to access of gifted education in rural areas, and Opening access to advanced
learning. Each subtheme is addressed in detail below.

**Impact of state mandate and community type on access.** The code “Supporting
Gifted Ed-District/State Leaders” speaks to access at the most basic level, particularly in
states such as California that have no state mandate for districts to provide gifted education. As Participant 1 shared,

‘Oh, you’ve identified 16 gifted students, so we’re mandated to give you money.’ It doesn’t happen like that out here...gifted services vary by the district-- So, like, I could say, ‘Gifted, gifted, gifted.’ Then, if nothing changes in the services that are provided, does it really matter that I’ve identified you as gifted?

In some California districts, access to gifted education is “very sporadic, unfortunately. It’s teacher driven. It depends on the class. There are teachers that know nothing about strategies for the gifted” (Participant 2). Sometimes access is gained only through advocacy efforts, “When you ask the high school teachers, they have no idea which students are identified gifted...Unless you’re an advocate, as a parent, the kids don’t get gifted services in secondary” (Participant 2). Access can also be an issue for twice-exceptional children, “Sometimes unwillingness of teachers or even administrators to get something done for their child’s cause can inhibit access or even participation” (Participant 10). Unfortunately, these issues are not limited to specific districts, but are more widespread. Reis’ (2010) examination of gifted research supports this notion showing that in regular classrooms across the country there is a lack of differentiation for gifted and high ability learners. She goes on to say, “Many classroom teachers have not received training in differentiation or gifted education pedagogy and fail to use it regularly or effectively in their classrooms” (Reis, 2010, p. 10). So if gifted education services are not provided, it is likely that gifted and high ability students have no access to school experiences that meet their learning needs.
PERSPECTIVES ON EQUITY

This view is contrasted by the states where gifted education is not only mandated, but also funded by the state (Georgia, Florida, and South Carolina). Most participants in these states indicated that access to basic gifted services was sufficient, but that services may look different across different community types. “For instance, when a child lives in a rural area and is profoundly gifted—technology can be the only way to meet the child’s learning needs” (Participant 6).

We would like to say that there would not be, but sometimes there are real barriers to that. If you only have two students who are taking AP Exams in that district and a neighboring district that is a lot more populous has hundreds of students taking AP Exams well of course parents may not want to move to rural areas of the state. That creates a cycle that is hard to break. We’re working on reversing those things and making sure there is equity across the state. (Participant 9)

Barriers to access of gifted education in rural areas. The literature indicated there are several barriers to achieving consistent levels of access to gifted education for students in rural schools. These challenges included:

(1) limited resources; (2) limited accessibility to resources; (3) scarcity of funding; (4) isolated geographic location; (5) distance from universities, libraries, and other cultural activities; (6) difficulty in obtaining trained personnel; (7) few choices of advanced courses; and (8) different cultural values (Castellano, 2011, p. 28).

Castellano (2011) added that sparse populations of gifted children in small rural schools create a lack of sizable peer base, and also difficulty providing cost-effective
services models. With budgets stretched thin to meet the needs of struggling learners, rural districts may opt to eliminate, consolidate, or reduce gifted services (Castellano, 2011). All of these actions resulted in decreased access for rural gifted students. Frasier’s (1991) “Four As Model” (Attitude, Access, Assessment, and Accommodation) applies to the challenge of meeting the learning needs of gifted students in rural areas. All of these factors impact the educational experience of rural gifted students. Since this model was created to examine the educational experiences of high ability students that are culturally and linguistically different, or from homes with low socio-economic status, a more detailed discussion of it will appear later during the section pertaining to identification.

**Opening access to advanced learning experiences.** Another way to conceptualize this subtheme is Talent Development, which has been mentioned in the literature review and will be discussed again later in this dissertation. Several participants (8 of 11) shared that access could include opening challenging learning experiences to high ability students who aren’t identified as gifted. “Usually we try to keep the class gifted only, but because of numbers and class sizes being higher in middle school we sometimes put advanced learners in there” (Participant 10). “Where we’ve said that we’re not going to limit high quality challenging services only to those who’ve already finished the paperwork” (Participant 8).

Then we’re looking more globally at gifted education than we used to, in terms of opening up programs for children who might not meet the same standards, so that we are flexing classes more at the high school and middle school levels.
Saying here’s the standard to come into the class. You can come in regardless of whether you’re in the gifted program or not. (Participant 5).

This participant also added,

In the U.S., we lose so much talent by failing to develop it. We lose so many engineers and so many kids who have the possibilities to go, especially those who may not be in families that can guide them. And so they don’t know where their possibilities lie.

There is literature supporting this idea of labeling the services rather than the children to offer more access. Renzulli (2005, 2010 and Renzulli, Reis, & Smith, 1981) has researched the benefits of this approach in depth recommending broad-based enrichment opportunities to all students, some of which will be followed up by more targeted advanced learning experiences. Subotnik, Olszewski-Kubilius, & Worrell (2011) agree saying that talent development in the form of enrichment should be provided for all children from an early age. This talent development should deepen for those children who show high motivation and task commitment. They go on to say that access to high quality talent development is needed over many years to fully develop the abilities of gifted and talented children (Subotnik, Olszewski-Kubilius, & Worrell, 2011). Participants also referred to various forms of talent development.

Some kindergartners coming in already knowing their letters, already knowing their sounds. They’re starting to read. We don’t want to just keep them there in our curriculum. What are we doing to differentiate, to prepare them? Because they’re going to be our future students in our gifted and talented programs. (Participant 9)
A more formalized talent development program, created by Renzulli (2010) was mentioned by Participant 8 as an effective way to expose many children to enriched learning experiences:

I love School-wide enrichment model for that idea for the elementary level....Give lots of children opportunities to show what they’ve got. Magnet schools can be used as an incubator, as a talent development program and sometimes we see things in those kids that we never would have seen if we did not get them into those types of creative programs that match their strengths.

Participant 7 from an urban district referred to an elementary talent development model for underrepresented groups in gifted education. This model opens seats in the gifted resource class for those students who are just missing the cut-off for gifted eligibility—"so more kids are benefiting when there are available seats. They’re essentially getting that education with no additional cost of funding more teachers.”

Other participants mentioned similar programs relating that often, the exposure to critical thinking skills, faster pace, and depth of study can help students show more of their talents in the regular classroom. In many cases, these students go on to become eligible for gifted services through later testing. “Even though you may not be identified, but you meet that cut-score, you can actually be a part of the gifted education program” (Participant 11). Another participant discusses the success of the talent development program, “Within two years, we’ve had about an 85% success rate of those students testing into the full time (gifted) program” (Participant 4).

**Identification.** Identification is widely debated in the gifted education literature, as discussed in Chapter Two. It may seem like a polarizing issue, however,
there may be ways for the contrasting views to come together, as expressed by Participant 8

I’d love to live long enough that we rarely talk about identifying kids, but we talk all the time about identifying kids’ advanced learning needs. And then say, “alright, we’re identifying the need, so whether not the kid is gifted, it is our obligation to do something about it.” That to me is the nice combination.

This same thinking process is well represented in the literature with Zeigler & Phillipson (2012) recommending a move away from individual identification toward a systemic model of talent development. Indeed, Subotnik, Olszewski-Kubilius, and Worrell (2011) support the idea of broad based-talent development moving toward more advanced learning experiences as indicated by motivation, interest, and achievement. These models can work without the identification of gifted students. They might also tend to diminish the cries of “elitism” that surround current talent development models based on formal identification processes. The authors suggest that a move toward the talent development model used for athletics and music may be more equitable, and in the end, better serve the purpose of aiding children in reaching their full potential (Subotnik, Olszewski-Kubilius, & Worrell, 2011).

Some aren’t ready to throw out gifted identification altogether, but do recognize the need for change. Such as Participant 9

Identification is like a moving target. It’s almost like an oxymoron. We like to say this is the list of criteria that we want use. This is what it looks like to be gifted. That belongs to a different generation. Kids change. Thinking changes,
and so we have to change what we use to measure intelligence, what we use to measure giftedness.

Some of the literature suggests that casting a wider net for screening would be a more equitable identification process. This screening could take the form of a student work portfolio, interest inventories (to ascertain passion or motivation), nomination forms, and standardized achievement tests (Castellano, 2011; Renzulli, Reis, & Smith, 1981; Worrell & Erwin, 2011). Worrell and Erwin (2011) continue with a 15 item list of potential items that could make up the identification process for students that show talent based on initial screening. This list includes some standardized pieces like ability and achievement tests, but also places emphasis on inclusion of at least some other measures such as nonverbal cognitive ability tests, above grade level curriculum based measures, portfolios, performance-based, and authentic assessments, and rating scales.

Participant 9 shared a thought provoking comment, “When I think about identification, I think it’s a challenge because we’re always limited by how we service the students, we want to identify them on the same terms”. This notion is supported by one of the questions on Worrell and Erwin’s (2011) identification framework: “What is the nature of the programming that the identified students will receive and what are the qualifications of the teachers who are serving those programs?” (p.335) Both suggest that it makes no sense to identify students in talent areas that the school or district has no means or intention of serving. This may be the reason that most states concentrate gifted identification on more academic factors, some adding
Exploring participant views concerning underrepresented populations. No discussion of gifted identification is complete without delving into underrepresented populations. This topic even makes it into popular media with articles in major city newspapers. Kendrick (2010) wrote of the aggressive efforts of an urban school district to identify gifted students, focusing on the most culturally diverse students from the most impoverished schools. It was later reported (Smiley, 2013) that the same district had an increase of 12,804 gifted students over a 10-year period. Of those gifted students, 11,337 were black or Hispanic, populations that are historically under-identified for gifted services. Another mainstream news article (McCaffrey, Tagami, & Sposito, 2014) discussed the inequity in gifted education in Georgia schools. Georgia has long been supportive of the needs of gifted students. It was one of the first states to mandate gifted services. McCaffrey, Tagami, and Sposito (2014) referenced the changes Georgia has made to create more access for gifted programs, “Georgia was ‘way ahead of almost all other states in developing a more flexible approach’ for admission to gifted programs, said Joseph Renzulli” (p. 8). This suggests that despite significant progress toward equity in gifted education, there is still much work to be done.

Sally Krisel, who lobbied for the new evaluations and then oversaw gifted programs at the state Department of Education, said the new methods of identifying gifted children led to more diversity than in the 1990s. “Changing the tests has resulted in
many more blacks and Hispanics taking part. Can we do better? Yes. But there has been progress.” (p. 8)

Underrepresented populations in gifted education were mentioned, in various contexts, by all 11 participants. The deep groundedness and clear representativeness of the associated codes in the data indicated this was an important subtheme. From a broad view, all participants recognized that there are indeed, groups of students that are underrepresented in gifted education. These groups consist of culturally and linguistically different students, students from impoverished backgrounds, and students with disabilities. All but one participant agreed that much more needs to be done to increase advanced learning opportunities for these groups of students, both formally through gifted education programs and informally through talent development programs of all types. Much of the work that the participants discussed involved opening access for underrepresented populations. Here is a sampling of their comments:

Because we follow the state rule so closely, we’re doing everything we can to make sure that everyone has equal access….The problem lies with some of the assessment instruments possibly being not as good for one group of the population or another… Every child should be on the same playing field when it comes to evaluation for gifted services…. It kind of goes back to what’s the problem? Is it socio-economic, is it ethnicity, is it lack of parental support and guidance, is it exposure to experiences when they’re young. I mean nobody really knows. (Participant 7)

“In some parts of the state, they need to do a better job of expanding their view of who might possibly be gifted” (Participant 5). Participant 10 shared, “I really feel like there has
to be a commitment in a district to look at all learners, especially those learners who don’t look like what we expect them to look like, and I’m talking about our underrepresented groups” and also “We’ve really made some good strides with our Hispanic population in identifying the gifted.” Participant 1 added, “There are a lot of myths and misconceptions surrounding who different types of learners are. Like English Learners. Just because they don’t speak the language the test is given in, doesn’t mean they don’t think at a sophisticated level.” Participant 4 shared the thinking behind Florida’s Plan B for identification: “If a student who is learning in two languages can demonstrate an I.Q. that is a whole standard deviation above the norm, that student is genuinely gifted. This is NOT a lowering of the standards. This is equity!” “We have a lot of twice exceptional kids that we totally ignore, totally. Or even if they’re identified for gifted, they don’t service them for that, only for the disability” (Participant 2). Participant 10 shared a funny, but very pointed message about misconceptions of giftedness, even among educators.

They’re first people or children and then they belong in the category of giftedness. And you can be impoverished or wealthy or have one leg and still be gifted. People sometimes have this picture of a little blond haired, blue-eyed, never gets her dress dirty child with a big bow in her hair and she’s gifted. I can’t tell you how many times principals or teachers, they were afraid of me, would say, “Oh, I have this new student today. I think she’s gonna be gifted. She is SO cute!” And I use my sense of humor a lot and I say to them, “Let’s look down this list here and see. I know it must be on here somewhere. Cute, cute, cute...just under blue eyes, here it is!”

The same participant offered her opinion on twice-exceptional students:
I think sometimes we neglect to put them in appropriate classes. It seems like people were late to the table figuring out that you could be special ed and gifted. That **pains my heart** because I see some really high functioning autistic children who are very gifted and qualify for programs. (Participant 10)

Comments about underrepresented groups in gifted education from the State Director of Gifted Services in the State of the State report:

Immeasurable positive impact on the state's support structure, increased awareness and service for under-represented students, and innovative assessments, such as the Performance Task Assessment (STAR) developed specifically for South Carolina to help identify more under-represented students by attempting to remove cultural barriers and prior knowledge requirements, in both the verbal and non-verbal domains. (Council of State Directors of Programs for the Gifted, 2013, p. 246)

At this point, it may be helpful to refer to Table 10 for District Statistics of the Participants. The categories included are commonly referenced in the literature surrounding equity in gifted education. It is important to note that there are many cells with missing data. While these statistics would be important to understand more specifically the reality of equity in gifted education, it was not possible to obtain the information in some cases.
### Table 10

**Demographic Statistics about States and School Districts of Participants (2012-13)**

<table>
<thead>
<tr>
<th>State</th>
<th>California</th>
<th>Florida</th>
<th>Georgia</th>
<th>South Carolina</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>State Mandated Gifted Services</strong></td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>State Funding for Gifted Education</strong></td>
<td>$44 Million</td>
<td>$280 Million</td>
<td>$367 Million</td>
<td>$26 Million</td>
</tr>
<tr>
<td><strong>Number of Gifted Students</strong></td>
<td>528,000</td>
<td>150,000</td>
<td>210,000</td>
<td>101,000</td>
</tr>
<tr>
<td><strong>Community Type</strong></td>
<td>Urban</td>
<td>Sub/Rural</td>
<td>Sub</td>
<td>Urban Sub</td>
</tr>
<tr>
<td><strong>Percentage of Identified Gifted Students</strong></td>
<td>N/A</td>
<td>10%</td>
<td>17%</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Racial Statistics of District</strong></td>
<td>B: 8.5%</td>
<td>W: 14%</td>
<td>A: 8%</td>
<td>B: 24%</td>
</tr>
<tr>
<td><strong>Racial Statistics of Gifted</strong></td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>District ELLs</strong></td>
<td>23%</td>
<td>N/A</td>
<td>9%</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Gifted ELLs</strong></td>
<td>N/A</td>
<td>N/A</td>
<td>1%</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>District Free or Reduced Lunch</strong></td>
<td>66%</td>
<td>59%</td>
<td>63%</td>
<td>50%</td>
</tr>
</tbody>
</table>

*Racial Codes: B=African American, W=White, A=Asian, H=Hispanic, AI: American Indian/Alaska Native, M=Multi-racial*
PERSPECTIVES ON EQUITY

The lone dissenting opinion on underrepresented groups was from a small, rural district. This district has less than 3,000 students. Table 10 includes some items of interest about this district: This district has the highest percentage of impoverished students, 85%. It has the second highest percentage of cultural/racial diversity, 88%. It has the lowest percentage of students qualifying for gifted services, 2.3%. The participant from this district did not perceive an equity issue for students in the district that are typically underrepresented in gifted education. Her comments were as follows:

Interviewer: How about Identification for gifted services, of your ESOL students?

Participant: We’re good there. No, no, no. That’s what I was saying. Special Ed, ESOL, Black/white. Arabic. We’re good there on the academic side. (Participant 11)

This interview raised immediate questions about underrepresented populations and perceptions of equity. These were detailed in two research memos:

July 21: Check racial demographics on district gifted population to explore claims of the director. Her comments about them "doing well" with the underrepresented groups don't ring true with other participants. This could be a negative case.

July 22: District Stats agree with emerging theory that underrepresented groups are not being adequately identified in districts with less funding or possibly small districts. Upon examination, her perceptions don't match the reality of the situation. Her district is not up to the identification level of underrepresented gifted compared with other similar districts. The student demographics are at least 65% African-American, and at least 70% Free/Reduced Lunch at each school in the district. The district has only identified 2.3% of their students as gifted.
PERSPECTIVES ON EQUITY

From the participant comments, the Program Documents, the demographic statistics of the selected districts from the four focus states, and the literature discussed earlier, it was clear that identification of underrepresented populations was an important emerging theme. The evolution of this theme into theory will be discussed later in this chapter.

**Participation.** According to the operational definition shared earlier in this work, participation is enrollment in a gifted education program. While that definition is simple, there are many factors that can influence whether a student continues to participate in a gifted education and the quality of that participation. This section will discuss several of the factors that may impact enrollment in gifted education, service delivery, learning needs in general and of twice exceptional students, and social and emotional needs. Before moving into a discussion of each of these subtopics, it is useful to examine the support for the Participation theme in the data from the Gifted Education Program Documents and Participant Interview data as shown in Figure 10 below. It is clear from Figure 10 that Participation is strongly grounded in both the Participant Interview and the Program Document data.

It is important to note that several codes have been shaded in Figure 10. These codes are either not strongly grounded or not strongly representative of the data sets. The earlier section, “Discarded Themes” explained why Acceleration topics, and mentoring were not carried forward into the ongoing analysis. Artistically gifted topics, although somewhat grounded, are not strongly representative of the whole data set, being mentioned in only South Carolina’s
Program Documents. The details of the treatment of this theme will be discussed later in this paper.

<table>
<thead>
<tr>
<th>Participation:</th>
<th>Participant Interview Data</th>
<th>Program Document Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>AC Model</td>
<td>69</td>
<td>15</td>
</tr>
<tr>
<td>Balancing needs-challenge vs. socio-emotional</td>
<td>60</td>
<td>19</td>
</tr>
<tr>
<td>Cluster Grouping</td>
<td>1</td>
<td>6</td>
</tr>
<tr>
<td>Collaborative Teaching</td>
<td>0</td>
<td>10</td>
</tr>
<tr>
<td>Considering socio-cultural context when looking at needs</td>
<td>16</td>
<td>10</td>
</tr>
<tr>
<td>Creating/finding service options</td>
<td>95</td>
<td>102</td>
</tr>
<tr>
<td>Creating bias against acceleration</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Creating objectivity in acceleration</td>
<td>2</td>
<td>12</td>
</tr>
<tr>
<td>Creating regional setting of excellence for gifted</td>
<td>7</td>
<td>0</td>
</tr>
<tr>
<td>Determining what is appropriate education</td>
<td>180</td>
<td>39</td>
</tr>
<tr>
<td>Education about acceleration</td>
<td>7</td>
<td>2</td>
</tr>
<tr>
<td>Expanding AC</td>
<td>35</td>
<td>0</td>
</tr>
<tr>
<td>Giving affective needs more attention</td>
<td>59</td>
<td>17</td>
</tr>
<tr>
<td>Growing counselor capacity</td>
<td>12</td>
<td>6</td>
</tr>
<tr>
<td>Identifying Barriers to meeting needs</td>
<td>406</td>
<td>32</td>
</tr>
<tr>
<td>Increasing acceleration</td>
<td>17</td>
<td>0</td>
</tr>
<tr>
<td>Limiting differentiation</td>
<td>10</td>
<td>0</td>
</tr>
<tr>
<td>Mentoring as a service model</td>
<td>8</td>
<td>14</td>
</tr>
<tr>
<td>Recognizing artistically gifted</td>
<td>33</td>
<td>3</td>
</tr>
<tr>
<td>Recognizing diversity in gifted students</td>
<td>145</td>
<td>35</td>
</tr>
<tr>
<td>Recognizing gifted as a special population</td>
<td>307</td>
<td>32</td>
</tr>
<tr>
<td>Recognizing needs other than academic</td>
<td>75</td>
<td>26</td>
</tr>
<tr>
<td>Refusing acceleration</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>Resource model</td>
<td>40</td>
<td>17</td>
</tr>
<tr>
<td>Serving artistically gifted</td>
<td>30</td>
<td>7</td>
</tr>
<tr>
<td>Training educators</td>
<td>90</td>
<td>52</td>
</tr>
<tr>
<td>Total (excluding codes with low representativeness or groundedness)</td>
<td>1607</td>
<td>432</td>
</tr>
</tbody>
</table>

(Shaded areas indicate codes with low representativeness or groundedness)

*Figure 10. Code Totals for Participation by Data Source.*

**Service delivery.** Some of the more common service delivery options for gifted education were described in Chapter Two of this dissertation. The main research question for this study was to investigate potential relationships between equity issues and service delivery for gifted education. As such, participants were asked about each of the areas (access, participation, and benefit) with regard to service delivery. According to Participant 5, “Access changes based on how the program model works.”
For gifted children with disabilities, sometimes the delivery model interferes with the student benefitting from gifted services, “I’m certain there are multi-exceptional, or twice exceptional children who aren’t getting served because Special Ed says they need to be in this particular class and we don’t have another one that suits them just as well” (Participant 10).

At times, service delivery can make all the difference for a gifted child, “They have a kid that they’ve identified in seventh grade and they placed him in AP Statistics” (Participant 5). Others described how gifted learners benefit from a particular service model, “At the elementary level we use a pullout resource model that is more integrative. We can really work on all skill areas with this type of model” (Participant 8). Participant 10 mentioned combining the Advanced Content (AC) Model with some aspects of the resource model as, “capitalizing on the strengths and continuing to use the integrated units of study.” This same participant went on to talk about the benefits of the AC model in high school,

They’ll get on up in the HS and they’ll select honors and AP courses according to their strength. If they’re verbal they’ll take AP Language & Lit. If they’re mathematical, they’ll take AP Calculus and all the good things that go with that...I’ve seen the benefits of having a class say a Humanities-English, maybe Sociology or some other course and the teachers are team teaching it or teaching in a rotation. You have the curriculum all shored up, all aligned.

Wow! What a wonderful confluent approach for children. (Participant 10)

The potential benefits from various service models were also discussed in Chapter Two of this dissertation. An advocacy piece written by Van Tassel-Baska and
Reis (Van Tassel-Baska & Reis, 2004) reports that, based on existing research, cluster, pullout, and full-time grouping have positive impact on learning for gifted students in elementary and secondary grades. They go on to specify that programs concentrating on acceleration (increased pacing), rather than enrichment (depth and breadth), have more important impact on gifted achievement. The key component of successful gifted education is differentiation according to the needs and abilities of the gifted learner. The curriculum and pace must be adequately modified to meet individual needs (Van Tassel-Baska & Reis, 2004).

Participant 8 combined all three equity components with service delivery:

I do think the balance tilts somewhat as they go through the K-12 trajectory, but I think the components are always there: Opportunity to move ahead in content areas as they show their readiness, opportunity to find and then develop their interests, and time to be together.

Learning needs. There are many factors to consider when examining learning needs of gifted students. Of course, need for advanced learning opportunities is the focus. The most beneficial components of gifted learning experiences, accelerated pace, depth of study, and extended learning opportunities, were discussed earlier in the section on Service Delivery. Not everyone is aware that these factors are key to effectively meeting the needs of our most advanced learners. There are many misconceptions about what gifted students need to fully develop their potential. One such mistaken notion, by even those in education, is that gifted students will be fine without significant differentiation or specialized curriculum experiences (Brown E. F., 2008; Colangelo, Assouline, & Gross, 2004; Reis, 2010).
I was just this week in a meeting and a higher up person not at the DOE. He was talking about the gifted and he said we don’t need to worry about them—they’re two parent families, they’re well off, they get it anyway, they’re going to succeed no matter what we do to them. (Participant 5)

Ten of eleven participants mentioned this misconception was a barrier to overcome in helping gifted children reach their potential. The need for differentiation came through in the participant comments: “The other thing we need to look at is we talk differentiation, but we’re not, in some ways we are differentiating, but we still have a big hesitancy to do subject acceleration” (Participant 5).

Within the broader topic of learning needs, there are subtopics that relate to this discussion. Two that will be explored here are “Integrated Coursework for Middle and High School” and “Learning Needs of Twice Exceptional Students”.

Integrated courses beyond elementary school. Another subtheme revealed in the analysis of the participants’ comments was the need for the curriculum to be more integrated for middle and high school students.

Well, if I had my druthers, we would serve an integrated approach in middle school too. And maybe even, an integrated approach through humanities and then through math and science in the high school, instead of every class being separate.

[Facetiously] This block is this and this block is this and this block is this. We don’t want to intertwine too much! I think it’s really a logical thing, but LAW, what a quick way to get your head cut off. [Participant laughs.] (Participant 10)

Another participant echoed those sentiments adding more detail on how this model might look:
One of the things I would like to see is MS and HS would be some kind of work toward interdisciplinary connections. It wouldn't be so much, “I'm going to science now, and then I'm going to math and I have to change classrooms.” I know some of that needs to happen, but if we could talk about universal concepts like Power and Structure, then I could make the connection between the power of two countries in my American History class and the power of the lead character in my eighth grade English class. Then the day could be more connected. The content could be more connected, as opposed to disjointed experiences. (Participant 1)

Participant 10 extended the thinking about the value of integrated curriculum in middle school by suggesting that middle school students struggle with being prepared with adequate study skills, ability to handle more interdisciplinary coursework, and larger conceptual projects that are major components of AP courses and the IB curriculum.

Interviewer: One thing that has come up in some of the districts is a need for more connectedness for the students, for their curriculum in middle school and high school.

Participant: Oh my god yes!

Interviewer: they’ve come from an elementary resource program that is interdisciplinary. They feel at a loss of how...

Participant: They are at a disadvantage, there’s no doubt about it.

The importance of meeting the learning needs of middle and high school gifted students is supported in the literature (Beane, 1993; Hansen & Toso, 2007; Hébert, et al., 2014).
Learning needs of twice-exceptional students. Sometimes effective gifted education programs are in place, but twice-exceptional students do not participate in them. As a result, their unique learning needs are not met. According to Participant 10, “Some twice-exceptional students don’t participate (in gifted programs) as much or at all because their teachers feel they need to be in the regular or inclusion classroom to have their learning needs met.” She went on to share this story about lack of recognition of the importance of advanced learning experiences for gifted students with disabilities:

I had a teacher tell me one time that the child couldn’t come to her gifted program because she was in a wheelchair. And I said, “I’m begging your pardon. There’s something about that I don’t understand.” “Well she’s in a wheelchair, so she can’t come to my class.” The teacher was in a portable classroom, so she said the girl couldn’t get into the classroom.

Even those twice-exceptional students who participate in gifted services may experience difficulties achieving in the gifted classroom. Not all gifted programs are designed to meet the needs of asynchronous learners, which accurately describes most twice-exceptional children. The diversity of their strengths and weaknesses can be overwhelming to even the most knowledgeable and dedicated gifted educator. Teachers must be diligent in providing ways for these students to work in their strengths as much as possible (Willard-Holt, 1999). Along with this, gifted students with learning disabilities should be taught compensation strategies that will allow them to learn at the accelerated rates and greater depth of knowledge that they crave (Baum, 1984). Most important though is for gifted programs to concentrate on
preventing the disability from creating a barrier to the child’s full academic development (Beckley, 1998).

**Social and emotional needs.** One topic that is becoming more widespread in the gifted literature is social and emotional needs of gifted students. Maslow’s (1943) work has long supported the importance of meeting the basic needs for security, love, and belonging before higher level needs can be attained. While this may be commonplace in education pedagogy now, only more recently have educators begun to realize that gifted children may have different social and emotional needs than their average ability classmates.

The participants clearly recognized the social and emotional issues that gifted children face in school--seven of eleven mentioned it in their comments. Participant 2 said, “The lack of understanding that the child’s social and emotional issues are real” Participant 10 shared a similar sentiment, “To have their social and emotional needs met. I don’t think we do enough with that.”

It is likely that the needs of gifted kids may increase in middle and high school because of their changing social and emotional development and changes in service models.

As children leave emotionally supportive elementary schools and transition to middle and high school classrooms where the focus shifts to immersing students in academically rigorous courses, they may struggle to adjust to the demands of these classrooms while navigating the complex challenges of adolescence. (Hébert, et al., 2014, p. 95)
Hansen and Toso (2007) provided a closer look at the social and emotional needs of gifted middle and high school students, especially those who later dropped out of school. They found that most of the 14 participants in their study (gifted adults who had dropped out of high school) reported lacking “a sense of belonging at school, positive relationship with teachers, challenge, and respect for values held in high esteem in school” (Hansen & Toso, 2007, p. 44). Participant 7 from the current study also shared about gifted students’ desire for peer acceptance and understanding and appreciation of their unique needs, “In the upper grades, they’re just mixed in with the other kids. That’s the bad thing about the advanced content model and the honors and the AP. They don’t have that grouping and sense of community anymore. As I said at the beginning, I think so much of the problem is that they’re misunderstood.”

A different participant suggested expansion of professional development for school counselors, “We have to really encourage that and train our guidance counselors to understand the needs of these children. Far too often, they think they don’t have any needs, maybe because they’re academically gifted. That doesn’t follow” (Participant 10).

They discussed the impact of social and emotional needs on academic achievement and underachievement in gifted students. Participant 5 shared concern for the long-term consequences of not serving those social and emotional needs:

There’s nothing more challenging than a gifted troubled kid or misbehaving kid. You can see that in Mary Frasier’s work, in her early work when she was leading the district teachers-basically the smartest kids you’d ever taught. And
look at where they were. They were leader of the Crips or another gang. So that’s going to come out some place.

Hansen and Toso (2007) stress the idea that gifted students who were Hispanic or African American, from a lower socio-economic class, or highly emotionally sensitive were at higher risk for dropping out of high school. This underscores the importance of making the social and emotional needs of gifted students a priority. The literature suggests that implementing a cohort model can increase participation and retention of culturally and linguistically diverse students (National Association for Gifted Children, 2011).

**Benefit.** The meaning of benefit, as operationally defined in Chapter One, was: *Outcomes, as stipulated by the various Gifted Education programs or perceived by Gifted Education administrators, related to participation by students in gifted education services.* The construct of has not been typically measured in a quantitative way by State Gifted Education Programs or Local School District Gifted Education Programs in the past (Council of State Directors of Programs for the Gifted, 2013). There is evidence in the literature to support benefit to gifted learners from participation in a gifted education program, which was shared earlier in Chapter Two. Additional literature support of Participant Interview and Program Document data will also be included here. In order to provide clarity to the reader, Figure 11 shows the codes associated with category of Benefit for this data analysis. The shaded codes, while related to this category did not have sufficient groundedness and/or representativeness across the data sources to warrant inclusion as meaningful parts of this theme.
Participant views of Benefit. As reported in Chapter Three, the participants’ comments about benefit supported and expanded on the operational definition of benefit given in Chapter One. In order to move forward with development of this theme, it was necessary to examine the codes and families carefully. From Figure 5, it was evident that Benefit had the fewest association codes of the six main categories, but it still warranted ongoing consideration as a theme. Many of the codes associated with Benefit are also associated with Service Delivery, which will be discussed next.

Every participant shared ways in which students benefit from gifted education such as this from Participant 11: “I mean the benefit is lifelong learning, skills and strategies, but it’s also motivating and pushing our children toward proficiency at their own level.” She went on to add, “So when I think about the benefit, especially here, where we are 22% below poverty level, this is something good for them. This pushes them to think beyond the four walls in the classroom. It has a benefit.” Participant 2 shared insights about the relationship between identification and services and ultimate benefit to the student: “For me, identification is wonderful, but without services in place behind it, it really doesn’t, in
my opinion, do any good, you know?” This belief is supported by Worrell and Erwin (2011) who recommend that schools identify the aspects of giftedness that can reasonably be developed within a regular school setting. They continue by suggesting that in most cases this means focusing on academic areas of giftedness, since this is the strength of many schools.

While the implicit assumption is that gifted children will benefit from specialized services designed to meet their learning needs, not all people agree with this. Participant 9 shared that being gifted may not always be seen as a benefit, especially for those students participating in pullout or other homogeneous program models, “Because that’s always the other caveat. Some people don’t look at being gifted and talented as a benefit. Sometimes it isolates the child, it separates them for their peers.” The literature supports this with findings indicating culturally or linguistically different students’ feelings of lack of belonging with other gifted students (Ford, Grantham, & Whiting, Culturally and linguistically diverse students in gifted education, 2008). Another participant (2) shared concerns that in some districts without mandated gifted education, “The benefits of gifted education are all interdependent upon the educators that you have, the instruction that you're receiving.” The importance of teacher preparation and effective implementation of gifted education models on student benefit is strongly supported in the literature (Borland, 1994; Cohen, 2011; Cross & Swiatek, 2009; Gentry, 1999; Klimis & VanTassel-Baska, 2013; Landrum, 2001; Renzulli J. S., 1977; VanTassel-Baska & Brown, 2007)

Benefit can be difficult to quantify, especially with the current federal laws regarding student achievement and testing accountability (No Child Left Behind Act of 2001, 2001). Participant 6 echoed this belief “No, we haven't tracked growth
expectations with the gifted. There really hasn’t been a good way to do this because the state AYP test has a ceiling effect for gifted kids.” She goes on to share more about the benefit of education for gifted learners, “Our U.S. education system is a socialist system because the system isn’t set up to recognize the brightest students. It is built to serve the majority, who are somewhere in the middle.” The literature includes examples of how the NCLB Act and pressures for social justice in education have negatively impacted outcomes for gifted children because of reduced focus on providing appropriate educational opportunities for advanced learners (Siemer, 2009; Wyner, Bridgeland, & John J. Diiulio, 2007).

**Support from program documents regarding Benefit.** Upon examination, the State level program documents revealed a pattern with regard to Benefit. References to Benefit or related terms varied drastically depending upon the state. According to Figure 11, references to Benefit in the State Gifted Education Program Documents were as follows: Florida-94, Georgia-58, South Carolina-30, and California-20. These findings strongly support the Benefit theme. Table 11 below details references to Benefit or related terms from the district level Gifted Education Program Documents.

Table 11

<table>
<thead>
<tr>
<th>District</th>
<th>CA-Urban</th>
<th>CA-Sub/Rural</th>
<th>FL-Urban</th>
<th>FL-Sub</th>
<th>GA-Urban</th>
<th>GA-Sub</th>
<th>GA-Rural</th>
<th>SC-Urban</th>
<th>SC-Sub</th>
<th>SC-Rural</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Number of Benefit Codes in Program Documents</strong></td>
<td>25</td>
<td>33</td>
<td>31</td>
<td>26</td>
<td>31</td>
<td>29</td>
<td>35</td>
<td>23</td>
<td>13</td>
<td></td>
</tr>
</tbody>
</table>
Table 11 shows that Benefit codes were substantially higher in the Suburban South Carolina school district and in each of the California, Florida, and Georgia school districts than in the Rural South Carolina district.

**Funding and use of resources.** While the term funding can have various meanings, it was operationally defined in Chapter One as: *Money or other resources set aside for the purpose of gifted education services.* Although analysis revealed funding source, state vs. local, showed no relationship to other themes, funding and creative use of resources were heavily grounded in the participant data as shown in Figure 5. From that chart, three codes were included in this theme: Creating/Finding Service Options, Creatively Meeting Needs of Gifted, and Funding. To assist the reader, Figure 12, showing Code Counts for Funding is included here.

<table>
<thead>
<tr>
<th>Funding:</th>
<th>Participant Interview Data</th>
<th>Program Document Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating/Finding Service Options</td>
<td>95</td>
<td>102</td>
</tr>
<tr>
<td>Creatively Meeting Needs of Gifted</td>
<td>144</td>
<td>78</td>
</tr>
<tr>
<td>Funding</td>
<td>55</td>
<td>25</td>
</tr>
<tr>
<td>Total (excluding codes with low representativeness or groundedness)</td>
<td>294</td>
<td>206</td>
</tr>
</tbody>
</table>

*Figure 12. Code Totals for Funding by Data Source.*

The topic of funding generated quite a bit of passion in the participants. Each one was eager to share an opinion. All believed that was an important topic to discuss, and would continue to be important to gifted education in the future. Participant 4 shared, “I agree, but I also think that you have to address the funding. What has to happen is that school districts have to allocate resources. Because you know how in school systems, everything boils down to money?” While funding is important, the prevailing sentiment of the participants indicated that it isn’t only about the amount of money allocated to gifted education. Participant 1 emphasized, “We can, and do need to be keeping gifted education and gifted services alive without
money.” The crucial point is making gifted education a priority, which means that it must be adequately funded. This funding can be existing resources that are creatively utilized to serve advanced learning needs, grant funding through federal or state sources, or dedicated funding from the state or local level. Participant 4’s comments supported this point, “It really does all boil down to re-allocating and re-educating to understand the necessity. Making it a priority, and doing without some other things to be able to be creative.” The key theme was gifted education must become a priority, if it is to continue to exist. Fair and necessary allocation of resources to support gifted education can be attained by a variety of means, which gets to the heart of equity.

In addition, the analysis of the Gifted Program Documents revealed 206 references to Creating/Finding Service Options, Creatively Meeting Needs of the Gifted, or Funding, as seen above in Figure 12.

There is support in the literature for the importance of funding in gifted education. Some of the literature focuses on creating parity between spending for special education of students with disabilities, and education for gifted students (Winner, 1996). Other aspects of the funding discussion in the literature focus on lack of funding at the federal level (Clickenbeard, 2007; Siemer, 2009) or the disparities in funding among states (Council of State Directors of Programs for the Gifted, 2013) and especially between local school districts (Yeung, 2014) creating potential inequities in gifted education service delivery.

**Leadership.** For the purposes of this research, leadership was defined in Chapter One as: *Support for gifted education from state, regional, or local district level*
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gifted specialists, which may take the form of creating policies/legislation, collaboration with gifted education experts, training educators, and creating and finding service options (Council of State Directors of Programs for the Gifted, 2013). Depending on the state, leadership in gifted education can have various configurations of layers such as: state director, district program director, principal, gifted coordinators; or district program director, gifted coordinators; or even just local school gifted coordinators.

The number of steps in the leadership chain is not the focal concept in this research; it is the support for gifted education provided from the leadership. This theme is related to multiple codes through several categories. As seen in Figure 13 below, codes associated with Leadership in this analysis is as follows: Supporting Gifted Ed-State/Local Leaders, Training Educators, and Creating/Finding Service Options.

<table>
<thead>
<tr>
<th>Leadership:</th>
<th>Participant Interview Data</th>
<th>Program Document Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating/Finding Service Options</td>
<td>95</td>
<td>102</td>
</tr>
<tr>
<td>Supporting Gifted Ed-State/Local Leaders</td>
<td>217</td>
<td>176</td>
</tr>
<tr>
<td>Training Educators</td>
<td>90</td>
<td>52</td>
</tr>
<tr>
<td>Total</td>
<td>402</td>
<td>330</td>
</tr>
</tbody>
</table>

Figure 13. Code Totals for Leadership by Data Source.

In the analysis of the Gifted Education Program Documents from the four states and nine local school districts, Leadership related codes reached a count of 330. Each of the subthemes will be discussed separately below.

Supporting gifted ed-state/local leaders. Analysis of Participant Data added additional support, since one of the most highly grounded and representative codes was Supporting Gifted Ed-State/Local Leaders. Referring back to Figure 5, that code was associated with comments from the participants 217 times, making it the third most associated code. Participant 8 shared this about the importance of leadership to developing and supporting a gifted program:
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I know that we’re living in Camelot here with the leadership we have. We’re being given the opportunity because our superintendent is so visionary and so courageous and thankfully we have a board that believes in what we’re doing. It’s a matter of that leadership and that belief.

According to Participant 4 state leaders worked with leading gifted experts to refine the gifted program in Florida,

We also use the Frameworks for Gifted Ed. I know you’re familiar with these from your research. There was a collaboration of specialists and experts from several of the leading universities in the state. These are the goals and objectives that are addressed on our education plans, which are legal documents.

Participant 2 shared comments showing that leadership must support an extensive gifted program, not only certain aspects of gifted education, saying gifted children “should be able to get differentiation, complexity, novelty, and acceleration for my particular needs, during regular hours, not just an afterschool program.” She went on to say that gifted services “should go from K, all the way through twelfth grade. There should be services, there should be programs.”

Literature supports this subtheme in various ways. Siemer (2009) emphasizes the importance of leader recognition and support for a variety of appropriate educational experiences for gifted learners. Other work creates a call to action on both the federal and state levels (Colangelo, Assouline, & Gross, 2004; Lord, 2009; Marland, 1972; National Association for Gifted Children, 2011; Novello, 2012; Olszewski-Kubilius & Corwith, 2010; Reis, 2010). These authors describe the learning
needs of gifted students, the economic imperative and impact from meeting those needs, and the necessary support from federal and state leaders to do so.

Training educators. Another related code within the Leadership theme was Training Educators, which was associated with 90 comments made by participants. This concept showed leadership because leadership at some level must support educator training, be it local, district, or state. Participant 1, offered this suggestion for educator training:

I feel like if we could instruct and educate teachers to use the high quality curriculum all day, every day, in every lesson, in some capacity, then gifted students could start to internalize those learning strategies and use them on their own.

She went on to discuss how educator training could support talent development, “targeting those teachers to say, ‘We may not formally identify until third grade, but here are some strategies that you can do in your classroom to activate the potential in all kids.’” In questioning Participant 11 about barriers to ideal service delivery, she discussed teacher training:

Interviewer: “So that seems like it’s a barrier to offering the kinds of services you would like because not enough teachers are taking advantage of the training opportunities.”

Participant: “They’re not.”

This subtheme is echoed in the literature by many authors. All shared the belief that training of educators in gifted identification methods and gifted education strategies will result in less biased identification, as well as more productive and satisfying educational
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experiences for gifted learners (Borland, 1994; Castellano, 2011; Cohen, 2011; Eckstein, 2009; Feldhusen, 1996; Fraser, Garcia, & Passow, 1995; Gentry, 1999; Kanevsky, 2011; Renzulli, Reis, & Smith, 1981).

Creating/finding service options. A third code that is part of the Leadership theme is Creating/Finding Service Options. With 95 associated comments in the Participant Interview data and 102 counts in the Program Document data, this code is well grounded. Although this code is also related to another theme, Access, it supports the Leadership theme as well. Gifted education service options are usually created or identified by those at the highest level of leadership within that state. States that mandate gifted services generally provide a menu of service options for local districts to choose from depending upon the needs of their gifted students (Council of State Directors of Programs for the Gifted, 2013).

Participants shared many different ideas on this topic. Most of these have already been included within other topics in this dissertation. There are a few new comments that support this theme. Participant 7 referred to the ideal service delivery as offering more access with “mixed model with gifted kids and non-gifted kids.” There were also comments about the relationship between service models and the diversity of needs among gifted students. According to Participant 9,

Service models should be applicable to what is needed for the student. It should not be a pre-packaged program. It should be customized for the student. We try to make sure that teachers have flexibility for how they deliver services. Within that flexibility, there are parameters. Within those parameters, you’re free to customize it for your students.
Participant 7 continued the idea of matching services to student needs:

- Not every child is gifted in every way. Some are gifted across the board in every subject they go into, and others are strictly mathematically gifted. I just think that what you can offer to the kids is extremely worth it as far as the participation and keeping the kids in gifted.

Within the literature, several main concepts dominate this strand. Gentry’s work (1999) on the benefits of cluster grouping suggests a simple way for leadership to better meet the needs of gifted learners without additional costs. Renzulli (1977) introduces the Enrichment Triad Model and the Schoolwide Enrichment Model as ways that school leaders can expand educational opportunities for gifted learners, as well as create talent development experiences for more students with no extra personnel expenses. He stresses that it is a matter of principals being willing to try an alternative approach with the potential to drastically change the educational experience for almost every student in the school building.

**Belief in Excellence.** Even though this concept was not present in the introduction to the research, initial literature review, or interview questions, it was added to the list of operational definitions in Chapter One after its emerged as a theme. For clarity, the definition of Belief in Excellence used in this research is: *The conviction that the potential for outstanding achievement or performance exists in students* (Subotnik, Olszewski-Kubilius, & Worrell, 2011). Awareness of this concept began with the first interview and continued through several of the later interviews. During the first interview, the participant said, “It takes creativity and it takes will and it takes belief.” The participant goes on to mention belief three more times in the interview. Organizing researcher
impressions, questions, and participant comments into the theme of Belief in Excellence didn’t begin until well into the data analysis process. After the codes were collapsed into categories and the initial theory was taking shape, there were still lingering questions about how the contradictory case represented by Participant 11 fit into the theory. Details about this process will be discussed later in this chapter. At this point, though, it is helpful for the reader to understand the basis for this theme. Figure 14, showing codes associated with this theme, is provided below for the reader’s reference.

<table>
<thead>
<tr>
<th>Belief in Excellence:</th>
<th>Participant Interview Data</th>
<th>Program Document Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit from Services</td>
<td>100</td>
<td>154</td>
</tr>
<tr>
<td>Increasing Challenge for all Students</td>
<td>40</td>
<td>42</td>
</tr>
<tr>
<td>Growing Talent</td>
<td>96</td>
<td>115</td>
</tr>
<tr>
<td>Increasing Opportunities for High Ability Students</td>
<td>178</td>
<td>98</td>
</tr>
<tr>
<td>Total</td>
<td>414</td>
<td>409</td>
</tr>
</tbody>
</table>

Figure 14. Code Totals for Belief in Excellence by Data Source

There were four codes associated with Belief in Excellence: Benefit from Services, Increasing Challenge for all Students, Growing Talent, Increasing Opportunities for High Ability Students. Even though these codes are also related to Benefit, Service Delivery, and Access, they are strongly related to Belief in Excellence as well. After all, leaders don’t put programs into place that provide advanced learning options for children, if there is no belief in the excellence that awaits development. In fact, analysis of both the Participant Interview Data and Program Documents for each state/school district strongly supported this theme with numerous references to ideas such as: “developing student potential”, “offering advanced learning opportunities”, “providing appropriate learning experiences”, and “expanding student achievement opportunities”. The code counts in the Participant Interview data were as follows: Benefit from Services: 100, Increasing Challenge for all Students: 40, Growing Talent: 96, Increasing Opportunities for High Ability Students: 178.
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These references and other similar references within the Program Documents revealed 409 codes for this theme, which shows strong groundedness. The next section discusses each subtopic within this theme.

**Promoting excellence.** It is common sense that gifted educators and leaders believe that students should benefit from participating in services. Furthermore, many believe the benefit should be student excellence. This view is supported in the literature by many researchers (Hollingsworth, 1926; Marland, 1972; Olszewski-Kubilius & Corwith, 2010; Plucker, Burroughs, & Song, 2010; Reis, 2010; Renzulli J., 2005; Robinson A., 2012; Siemer, 2009; Subotnik, Olszewski-Kubilius, & Worrell, 2011; Ziegler & Phillipson, 2012). Indeed, Participant 8 agreed, “It is our mission to take a proficiency view of all students, an important first step in raising expectations for student achievement, and then to provide curriculum that maximizes the talent of each student.” This view is supported by Ford’s recommendation, “Educators must raise their expectations for lower income students and implement effective strategies for maintaining and increasing advanced learning within this population” (2011, p. 34). Participant 6 also shared a similar mission: “Serve the learning needs of academically gifted and highly able learners through programs that provide rigorous and accelerated curricula.” Making services available at local schools, rather than at several central locations, allowed one district to develop excellence in more students. Participant 3 described this approach, “By expanding our services and making them available district-wide, we saw an increase in our numbers. It’s the whole ‘build it and they will come.’”

**Advocating for gifted students.** Likewise, leaders don’t advocate for meeting student learning needs for challenge without a belief that talent exists, even in a
rudimentary form. Participant 4 describes this advocacy, “So, I talk to and collaborate with people from some of the most rural districts in Florida where the services are almost nil, yet there is advocacy there.” Gifted Program Documents from the same district state that ESOL Students who are gifted are eligible to receive both gifted education services, and ESOL services. They may also have modifications, even in the gifted classroom. Participant 4 added that Gifted ESOL students are entitled to, “Enjoy the rigor of an enriched curriculum that feeds their hungry mind.” This advocacy extends to the talent development program according to (Participant 4), “It’s been really good for us to build the program in some of our very needy schools. So now, it’s truly indicative of the exposure piece, to those resources. It speaks to that so apparently in those communities.” Participant 7 explained that advocacy for the needs of gifted learners is about fairness.

That’s fairness. That, to me, is the benefit of having a gifted program; to staff it, and fund it, to make it a priority in a school because there are a group of gifted students that have different needs than the special ed kids or the general ed kids.

*Talent development.* Although it may be more often associated with Access and was discussed under that theme, talent development is a direct result of the Belief in Excellence. Because of this, it is important to examine Talent Development in other ways. From the interviews, it is clear that participants agree. Participant 1 said, “Early identification and early activation of potential” are key. Participant 8 shared that targeted academic programs should be part of every gifted education program, “But equally as important is the talent development phase because of the disparity of development. We know that scores are all over the place until kids are about age
eight.” She went on to reiterate the continuing need for talent development, “I think Middle School continues to be a place where kids need to explore and find their strengths, but we also by middle school are beginning to see kids distinguish themselves as superstars, in particular content areas.” Another participant (5), described how talent development and social and emotional needs can interact to support Belief in Excellence for high ability students not identified as gifted. “You want it [AP or Honors class] to be a successful experience so that they continue to challenge themselves and they might bring some of their friends along who might be ready for a challenge.”

**Increasing opportunity for high ability students.** This quote really goes to the Belief in Excellence: “Teachers can learn strategies and implement strategies in their classrooms with one gifted child, with no gifted kids, with a roomful of gifted children, that do not require extra resources or money.” (Participant 1) The same participant also asked this question, showing she believes excellence exists in many students, not just gifted students. “Why not raise the academic rigor through programming and strategies that we know work at a high level, to raise the level of what all kids can do?”

**Development of Core Category-Unmet Needs**

As the analysis continued, the categories led to development of a core category of *Unmet Needs*. According to Glaser (1978) the core category “accounts for most of the variation” (p. 93) in the data. Glaser (1978) refers to selective coding, meaning after development of the core category, all subsequent data collection, coding, and analysis is centered on only that core category. For this research,
however, a more constructivist approach was taken to allow for the emergence of other categories or themes later in the process (Charmaz, 2006).

When all of the themes and subthemes were examined, they aligned into the core category of Unmet Needs. This core category is, in essence, another way to look at equity. When there are unmet needs, equity is not possible. All equity issues are, at the most basic level, the result of unmet needs. Figure 15 is a diagram created to represent the relationship between the themes and the core category.

Figure 15. Core Category and Subthemes.

Figure 15 shows that each of the themes contribute to create the core category of Unmet Needs. It is important to mention that while each of the themes supports the core category, they also influence each other. Each of these themes is related to the research questions about Equity, more specifically Access, Participation, and Benefit. Later in this chapter, the relationship between the themes of Funding, Leadership, and Belief in Excellence and the Equity Themes of Access, Participation, and Benefit
will be discussed in detail. Two of the themes are built from the interaction of subthemes, such as Access (Identification, Talent Development, and Underrepresented Groups) and Participation (Social/Emotional and Service Delivery: Integrated Coursework and Twice-Exceptional). These subthemes were discussed in detail earlier in this chapter. Even though the subthemes have been assigned to a theme, many overlap with other subthemes or themes. For instance, Benefit appears in the discussion of Access, Underrepresented Populations, and Social and Emotional Needs. The same is true of Participation, which is present in the discussions of Access, Underrepresented Populations, and Social and Emotional Needs.

**Explanation of themes.** At this time, it would be useful to elaborate on how the subthemes were integrated into themes. Access will be the first focus, since that process was more straightforward. Participation will be discussed in greater detail next with explanations of how the pieces fit together to support the main theme. It is important to clarify that some of the components of Participation, Needs of Twice Exceptional Students and Integrated Curriculum in Middle School, were discussed earlier under the category of Learning Needs. Because of their direct impact on participation, it made sense to include them as subthemes here. Benefit will be discussed next. Finally, Funding, Leadership, and Belief in Excellence will be addressed with a brief overview of underlying concepts.

**Access.** As detailed earlier in this chapter, access is comprised of several components. Within this study, Access was defined as a combination of Identification and Availability of Appropriate Services. In looking more deeply into Identification, other concepts emerged. One of those was Underrepresented Populations. Because there were
many concerns, questions, and suggestions about this topic, both in this research and in the literature, Underrepresented Populations became a subtheme, not only a part of Identification. This focus matched the reality of identification being only a part of the discussion surrounding underrepresented populations. There were also participant comments and references in the literature to issues of availability of gifted services for underrepresented populations. These concepts taken together form a substantial part of the discussion about equity in gifted education, thus the decision to highlight Underrepresented Populations as a subtheme.

As a final note on the topic of Access, it was an easy decision to include Talent Development in this theme. Throughout the literature, as referenced earlier in this dissertation, and in participant comments, talent development is one of the most effective ways to increase access to advanced learning experiences (Ford D., 2011; Gagne, 1985; Gentry, 1999; Renzulli, 2005; Subotnik, Olszewski-Kubilius, & Worrell, 2011; Van Tassel-Baska & Reis, 2004).

Participation. This was the most difficult theme to form. The subthemes all emerged quickly from the data, as the interviews continued. What was challenging was trying to synthesize these seemingly disparate concepts into the developing core category in a coherent way. Looking back at the participants’ comments helped form the connections among the concepts of Social and Emotional Needs, Service Delivery, Needs of Twice Exceptional Students, and Integrated Coursework. Over and over, the participants mentioned that each of these areas could impact participation in gifted services. By examining the nature and direction of the participant comments, it became apparent that most considered meeting the social and emotional needs of the gifted an vital part of
improving participation in gifted education programs. Several emphasized the importance of recognizing and satisfying the learning needs of Twice Exceptional students and Middle and High school students who feel a need for interconnected coursework. Optimizing service delivery with creativity and flexibility to more closely meet student needs also emerged as an essential component of participation. In summary, meeting the full spectrum of needs of gifted students is an emerging focus for many districts because of the impact on student participation, retention, and achievement in gifted education programs.

**Benefit.** As previously discussed, the underlying premise of any educational program must be benefit to the students. The same is true for gifted education. As one of the three components of equity for this research, it cannot be emphasized enough that benefit was implicit in most of what the participants shared. This was eminently clear in the policies of the three states included in this research that mandate gifted services, Florida, Georgia, and South Carolina. This was true of even comments that were associated with codes related to Access and Participation. This interconnected relationship will be explored further in Chapter Five.

Furthermore, the analysis of State level program documents as reported earlier in this chapter supports this theory as well. As shared earlier, references to Benefit in State Program Documents were as follows: Florida-94, Georgia-51, South Carolina-20, and California-14. These numbers show that Florida’s state gifted policies most strongly support Benefit for gifted students, while support for the Benefit of Gifted Education is weaker in the state gifted policies of Georgia, California, and South Carolina. Since California does not mandate or fund gifted education services at the State Level, it is not surprising that the incidence of codes related to
Benefit would be lowest for the California State Program Documents. The most recent revision to Florida’s Gifted Program Documents in 2013 was significant in scope and sequence resulting in greater detail regarding all details of gifted education in Florida (Florida Department of Education, 2013). This document is more extensive than any of the other State Program Documents, which may be related to the high number of instances of codes associated with Benefit in this document.

In contrast, the differences among the mean number of codes related to Benefit in the Local School District Program Documents were not as great (CA Districts: 22.5, FL Districts: 20.5, GA Districts: 21, and SC Districts: 16). It is worth noting that at both state and local levels, South Carolina had the lowest number of codes related to Benefit from the Program Documents.

**Funding, leadership, and belief in excellence.** These final themes were not realized during the formation of categories during coding, but came later as the analysis process continued. This may have been because these topics were unanticipated in the initial literature review and in the development of interview questions.

The theme of funding came directly from participant comments. Through analysis of these comments, it became apparent that funding was seen by many as a crucial part of gifted education. Even the participants, who believed that gifted education should not be limited by funding, realized that funding is still an important conversation within this field.

Leadership has several concepts within it going beyond just leaders supporting gifted education. Upon deeper examination, leadership also entails training educators, and creating or finding ways to serve gifted students. Teachers can only implement what their
leadership provides as service delivery options. Several of the participants discussed the impact of creative service delivery on the success of their gifted education programs. Each of these participants had taken initiative to implement innovative programs. These programs included talent development, mixed grouping advanced content, choice schools, magnet schools and teacher/counselors to address social and emotional needs of gifted high school students. Furthermore, the participants shared successes resulting from these initiatives.

The final theme was Belief in Excellence. This was also formed out of analysis of participant comments. So many of them expressed delight, confidence, and satisfaction in the successes of their gifted and high ability students. This feeling was tangible in the interview conversations. It took some time and reflection to put a name to this feeling, since it was not a pre-conceived notion from earlier literature review or development of the previous chapter of this dissertation. Once it was identified however, the subthemes of this piece fell into place. In tying it together, thoughts converged around this question: *What would leaders who believe in the potential for excellence of their students do to fully develop that capacity?* The main concepts that emerged from the participants’ comments were Belief that Gifted Education Should Develop Excellence, Advocacy, and Growing Talents. These topics were spoken about with passion, conviction, and pride by all participants, showing they are key pieces in meeting student needs. This theme will be explored further later in this chapter.

**Unifying Themes into Theory**

Taken as a whole, the information shared by the participants brings the gifted education picture into clearer focus. Their comments show that they strongly believe
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children’s learning needs should be met, and the best way to do that is by opening access. This seems to be the key factor for districts and states that have created more equity in their gifted education programs.

The districts with the most success in increasing equity were those in Florida. Program documents strongly support that they have gone beyond the initial changes that districts in Georgia and South Carolina have made to use fairer test instruments and consistently offer talent development opportunities. Florida has created legislation that makes opening access to underrepresented populations a priority. By adding in grant opportunities for districts pursuing these access reforms, Florida has also integrated funding into the equation. To cap it off, Participant 4 shared the impact of a newly created and funded service model at the high school level that is having a positive impact on the social and emotional needs of the gifted students, particularly those from underrepresented groups.

A contradictory case. Examining the contradictory case from the rural South Carolina district further supports the development of this theory. Despite having the funding to do extensive talent development in the early grades, Participant 11 repeatedly emphasized that the biggest barrier to fully meeting the needs of gifted students in this district was a lack of funding.

Interviewer: “So, it sounds like you’re saying the only thing preventing you from reaching that ideal situation is lack of funding.”

Participant: “Exactly!”

Participant 11 shared several strategies that should equate to equity in this district. Among these are offering training to educators, talent development for primary
grade students, creative service delivery to offer high ability students access to advanced learning opportunities in elementary, middle, and high school. These coupled with her strong belief in the potential excellence of the students should be enough to create more equity. The true picture of equity in this district differs from Participant 11’s vision.

The perception of equity was skewed because it did not realistically evaluate current conditions in the district. This district is highly culturally diverse and also severely impoverished. With such a small percentage of identified gifted students (2.3%), it is clear that identification processes should be improved. Table 12 shows racial statistics for students in this district.

Table 12

<table>
<thead>
<tr>
<th>Racial Statistics for Students Grades 2-12 in District 11</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Student Population</td>
</tr>
<tr>
<td>--------------------------</td>
</tr>
<tr>
<td>Black: 64%</td>
</tr>
<tr>
<td>White: 12%</td>
</tr>
<tr>
<td>Hispanic: 24%</td>
</tr>
<tr>
<td>Other: &lt;.1%</td>
</tr>
</tbody>
</table>

From Table 12, it appears that although the gap was not as large as many districts, Black and Hispanic children were still underrepresented in gifted education in this district. Correspondingly, White students are overrepresented in gifted education in this district as compared to overall percentage of White students.
The director (Participant 11) also shared a revealing comment about the lack of student interest in participation in gifted programs. She spoke about finding “good representatives of the program” to go back and tell the other students how much fun it was to be in talent development. From her comments and the district educational statistics, it appears that a pervasive culture of underachievement is present in this district. What is lacking is not funding, it’s critical mass with a belief in excellence. Because the district is so small, there are not enough students participating in gifted programs to create a tipping point of change in thinking about educational attainment and success. Furthermore, teachers and others do not yet believe in the vision of excellence for their students. This is evidenced by Participant 11’s comments regarding teacher training efforts:

Interviewer: Would you say that’s a need for more teacher education, more teacher training?

Participant: Well, we’ve tried. I’ve offered. In South Carolina, all you need to take are two classes for $45 dollars. That’s a one-time fee of $45 dollars for five sessions per class and you’re endorsed. No taxes, no anything else. Right now, I have 22 teachers from K-12 that are endorsed GT. I am offering classes like you wouldn’t believe, and I still don’t have everyone signing up.

Another missing piece of the puzzle is attention to the social and emotional needs of the gifted students. This goes hand-in-hand with efforts to increase participation, especially in a district where underachievement is part of the student and community culture. Attention to the social needs of gifted students could begin to address the reasons behind the reluctance to participate in gifted programs. This would be a long process to
begin to change the school culture. The byproducts would be felt beyond the gifted program into the general school culture, likely raising achievement across the board.

Clearly, there are many pieces in place that support equity. There are a few crucial components missing: Critical Mass with a Belief in Excellence, Attention to Social and Emotional Needs, and Efforts to Open Access and Increase Participation of Underrepresented Populations. The current programs have only been in place for two years, which is a relatively short period of time to expect significant change.

**Successful efforts.** In contrast, the districts in Florida have waged aggressive campaigns to increase equity for over 10 years. Theirs is a long-term effort, one that is helped tremendously by the support of laws surrounding gifted identification that are sensitive to the needs of underrepresented student groups. Moreover, these districts have the critical mass to create paradigm changes regarding what giftedness might look like. Other districts included in this research are also well on their way to achieving equity in gifted education. Innovative identification practices, educator training about identification, and as Participant 8 said, “It also affirms for me that it is DOABLE. It’s a matter of that leadership and that belief. You know and if this is what we want to do or do we want to focus on adequacy and remediation.”

**Revealed Theory.** The revealed theory is illustrated in Figure 16 below. It shows how all the necessary components combine to create Equity in gifted education. To clarify the diagram below, subthemes are included under Access and Participation because they were formed from strong categories made up of several codes during the analysis process. Benefit, Leadership, Funding, and Belief in Excellence had fewer different codes, so no categories were formed for these themes during the data analysis process. Each of these
themes is made up of 3-5 codes. The reader may refer back to Figures 6 and 7 for those specific codes.

![Diagram of Revealed Theory—Equity](image)

*Figure 16. Diagram of Revealed Theory—Equity.*

**Breaking down Equity.** Looking at the Figure 16, it is apparent that two main parts combine to create Equity. These are Foundational Elements of Equity and Essential Supportive Elements of Equity. The reader will notice that the components of Foundational Elements of Equity are the same three parts used throughout this dissertation to describe equity (Access, Participation, and Benefit). For Access, the three main subcomponents have been included: Identification, Underrepresentation,
and Talent Development. These represent categories within the coding and analysis of the Participant Data. Within Participation, there are subcomponents of Social/Emotional Needs and Service Delivery with Integrated Coursework and Twice Exceptional Needs as supportive components. Again, these subcomponents represent categories from the coding and analysis of the Participant Data. The other remaining elements of equity are made up of many codes, but not necessarily categories, so those are not included in this diagram. The second major part of Equity is Essential Supportive Elements of Equity, consisting of Leadership, Funding, and Belief in Excellence. Another point to examine, which is discussed below, is the Code Counts for each of the Components of Equity. They have been listed within each component on Figure 16. These code counts represent a combination of the number of times that particular theme was counted within the Participant Interview data and the Program Document data.

**The whole picture.** Figure 16 represents a snapshot of what the data revealed through participant comments, gifted program documents, and review of the literature. Although equity can take many forms in reality, this figure is merely an attempt to explain the perceptions of equity found in the participants’ states and districts.

When one views the participating districts through the lens of Equity, the theory seems to explain some of the differences between perceptions and reality of equity. More specifically, Participant 11’s perceptions of the district indicate a high level of equity. These perceptions do not match the reality of Equity in that district, as discussed above in “A contradictory case”. That district is weak in one of the
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Essential Supportive Elements of Equity-Belief in Excellence. This results in weaknesses in all Foundational Elements of Equity: Access, Participation, and Benefit.

This theory does not attempt to imply that Districts 1-10 have fully developed each of the components and subcomponents to create perfect Equity in their gifted education programs. The point is that the Essential Supportive Elements of Equity are present in varying amounts in those districts, resulting in varying levels of progress toward increasing the Foundational Elements of Equity leading to greater Equity. The demographics from Table 10 support the assertion that Districts 1-10 appear to have achieved a greater level of Equity in their gifted programs than District 11. The theory presented in Figure 16 attempts to explain that assertion.

Ancillary Information (subtheme)

One subtheme was not grounded or representative enough to develop into a revealed theory. This subtheme was the need for recognition of and services for students who are artistically gifted. Five out of eleven participants discussed this during the interview process. One state, South Carolina, even offered funding opportunities for local school districts to create programs to meet the needs of their artistically gifted students. Although this subtheme was not included in the revealed theory, it is still worth acknowledging as an area to be explored.

Chapter Summary

The purpose of chapter four was to provide a detailed look at the research analysis process, the methods used to discover and develop a theory that was fully grounded in the data generated, and communicate these theories using text and
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figures. Furthermore, participant comments and literature were used to support the emerging theories. Saturation was reached, and a potentially rewarding subtheme was shared as *Ancillary Information*, even though it was not as representative of the entire data set. This subtheme may make excellent topic for future research. Briefly, here are the main interrelated aspects of the theory:

1. Opening access is an important part of increasing equity in gifted education.
2. Amount of funding is not the main factor in creating equitable gifted education programs.
3. Participation can be influenced by focusing on Social and Emotional Needs, Twice Exceptional Students, Integrated Coursework, and Service Delivery.
4. A leader’s belief in the potential excellence of students is not sufficient. A critical mass of people in the school and the community who believe this is necessary to increase participation, access, and eventual benefit for gifted students.
5. Leadership is instrumental in laying the foundation for equity in gifted education by implementing educator training, creative service models, talent development opportunities, and policies that support the needs of gifted children.

All of these are integral to the research question of equity in gifted education. In the next chapter, the theory will be explored more fully in addition to ways the participating states and districts have begun the work of creating more equitable gifted education programs.
Chapter 5: Discussion

Purpose of Chapter Five

The purpose of this grounded theory research was to investigate the perceptions on equity in gifted education service delivery. The study examined the relationship between the main components of equity (access, benefit, and participation) and service delivery. Secondary factors such as community type and school level were also reviewed to determine the interaction with equity in gifted education.

The goal of chapter five is to gather all the components of the research process in order to create a complete view for the reader. It can then be determined whether the purpose of the study was met: What are the state and district gifted specialists’ perceptions of equity in gifted education? Chapter five will also discuss potential areas for future research.

Overview of Revealed Theories

The term “revealed theories” is used to indicate the interpretation of multiple sources of data resulting in the emergence of a theory. The researcher did not build this theory; although in grounded theory, the researcher is an instrument of the research. Discovery of this theory began with the choice of grounded theory for the methodology. It was further refined by the decision to use a more constructivist approach to grounded theory because, “constructivist grounded theorists enter the
studied phenomenon and attempt to see it from the inside” (Charmaz, 2013, p. 305). Theory began to emerge through the voices of the participants during interviews. As key ideas started to unfold, relevant literature was added, as well as reflective memos to guide the process. The most significant piece of this theory was the thick, rich descriptions given by the participants. The words of those participants, who are passionate about the field of gifted education, provided the signposts along the way to finding the theory. Theory emerged throughout the iterative process of constant comparisons, in answer to the research questions.

After a brief summary of the revealed theory, this chapter will discuss each of the main components of the revealed theory in greater depth using participant comments and support from the literature. The second section of the chapter will focus on implications of this research for gifted educators, state and local gifted specialists, and policy makers. Finally, the last section will suggest some potential areas for continued study.

**Summary of Revealed Theory of Equity**

The revealed theory of Equity that emerged attempts to describe perceptions of equity in gifted education service delivery. The theory as shown in Figure 16, explains how the components of equity combine to create Equity. The Essential Supportive Elements of Equity: Leadership, Funding, and Belief in Excellence, are necessary building blocks to create the Foundational Elements of Equity: Access, Participation, and Benefit. Based on the findings, this theory proposes that if any of the Essential Supportive Elements of Equity are missing or weak, the possible result would be weakness or limitation in the Foundational Elements of Equity.
Overview of Findings

This section will explore each of the components of Equity in more depth showing the ways they interact. Participant comments and literature support included here focus on how the components contribute to impact Equity.

**Access.** In the words of Participant 8, “Initial access begins with teacher recognition of their needs and then access to appropriate services.” It is true that teachers are often the frontline of opening access to gifted education services. From that point, access is comprised of two main components: availability of advanced learning opportunities, and identification of children as eligible to received gifted education services. It is important to note that not all advanced learning experiences are part of formal gifted education program. Some are open to a wider group of students, who may not be eligible for gifted education services. For that reason, talent development will be discussed first, followed by identification.

**Talent development.** Much has been researched, discussed, and written about the varieties, challenges, costs, and benefits of talent development. This section will attempt to integrate the participant perspective with support from the literature in order to explain why talent development is an important part of increasing access.

**Participant views on talent development.** Many of these comments were related to opening access to advanced learning experiences through the use of talent development programs. This theme was a significant part of creating the larger concept of equity for gifted and high ability students. It certainly addresses the concern shared by Participant 8, “Think how many times in the past, a kid misses whatever magic cut-off we’ve established
by a point or two and they get nothing that changes in their instructional program, and that makes no sense to me.” Alternate means of entry into advanced learning situations can often lead to even higher achievement for these high ability learners. As Participant 7 shared:

I’m pretty proud of it because back about 10 years ago, the numbers [of gifted students] were just ridiculously low in the South County. We did notice a correlation after several years of offering the High Potential Model, the numbers [of gifted identified] started going up.

In comments shared earlier in this dissertation, other participants shared the success of talent development efforts in increasing access to advanced learning opportunities, especially for students from groups typically underrepresented in gifted education.

Support from the literature. A related perspective from the literature focuses on a talent development method that utilizes a different model of service delivery, consultation and collaboration between gifted specialists and regular education teachers. Landrum (2001) described how the Catalyst Program was tested in a district. The program involved consistent, ongoing collaboration to create differentiated instruction for gifted children in the regular classroom. Landrum also noted that not only did gifted children benefit from the increased exposure to advanced learning opportunities, but the regular education students did too (Landrum, 2001). This research showed that increasing participation in advanced learning opportunities impacted higher level reasoning skills for all students, with gifted students showing slightly more benefit (Landrum, 2001). While the main
service delivery component was differentiation in the regular classroom, this
involved talent development for those students showing high ability, but not
identified as gifted. Landrum (2001) asserts that talent development opportunities
such as these can lead to greater chance of identification and later participation in
gifted services for high ability students.

 Identification. Every participant discussed identification in some capacity.
The combined codes related to identification are more grounded and representative
in the data, than any other code. That shows the importance of identification in the
participants’ perceptions of equity. Some participants see the identification process
as a means of recognizing the special learning needs of gifted children. “I think we
need to constantly improve formal identification mainly to keep us in the game as a
special needs population” (Participant 8). Two other participants mentioned the
impact of gifted students’ lack of formal special needs status. According to
Participant 2, the difficulty for states where there is no mandate for gifted education
service is, “There’s really no money behind it, no clout.”

One way to improve the identification process is to begin with teacher
education efforts, as shown by Participant 1’s comments:

You have to assess teachers’ knowledge of: “Who are gifted learners? What
are their characteristics? What are their needs, interests, and abilities? What
do they look like?” We have to dispel some of those misconceptions. We have
to shore up teachers’ knowledge and skills in recognizing and identifying
characteristics of gifted learners

A few participants extended identification’s purpose beyond a means of recognition
of special learning needs all the way to a responsibility for providing gifted education services. “Once I’ve identified you as gifted, do I have a legal, moral, ethical right to do something different in terms of services for you?” (Participant 1) Participant 8 added, “Alright, we’re identifying the need, so whether not the kid is gifted, it is our obligation to do something about it.”

Another expressed frustration at the use of identification as a “gatekeeper” for gifted education services, and wishing for, “a more universal identification process. So that we don’t have the risk of, ‘I’m gifted today, but tomorrow I’ve moved into a district that says I’m not gifted’ “ (Participant 2).

The final topic within identification revolves around testing practices that may promote inequity. One participant shared, “Every child should be on the same playing field when it comes to evaluation for gifted services. I know that doesn’t always happen because there’s test bias” (Participant 7). Some states have changed laws regarding gifted education in an attempt to create more equitable identification practices. Participant 4 shared her thoughts on how legal support is only one part of creating more equitable identification practices, “I think legislation has to be in place, and I think that people have to be willing to make it work.”

For students who are poor, or learning English, the state’s “Plan B” threshold for IQs is lower, at 115, due to evidence that they tend to score lower on such tests largely because of cultural and language issues. Each district establishes its own criteria with state approval, and each school has a committee to identify or deny individual students. For one, the district regularly accepts partial IQ scores, meaning a student who scores high on the verbal portion of a test, but not the non-verbal, may still be
admitted. The district also allows for standard error on IQ tests, so minimum scores in the district [Wording changed to protect confidentiality] are actually 127 instead of 130 and for “Plan B” students, 112 instead of 115. (Smiley, 2013)

A program director emphasized that the district also takes other factors seriously, such as creativity and leadership, “We certainly feel gifted isn’t just about your IQ number,” she said. “It’s much more complex than that” (Smiley, 2013).

**Underrepresented populations.** Tackling equity with underrepresented populations in gifted programs is an ongoing effort. “We haven’t solved the riddle of under represented population either. We continue to work on that. I do think we have raised the consciousness level about those kids” (Participant 8).

Some participants discussed the circular relationship among access, talent development, and identification with English Learners.

The other thing, we have a lot of, like most counties, pockets of children who don’t speak English. They are overlooked in gifted identification. Because of test bias or because they don’t stand out in the regular classroom to the teacher. So, they don’t get referred. So, the High Potential Program has helped those kids a lot. Once they start picking up on the thinking skills and using them in their regular classroom, then that teacher starts recognizing more in that child than they ever would have seen before. Then we can start to see those motivation rating start to go higher. The creative thinking skills that they work on and such. All of the sudden, the child just starts “Blooming” so to speak. (Participant 7)

This interaction between access, talent development and identification impacts not only linguistically diverse students, but also others who may fall into those groups that are
underrepresented in gifted education, such as culturally diverse students, students with disabilities, and students from impoverished backgrounds. The interaction will be discussed with more detail in the next section.

**Participation.** This is a complicated concept with several components. To that end, the components will be discussed within subtopics to aid in understanding. It will be helpful to revisit the operation definition of participation that was shared in chapter one: *The type, duration, and frequency of gifted education services within which students of majority and minority groups are enrolled.* Service delivery encompasses type, duration, and frequency of gifted education services. The other components that will be examined here directly impact the duration and frequency of student involvement in gifted services. The relationship between social and emotional needs and participation will be the first topic addressed. Further, to increase coherence Needs of Twice Exceptional learners and Integrated Coursework will be addressed together under the topic of Service Delivery in relationship to Participation in the second part of this section.

**Social and emotional needs.** It may seem odd to place this topic under participation, but there are valid reasons for doing so. Referring back to an earlier discussion of Maslow’s Hierarchy of Needs (1943), it is important to remember the relative position of social and emotional needs and the higher level need for self-actualization. As Maslow’s theory suggests, people are not motivated to attain higher levels until the lower level needs have been met. He referred to this as *metamotivation;* the motivation of humans to go beyond meeting basic needs to strive for continuous improvement or learning (Maslow, 1943). To extend this
thinking, gifted children will not be ready or perhaps motivated to fully explore their academic potential and participate in challenging learning experiences, if their social and emotional needs are not met.

Some districts have recognized this challenge, “That’s where I think their social and emotional needs have got to be met, if you’re going to do anything to help children you gotta see where they are” (Participant 10). Another shared, because I don’t care what the rigor is with academics, if that affective domain is not in a good place, they are NOT going to make it. They are at risk! They make up such a small percentage of the population, but such a high percentage of our dropout rate, and we lose them. (Participant 4)

Others have implemented programs to overcome it.

They started with the SENG Organization and it’s now part of their GATE program in their district. Actually, they started doing SENG like things with their parents of gifted students at the junior high level. Her gifted are primarily English language learners, poverty level. She’s got this phenomenal thing going on right now. I’m hoping it will spread to surrounding districts. She spoke at our local TAG conference and had a great reception. It’s a really positive thing. (Participant 2)

Participant 4 shared this,

Every one of the high schools is served by one of my high school consultation teachers. The students are served, Their affective domain is nurtured for 4 years....So my high school team is SO important to that caring component as well. That’s how it’s different.
The literature supports the components this district has put into place to support their high school students. According to Hansen and Toso (2007), gifted students benefit from emotional support, especially those who have suffered extreme personal losses. Several of their participants shared that nobody at school offered help in dealing with these losses. The authors (Hansen & Toso, 2007) recommend creating an environment where gifted students feel valued, respected, and supported for the unique talents and emotional sensitivities that sometimes go together.

Furthermore, the literature advises that providing gifted students with challenging coursework, coupled with a caring teacher, can satisfy the need for academic challenge and emotional support while helping to build the study skills that some gifted students lack (Baum, Renzulli, & Hébert, 1995; Hansen & Toso, 2007). This teacher/guidance counselor is exactly what Participant 4 describes, “They’ll definitely interface with the teachers, advocate for the students, teach them to self-advocate, work on organization for those few who still need it because they’ve never really met a challenge until the high school level.”

**Service delivery.** As described earlier in this dissertation, service delivery can take a variety of forms and also encompass many topics. The discussion here will center on Integrated Coursework and Addressing Needs of Twice Exceptional Students.

**Support from the literature.** The literature is replete with research examining the efficacy of different methods of service delivery and ways to address the needs of twice-exceptional students. Both of these topics have been discussed earlier in this
dissertation. This section will examine a less common method of service delivery—integration of coursework at the middle and high school level.

Best practices in middle school curriculum design have been examined in the literature over the past several decades. The discussions for serious reform began with the *Middle School Movement* in the late 1980s and early 1990s. James Beane was a thought leader during this period with his work on middle school curriculum. Bean (1993) described an “integrative, thematic curriculum planned from scratch with their students” (p. xiv). His work creates a blueprint for creating this curriculum in any middle school.

This thinking has recently enjoyed resurgence, bringing new attention to the needs of middle school students. Researchers in gifted education have focused on this topic as well. Klimis and VanTassel-Baska’s (2013) work examined a pilot project that created gifted middle school centers complete with many elements of the curriculum proposed by Beane (1993). The integrated curriculum, overarching concepts, and thematic focus combined with opportunities for authentic, collaborative learning activities proved to be exactly what these middle school students wanted and needed. In the words of one of the gifted middle school students, “I feel like the curriculum was designed to provide us with a challenge, and the teaching styles of the teachers were wide and diverse. Teachers seem to realize that we, as mature students, can learn deeper things” (Klimis & VanTassel-Baska, 2013, p. 177).

Both of these works highlight the middle school student’s need for learning that is connected to their lives and experiences, as well as the need of gifted students
to explore the deeper concepts that draw various subject areas together. The collaborative model was also successful because of the increase in challenging, interesting learning experiences. Continuous high levels of engagement in learning from these programs are a natural way to increase participation in gifted programs.

Participant views. Throughout the interviews, it was evident that the subthemes making up Service Delivery were important to the participants. Their comments about finding ways to meet the needs of twice-exceptional students and middle school students were filled with passion. They referenced the importance of finding or creating service delivery options that meet the needs of middle school students or twice-exceptional students.

I just think the world is not slotted like we sometimes slot our coursework. It’s just really not reality. If you want something done well in middle school or high school, add the strength of an elementary person to the planning of it because I think they understand the whole child much better. (Participant 10)

Participant 1 describes a potential student perspective of integrated middle school coursework, “If we could talk about universal concepts like Power and Structure, then I could make the connection between the power of two countries in American History class and power of the lead character in my eighth grade English class.” Participant 10 shared this about twice exceptional students, “I’m certain there are multi-exceptional, or twice exceptional children who aren’t getting served because Special Ed says they need to be in this particular class and we don’t have another one that suits them just as well” (Participant 10). Another participant (2) shared frustration about the reality of meeting the needs of twice exceptional students. “We have a lot of twice exceptional kids that we
totally ignore, totally. Or even if they’re identified for gifted, they don’t service them for that, only for the disability.” Sometimes gifted identification is in place, but the service model creates a perceived burden for twice-exceptional students. “I have known of a few cases where the child is Special Ed and turned down gifted services because the parent has said, “No, we can’t do that. We have enough on our plate” (Participant 2).

The focus of this section was models that open access in some way, be it integrated coursework or co-ordination of services for twice-exceptional services. These models, when combined with addressing the social and emotional needs of gifted learners, can have dramatic impact on participation.

**Putting it all together.** Indeed, there is ongoing interrelatedness among Opening Access, Talent Development, Benefit, Identification, and Participation. This may seem to contradict the order in which the main components of equity (DeVillar, 1986) were discussed in the operational definition in chapter one. As the data, interviews, program documents, and literature, were analyzed, it became clear that there is not a strictly linear relationship between Access, Participation, and Benefit in gifted education. These components are interrelated and often they may skip ahead or circle back to a different point. This will be clearer after reading the discussion of each component below.
*KEY* Subcomponents of each Equity component: Opening Access-Talent Development, Service Delivery-Integrated Coursework & Twice Exceptional

Figure 17. Relationship among elements of Equity components.

This figure was designed to illustrate the interrelatedness of the Foundational Elements of Equity, as described throughout this dissertation. It is included here to provide clarity about some of the aspects of the revealed theory of Equity. The exploration of this interrelatedness appears here to clarify details that may influence how the participants perceive the relationship between the components and/or subcomponents of equity to gifted education service delivery. The first step begins
with opening access in some way to give students opportunities for advanced learning experiences. These could take any number of service delivery options from informal differentiation in the regular classroom to highly organized methods such as the Schoolwide Enrichment Model (Renzulli, 2005). If the method is implemented with attention to the needs of advanced learners, there will be benefit for the student, as discussed earlier in this dissertation. Once there is benefit, identification is impacted, usually in a positive way.

For twice exceptional students, their disabilities or needs for special education services can sometimes interfere with their participation in gifted education. The interaction of elements for these students looks slightly different, since they are already identified as gifted. Working to coordinate their service delivery for both special education and gifted education would increase benefit to the students. After seeing the benefits, it is likely that educators and parents would decide to continue participation in gifted education for twice exceptional students.

As participant comments from this dissertation show, students with exposure to talent development gain confidence and have opportunity to develop and show the critical and divergent thinking skills that are required for most gifted identification processes. Participant 11 shared her thoughts about the positive impact of more time for talent development on participation, “Another teacher could continue seeing second graders twice a week [for talent development], and do pullouts with them as groups….Then let my other teachers focus on third-fifth, we would get more students participating. I really believe that.” In addition, teachers are more able or likely to recognize the traits of giftedness in these students because of
the students’ increased use of critical and divergent thinking skills in the regular classroom. Identification for gifted eligibility results in greater participation rates in gifted services. Of course, there are also some reciprocal relationships within these elements. Participation in gifted services results in benefit for the student. Opening access directly increases participation in advanced learning, but may also increase it indirectly because of the impact of social needs, as previously discussed.

**Funding and Use of Resources.** Untangling the sometimes, disparate thoughts among the many participant comments related to funding was challenging. There are those who believe that lack of funding does not necessarily mean the demise of a gifted program or gifted education in general.

And I think sometime we hide behind that like: I don’t have enough endorsed teachers or I don’t have enough money, or whatever. I’ve sort of gotten to the point of: It is a matter of our will and our creativity that if every penny of weighted funding were gone tomorrow, I don’t think we would change one thing that we’re doing for bright kids in this district. We’d probably have larger class sizes just because of the weighted funding that we pull in.

(Participant 8)

Participant 1’s comments supported that idea as well, “Money is not the be-all and end-all. It’s nice, but we can do things in our classroom, we can do things at our school site to affect the sphere of influence where we can, regardless of funding.” These comments reinforce the notion that good teaching and creative service delivery models can go a long way toward meeting the advanced learning needs of gifted students. Funding issues may be another reason that some in the gifted
community have proposed a re-imagining of gifted education models. If funding gifted educators is a constant battle in some areas, then perhaps alternate service models that don’t require additional gifted specialists could meet those learning needs. That may be the intended idea, but there are larger issues than just the money for gifted teachers.

Several participants suggested that commitment to funding gifted services is really another way to show recognition of the special learning needs of gifted children. Participant 7 said, “So funding is always going to be a problem. I think the mindset of making people understand that it is an important program and it is needed, is an obstacle.” Along similar lines, Participant 1 suggested that motivation and funding go together in recognizing and serving gifted students, “Motivation of districts, in terms of funding, motivation of society in general, in terms of recognizing the needs of gifted students.”

This discussion would be incomplete without revisiting the extreme emphasis on funding by Participant 11 from a small rural district in South Carolina. When this participant was asked about barriers to ideal access for gifted education, she replied, “We have a big barrier. Our barrier is huge. Because our funding was $22 thousand, that’s it, for about 147 GT kids grades 3-12.” She went on to say that this funding was not for teacher employment, but for resources, supplies, and educator training for the gifted program. When that perspective is contemplated, funding doesn’t seem to be such an issue. Fully funded programs in other states provide comparable monetary amounts for resources beyond teacher salaries. For example, Participant 8 shared that several of the gifted programs in the district have no additional costs
beyond the salaries of teachers necessary to serve the students whether they were identified as gifted or not.

Finally, Participant 4 shared how looking at the long-term benefit to students, the school, and the community could overcome the reluctance to make funding gifted education a priority, "I think if they start understanding the impact and the benefits of catching these learners, and the payback that will happen that it will transcend the funding issue."

**Leadership.** As is true in nearly every field, good leadership makes all the difference. Good leaders not only recognize the needs of gifted children, but also search for effective ways to meet those needs. The best leaders go even farther and are willing to face the obstacles to attain that vision for best practices in gifted education. Participant 10 had a particularly vivid way of describing the barriers to reaching ideal access for gifted education, "Oh, they are vast and great and deep and wide and high and mountainous and whatever other adjective you could use to describe something like climbing Mt. Everest without boots on." Another shared that it might be time to tweak the collective view of access to gifted education to believe that maybe the obstacles are not as insurmountable as educators think they are:

I’ve gotten to the point where I think there are not as many barriers to doing right by gifted children as we sometimes think there are….I really think we have the power in our hands to do the right thing by gifted kids and it doesn’t always take a whole lot of extra money. It takes creativity and it takes will and it takes belief. (Participant 8)
Several times during the course of the interviews, participants shared that support from higher levels (state or federal) makes a difference in the ability for district or school level leaders to pursue their vision for gifted education. When leaders want to explore or implement innovative program models or create new ways to meet student needs, they can only do so in partnership with higher-level leaders. This is the case for the Georgia rural district that was included in this research. Trust, belief, and willingness to support research based innovative practices allows this district to offer unprecedented advanced learning opportunities, not only for their gifted students, but also for many high ability students as well.

This type of innovation is challenging, but is even more difficult in districts where there is no state mandate for gifted education—like California. This state does have a network of regional advocates for gifted education, who are part of the California Association for the Gifted. This umbrella agency is a clearinghouse for best practices in gifted education, as well as a support system for advocacy efforts. Florida and Georgia also have active statewide Gifted Associations that engage in education and advocacy for students, educators, and families, while South Carolina has an association for Educators of the Gifted. Given the dynamic state-level leadership focusing on gifted education in South Carolina, there may be a parent education and advocacy group on the horizon. Statewide advocacy/education groups are another means of creating leadership that can positively impact educational experiences for gifted students. The efficacy of these groups is tied in large part to the collaborative nature of the organizations, and the many circles of influence individual members and small and larger committees can have within a state’s gifted education program. Indeed, Siegle (2008) suggests that parents can and should advocate
for the needs of gifted learners beginning with their own child, possibly progressing to the national level for all gifted children.

**Belief of Excellence.** Belief in Excellence is exactly what Participant 8 referred to. The belief that the students are capable of excellence with the appropriate learning experiences, and the collective will to make this vision a reality. The idea of critical mass as a necessary component came from a chance comment from a colleague. She mentioned the small size of her class of students was causing some problems. Most teachers would be delighted to have a class of eight, and she wasn’t complaining about the small class size, just discussing some of the unimagined challenges and ways to meet them. What she described was a lack of class ethos for achievement. With such a small group, the students weren’t taking their learning seriously. They had begun to create a culture of underachievement and laziness, with some hints of disrespect for their classmates and their teacher.

It is this same notion that underlies the problem of increasing equity. All of the other components (Access, Participation, Benefit, Leadership, and Funding) can be in place, yet equity in gifted education can still be elusive because without participation, there can be no benefit. If students, teachers, school administrators, and families do not believe that excellence is a worthy and attainable goal, it will not happen. It takes a belief that gifted learners come in all sorts of different packages, meaning racially, culturally, and linguistically different, varying in socio-economic status, and students with disabilities. The literature supports the importance of this belief to equitable gifted programs (Olszewski-Kubilius & Clarenbach, 2012). Renzulli shares his findings regarding belief in growing student excellence as a
means of increasing equity, “Our experience has shown, however, that once the concept of talent development catches on, students, parents, teachers, and administrators begin to view their school in a different way” (2005, p. 84). It is also crucial that district leaders, teachers, parents, and even the students themselves believe that the students of the school are capable of excellence and high achievement. Olszewski-Kubilius and Clarenbach (2012) found that labeling students as gifted could have negative social and emotional consequences that could reduce participation in gifted programs. The very program that is designed to provide appropriate learning experiences for student benefit, may be in direct conflict with the school and community culture of what is acceptable or desirable for “success”. This may have been the case for one rural district where gifted participation levels are much lower than expected (2.3% of all students) for similar districts in the state. Participant 11 shared these comments on the topic: “Or it may be that child that just doesn’t want to do it, but can, and doesn’t bubble anything, so he/she doesn’t make it” and “But the initial second grade testing, if the child didn’t want to do it—it may be possible that we miss them to participate in the GT program because they just didn’t want to take the test” and “I think that children don’t want to leave the classroom [regular ed classroom].” And “I think some students who do may come back and express what they are doing in the GT classroom, and it may not be exciting. So the next time for testing, when it’s time to be nominated, they just won’t do it because they don’t want to go to the class.”
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Where there is collective will and belief in excellence, student outcomes can be amazing. This comment from Participant 10 describes the how the belief in excellence extends to linguistically diverse students.

Could you go to their country, speak in their language, and learn anything? My answer to that would be I couldn’t even ask where the restroom is. When you put it in that perspective, people say, “Yeah, you’re right!” When you tell people about the research over the last 10 years and how these kids perform, they’re spellbound! They’re believers! It is a paradigm shift, as you well know.

Conclusions About the Theory Discovered

In the end, the point of any educational program is benefit for students. Benefit means, in the words of Participant 10, “Students reaching their potential because of participation in the gifted program.” One participant shared these thoughts:

Who doesn’t benefit from getting what they need and a little bit more? Gifted students often need more than what is typically offered in the regular classroom. You know everyone likes to throw out the old saying that “Being fair doesn’t mean that everyone gets the same thing. Everyone gets what they need.” (Participant 7)

This comment gets to the core of equity, “Everyone gets what they [he or she] need [s].” When the theory is examined in totality, each of the components represents a need of gifted learners. Taken together, the components point the way forward toward reaching equity in gifted education. Achieving equity requires the combined
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Significance of the Study

The study was significant because it examined the Foundational Elements of Equity (Access, Participation, and Benefit) and how those elements interact and build upon the Essential Supportive Elements of Equity (Leadership, Funding, Belief in Excellence) to create equity in gifted education programs. The voices of the participants revealed their perceptions about the reality of equity in gifted education programs today. As Participant 8 shared about the process of creating more equity in gifted programs, “It’s slow and it’s frustrating. The consciousness raising has been going on a good long while now, and we’re seeing some concrete results.” Participant 4 commented on the changes to gifted identification and program options in Florida, “I think that there was a lot of resistance. I think there has to be a mindset change. This works, and it’s necessary. It HAS to be.”

There is still work to be done in creating more equity for gifted programs. This is especially true in California because California has no state mandate for gifted education. According to Participant 2, “Service delivery depends on the school district that you’re involved in or teachers themselves... There’s not a lot of consistency where you think you’re getting gifted services. They may not really truly be meeting individual needs. That’s a problem.” South Carolina shares these concerns because opportunities for gifted
students don’t look the same across the state. “Gifted education services may look very
different in those two extremes [rural and suburban districts] and that’s a barrier,”
according to Participant 9.

The participants have shared all the necessary components to creating equity in
gifted education. This study is the first to create a theory of equity in gifted education
based on the perspectives of gifted specialists. Because the theory is grounded in the
participants’ comments and state and district gifted program documents as well as the
literature, it is inherently tied with the reality of gifted education, as it exists in these four
states. This theory does not represent a conceptual framework of equity based upon the
research of others, but on the actual current practices, policies, and practices of gifted
specialists as revealed through participant interviews and district or state gifted program
documents. That lends significant weight to the ideas discussed here making this research
worthy of consideration by the states involved, as well as other states attempting to
improve equity in their gifted education programs.

Limitations

In qualitative research, the researcher as instrument is a limitation. That
should be considered in this study, since I have experiences in gifted education on
several levels—as a K-12 student participating in gifted education myself, as a gifted
specialist in a school district, and as a parent of two gifted children. Although I do
not believe that these experiences unduly influenced the direction or development of
the theory presented here, there would naturally have been some influence of my
background on the interpretation and analysis of the results. As mentioned earlier in
this dissertation, I used extensive member-checking and peer review to guard against researcher bias while maintaining researcher reflexivity.

The second limitation involves the scope and sequence of this research. The search for participants was guided by the findings in the State of the State report (Council of State Directors of Programs for the Gifted, 2013) and the research question of this study. The number of participants was limited by researcher access to people that would fit the parameters detailed in the methodology. It would have provided an added perspective, if local school district gifted specialists from California had been included in addition to the regional gifted specialists. The reasons for this omission were discussed earlier in Chapter Three. While the categories were saturated through theoretical sampling, additional nuances may have been added to the theory with more participants from rural districts. Moreover, the small number of states (4) and participants (11) mean that while the theory developed shows validity for this sample, it may not be valid for all gifted programs across the country (Merriam, 2009).

**Delimitations**

The delimitations are set forth by a researcher to create boundaries on the purpose and scope of the research (Creswell, 2013). One delimitation is the focus on four states. While the states were chosen to represent good possibilities in satisfying the demands of the research questions, it is a small sample of the gifted education programs. A second delimitation was the choice to include only the perspectives of gifted specialists, not researchers, teachers, parents, or gifted students themselves. These other perspectives may have strengthened this study or taken it in a different
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direction, but were deemed as beyond the scope of the current research. A third
delimitation was the decision to include only interviews and program documents,
but not observations of gifted programs. This decision was made because of the
extensive travel and time that would have been required to gain permission for
observations and conduct the observations themselves. It is possible that
observations may have resulted in uncovering other themes or even theories about
equity in gifted education, but that work is beyond the scope of this study.

Implications

If we believe that gifted kids need to be grouped with other kids who are achieving
at similar levels in a content area so they can really fly and move at their pace, we
can do that. There’s not one thing that keeps us from doing that. (Participant 8)
This is exactly the type of leadership necessary for schools and districts to achieve the goal
of reaching every learner’s needs. It will take willingness to embrace change along with
aggressive steps to implement innovative service delivery models, if gifted education
intends to be truly equitable. Only with leaders, educators, parents, and even students
working together will equity become a reality in gifted education. This is evidenced by
California’s progress with equity despite lacking a state mandate or dedicated funding for
gifted education. The existing support network may be one reason that California is
making good progress in efforts to increase identification and participation of students
from underrepresented groups in gifted education. It points the way for other states to
pursue equity for their gifted students.

Innovation service delivery could be a large part of equity efforts, even in states
where there is no service mandate or funding. As one participant (8) suggested, “I joke
about subversive teaching, but I’m not really joking.” Participant 10 suggested this to solve the equity issues for gifted programs, “Think outside the box! Exactly! You need to put gifted people on it, so it will get done!” This type of thinking could lead to a potential answer for middle school. The integrated middle school curriculum could be combined with the collaborative planning model to create a synergy that would benefit gifted students even more. This combined model could increase access to advanced learning experiences across a broader array of subjects for gifted middle school students, as well as other high ability students who could participate.

Of course, the other innovative program elements detailed in this research also provide compelling ideas to address equity in gifted education. Many of them such as: talent development, teacher training on gifted characteristics and identification process, coordination of gifted and special education services, and addressing the social and emotional needs of gifted students, do not require significant amounts of money to implement. They involve re-allocation or creative use of existing resources or personnel making these strategies attainable for many districts.

A final source for creating equity in gifted education is the students themselves. Participant 8 suggested, “Gifted students, through the use of PBL, can help schools systems answer this question. Instead of all adult/teacher advisory committees, we need to let the students advise us.” Sounds so simple, but sometimes the best solutions are the simplest.

**Areas for future research**

There are several areas for future research based on the findings of this study. The first, explore underrepresented populations in more depth. This would include finding
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district statistics related to race, socio-economic status, culture, and language proficiency of
gifted students. This would provide a quantitative look at equity in gifted programs,
perhaps revealing how perspectives intersect with reality for equity. Second, broaden the
scope of the research to investigate more states with no mandate or funding for services. A
third suggestion is to examine equity in other states with high populations of culturally or
linguistically diverse students, such as Texas or New York. Finally, as mentioned earlier,
exploring student perspectives on equity in gifted education might add different nuances to
this line of research. It seems likely that their viewpoints may differ significantly from
those included in this research. This perspective could create a much more complex
understanding of equity in gifted education and its impact on students.

Closing Thoughts

It is my hope that this research study has contributed some useful knowledge and
understanding to the field of gifted education. Every attempt was made to highlight
practices that have been effective to increase equity, while uncovering things needing
improvement. Furthermore, my intention was to offer findings that could advance gifted
education. While interviewing the participants, I was struck by their passion, dedication,
enthusiasm, and hope for the future of gifted students. Undoubtedly, these qualities are
instrumental in the outstanding work they are doing for gifted students. I share their
passion for gifted education and look forward to continuing this work both as an educator
and as a researcher.
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http://www.nsgt.org/resources/articles/problem_based_learning.asp


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Appendix

Interview Questions

1. How did you get into the field?

2. What are the most pressing needs of gifted students?

3. What does access mean to you with regard to gifted education?

4. What are your thoughts about how access in gifted education interacts with service delivery?

5. What are your thoughts about how access to gifted education in your particular district or state meets the learning needs of gifted students?

6. What does participation mean to you with regard to gifted education?

7. What are your thoughts about how participation in gifted education may be impacted by service delivery?

8. What does benefit mean to you with regard to gifted education?

9. What are your thoughts about how benefit from gifted education may interact with service delivery?

10. How would ideal access to gifted education look at different school levels (elementary, middle, and high school)?
    a. What are the barriers/challenges in reaching/obtaining this ideal access?

11. How would ideal participation in gifted education look at different school levels (elementary, middle, and high school)?
    a. What are the barriers/challenges in reaching/obtaining this ideal participation?
12. What are the perceived benefits to gifted learners of the ideal gifted program at different school levels (elementary, middle, and high school)?
   a. What are the barriers/challenges in reaching/obtaining this ideal benefit?

13. How might technology interact with access into gifted education?

14. Are there any students/types of gifted students whose learning needs are not being met?