GIFTED EDUCATION: A MULTI-CASE STUDY ON THE IDENTIFICATION PROCESS OF HISTORICALLY UNDERREPRESENTED STUDENTS IN GIFTED PROGRAMS IN NORTH CAROLINA

by

Michael David Acosta

Liberty University

A Dissertation Presented in Partial Fulfillment

Of the Requirements for the Degree

Doctor of Education

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ABSTRACT

The purpose of this multiple case study was to explore how Newland, Big Hills, and Edison Elementary, which are public elementary schools in North Carolina, identify gifted students who are historically underrepresented for placement in academically gifted classes. Based on statistical data from the Department of Education and the North Carolina Department of Public Instruction, there is a disparity between the identification of Whites, Blacks, and Hispanics, especially in impoverished communities. The study sought to understand the process of identification of gifted students and how it contributes to under-representation of Black, Hispanic, and impoverished students. The study revealed what social characteristics and demographic data are prioritized in the process and what factors and values influence the process of identification in these schools by asking: what factors of identification procedures result in higher than average identification rates of historically underrepresented gifted students? The theory guiding this study is Social Dominance Theory by Sidanius and Pratto (1999), which holds that possible oppression and discrimination is subconscious and upheld by society as a whole, whether or not it works in favor of society. This study focused on 3 elementary schools that have data that supports a higher than average enrollment of gifted students that are historically underrepresented. At each school interviews were conducted with 10 – 15 participants who have direct contact with the gifted program: principals, assistant principals, gifted coordinators, psychologists, counselors, and lead teachers. Data from the interviews were analyzed for categories and themes to connect important in this manner, and adds to the growing empirical research. Specific documents were analyzed for additional data.

Keywords: Gifted, historically underrepresented, impoverished, moral imperative, unidentified gifted students.

Copyright Page

Dedication

This dissertation is dedicated to the many public school students who suffer from poverty and bias, and have been passed over for gifted programs. You have not gone unnoticed.

Acknowledgments

It is impossible to acknowledge everyone who has had a part in making this a reality for me. No one, however, deserves more thanks than my family. My wife Beth and children, Brecker, Miles, Michela, and Elijah, have sacrificed much while I toiled with the most miniscule of abstract details, listened to me rant about a subject they had little interest in, and watched me go to the very edge of intellectual exhaustion. Beth held it all together and allowed me the time to spend fighting for other people's children. She is a rock. To Dr. Jim Zabloski and Dr. Bruce Kirk for their professionalism and guidance during this process; iron sharpens iron, and I have been sharpened. I thank you sincerely for your leadership, scholarship, and friendship. *Videamus quid deinde fit*.

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List of Abbreviations

Academically and Intellectually Gifted (AIG)

Association of Christian Schools International (ACSI)

Intelligence Quotient (I.Q.)

Kindergarten through 12th grade (K-12)

Local Education Agency (LEA)

National Association for Gifted Children (NAGC)

National Center for Education Statistics (NCES)

North Carolina Department of Public Instruction (NCDPI)

North Carolina Public Schools (NCPS)

Qualitative Data Analysis Software (QDAS)

Social Dominance Orientation (SDO)

Social Dominance Theory (SDT)

Socio-Economic Status (SES)

U.S. Census Bureau (USCB)

U.S. Department of Agriculture (USDA)

U.S. Department of Education (USDE)

CHAPTER ONE: INTRODUCTION

Overview

The purpose of this chapter is to provide a cogent framework for the study, which includes background information on the subject of unidentified highly intellectual students. This chapter discusses the background, historical, theoretical, and social contexts, and situation to self to afford the reader with information on the researcher and how he is involved in the research. The purpose statement and research questions that guided the inquiry are provided. Necessary definition and summaries are presented in this chapter as well. This information may significantly edify public school principals, counselors, teachers, and parents and be an impetus to recognizing potential deficiencies in the process of identifying highly intellectual students from historically underrepresented communities.

Background

History shows that the United States (U.S.) education system has been unequal to minorities in the past and that these circumstances continue to plague the education system (Blad, 2016). Specifically speaking, gifted education has been offered disproportionately to White students over Black and Hispanic students. Data collection from years through the Office for Civil Rights and national reports divulges that institutional deficit thinking, prejudice, and discrimination are most likely one of the causes of this inequity, which compromises the educational experiences of minority and underrepresented gifted students (Wright, Ford, & Young, 2017). Giroux (2010) described institutional deficit thinking as a situation in which a group believes that lack of achievement by a sub-group is the fault of the students' races, cultures and/or socioeconomic status. The literature indicated that students who qualified for and have been identified for gifted programs are predominantly Caucasian or Asian students (Bernal,

2002; Ford, Harris, Tyson, & Trotman, 2002; Ford, Howard, & Harris, 1999; Grantham, 2003; Lee, Matthews, & Olszewski-Kubilius, 2008; Olszewski-Kubilius & Steenbergen-Hu, 2017; Worrell, 2007; Wyner, Bridgeland, & Dilulio, 2007). Furthermore, Black students have been underrepresented by as much as 55% in national averages for identification to academically advanced or gifted programs (Ford, Grantham, & Whiting, 2008). Therefore, it raises the question of how the process of selecting gifted students is done in our elementary schools where identification first takes place. Limited case studies have been done on this subject and stakeholders would pervasively be rewarded by fully understanding the basis for unequal treatment, specifically in the process of identifying gifted minority candidates. Socially speaking, society is stronger for having gifted children emerge from our schools and it is critical that programs for poor minority students specifically work to level the playing field (Olszewski-Kubilius & Thomson, 2010). Students must be provided with opportunities by educators to be able to move education to exceptional levels. However, a variety of barriers limit underserved minority student's identification and participation in these program (Siegle et al., 2016). Understanding the process of identification and its inequities would benefit appropriate changes to the process for minority stakeholders.

Historical Context

As far back as the 1920s standard grade schools could not meet the needs of both "sub-normal" and "super-normal" students and changes needed to be made (Hollingworth, 1943). From 1916 to 1920 one of the leaders of this research, Hollingworth, wrote the book *The Psychology of the Adolescent* (1943), which identified and codified exceptional children. The only metric used to identify giftedness at that point in history was an I.Q. score, in which the cut-off was 130 (Hollingworth, 1943). During the 1940s, naturally due to the lack of civil rights, and

to the existence of population minority, segregated schools, and other prejudices, gifted education was not in any way applied across all populations. In fact, prior to 1957 desegregation, Blacks and Latinos were not even allowed (Constitutionally protected) to attend White schools (*Brown v. Board of Education*, 1954). Despite integration taking place, the language of colorblind meritocracy, with its assumption of White racial innocence, continues to uphold unequal socio-spatial arrangements in the U.S. and to leave intact racialized ways of thinking that consistently value White lives over non-white lives (Nagel et al., 2015).

Minority residential placement has as much to do with education, as education access becomes front and center. Although Civil Rights gave Constitutional protections to minorities, it did not change living arrangements. After World War II, the newly-developed South pursued aggressively the residential and industrial decentralization policies, which ensured that Whites would not be required to integrate with Blacks even with court-ordered desegregation. As families migrated to the suburbs, Southern cities increasingly become more, not less, segregated in the late 20th century (Massey & Denton, 1993). By controlling where minorities lived, desegregation in essence controlled how they would be educated.

Gifted education was even on the front burner, as equal access of education was the primary concern. However, in 1972 the Marland Report encouraged states and schools to re-define giftedness to include leadership ability, visual and performing arts, creative or productive thinking, and psychomotor ability. Thus, gifted education as it is known today began, as well as the current inequalities. Gifted programs in North Carolina focus the identification of gifted students based on above average intelligence, consistent high achievement on assessments, and consistent high performance in class. It is possible for students to be of high intellectual ability, and yet not have not acquired the background knowledge and academic skills necessary to be

recognized as gifted (which includes students from rural communities). This process does not do the job of appropriately identifying these types of students but isolates them from gifted programs (Siegle et al., 2016).

Social Context

Nationally speaking, only 6% of students will be identified as gifted (National Center for Educational Statistics - NCES, 2016). Students nominated or suspected of being advanced are tested by the following methods and domains: intelligence, achievement, content area, creativity, leadership, performing arts, and motivation (Kaufman, 2012). However, nearly 40 states rely on language that defines giftedness through achievement, which is measured by standardized testing alone, and wide variations of the definition of the term gifted continue to exist (Renzulli & Park, 2002). Only 27 states were identified for creativity, 15 for leadership, and three performing arts and motivation (Kaufman, 2012). However, research has shown Whites outperform Blacks and Hispanics on standardized tests based on numerous cultural factors including poverty, early education, and reading proficiency, not intelligence (Cornwell, Mustard, & Van Parys, 2013; Kurtz-Costes, Swinton, & Skinner, 2014).

Additionally, having a non-uniform definition of giftedness prevents advocates from specifically identifying potential underrepresented students for such a program that does not in itself have a firm definition (Plucker & Callahan, 2014). The issue of a universally acknowledged definition of giftedness results in convoluted data that often conflicts and prevents further action. For instance, Renzulli and Park (2002) said nearly 20% of all high school dropouts are gifted students; Mathews (2006) estimated closer to 1% for this subgroup. These obstacles are persistent and limit participation of underrepresented students by preventing identification, which is an unresolved issue with an extensive history that continues to persist in

today's education system (Siegle et al., 2016). The process of identifying all children who are exceptional is incumbent upon the educational system to deliver a fair and equitable identification process. Gifted intellects that are set up for success in school and succeed in the market place aids the inculcation of democracy, improves the economy, and improves race relations.

Theoretical Context

Equal access to housing and education, as well as freedom from food desserts, can emancipate people from invisible forms of bondage. However, it is education that has the most effect on the future of its participants. Parents of minority children or parents who suffer from poverty desire to secure good educations for their children, and "a decent education for children is informed by a particular knowledge" (Nagel et al., 2015). A recent study from the Robert Wood Johnson Foundation confirmed the impact of education, noting that premature death is significantly determined by access to education, which is highly stratified by race and class (Tavernise, 2012). This statement affirmed the fact that education is a main driver of, not only success, but of liberty, which is protected under the Constitution. The statement also identified that social supremacy is sought both intrinsically and extrinsically by dominant members of society, and that education is a powerful tool to that end. This phenomenon is better explained by Social Dominance Theory (SDT), where these stratified classes are communally supported (Sidanius & Pratto, 1999). More explicitly, SDT is the idea that society clings to certain stratified ideals exemplified by race, status, gender, and other cultural maxims unique to them. The current study adds to the literature and practical application of SDT as an appropriate and useful theory with which to approach gifted identification, as well as education in general.

Situation to Self

Education is the road that makes possible the very pursuit of happiness that our Constitution guarantees. Ignorance, both blissful and purposeful, contributes to some of the nation's greatest atrocities. I believe that education may limit this, and therefore the fair and equitable identification of gifted, students regardless of race and/or socio-economic, status may be one of these atrocities. It is fair to reveal my subjectivity and bias, as I grew up impoverished and unidentified as a gifted student in the state of North Carolina. My zeitgeist presents the idea of strength in diversity. This combined with a Jeffersonian belief in exceptionality, the best and most promising genius and disposition (Jefferson, 1782), where the best students should be allowed to advance into leadership roles for the betterment of all mankind. To maintain objectivity, I bracketed myself by keeping a reflective log and I provided context to the problem by seeking strong literary evidence (Moustakas, 1994). Transparency was exercised in the research for potential audit and internal validity, as the participants were allowed to speak for themselves without judgment.

The philosophical assumptions driving my research were from an axiological view point, where personal values were brought to the study (Creswell, 2012). These assumptions include the following: (a) All peoples deserve to be treated fairly and equally. (b) Race and/or economic status do not correlate to intelligence. (c) Education is the great equalizer and can lift those at the bottom of the social and economic ladder to financial stability and success. (d) The fair education of all leads to a better world. (e) The experience of those who reside at the top of the social and economic stratosphere do not have all the answers and must be aided and led by those of more humble beginnings. (f) Finally, those elevated into social heights are not automatically equated with intelligence.

I approached this research in a pragmatic way. Education has changed, as has its students, and therefore as in all things change is necessary. The universe is not a static thing, but dynamic and constantly in a state of change. In this pragmatic paradigm, the real experiences of the participants were recorded and how they addressed the problem of identifying historically underrepresented students of gifted programs. Pragmatic practitioners like John Dewey understood that reality is constantly changing and that we learn best through applying our experiences and thoughts to problems (Cohen, 1999). Through pragmatism, revelations of this study should produce actions, rather than the pondering of theories that leads to indecisiveness (Pierce, 1878), and this study adds to the research that may address socioeconomic status (SES) disparity of gifted identification. With a firm belief in equity and opportunity, the voices of the participants were fairly heard, and no presumption of data was used. By accessing and studying schools from a positive asset point of view (schools who have achieved identification equality), the data was freely and accurately shared. Inductive analysis and transparent observation yielded data based in reality, which is usable and actionable by future gifted identification programs and future research.

Problem Statement

In North Carolina a significant disparity exists between identified gifted students who are White versus Black, and/or Hispanic. According to NCES (2016), there are 50.4 million K-12 students in the United States. Of these, 45 million will attend public schools. Of these public school students, approximately 6% nationally will be identified as gifted, (NCES, 2016; National Association of Gifted Children - NAGC, 2017). In North Carolina, the number of identified gifted is double the national average, coming in at 12% (NCES, 2016). However, the identification of giftedness has not been achieved considering school population percentages

when compared to the state racial make-up. The U.S. national K-12 demographics are: 52% White, 24% Hispanic, and 16% Black. In North Carolina specifically, the percentages are: 50% White, 17% Hispanic, 26% Black (U.S. Dept. of Education, 2016). The U.S. identifies gifted individuals throughout the nation by the following racial breakdown: 8% White, 4% Hispanic, and 4% Black (NCES, 2016). In North Carolina the gifted identification percentages by race are: 18.28% White, 5.53% Hispanic, 5.02% Black, (North Carolina Public Schools - NCPS, 2016). While there is a 100% increase in identified gifted students in the state of North Carolina, a glaring disparity also exists between the identification of Whites compared to Blacks and Hispanics. This continuous obstacle, which acts like internal segregation, limits identification and access to gifted programs to underrepresented minorities and is reflective of the historical elements of contemporary residential segregation practiced in the 1940s (Wright et al., 2017).

Giftedness is even more difficult to identify in impoverished student, and may in fact be the most important of all differences among them (Burney & Beilke, 2008). Wide gaps of knowledge begin in kindergarten between lower and higher SES students and these wide gaps continue through elementary school (Morgan, Farkas, Hillemeier, & Maczuga, 2016). Poverty is pervasive and affects minority students with more regularity than Whites. However, economic factors may have the same debilitating effect on White SES students as minority or minority SES students. This factor creates unequal opportunities for extra outside-of-school learning experiences, especially in the summer, which plays a role in achievement and excellence gaps. Approximately two-thirds of the achievement gaps between low and high SES students can be attributed to inequalities in summer learning programs (Olszewski-Kubilius & Steenbergen-Hu, 2017). Identifying gifted students of all categories is important, as these students are more likely, not only to succeed, but to ascribe positive attributions to success and failure. This

specifically means that they take responsibility for both and seek to improve (Clinkenbeard, 2012), which inculcates democracy, improves national economics, and closes the gap between the haves and have nots. Providing for the fair and equal access to education for all children is a moral imperative for our nation.

The problem is the process of identifying gifted students who are Black, Hispanic, and/or impoverished has created inequality in gifted program populations in North Carolina. There are no current multiple case studies that specifically seek to understand the process of how schools with a higher than average percentage of historically underrepresented students (impoverished, ethnic minorities) have identified these students as gifted with equity and accuracy in North Carolina.

Purpose Statement

The purpose of this multiple case study is to explore how schools with a higher than average percentage of historically underrepresented students have identified them for placement in academically gifted classes. The sites were three public elementary schools that have identified higher than state averages (5% Black, 5% Hispanic) in historically underrepresented gifted students (U.S. Dept. of Education, 2016). The identification of historically underrepresented gifted students is generally defined as students who are ethnic minorities of Black or Hispanic descent and/or impoverished according to the U.S. Department of Education (2016; NAGC, 2017). Poverty for the use of this study was defined as having an income below the federally determined poverty threshold, published by the U.S. Census Bureau (USCB). The poverty threshold for 2017 was $24,600.00 for a family of four (USDA, 2017). At the beginning of this research, there had been no significant qualitative multiple case studies that explored the process of identifying Black, Hispanic, or impoverished students from the asset point of view.

The theory guiding this study is the social dominance theory (SDT) (Sidanius & Pratto, 1999). Human societies often organize themselves by way of intergroup oppression, discrimination, and prejudice. This group-based hierarchal structure has hegemonic members at the top, where they have secured a greater amount of the power. The idea of stratified social structures seems to be a universally human phenomenon (Lenski, 1984). SDT has three specific levels: (a) an age system where adults and middle-aged people have power over the young and children; (b) a gender or patriarchal system where men have disproportionate amounts of social and political power; and (c) arbitrarily set systems, which vary by region, i.e. race, caste, ethnicity, social class, or religion, based on the values of the region. While level two, gender, does not seem to affect the identification of female gifted students, according to The Digest of Educational Statistics (NCES, 2015), there is a significant gap by race and socio-economic status. SDT contends that society may not meet the needs of the oppressed group; however, these subconscious choices are made by all social groups to uphold stability in favor of uncertainty (Sidanius & Pratto, 1999).

Approaching this study through the lens of SDT, may explain, for one, the lack of teacher-nominated Black and Hispanic students for gifted testing, as SDT operates in society with unaware individual members, and may subconsciously impair teachers from making qualified judgements based on performance (Sudkamp, Kaiser, & Moller, 2012). This falls in line with the idea that societies uphold social hierarchies, even when they do not conform to the best interest of the oppressed group(s). Society clings subconsciously to stability over objective morality (Cross & Cross, 2005).

Significance of the Study

Social structures and hierarchies are subconsciously supported by everyone, which include inter-group dynamics or how groups within groups adhere to commonly held social structures (Ho et al., 2015). It can be inferred that those with higher socio-economic status would support such structures as they gain advantage by it. Therefore, being identified as gifted would become an inter-group hierarchy with social dominance. Obstacles and barriers exist, which affect the overall student population, and to a much greater degree, historically underrepresented students (Siegle et al., 2016). For the sake of this study, it is believed that diversity is strength, and therefore, a moral imperative to dissuade the conscious and subconscious acceptance of such social structures based on social dominance. Even the mere act of identifying gifted students as a sole population neglects the enormous diversity among gifted student groups (Siegle et al., 2016).

Identifying how accurately SDT can categorize these groups may assist all stakeholders in avoiding bias, subconscious and latent bias included. Principals, counselors, Academically and Intellectually Gifted (AIG) coordinators, teachers, and parents may find that the identification and subsequent removal of subconscious prejudgment to previously unknown grouped partiality allows for the identification of historically unidentified gifted students in a way not currently practiced by most schools. Data that supports this idea would significantly add to the existing literature supporting both SDT and studies on gifted education. This study inferred that the data will reveal invisible barriers erected by the social hierarchy; some purposely done and some merely following as a design. By tracing the origins of this country's economic and racial make-up and the subsequent diverse change from Eastern European immigration to one of color has solidified the social hierarchies as defense mechanisms, which

undermines pervasive equality paradigms. A growing diverse racial and economic population seems to trigger and embolden policies that filter down into public school legislation, which seems to make it more difficult for students to get identified for gifted programs. Between the years of 2000 and 2010, North Carolina owned a 28.3% share of the total Hispanic growth of the U.S. (Johnson, 2016). In 2000, the Hispanic population in North Carolina was nearly 5% and by 2011 it was nearly 9% (Chesser, 2012). Yet testing has not become more inclusive of those who do not speak and read a different language in that time. Gifted students may not be recognized for intelligence if they cannot read the identification instrument properly. This testing process is an exclusive practice, not an inclusive practice based on skill not intelligence, which is in direct opposition to the North Carolina mission statement for gifted students. "In North Carolina, state legislation mandates that public schools identify and serve AIG K-12 students" (NC Public Schools, 2016).

Identifying non-typical gifted students could impact this deeply held understanding of social order and create social instability, (Cross & Cross, 2005). By shining a light into deeply held social beliefs, educators may be able to break down falsely built hierarchies more closely related to racism and classism than to modern education based on fairness and equity. This change may expose the fact that minority groups have natural gifts and talents, which means that measured intelligence used as the primary or exclusive criteria for gifted program identification and is not equitable or indicative of best practices (Wright et al., 2017).

Data that supports this need for a change may provide empirical evidence on how revelations of SDT can serve to break down hierarchies for the sake of oppressed groups, which may create a fairer and more level playing field for all students with gifted intellectual abilities. Simply put, data observed in this study could significantly aid practitioners (principals,

counselors, and teachers) in breaking down obstacles identified by SDT. SDT may then become part of the practitioners' lexicon, by using it to identify oppressed groups (historically underrepresented students) and removing boundaries for their nomination to gifted programs. This revelation could very well add significantly to the understanding of SES and minority giftedness.

Practically speaking, professionals in programs established on the understanding of subconscious adherence to social structures may be able to concentrate on how to identify non-typical gifted students, as well as to identify what allows typical gifted students to be apparent when compared to that of others. For example, what intrinsic measures do gifted students exhibit in comparison to non-gifted students when this may have important implications to historically non-identified students (Clinkenbeard, 2012)? Whether schools use this study to improve and/or explore their gifted identification system or as an empirical basis for further research, this research should pragmatically align with action-based measures aimed to specifically drill down on their identification of ethnic minorities and low SES students.

Research Questions

Central Research Question

The central research question guiding this study was: What factors of identification procedures result in higher than average identification rates of historically underrepresented gifted students in three North Carolina elementary schools? At the center of this research is the existence of a disparity among Black, Hispanic, and low SES students versus affluent or middle-class White students when compared to school populations (NCPS, 2016). Minority students in general (Black and Hispanic students in particular) continue to be isolated racially and economically where access and nomination into gifted programs are limited (Wright et al.,

2017). This central question forced the research to stay focused. Sub-questions allowed the researcher to examine the central research question more closely.

Sub-Question 1

What data are prioritized by nominators and testers in the process of identifying gifted students? The literature states that gifted students have the following characteristics: keen sense of humor, mathematical skills, leadership abilities, an internal locus of control, varying interests, intense analytical thinking, creativity, goal-orientation, nonconformist attitudes, propensity to collect things (Perrone, Ksiazak, Wright, Jackson, & Perrone, 2007). Additionally, these same students often present above average competitiveness, creativity, ability to identify the unusual, and often an inability to do well in all subjects equally (Zabloski, 2010). This question focuses on these unique identifiers and if they have an effect on the selection, nomination, or identification process. Based on SDT, stakeholders may unknowingly prioritize criteria that they hold as important but serve to uphold and strengthen unfair social hierarchies subconsciously. Answers that participants give are important, but just as important are the answers they do not give.

Sub-Question 2

What state-defined factors and values influence the process of identification in Big Hills, Newland, and Edison Elementary schools? Looking through the lens of the Social Dominance Theory, this question illuminates if the state has criteria that specifically diminishes the opportunities for schools to identify potential gifted candidates from historically underrepresented demographics. Oppressed groups disproportionately deal with unfair practices ranging from food security, to housing, to education (Pratto et al., 2016), and become identified culturally to a single group (Draper, 2015), which may influence identification practices.

Nominators are as susceptible as everyone else to the subconscious need to support the hierarchical system and put stability in front of the need of individuals (Pratto et al., 2016).

Sub-Question 3

What specific school-based values are used to identify gifted students beyond the state definition? This question goes to the heart of the problem by recognizing if unique measures are taken to increase the nomination and identification process. In other words, does this school use an additional criterion that enhances the demographic for potential gifted students that goes beyond how the state defines them? Under representation is not only an individual problem, but one of economics (Borland, 2003; Giessman, Gambrell, & Stebbins, 2013). A clear and present history exists of depriving students in poverty and of color in gifted education programs (Brown, 2008) and these students are often not identified for gifted services (Plucker, Hardesty, & Burroughs, 2013; Valencia & Suzuki, 2001); therefore, discerning what expanded information, factors, or values the selected sites use is germane to the central focus of this study.

Definitions

1. *Gifted* – There is no one definition for giftedness nationally; however, for the purpose of this study, the General Assembly of North Carolina's definition will be used.
    a. 115C-150.5. Academically or intellectually gifted students. The General Assembly believes the public schools should challenge all students to aim for academic excellence and that academically or intellectually gifted students perform or show the potential to perform at substantially high levels of accomplishment when compared with others of their age, experience, or environment. Academically or intellectually gifted students exhibit high performance capability in intellectual areas, specific academic fields, or in both

> intellectual areas and specific academic fields. Academically or intellectually gifted students require differentiated educational services beyond those ordinarily provided by the regular educational program. Outstanding abilities are present in students from all cultural groups, across all economic strata, and in all areas of human endeavor. (N.C. Legislature, 2017, 1996, 2nd Ex. Sess., c. 18, s. 18.24(f))

2. *Historically underrepresented* – Populations that have not been allowed to participate in a program monopolized by another population are considered to be underrepresented. In this case specifically, "high-ability students from underserved populations -- those who are limited English proficient, disabled, or from minority or low-income backgrounds -- are persistently underrepresented in advanced classes and in programs for students identified as gifted," (NAGC, 2017, p. 1). The confines of this study will stay focused on Blacks (those of African American descent) and Hispanics (those of Spanish, Latin American, or Mexican heritage).
3. *Low socio-economic status* – Poverty for the use of this study shall be defined as having an income below a federally determined poverty threshold, published by the USCB. The poverty threshold for 2017 was $24,600.00 for a family of four (USDA, 2017). Those from impoverished households may not have the necessary background information to be identified as gifted using current assessment measures. Poverty provides obstacles for identification of giftedness (Siegle et al., 2016).
4. *Moral imperative* – Within this study there is a presumption that public schools have a responsibility to treat all students with equality and fairness, while providing them with equity, specifically to those who have arrived with less prior to their entrance into public schools. A moral imperative is a strongly-felt principle that compels action. According

to Kant (1785), this morale imperative is an objective, rationally necessary, and unconditional principle that we must always follow despite any natural desires or inclinations we may have to the contrary. Fair identification requires this concept to be the accepted presumption of moving forward.

Summary

The problem is that in North Carolina a large disparity exists between the numbers of White versus Black, Hispanic, and low SES gifted students. Black and Hispanics are historically underrepresented in gifted programs. The purpose of this multiple case study is to explore the process of identification for historically underrepresented gifted students in North Carolina public elementary schools. The sites are three North Carolina public elementary schools that have identified higher than state averages in historically underrepresented gifted students. This research may provide pragmatic solutions to schools who may need to focus on different values and factors to improve their demographic percentage of the identification of historically underrepresented students, as well as to add to the literature for future research.

CHAPTER TWO: LITERATURE REVIEW

Overview

This chapter focuses on how the literature supports the latent and subconscious need to uphold overt social hierarchies based on Social Dominance Theory. The results of the hierarchy may influence how students are identified or nominated for gifted programs in North Carolina, as evidenced by the uneven racial make-up of these programs, as well as the congruent ratios based on national statistics. This chapter discusses how current literature supports the manner in which Social Dominance Theory may influence gifted education, as well as how this study addresses the gap in the literature, which is exploring the qualitative processes in identifying gifted students from historically underrepresented groups: Black, Hispanic, and impoverished. The literature presented and discussed identifies what giftedness means and how it may have changed. The literature also discusses how giftedness is identified with a special lens on those of low socio-economic status (SES), which is largely in minority populations. The practices associated with discovering giftedness (according to the definition) is analyzed through the literature and specifically how it is done through North Carolina schools. All literature is viewed through the lens of Social Dominance Theory (Sidanius & Pratto, 1999), which is used as the theoretical framework.

Theoretical Framework

Throughout history exist example after example of how the human condition oppresses one another based on stereotypically defined elements: gender, race, religion, sect, socio-status, financial status, and popularity. All these elements constitute prejudices and how social structures are stratified and locked in place. The literature shows that the United States (U.S.) has been gripped by systemic inequalities for ethnic groups, which include Black, Hispanic, and

impoverished (which are often the same) groups (Alexander, 2010; Fredrickson, 2002; Jackman, 1994; Massey, Charles, Lundy, & Fischer, 2006; Mays, Cochran, & Barnes, 2007; Sidanius & Pratto, 1999). These inequalities create the issue of trying to fix a problem based in inequity (Sidanius, Feshbach, Levin, & Pratto, 1997). In other words, the groups discussed, Black, Hispanics, and impoverished peoples are all historically oppressed groups (Wright, Ford, & Young, 2017). Since these groups have been identified by multiple studies (Bernal, 2002; Ford, Harris, Tyson, & Trotman, 2002; Ford, Howard, & Harris, 1999; Grantham, 2003; Lee, Matthews, & Olszewski-Kubilius, 2008; Olszewski-Kubilius & Steenbergen-Hu, 2017; Worrell, 2007; Wyner, Bridgeland, & Dilulio, 2007), it is imperative that the problem is researched through a social lens, while in part providing a potential reason for the oppression to take place at the educational level. Obfuscating the problem by failing to acknowledge the social context is a mistake. Social Dominance Theory may provide a more full and rich understanding of it. Using SDT is the strongest framework, especially when compared to other popular social theories, for example Race Theory and Critical Theory.

Race Theory

Social scientists have written extensively about these conditions: gender, race, religion, sect, socio-status, financial status, popularity. One of these for example, is Race Theory, which is the critical analysis of race through the law addressing racial inequalities and identifies six points: (a) racism is ordinary, (b) the dominance of one race over another serves a purpose for the dominant group, (c) racism is a result of social thought, (d) society racializes different groups at different times based on economic and labor needs, (e) each race has its own origin and evolves over time, and (f) Whites will have a difficult time conceptualizing the minority experience and expressing it (Bell, 1973).

Critical Theory

Critical Theory is another example, which seeks to identify and employ the aims necessary to free humanity from social bonds "to the extent that it seeks human 'emancipation from slavery', acts as a 'liberating … influence', and works 'to create a world which satisfies the needs and powers' of human beings (Horkheimer, 1972, p. 246). This theory has been connected to social movements that have identified dominated people in both historic and modern societies. Critical Theory provides a historical description to provide researchers with a current norm upon which to base modern research in effort to decrease domination of tyrannical presents says Bohan (as cited in Healy, 2005).

Both of these, Race Theory and Critical Theory, seek not only to explain, but to change or transform circumstances that enslave human beings. That being said, however, neither Race Theory nor Critical Theory will allow for the deep investigation into the modern and social issues embedded in society that may lay at the foundation of mis-(or) dis-identification of gifted students. SDT does. Moreover, SDT allows for how these prejudices and/or biases become accepted and supported, which creates a culture of practice. Neither of these other theories identify the unsaid and unseen social structures invented and supported by society. Therefore, this study looked at the problem in a social context, which is where the problems reside.

Social Dominance Theory

Social Dominance Theory comprises ideas and concepts about phenomena that occur in societies and how they change, develop, and identify methods of explaining behaviors that concern social structures indicated by race, gender, religion, ethnicities, modernity, and how it relates to revolution and utopia (Harrington, 2005). SDT introduces bits and pieces of other social theories and aggregates them to understand that cultures stratify certain elements of

society in an order that serves the need to uphold stability in social structures before the need of self. Human cultures and societies are organized into group-based hierarchies, having one hegemonic group and at least one subordinate group (Brown, 1991, pp. 137-139; Murdock, 1956; Putnam, 1976). Based on economic power, ideals, and belief systems one group is specifically raised and the other oppressed. The hegemonic group that holds a disproportionate amount of social status and power, and socially valued things that status and power bring, such as money, highly esteemed roles, and better living quarters is the stratified group (Engels, 1891; Mosca, 1896/1939). The oppressed group is disproportionately plagued by undesirable things like refuse, prison terms, and poor health (Pratto et al., 2016, p. 370).

In other words, people continue to support structures that may not be in their best interest for the sake of social stability. One can use the example of an impoverished person supporting a political candidate who does not support social safety net programs, because their family has historically supported the candidate's party. This support against self-interest is the up-holding of traditions and social norms for the sake of stability, not self-advocacy. Geographically speaking, when an area is populated predominantly by a single social group, such as low SES families concentrated in neighborhoods and subsidized housing and the most inexpensive housing or accommodation, it makes sense as to why these groups become socially and culturally immersed within a single culture of the group (Draper, 2015), and therefore the stability and importance of the system outweighs the needs and wants of the individual.

People have a need, both subconsciously and overtly, for social stability, which allows for publicly supported inequalities to not only take place but become practice. This can be measured through the individual by relating stories of abused children who do not turn in their abusers, or battered women who do not leave. These phenomena can be explained, in part, by

the need to uphold a stable and definable situation above even that of safety. SDT has provided a clearer understanding of why groups become oppressed and how they stay oppressed. Keeping the status quo of inequality is not individual, but systemic. Metaphorically speaking, the only way to cure a disease is first to diagnose it. Educators must be made aware of potential subconscious adherence to hierarchal social structures and use this in their calculus when identifying underrepresented students. Ironically, education and acceptance is the key. Countries that have shown higher rates of capital punishments, which includes the United States were the same countries that had the highest rates of inequality (Pratto et al., 2016). Agencies within the government like police departments, the military, and the independent judiciary do not only maintain law and order, but also assist in the maintenance of inequities and unequal group relations (Pratto, et al., 2016).

Society's latent and subconscious need to uphold these stratified social hierarchies may influence how historically underrepresented students are identified or nominated for gifted programs in North Carolina, given the uneven racial make-up of statewide gifted programs. An example practiced by public schools is the teaching to the center mentality. Public schools inherently value the skills, and knowledge of the middle-class, and therefore, they have become the center of what schools are looking for in students' expectations. This data is reflected in the literature on social class, where the middle class represents a standard, a target, against all other students (Dominic, 2010). Affluent gifted children enter school on a higher social ladder than most, and therefore within the stratified system the middle-class is a common place where affluent can succeed, middle class needs are met, and the underrepresented and low SES students can to attempt to ascend. The experiences, development, and growth of middle-income children are benchmarks. This practice seems appropriate to use as a target population to gauge and rate

against the lowest income families (Waldfogel & Washbrook, 2010). The very idea of education (teaching to the middle) is based on a stratified social structure. For this reason, SDT is so useful in explaining why practices that do not seem to work by teachers or for students continue to be implemented and executed despite imminent failure.

Social issues, which exist within educational environments, cannot be solved without the identification of the issues. SDT acknowledges different social stratifications that exist within schools. Data shows teachers struggle teaching those students who suffer from poverty and often refuse to admit the role it plays in the learning process. The subconscious belief is social stratified hierarchies are not a collection of malevolent ideologies and may seem true due to regular psychological processes in the social realm such as self-fulfilling prophecies and false consensus biases. Ideologies such as these have power because they are shared collectively among the members of the group and among society as a whole (Moscovici, 1984). The ideas of a group spread itself within the group until it becomes a fact. This is known as a feedback loop, which reinforces ideas which may or may not be based in fact or reality. This contributes to psychological biases and social context, interacting in ways that allow the perpetuation of group stereotypes and differences (Augoustinos & Walker, 1995; Hilton & von Hippel, 1996; Leyens, Yzerbyt, & Schadron, 1994; Oakes, Haslam, & Turner, 1994; Pratto, 1999).

The national teaching workforce is primarily middle-class. While there is no ontology that declares Black and Brown teachers can automatically teach Black and Brown students (Milner & Laughter, 2015), we cannot assume that any teacher understands how oppression and marginalization work to the detriment of too many [K-12] students of color. "Any teacher might not understand the role that racist and classist systems and structures play in perpetuating the status quo" (Milner & Laughter, 2015, p. 343). The act of identifying gifted students may be

prohibited by the lens of the nominator, and therefore the problem must be attached to a social framework that identifies these biases.

Looking at this specific problem through the SDT lens could provide researchers and educational practitioners an answer to the problem of unequal achievement based on historically unidentified groups, specifically Black, Hispanic, and impoverished. The central question - what factors of identification procedures result in higher than average identification rates of historically underrepresented gifted students in three North Carolina elementary schools - will identify specific values and factors unique to schools who have achieved higher than average identification of historically unidentified gifted students. The factors and values of these schools will be viewed through the understanding (SDT) that oppression is a social construct, and therefore, it can be navigated when it is fully understood.

Related Literature

Research must be grounded. Research should be grounded in theory, and/or solution-based results; however, it must have attached to it previous work and research that lends credibility to the subject. Giftedness has been a study of interest for many decades. There is much to say on the subject and many problems, which recognize consistent issues in the identification of gifted students. This research is aided by much of the previous research that has defined what giftedness is, as well as how giftedness has been measured. The literature also points out quite specifically how the failure of appropriately identifying all types of giftedness has led to an imbalance that seems to run across very specific demographics, namely, Blacks, Hispanics, and those of low SES. This literature aided in the construction of this study, which focused on this under-identified demographic in North Carolina elementary schools.

Giftedness Defined

The idea of mentally proficiency and high I.Q. has been defined by the U.S. Department of Education as reported by the National Society for the Gifted and Talented (NSGT, 2019b) as students who have the outstanding talent and perform or show the potential for performing at remarkably high levels of accomplishment when compared with others of their age, experience, or environment. To meet these students' needs a well-coordinated program of scientifically based research, demonstration projects, innovative strategies, and similar activities will be executed, designed to build and enhance the ability of elementary schools and secondary schools nationwide. These special programs meet the special educational needs of gifted and talented students across the nation (NGST, 2019a). As far back as the 1920s, giftedness has been generally defined by identifying one metric, IQ. It was clearly understood that standard grade schools could not meet the needs of both "sub-normal" and "super-normal" students and that changes needed to be made. In the 1940s the IQ test continued to be the only metric used to identify giftedness. The cut-off was 130 (Hollingworth, 1943), whereas the average IQ in the United States is 98 (Lynn & Vanhanen, 2006). During this era gifted education was far from being implemented equally and fairly in minority populations with the practice of segregated schools due to the lack civil rights.

In the 1970s the Marland Report (1972) indicated that gifted education was more than measurable intelligence and encouraged states and schools to re-define giftedness to include leadership ability, visual and performing arts, creative or productive thinking, and psychomotor ability. While this was a good change and in a move in more fair direction, states did not uniformly enforce a common definition and these loose and different ideas have stayed nearly the same since that time. The lack of a uniform understanding can be highlighted by the

difference in definition between the National Association for Gifted Children and the Department of Education. The NAGC defined giftedness as fluid concepts that may look differently based on cultural differences. The NAGC reported that the gifted may develop at different times with uneven development (physical, cognitive) and emotional, as well differentiated from their peers via behavior, cognition, and processing (Renzulli & Park, 2002).

Other research on gifted students (Perrone, Ksiazak, Wright, Jackson, & Perrone, 2007; Zabloski, 2010) identified specific characteristics prominently found in gifted students: keen sense of humor, mathematical skills, leadership abilities, an internal locus of control, varying interests, intense analytical thinking, creativity, goal-orientation, nonconformist attitudes, propensity to collect things, competitiveness, preference to work alone, complexity and ambiguity, ability to see the unusual or unique, vivid imagination, possession of large vocabulary and linguistic skills, and often an inability to do well in all subjects equally. Gifted students also share tangential characteristics, which include an insatiable curiosity and a specific propensity to question things, whether it be a common understanding or not. Additionally, a desire for deep and clear understanding of sentence structure, large vocabulary, problem solving skills, higher level thinking more so than their peers, advanced cognition, speedy comprehension and the ability to retain information for a much longer amount of time than on-grade-level students (Zabloski, 2010).

Last, achievement may not be overtly noticeable or demonstrated by hyper-performance at all times, due to environmental circumstances such as limited opportunities to learn as a result of poverty, discrimination, or cultural barriers (NAGC, 2017). In fact, giftedness is difficult to identify and label due to the complicated nature. According to Colangelo and Davis (2003), students who are gifted and creative also have common likes of mystery, independence,

questions, and innovation, but tend to dislike authority figures (although may behave), planning, and strict devotion to the rules (Zabloski, 2010).

Identification Process

To be identified as Academically and Intellectually Gifted (AIG) in North Carolina the process is not specifically uniform in all of its 115 Local Education Agencies (LEA). There are some broad common rules. Students can be nominated at any time, but second grade is typically early. Screening in the second grade requires at least one of the following: completed nomination form by a teacher, parent, or student, teacher anecdotal notes to document above level/extraordinary performance, teacher checklist, parent checklist, school and district administered assessments, independently administered psychological assessments, classroom performance and portfolios of student work, or mCLASS reading assessments (NC Public Schools, 2018). The achievements and aptitude scores must reflect 98% or above to be selected at the second grade. In a nutshell, the above work like this: a parent may see something that makes them believe that their child is gifted. They report this to the teacher and fill out a checklist to receive a base score to initiate identification procedures. Parents may demand their child be tested despite the checklist score. The teacher informs the AIG coordinator, who gives the student a battery of mClass assessments which show that the student meets or does not meet standards outlined by the LEA (most commonly a 98% score). If a teacher notices that a student is receiving exceptional grades and showing high degrees of understanding the teacher can inform the AIG coordinator and the process goes forth as described. AIG coordinators routinely scan end-of-grade high stakes assessments for high achievements scores coupled with scores in the top-most percentiles and refer students for the gifted testing battery. High test scores do not always lead to identification as gifted.

Screening for third grade is a general screening for all potential AIG students, which may involve a series of assessments. The first in the series is the Cognitive Abilities Test (CogAT). Generally, students who score 85% and higher may be asked to take the Iowa Assessments. Other ways to be nominated and identified are parent nominations, student nominations, or teacher nominations. The district may administer benchmark assessments and End of Grade tests to evaluate entry as well. All assessments metrics may be different for each LEA (NC Public Schools, 2018).

Giftedness is loosely defined as high IQ (130 and above), and those students who have the outstanding talent and perform or show the potential for performing at remarkably high levels of accomplishment when compared with others of their age, experience, or environment (U.S. Department of Education, 1993). IQ, generally speaking, increases with age and yet students are tested as early as seven years of age using text-based assessments. However, if students have an IQ of 130, but cannot read, these students will be unidentified based on a skill and not on giftedness. Fluid concepts that may look differently based on cultural differences is how the NAGC defines giftedness, not the ability to read at above grade level. The NAGC also reports that the gifted may develop at different times. Blacks, Hispanics, and those suffering from poverty are shown to receive lower scores on achievement tests than White affluent peers (Plucker, Hardesty, & Burroughs, 2013; Valencia & Suzuki, 2001). This phenomenon may show a pattern of below grade level reading comprehension that begets systemic identification of gifted students, who at a young age cannot read to the level of their intelligence.

Giftedness in Context

A moral imperative for peoples of a nation is to expect that its population has a certain set of concepts that are mutually understood and agreed upon to make a nation of laws work. The

most basic of these is the concept of right and wrong. Some may argue that the concept of right versus wrong (morale or immoral) is innate, and therefore, requires no education. For instance, Robb (2015) said, "It seems obvious that, as a whole, humans are genetically pre-disposed to be moral/altruistic." However, if two toddlers are placed together and a single cookie is placed between them, odds are that they will fight, thereby proving the innate hypothesis as a fallacy.

Some things must be learned and result in a common set of beliefs, a social contract, and an agreement of a certain group of facts. The act of becoming educated as a nation is a core element in supporting the American pursuit of happiness, as well as inculcating the very nature of democracy. An unsaid prime directive seems to be pushed forward as a society, which is a social consensus that we all need to be educated to some degree. No one says this more eloquently than Thomas Jefferson (1979), when he said,

> The most effectual means of preventing [the perversion of power into tyranny are] to illuminate, as far as practicable, the minds of the people at large, and more especially to give them knowledge of those facts which history exhibits, that possessed thereby of the experience of other ages and countries, they may be enabled to know ambition under all its shapes, and prompt to exert their natural powers to defeat its purposes.

History, both ancient and modern, shows through literature that education is of fundamental import for a nation to operate well. Moreover, that education in many ways separate those with specific cognitive skills, the thinkers. Thomas Jefferson, for instance, is arguably one of these gifted minds that was allowed to shape his mind through education. He believed that students who performed in the top 10% should be allowed to continue their education at the tax payer's expensive, and while antiquated, is evidence of the belief in the importance of gifted education. This is perhaps the first public acknowledgment of gifted students, when he wrote that the

"mentally proficient should be enabled to pursue education to the highest levels at public expense" (Jefferson, 1817). The understanding of giftedness has changed, however, not the belief that those who are giftedness should be allowed to exercise the gifts.

With the consensus of educational needs and the acknowledgment of the differences between mentally proficient students, comes the inevitable issue of differentness. In the early 1920s, Hollingworth (1943) expressed observations in the differences between students and their seemingly natural academic abilities. They were identified as normal, sub-normal, and super-normal. Super normal children were children who outpaced others in their cognitive performance. This phenomenon was codified in *The Psychology of the Adolescent*, and these became the first examples of advanced children who were identified as exceptional (Hollingworth, 1943). The metric used to categorize giftedness was solely an I.Q. score. One hundred thirty points was cut-off (Hollingworth, 1943). This allowed for a real metric to be used to identify students who were advanced and made it clear that these students needed different levels of challenge. This metric was used without regard for background knowledge, the underscoring of poverty or quality or access of primary education. Ignorance is not a lack of intelligence; however, the definition of giftedness even up to this day is largely dependent upon I.Q. tests. Wright et al. (2017) wrote: .

> The ideology that being well-born and highly intelligent are characteristics possessed only by a select number of people. This movement and ideology have not only been used to justify the unequal allocation of a quality education to students of different races, but also to protect gifted education for a relatively small number of students -- namely White and middle-class. (p. 46)

Identifying exceptional (gifted) students has continued, in one way or another, using these very same practices despite this obvious and other more covert conflicts (Fischer et al., 1996; Ford, 2013).

Minorities in Gifted Education

Minority students, specifically, Blacks, Hispanics, and those of low SES have not fared well with the identification practices of gifted and talented programs, and have largely gone unidentified (Peters & Engerrand, 2016; Yoon & Gentry, 2009). This is not merely a moral issue or political football, but presents economic and population challenges. This group of regularly unidentified students represents the largest growing segment of the K-12 population, and therefore, a major percentage of the workforce, and many of their talents are going overlooked and underdeveloped (Lakin & Lohman, 2011; Peters & Engerrand, 2016; Wyner, Bridgeland, & Dilulio, 2009).

The issue of underrepresentation in gifted programs dates back nearly 100 years (Brown, 2008), and there still maintains an enormous obstacle for intellectually gifted minority students when it comes to the identification for gifted programs, which includes Blacks, Hispanics, and those suffering from poverty. These groups typically receive lower scores on academic achievement tests when compared to their counterparts who have higher income and are White, and therefore, these groups are most often left out of gifted services (Plucker et al., 2013; Valencia & Suzuki, 2001). This continued and recognized issue is not merely a problem presented to theorists, but also a practitioner's issue (Callahan, 2005; Donovan & Cross, 2002; Ford et al., 1999; Giessman, Gambrell, & Stebbins, 2013; U.S. Department of Education, 1993), because the economic impact widens the financial gap between subgroups in the United States, which we refer to as the have and the have-nots (Borland, 2003; Giessman et al., 2013). In light

of future economic troubles, educational objectives, and the moral right, meaning what is fair to all subgroups despite racial or socio-economic factor, this study presents a significant possibility of up-ending current identification paradigms.

Social and Emotional Obstacles

Much of the identification process for gifted programs begins with a test. Testing causes anxiety and may have a limited ability to properly measure cognitive functions and achievement (Segool, Carlson, Goforth, Von Der Embse, & Barterian, 2013). This affect is amplified when dealing with the underrepresented. Historically, Blacks, Hispanics and low SES students, which includes poor Whites, have scored remarkably lower on these assessments, which do not indicate intelligence, but achievement (Peters & Engerrand, 2016). At a national level Blacks represented approximately 15% total K-12 enrollment. Of that 15% population 9% were identified as gifted and retained services (Siegle et al., 2016).

This issue is not only a testing problem, but one of socio-economics, and emotional support. Students must feel they are connected to a system, which has value and in turn values them. These value systems and failure to agree equally on a common set is called social dominance orientation (SDO). People who are stratified and higher on SDO generally support group hierarchies and trust that social groups do and should differ in value. Conversely, people who are low on SDO support group equality and equity dynamics, while opposing group distinction along status, power, and economic lines. The higher SDO people, especially support the ideologies and social systems that legitimize group inequalities (Pratto et al., 2016, p. 373).

To begin to even counter this tendency, teachers should be aware of the historical oppression of Black, Hispanic, and low SES students. Students infer teachers' beliefs based on this awareness about why they succeed or fail is rooted in teachers' emotional reaction to them

(Long-Mitchell, 2011, p. 102). This means that historically unidentified students have come to believe that they do not deserve to be part of the gifted system and that they are pre-judged in large by teachers, while inferring this information (true or not) from the emotional reactions of their teachers. Good relationships turn unconfident students into those who begin to build a culture of academic achievement and learn to integrate into the socially stratified program of giftedness. Simply, providing underrepresented students with emotional support dissolves emotional barriers and removes some obstacles that prevent them from ascending the social ladder placed by society and described by Social Dominance Theory.

Assessment and Identification

In 1993 the U.S Department of Education defined giftedness, but moreover added specific criteria that should have increased education's current and historic trough of minority representation. The definition spoke to the nature of talent development and how to specifically recruit and retain these under-served gifted students. The definition included two subparts, which indicated the following: (a) gifted students must be compared with others not just by age, but also experience and environment, and (b) outstanding talents are present in students from all cultural groups, across all economic strata, and in all areas of human endeavor. While these subparts give guidance to state and local programs, it doesn't seem to have done the trick when it comes to making gifted programs equitably assessable to all populations (Wright et al., 2017), based on population and participation data. The North Carolina General Assembly (Article 9B, 115C-150.5, 2015) defined giftedness as follows:

> Academically or intellectually gifted students perform or show the potential to perform at substantially high levels of accomplishment when compared with others of their age, experience, or environment. Academically or intellectually gifted students exhibit high

> performance capability in intellectual areas, specific academic fields, or in both the intellectual areas and specific academic fields. Academically or intellectually gifted students require differentiated educational services beyond those ordinarily provided by the regular educational program. Outstanding abilities are present in students from all cultural groups, across all economic strata, and in all areas of human endeavor.

However, this definition is only loosely followed as each local education agency (LEA) may employ completely different identification practices based on the guidelines. Each state and each district may impose different criteria, standards, and identification practices as they see fit using the Department of Education's definition as a mere guideline. Identifying gifted students is in fact quite difficult due to their complexities and different types of giftedness, albeit not impossible. For instance, not all intellectually gifted students share the same characteristics or traits. Students who are creatively gifted individuals may not fit the specific profile of other students who have more apparent intellectual academic abilities and giftedness. Creatively gifted students may differ from their academic peers by displaying some of the following characteristics: highly energetic, highly motivated, highly creative, extroverted, adventurous, persistent, gregarious, introverted, risk-taking, and somewhat disorganized (Davis & Rimm, 2004; Zabloski, 2010).

In most North Carolina LEAs, students are tested in grade 3 for giftedness. The broadly accepted process is this (although there may be some differences from district to district): Nomination windows are posted. Nominations are received by the AIG coordinator from teachers or parents based on observations and work example. Nominations are based on the following criteria: (a) a score in the 85th – 95th percentile on a CogAT (cognitive abilities test, IQ test) like the Woodcock-Johnson, Stanford Benet, or Wechsler Intelligence Scale for Children

(NAGC, 2017); (b) score on a high-stakes standardized state test in the 95th percentile (90th percentile in at least half the LEAs); (c) score in the 95th percentile on an achievement test, most often the Iowa Test of Basic Skills (ITBS); and (d) classroom behaviors documented by content teacher (Shugg, 2015) that signify high performance relative to classmates.

These data are then aggregated and sent to committee, which is often the AIG coordinator and a principal, and a determination is made for recommendation for services. Recommendation for AIG is available from kindergarten to grade 12 and can be made at any time by the parent, teacher, or AIG coordinator. Assessment and achievement scores are an imperative part of selection in NC, serving as benchmarks for nomination and acceptance into the AIG programs. As a matter of fact, AIG coordinators and principals use high-stakes testing results as the primary quantitative measure for identification into gifted programs.

Evidence from 12 years explicates fully that focusing on high-stakes testing scores as an exclusive measure of student achievement and teacher accountability has produced outcomes contrary to its intent (Croft, Roberts, & Stenhouse, 2016; Ravitch 2010; Sacks, 2001). Additionally, using standardized tests as the primary method to evaluate schools and teachers has contributed to severe problems in the U.S., which included widening of the participation rate of Black, Hispanic, and low SES students in gifted program. The approach of assessment is particularly harmful towards disadvantaged students and its use is more damaging to students from low SES backgrounds, especially considering that the population of historically unidentified students is growing (Morgan, 2016).

Diversity Imbalance

Despite standards and protocols being spelled out with language that specifically identifies underserved populations in gifted programs in both federal and state definitions, the

data and literature shows this issue has not advanced. The continual disparity between those of affluent backgrounds and White high levels of student achievement versus the top performing students from minority (Black or Hispanic) or low SES backgrounds, remains a problem (Plucker & Callahan, 2014). One of the issues preventing historically under-represented students from being recognized as gifted is deficit thinking, where stereotypes, bias, and prejudices influence nominators (teachers, AIG coordinators, counselors, principals). These nominators consciously or subconsciously consider differences as weaknesses rather than potential strengths (Cleveland, 2017; Ford, Grantham, & Whiting, 2008). Another issue is that nominators have an impeded ability to appropriately nominate underrepresented gifted students due to a lack of knowledge about cultures, which include Black, Hispanic, and impoverished cultures (Ford et al., 2008). Cleveland (2017) and Ford (2013) cited that deficit thinking has four main barriers preventing the nomination of historically underserved gifted students: (a) lack of teacher nomination, (b) students' differential performance on traditional intelligence, aptitude and/or standardized achievement tests, (c) policies that do not support non-traditional and minority students, and (d) socio-emotional issues and lack of engagement of parents from typical historically underrepresented gifted students (Renzulli & Park, 2002). The literature concedes that this deficit thinking is the leading cause of lack of nomination to gifted programs (Tomlinson & Jarvis, 2014).

The second most common potential barrier is the discontinuity paradigm, which touches directly on competence, experience, and training. Teachers who come from middle class or affluent backgrounds will have difficulty fully understanding the culture of an impoverished community. This goes for race, creed, and social economic status. The reverse is also true.

This paradigm cites that the lack of achievement of historically underrepresented students may be credited to the lack of ability, understanding, or commitment by educators (nominators) to provide a culturally appropriate environment that allows for a diverse population to thrive (Ford et al., 2008; Tomlinson & Jarvis, 2014). In other words, all nominators, based on their background of race and experience with others, socio-economic status, and religion may not be able to properly decipher giftedness. Teachers are often unfairly blamed for the underachievement and lack of success of their Black, Brown, and low SES students, when teacher education programs (both traditional and nontraditional) rarely provide the kinds of opportunities and training necessary for teachers to examine what race and poverty is and how prominent a role it plays for their students and in their careers in education and work with students (Milner & Laughter, 2015). Also, according to the discontinuity paradigm, nominators do not receive the proper training that highlights cultural differences as differential, instead of broken. Especially, young and inexperienced teachers may feel a need to fix broken students instead of understanding they are not broken, but from a different culture (Tomlinson & Jarvis, 2014). This lack of training and understanding causes high levels of under estimation by nominators, which serves to accentuate the cycle of non-participation for historically underrepresented gifted students (Olszewski-Kubilius & Clarenbach, 2012). This pattern implies a deeper understanding of minorities and impoverished students is necessary, as well as a more full view of how historically underrepresented students may be gifted.

In other fields beyond education, such as anthropology and sociology, researchers are expected to study and understand race deeply, because it is a very real social construct and factor in people's lives (Milner & Laughter, 2015). Examples of this make it necessary to provide funds for professional training to identify and understand cultural differences; however, it also

requires that individual nominators reflect on their personal values and ethics when deciding how they will personally change behaviors in order to rectify the lack of diversity in gifted programs (Ward, 2013). It is interesting to see how both deficit thinking and the discontinuity paradigm configure so well with social dominance theory, as bias and behaviors seem to align with the stratified dichotomy of social thinking. Minority cultures are pre-judged as needing to be fixed, and, therefore, do not receive the nomination to gifted programs they may deserve. As long as nominators fall prey to social generated and stratified social classes without knowing, they will be unable to change subconscious identification paradigms and practices.

Poverty

> J. D. Vance (2016) began his book *Hillbilly Elegy* by saying:
>
> Today people look at me, at my job and my Ivy League credentials, and assume that I'm some sort of genius, that only a truly extraordinary person could have made it to where I am today. With all due respect to those people, I think that theory is a load of bullshit. Whatever talents I have, I almost squandered until a handful of loving people rescued me. (p.1)

Vance is an academic standout whose achievement in school allowed him to qualify for one of the most prestigious schools in the American system, Yale University. However, he claims that it was not his academic prowess that got him there, but people who recognized obstacles in his path that only people of poverty must face; some of these are cultural, ignorance, and a different set of values from those with whom he would soon become peers. This sentiment is a common trope in public schools for those students who suffer from poverty. The data seems to show that Vance's acceptance into a select school is an anomaly and not the norm. According to a Cooke Foundation report, students from impoverished households in the lowest income quartile make

up 3% of enrollment at Ivy league colleges. "The college admissions system is rigged against low-income applicants… from the test prep wealthy students get to legacy admissions and so-called merit aid" (Fain, 2016, para. 8). Of course, the discussion of poor students going to selective colleges is not the biggest issue; it is a result of the issue. Looking at assessment scores and achievement data shows a picture of minority students failing to keep pace with their White counterparts, but that picture is not the whole picture. What continues to connect low achievement and assessment data together is poverty.

Education throws the popular term differentiation around to identify the practice of meeting student needs. Differentiation is the practice of designing instruction to multiple subsets of diverse learners based on student readiness, interest, and different learning styles. However, it is most often used to describe meeting the needs of students with exceptionalities, such as learning disabilities, gifts and talents, and emotional disorders (University of North Carolina - UNC, 2013). There are tools and instruments used to detect gifted students, but the job of identifying students who require differentiating practices is most often solely dependent upon the observations of the classroom teacher (Milner & Laughter, 2015). Teachers may be aware of how important race is, but they may not understand the role that race and class systems play in the perpetuation of the status quo to White privilege (Milner & Laughter, 2015).

Once the determination of giftedness has been made, changes in the curriculum are put in place using four areas: process, content, product, and environment. What is most interesting is that while a correlation has been made between poverty and underachievement and lack of academic success (Peters & Engerrand, 2016), there is no mention of differentiation for impoverished students. This seems to be in direct conflict with the USDE when they stated that gifted students must be compared with students that are of like age, experience, and environment

and are represented by all cultural groups, across all economic strata, and in all areas of human endeavor. Speaking specifically for the economic part of that statement, it does not seem to have done the trick when it comes to making gifted programs equitably assessable to all economic demographics (Wright et al., 2017).

To fully understand poverty and its pervasiveness in gifted education the very concept of poverty needs to be separated into three parts. First, financial poverty, which is how most define it. This is being cash poor, food insecurity, credit issues, and the transient nature of those who do not have permanent places to live. This is the most common understanding. It is those who do not have much money. Second, social poverty, which is where poor people are placed on the hierarchy of power in society when it comes to a tax base or voting power. Third is cultural poverty, where families of poverty do not interface with artistic culture, pop culture, social trends, or are isolated due to geography. Most families in poverty suffer from more than one of these and the combination places an unfair disadvantage on children from these homes making it more difficult to be identified using the current process.

Financial poverty. Financial poverty is defined as a lack of monetary means to meet basic needs such as food, clothing, and shelter. Financial poverty may also lead to lack of communication (phones) and transportation (getting work), which further exacerbates the poverty challenge. Other terms for financial poverty may include: absolute poverty, extreme poverty, or destitution. Poverty is not an individual issue. If people are not given opportunities to fulfill "their potential because of their racial, ethnic, class or gendered status it is now widely understood that society as a whole bears a social and economic cost by being deprived the fruits of their enterprise, energy and imagination" (Gillborn & Mirza, 2000, p. 6). Financial poverty due to its limiting factors may and often does promote job insecurity, food scarcity,

homelessness. or transient populations. Each one of these individual issues or combination thereof directly affect children. These families live check to check, have difficulty paying bills, and therefore have increased stress.

The very nature of the instability of food and shelter reduces the social stature of those who struggle with financial poverty. Inhabiting or descending the social ladder does not increase the likelihood of positive outcomes for historically underserved students. This simple inability to purchase a winter coat can inhibit a student from waiting for the bus in the cold and going to school, which causes a domino effect. Absenteeism leads to lack of understanding concepts, which lowers grades, which begets frustration and negative attitude outcomes. None of this is a recipe for exceptional attributes to be identified by nominators. Quite the opposite, these students will more likely be identified as underachievers rather than as intellectually exceptional.

Social poverty. Poverty is so pervasive when experienced that it brings with it a deficit of social status. Where one lives, where one works, what one drives are all symbols that announce our place on the economic ladder. For students it is often receiving a free meal or reduced costs of lunch that identifies poverty and lower social status. The eligibility for Free School Meals is a useful way for researchers to gauge socio-economic levels; however, it must also be noted that receipt of FSM is really an indicator of family poverty and not a measure of social class in the sense that the term is most often used (Gillborn & Mirza, 2000). This is, however, not the case when students and families judge one another. Once a group of people are judged as lower class, based on economic standing, they lose certain public powers. For instance, they experience less consistent police patrols and higher budgets for schools. Due to this population voting at a lower percentage rate than more affluent populations, they often do not receive the benefit of a voter's voice. Neighborhoods with affluent residents have high tax

bases, voices who speak up when they need something, and therefore high advocacy response from local public servants and politicians.

Situations as described above are often decried as being unfair; however, the issue is deeper than that. The issue catalyzes with how each social class views the world through which lens. Money, society, food, and education have very different paradigms based on social class and experience with poverty (Payne, 2005).

Money is to be spent by the poor, to be managed by the middle-class, and to be invested by the affluent. Social interactions are about people who they like in poor communities (social inclusion), self-governance for middle-class (self-reliance), and social exclusion by the affluent. Food is about having enough by the poor, tasting good to the middle class, and presented well by the affluent. Education is valued as an abstraction in poor communities, valued in middle-class communities as a way of climbing the ladder (making more money), and as a tradition and networking opportunity in affluent communities (Payne, 2005). These extremely different ways of valuing the same things can lead to huge discrepancies in how people are treated by society. Affluent communities expect their children to attend college, though not purely for education, which puts impoverished communities at a disadvantage via paradigm. This is a top down approach created by stratified hierarchies, which manifests in the opportunities received by affluent college graduates, who go on to create laws that continue the practice of local tax funded public schools. Simply, this means that those at the top make the laws that advantage the top, and these very same communities are simultaneously the most consistent voters. Education becomes a birthright rather than a privilege and the result of graduation is the continuation of residence in the upper levels of the stratified hierarchy.

Cultural poverty. Poverty is insidious in that it can affect many areas in an invisible way. Culture is often attributed to one's religion, ancestry, or race; however, poverty has its own culture that supersedes many of the attributes of the others. A survey instrument helps o identify the class to which one belongs (Payne, 2012). This instrument includes 17 to 20 statements for each class, poor, middle-class, and wealthy, and requires the people taking the survey to select 'yes' to statements with which they agree. The following are identifying questions.

Poor

1. I can physical fight and/or defend myself.
2. I know how to protect my clothes from being stolen at the laundry mat.
3. I know how to move in a half day.
4. I know which churches will provide assistance with food or shelter.
5. I know when Walmart, drug stores, and convenience stores throw away over-the-counter medicine with expired dates.

Middle-Class

1. I know how to enroll my children in Little League, piano lessons, soccer, etc…
2. I have an online bank account that I monitor.
3. I/we plan our vacations six months to a year in advance.
4. I repair items in my house almost immediately when they break—or know a repair services and call it.
5. I know how to help my children with their homework and do not hesitate to call the school if I need additional information.

Wealthy

1. I know how to secure confidentially and loyalty from my domestic staff.

2. I have at least two to three screens to keep people I wish not to speak with away from me.
3. I have worldwide coverage on my cell phone.
4. I can read a menu in at least three languages.
5. I know how to enroll my children in the preferred private schools.

The culture divide begins with rules. Payne (2005) posited social rules are hidden within each group, broken broadly into three areas: poor, middle class, and affluent (wealthy). Payne said some of the issues with these hidden rules are that each group takes it for granted that they are for every other person equally. They are more than rules and values; however, these are pillars to which each class must adhere for survival in their group. Breaking these rules may not only lead to personal issues, but may threaten to have the one rebelling against said rules to be forced out of the group and isolated. This fear is common among all three classes.

Impoverished students lack some of the cultural touchstones that middle-class and affluent students may take for granted. Due to financial constraints, lack of transportation, or lack of value, these students do not participate in some of the activities practiced by others. For example, vacations that take place out of state or country; trips to museums, art galleries, the zoo; college campus visits; and dinner out at nice (slow food) restaurants, etc… This group tends to be outside of social movements and not included in local political trends. These activities are not connected to people who cannot afford them or do not believe they are a valued activity, based on their need to deal with the present, which may be food, rent, or the power bill. Some of this detachment is due to geography. Rural residents spread out wide over an area impact how they approach problems. Additionally, social poverty impacts rural people's exposure to new ideas. Geography and population affect funding of essential services, which includes public education, due to a marginal tax base (Everhart, 2016).

A specific hallmark for the culturally poor is the spoiled poor. Poverty breeds ignorance in the sense that a lack of financial means creates an environment of being unpracticed in the use of money. This does not mean complete ignorance in the way that people have a lack of knowledge, but the willful act of mis-managing funds to appease a social or cultural desire, despite the over-riding need to meet one's financial obligations. In Title I schools students known to be suffering in an impoverished environment and who receive free and/or reduced lunch have been observed to also have new and expensive shoes, the latest iPhones and iPads, and name brand clothing, despite the inability to pay utility bills. Vance's (2016) words are striking and revealing when describing this anti-intuitive and irrational behavior of willful ignorance.

> We spend our way into the poorhouse. We buy giant TVs and iPads. Our children wear nice clothes thanks to high interest credit cards and pay-day loans. We purchase homes we don't need, refinance them for more spending money, and declare bankruptcy, often leaving them full of garbage in our wake. Thrift is inimical to our being. We spend to pretend that we're upper-class. And when the dust clears- when bankruptcy hits or a family member bails us out of our stupidity – there's nothing left over. Nothing for the kid's college tuition, no investment to grow our wealth, no rainy day fund if someone loses their job. We know we shouldn't spend like this. Sometimes we beat ourselves up over it, but we do it anyway. (Vance, 2016, p. 148)

The Moral Imperative

The purpose of an American public education is to prepare all students for the adult responsibilities and duties of living in a democracy (Ravitch, 2010), while inuring them with the skills for employment or preparation for higher education. This includes the recognition,

identification, and active inclusive education of highly intellectual or high-performance students despite race or background (Wright et al., 2017). Hispanics, Blacks, and the impoverished are represented at disproportionate numbers in AIG programs, meaning they are not represented at the same higher rates of affluent students. Minorities largely attend schools that serve higher numbers of low-income students, usually have fewer resources, and display significantly higher discrepancies per student via expenditures than more affluent schools (Ford et al., 2008; Johnson, 2015). Spangenberg and McIntosh (2014) wrote that the moral need for non-discriminatory education is far more important than the perceptions of budget. Spangenberg and McIntosh went on to say that an education system based on democratic imperatives will allow for more effective social integration based on ability and not privilege. With the goal of providing a fair and equal education for all gifted students, educators will be more equipped to handle prejudice and social injustice as a moral obligation, which advances the overall goals of education and social justice (Rivera-McCutchen, 2014).

North Carolina recognizes the need for differentiation, which is the practice of tailoring instruction to multiple sets of diverse learners based on student readiness, interest, and different learning styles (University of North Carolina UNC, 2013). Focusing on a moral imperative, the idea of testing being a singularly authoritative indicator of giftedness does not appropriately identify all gifted students. Testing often favors the advantaged over the disadvantaged, while turning school systems into competing publicly funded entities (Ravitch, 2010), rather than introspectively designed laboratories intended to discover talent and improve the *status quo*. In fact, many "gifted programs began as specific mechanisms for the affluent designed to develop a similar class of people who lead, direct, and hold the majority of the political and economic power" (Margolin, 1994, p. 164). Gifted education began during a time of protracted racism,

sexism, and classism in this country. Based on the underrepresentation of various oppressed groups such as non-White and non-Asian poor and working-class children (Borland & Wright, 1994) in gifted education programs today, it remains clear that these precepts that bore and designed gifted education programs still exist (Latz, Cheryll, & Adams, 2011). As stated earlier, testing is a primary marker for the identification and access to gifted programs in North Carolina; however, the literature shows that testing, especially high-stakes testing, data is not accurate (Margolin, 1994).

Testing and Social Dominance

All tests are not bad, and in many sectors of society testing is necessary. However, using testing results as a sole measure is the same as attempting to measure a three-dimensional object using a yard stick. Giftedness reveals itself in many different ways. In *Frames of Mind*, Gardner (1983) described seven separate intelligences: logical, music, linguistic, spatial, kinesthetic, interpersonal, and intrapersonal. Standard approaches of identifying and measuring intelligence in isolation from the culture has been inaccurate or impossible (Gardner & Hatch, 1989). High stakes testing attempts to measure intelligence but fails to take advantage of the particular giftedness of students by relying exclusively on linguistic and logical skills (Gardner & Hatch, 1989).

The very nature of standardized testing derives a contrary set of data to the stated nature of its mission. For example, a non-exceptional student with above level reading comprehension (due to affluence and supportive home environment) will test relatively higher than an exceptionally gifted student who reads below grade level, thereby distorting the comparative intellects based on insufficient data gleaned through standardized testing. The resulting score, using an interval scale from one (fail) to five (superior), becomes a label of school-based

stratified social order. This is an example of how hegemonic groups are formed within educational societies at the building level. The idea of gifted kids and non-gifted kids is a class system and a social ideology. Social ideologies are powerfully influential, because they organize people into common relationships that establish the perimeter of their stratified societies (Foucault, 1980; Sanday, 1981); because they are so commonly understood and cued by ordinary social context that they are habitually accessible (Higgins & Bargh, 1987; Pratto, 1999). Reinforced ideologies justify and explain why certain people should be punished, rewarded, or given power (Jost & Banaji, 1994; Pettigrew, 1979; Pratto, Sidanius, Stallworth, & Malle, 1994).

Sociologist Svalastoga (1959), who created the survey *Prestige, Class, and Mobility*, wrote that the passing or failing scores of achievement tests are predominant markers among society's status and that standardized testing serves as a gatekeeper function for it (Ydesen, 2014). This means that the idea of social dominance continues to be driven into the student population by way of, what the literature shows, an unfair and unequitable form of identification and inclusion into gifted programs. Labels are being attached to students based on testing results for tests that do not properly measure the student's abilities, skills, aptitude, or intelligence, while simultaneously re-enforcing the barriers and social order(s) that exist to historically underrepresented gifted students.

Social Domination Orientation (SDO), which is the subconscious process of labelling and creating these structures correlates completely and positively with racism, sexism, belief in equal opportunities, and meritocracy (Pratto et al., 2016; Pratto et al., 1994; Sidanius, Pratto, & Bobo, 1994). Labels incorrectly attached to a group reinforce this ideology of the support for stratified hierarchies, which legitimize resource allocation, political appointments, and social policies that enhance social hierarchy (Pratto et al., 2016; Pratto, Stallworth, Sidanius, & Siers, 1997; Pratto,

Tatar, & Conway-Lanz, 1999; Sidanius & Pratto, 1993). Testing has become a de factor litmus test for the ensuring of a system of SDO. The difference of paradigm could not be more clear. Those who are low on SDO support policies that would lessen group inequality (Pratto et al., 1994), while those high on SDO support the status quo. (Sidanius, Pratto, & Mitchell, 1994). What is most important to note is that those who are high on SDO often attain the roles within the institutions that support socially dominant infrastructures that are compatible with their tendencies to discriminate, maintain, or to attenuate group hierarchy, respectively (Pratto et al., 2016; Pratto et al., 1997; Sidanius, Liu, Shaw, & Pratto, 1994).

Summary

The literature points out quite specifically a gap existing in achievement and identification of gifted students from historically underrepresented students from low socio-economic status background, or who are Black or Hispanic (Lyman & Luthar, 2014; Milic & Simeunovic, 2016; Mills, 2015; Tomlinson & Jarvis, 2014). It is clear that poverty plays a significant role in the bifurcation of social classes and results in a stratified hierarchy in society, as well as within a school (Pratto et al., 2016). This class system exploits poverty by creating cultural, social, and moral deficits, which create lack of agency resulting in a culture of oppression within the education system of intellectual giftedness. In these same studies, it is empirically evident that while identification gaps exist, the intellectual capacity of these underrepresented groups does not differ from those of their White and affluent counter-parts; however, using the current protocols of achievement and aptitude assessment there remains a wide gap, and therefore a lack of diversity (Olszewski-Kubilius & Clarenbach, 2012). The cumulative data from the literature suggests that changes must be made to properly, fairly, and equitably identify these populations, as well as identify the efficacy in which it is conducted. In

the field of gifted education, there is increasing recognition that successful efforts to identify and develop high academic potential in students from ethnic minorities and economically disadvantaged populations must involve both identifying current advanced achievement or performance, and nurturing, and uncovering latent potential (Jarvis, 2009). In fact, the USDE refers specifically to these groups; however, identification of gifted and talented minority and low SES students have largely gone unidentified (Peters & Engerrand, 2016; Yoon & Gentry, 2009).

The use of standardized testing as a primary identification tool has significantly reduced the identification of historically underrepresented students (Morgan, 2016). This has resulted in a socially stratified dichotomy within schools where testing favors affluent students over minorities and low SES students (Croft et al., 2016; Ravitch, 2010; Sacks, 2001), as well as fortifies the collective subconscious social structure(s) (Sidanius & Pratto, 1999; Svalastoga, 1959; Ydesen, 2014) making the issue exponential, rather than reductive.

The current process widely adopted in North Carolina schools does not serve this underrepresented population well, as suggested by the data (NCPS, 2016). Tomlinson and Jarvis's (2014) case study identified leadership and vision as potential culprits for both failure and success in identifying, as well as growing (cultivating) gifted students. Tomlinson and Jarvis even called for future studies to identify practices of different kinds of schools into gifted education. Much of gifted research is clouded in definition issues and fabled understandings that do not correlate with facts. Outside observers have noted, some of the widely-held tenets in gifted education are not well supported empirically (Ritchie, 2013). Issues emerge from a desire to advocate on topics with thin research bases, and that more specific research would deepen and

strengthen these areas of relative empirical weakness, as well as improve the efficacy of advocacy efforts (Plucker & Callahan, 2014).

There are schools that do a better job of identifying gifted students from historically underrepresented populations. It is the central mission of this research to explore the process of successful identification of gifted students in underrepresented populations in North Carolina elementary schools and to connect these implications of the literature with data gleaned from the study. The gap in the literature addressed in this study is supported by the studies written by Lyman and Luthar (2014), Milic and Simeunovic (2016), Mills (2015), and Tomlinson and Jarvis (2014), combined with the data articulated by North Carolina elementary schools that have already increased a diverse and above average number of historically underrepresented students.

CHAPTER THREE: METHODS

Overview

The purpose of this chapter is to identify the methodology of the study and the sections discussed. The specific design is a qualitative, exploratory multiple case study with a particularistic approach. This chapter identifies and discusses the study's participants, research questions guiding the study, the setting, as well as procedures of data collection and analysis. The researcher's role and methods for how trustworthiness and ethical concerns are satisfactorily met are also discussed in this chapter.

Design

Qualitative studies are exploratory in nature and seek to hear and understand the story of the participants and construct an understanding of their experience (Creswell, 2003). This study uses a qualitative multiple case study design. This study recognizes that qualitative research is the attempt to interpret phenomena by carefully analyzing the voices of the people who are closest to it. In other words, participants have been chosen specifically based on their proximity to the problem, their voices are heard, and their stories told. Qualitative researchers situate themselves in the world and by trying to understand a problem in its natural state can transform the world (Guba & Lincoln, 2005). The umbrella of qualitative methodology combined with case study allows for a specific focus on a problem using triangulatory sites for credible non-bias, without taking away the voices of the participants. Case study research is appropriate and affective for investigation in exploratory, descriptive, or explanatory purposes (Yin, 1981a & b) and in this case, used exploratory tactics. The election of case study as a strategy allows for the researcher to identify the most advantageous research strategies (Sieber, 1973; Yin, 1994). In this study, the researcher uses the replication approach (Yin, Bateman, & Moore, 1983). This

allows the researcher to explore the differences of cases from within and draw comparisons (Yin, 2003), while allowing for future studies to replicate and draw similar comparisons to strengthen the full body of research of historically under-served gifted students. A case study is an empirical and academic inquiry that investigates a contemporary problem, as well as the boundaries of that problem when context is not explicitly clear (Yin, 1994). Other research designs work to separate context from phenomenon; however, since this study investigated the problem within the context, without separating out variables, case study is the perfect method for a successful investigation in this instance (Yin, 1994).

Historically, case study has been used as a data collection tactic (Yin, 1994), but it is more than that; it is a comprehensive research strategy. Using this strategy and design for this study allows the researcher to sort through variables of interest that rely on triangulated, multi-sourced data sets within and guided by a proposition that accurately limits data to what is germane. Without this proposition, the data stream would be far too large and collection would be an impossible task (Yin, 1994).

This qualitative multiple case study takes a particularistic approach, which allows the researcher to give voice to school administrators and other stakeholders (Merriam, 1998), who have successfully identified historically underrepresented students for gifted programs in North Carolina. Case study is the most comprehensive way to arrive at a full understanding of a particular phenomenon of a case (MacDonald & Walker, 1977), and an instrumental way in which to explore a case fully (Yin, 2003). Identifying the positive perspective, where schools have higher percentages of historically underrepresented gifted students, reveals best practices and underscore how other schools may transfer this information to a more equitable process, which may alleviate the current dominance by race and socio-economic status, as indicated by

the Social Dominance Theory (SDT). Ultimately, the identification of students is a decision derived from practice and school culture adopted by the stakeholders. This case study explored by isolating decisions, how they were made, why they were made, and what the results were (Schramm, 1971). These strategies are generally exploratory, descriptive, or explanatory and may over-lap one another; however, they generally push forward with a specific purpose limiting the scope of the research and providing for focus. The particularistic approach taken in this study focuses on the decisions and practices, and process of identifying historically unidentified students, which is the most appropriate way to find practical solutions from everyday occurrences (Merriam, 1998). This design reveals potential solutions and pragmatic implications to the larger issue at hand in the most efficient way relevant to other research designs.

Research Questions

Central Question

What factors of identification procedures result in higher than average identification rates of historically underrepresented gifted students in three North Carolina elementary schools?

Sub-Questions

1. What data are prioritized by nominators and testers in the process of identifying gifted students?
2. What state-defined factors and values influence the process of identification in Newland, Big Hills, and Edison Elementary schools?
3. What specific school-based values are used to identify gifted students above and beyond the state definition?

Setting

The site(s) for this study are three public elementary schools that have exceeded the

North Carolina average in the identification of historically underrepresented gifted students, which is 5% for Blacks and 5% for Hispanics. Table 1 and Table 2 identify setting demographics and Academically and Intellectually Gifted (AIG) sub-group statistics against two other schools in the same district.

Table 1

AIG Population per Subgroup

AIG Population	Big Hills Elementary	Edison Elementary	Newland Elementary	Northern Elementary	Southern Elementary
Black	55%	20%	34%	6%	9%
Hispanic	80%	30%	36%	7%	5%
White	27%	51%	44%	29%	19%
Title I	No	Yes	Yes	Yes	No

Table 2

Site Demographics

	Black	Hispanic	White
Newland Elementary	8%	56%	36%
Big Hills Elementary	16%	5%	79%
Edison Elementary	28%	26%	54%
Northern Elementary	37%	18%	45%
Southern Elementary	15%	13%	72%

Schools met the following selection criteria: must be an elementary school in the state of North Carolina; must be a public school, must have a gifted program; must have state or district data that provides evidence they have a higher average of historically underrepresented identified

gifted students. Three North Carolina elementary schools (cases) were the focus of this investigation; however, the process of identification was researched through individuals that made up each case. The research question was written to unearth the process of identification by the school, and therefore the school becomes the unit of analysis (Yin, 1994).

Each school has been given a pseudonym and have their gifted identification demographics published in Table 2. Elementary schools were chosen because all students are generally tested between the second grade and fourth grade. Identification practices among local education agencies vary; however, students may be nominated from kindergarten to 12th grade. Elementary school, however, is the level where students are first missed as potentially gifted, and therefore, the focus of this investigation. The leadership structures for most elementary schools are very similar. There was a principal, assistant principal (potentially two based on school population), an AIG coordinator, a psychologist and/or counselor, lead teachers, and class room teachers.

Participants

The researcher used essential criterion-based selection (LeCompte & Preissle, 1993) and unique sampling based on successfully identified participants through criteria (Creswell, 2012; Merriam, 1998). Participants in each site (case) were selected from sites as licensed faculty or staff that have direct contact with their school's gifted program. Non-probability, purposeful sampling was conducted to study the implications of what occurs, and the relationships of occurrences (Chein, 1981; Honnigmann & Honnigmann, 1982; Patton, 1990). These participants were principals, assistant principals, AIG coordinators, lead teachers, classroom teachers, psychologists, counselors, and testing coordinators with connection to AIG programs nomination, testing, or identification for AIG services (see Table 3).

Table 3

Participants

Title	Nominator	Input	Influence
Principal or Assistant Principle	Yes	Yes	Yes
Classroom teacher	Yes	Yes	No
AIG Coordinator/tester	Yes	Yes	Yes
Psychologist/counselor	Yes	Yes	No

Two to five participants per site for a total of 10 to 15 participants were recruited. Selection of participants had only one criterion, which was contact or influence with an AIG program's nomination, selection, or identification. Gender, age, time in service, and race were not relevant criteria for the selection of individual participants in this study.

As researcher, I identified schools as potential sites meeting the criteria of the study, then emailed and called these schools to get approval for the study from the district, school, and/or principal. Liberty University Institutional Review Board (IRB) granted approval to proceed with this study (see Appendix A). All participants are coded with pseudonyms for informational security.

Procedures

A detailed review of North Carolina Public School data to reveal schools meeting the criterion of above average identification of historically underrepresented students was conducted. The researcher used document data provided by the District AIG coordinator to identify schools for the study. E-mails were sent to the school requesting access and interviews to be taken in

their school. These were followed up with site visits to meet personally with principals to discuss potential study participation. I did not begin to collect data until after obtaining IRB approval, as well as site and participant consent (see Appendix B). Interviews were scheduled at the leisure of the interviewees. Focus groups were scheduled following the interviews.

Interviewees were chosen based on their contact and/or influence with the AIG program, which included selection and/or nomination. Some of the participants were: principals, assistant principals, AIG coordinators, counselors, psychologists, testing coordinators, lead teachers, and classroom teachers. I identified 12 candidate participants, but communication with one setting stalled. Emails, phone calls, and site visits continued to have no results. After 11 weeks of persistent communication and no response, I moved on with the 10 participants. The interviews took place on school property. The interviews were recorded on a digital audio device in the interviewee's office, classroom, lounge, or other area guarantying anonymity and uninterrupted time. A back-up device was on hand and both devices were tested prior to the interview. I also had additional batteries. Interviews took up to one hour. Each interviewee was invited to the focus group, which was also recorded. The interviewees were aware that the researcher could not guarantee anonymity in a focus group setting. Interviews were transcribed by professional transcription service and uploaded and coded into Ligre qualitative analysis software for categorical pattern matching analysis.

The Researcher's Role

I am the instrument through which connections of data were made (Creswell, 2012; Patton, 2001). Some bias exists on my part. As a child and elementary student, I was a non-identified gifted student suffering from poverty, which placed me in the historically underrepresented gifted demographic. As a new student, transferred from New York, I did not

have history or relationships with the faculty who would be designated to identify me as gifted. Due to different states and school systems being on different curriculums, I may have been behind, and therefore misidentified as average or below academically. Additionally, due to poverty, my mother was not able to advocate on my behalf because of her heavy work schedule. This seems to be an extremely common pattern among low SES students and families. It is this experience which provided the original impetus for my interest in this issue. It was also the catalyst for me working with AIG kids at Title I public K-12 schools, which are highly impoverished. While practicing as a classroom teacher, many of my students were ethnic minorities who presented high intellects that indicated giftedness, but low performance and/or achievement scores rendered them unidentifiable with current assessment instruments and nominations processes. I believe in equity and opportunity for the betterment of the nation, and see education as a pathway out of poverty. I bracketed myself by identifying personal bias and philosophy (Creswell, 2012), and permitted the design to allow the voices of the participants to be heard and accurately recorded without judgment or bias. The participants spoke for themselves and no inferences were made when in the presence of direct data. I was open to contrary findings and if these findings were compelling, the results of the study reflected them (Yin, 1994). The evidence speaks for itself, as recorded, and professionally transcribed for accuracy.

I have contacts in public education in North Carolina after having worked in the community; however, I did not use former colleagues as participants in this study. I excluded any former colleagues. Additionally, as I no longer work in public K-12 education, I did not use a site where I am employed.

An inquiring mind is the primary way in which data was analyzed into functional and connectable events (Yin, 1994). The design and questions allow for deep and rich answers and explanations that were analyzed for commonalities of culture, values, and processes site to site. These commonalities were made by me, the researcher (the qualitative instrument) and with the additional use of Ligre software where data were categorized into themes and patterns.

Data Collection

North Carolina public elementary schools were identified using N.C. DPI data for their classification as Title I or non-Title I. The researcher first contacted schools through emails and phone calls to request approval for the study to be conducted at their site. The collection of data did not occur until after IRB approval, participant and site consent. Data is a pervasive flow and "a considerable proportion of all data is impressionistic, picked up informally as the researcher first becomes acquainted with the case" (Stake, 1995, p. 49). The principal and key informants were emailed to request interviews, as well as to schedule focus groups. The researcher followed up on emails with school visits. To increase success rate, interviews and focus groups were scheduled close together as possible. An audio device was used to record all interviews and was submitted for professional transcription. All procedures aimed at maximizing and gathering high quality data (Yin, 2014). The methods for data triangulation were: document analysis, questionnaire, interview, focus groups. Document analysis provided the qualifying schools and participants for interviews. Interviews provided direct data. Focus groups provided a second tier of data to confirm interview data.

Document Analysis

Documents were data mined and gathered from primary sources like the Department of Public Instruction (NC), National Education Statistics, and LEA documentation provided as

these are in the public domain. The first of these is the DPI, AIG child count LEA summary for 2016-2017 [Table 1], which indicated higher identification of underrepresented students. These documents first identify schools as meeting the criteria stated by this study. For the study to be successful, gifted percentages and demographic data must be verified through the state's agencies and be compared to national statistics. This information also created context to the degree of racial make-up of the site and the specific percentage above the norm that this site has met the criteria of the study. Basically, documents provided by these agencies create a picture that allows for a fair comparison of racial and socio-economic status demographics and gifted education population within each site. These documents also provided empirical evidence that criteria of the study have been met by the selected sites.

Questionnaire

The questionnaire (see Appendix C) was provided to potential participants to ascertain the participant criterion. Answers to this questionnaire allowed for the vetting of qualified participants and categorization.

Interviews

Interviews were scheduled at the school of the participants before, after school, or during their planning period. The interview took up to one hour long and was recorded on an audio device with the knowledge and consent of participant. The researcher had a back-up recording device on hand.

Interviews (see Appendix D) are at the heart of qualitative research and are the prime data that provided appropriate data to the case(s). Researchers use interviews to retrieve very specific kinds of data to find out what is on someone else's mind (Merriam, 1998; Patton, 1990). Yin (1994) remarked that questions are not always about answers, but about more questions that

allow for important and germane inferences and insights to be made. Questions were developed through the lens of SDT, the information contained in the literature, and informed by the proposition. Establishing the latent or conscious understanding that stratified hierarchies exist and affects the nomination process is implicit within the question and designed to recognize if participants are aware. The questions attempted to elicit common values held by the participants and the culture environment of the site, which may attest for their higher than average identification of historically underrepresented gifted students.

Interview Questions

1. Please tell me about yourself as an educator.
2. How long you have been in education?
3. Why did you choose education?
4. What is your role, what do you do?
5. Do you nominate students for AIG services?
6. Tell me about your experience in gifted education from your point of view?
7. How would you ideally define giftedness?
8. How do you think giftedness is defined in North Carolina education?
9. (if different) Why do you think your definition is different?
10. Do you believe gifted education is important? Why or why not?
11. In your experience, does this school exhibit values, in reference to gifted students, that others may not?
12. Explain how you understand the phenomenon of underrepresented students in gifted programs in North Carolina.
13. How do you define poverty?

14. Some people believe that there is a disparity between impoverished students identified as gifted in NC. What would you say to them?
15. There are those who believe that there may a subconscious reluctance to identify certain students based on socio-economics or race at some schools. How do you feel about this?
16. Please explain how you understand the process of this school in identifying gifted students.
17. Do you believe that this process differs from other schools? Why?
18. Suppose your school's process was the standard for all schools in N.C., please describe what that would look like in the state?
19. How would you describe underrepresented gifted students?
20. How does your personal experience inform your decision to identify students as gifted?
21. Beyond your licensure, how would you describe your personal qualifications to identify gifted students?
22. Tell a time when you believe a gifted student was not identified.
23. Tell me a time when you believe a non-gifted student was identified as gifted.
24. Why do you believe that some of the students you refer for gifted testing are not identified?
25. Describe how you believe poverty plays a role in a student's ability to be identified.

Questions 1through 4 are questions about self and were used to establish rapport. These are non-threatening and straightforward, (Patton, 2015) and are extremely useful in defining the tone of the remainder of the interview.

Questions 5 through 9 are all questions that established participant's knowledge and zeitgeist about the specifics of giftedness. These questions are moderately written as ideal

questions (Merriam, 1998), allowing the participants to reflect on their understanding of an ideal situation or definition. Question 8 is specifically grounded in SDT (Sidanius & Pratto, 1999) and formed as an interpretive question, (Merriam, 1998; Yin, 1994). The social structure in which gifted selection takes place is important to identify and compared with the literature from (Bernal, 2002; Ford, Harris, Tyson, & Trotman, 2002; Ford, Howard, & Harris, 1999; Grantham, 2003; Lee, Matthews, & Olszewski-Kubilius, 2008; Olszewski-Kubilius & Steenbergen-Hu, 2017; Worrell, 2007; Wyner, Bridgeland, & Dilulio, 2007). This established the crux of any potential differences in process based on a different value system that identifies more historically underrepresented students than others. It also identified value in the pervasive importance of gifted education (Marland, 1972). Question 9 was written as a devil's advocate question, which engaged a potentially controversial topic, and allowed the participant to speak from the positive side; however, the response was nearly always a very personal opinion (Merriam, 1998; Patton, 2015).

Questions 13 through 15 are interpretive questions that explore the participants significant understanding of the phenomenon, if they believe the phenomenon exists absent the data, and personal values attributed to it, which were compared to literature on under-served demographics by Lakin and Lohman (2011), Peters and Engerrand (2016), and Wyner, Bridgeland, and Dilulio (2009). This information was crucial to participants' ability to be involved in the selection process. These questions also provided a check for the researcher to determine if nominators were either on the same page or different pages, which illuminated different practices at different sites (Meriam, 1998; Merton, Fiske, & Kendall, 1990; Yin, 1994). Additionally, the questions were designed to illuminate the participants' understanding of the

culture of poverty. These questions were cross referenced with the literature on poverty by Payne (2005, 2012) and Everhart (2016).

Questions 16 through 24 allowed the participants to drill down on an exact process, (Patton, 2015). The data from this question d serve much of the study, which allowed the participants to extrapolate their answers into a presumed action. The questions most often allowed the participant to describe their actual experience (Merriam, 1998; Patton, 2015). These questions offered a deeper and more rich insight into the process and value systems of this site and its participants with a specific focus on process (Yin, 1994).

Focus Groups

Focus groups were scheduled at the conclusion of the interviews for each site. Focus groups had two to five participants including only those who were interviewed. Questions were drawn by the researcher to find patterns and/or congruent methods among participants on values, culture, and process of identification within the school that precipitated the identification of higher than average percentages of underrepresented gifted students (see Appendix E).

Focus Group Questions

1. Explain why gifted education is important in K-12 public education?
2. Why are these services important to individual students?
3. Research shows that 25% of gifted students are underachievers and their efforts often lead to lack of satisfaction, i.e. boredom (Galbraith & Delisle, 1996). Do you believe that gifted education is an imperative service, why, and how does this information relate?
4. Data shows that 88% of high school dropouts had passing grades, but circumstances in students' lives and an inadequate response to those circumstances from schools has led to dropping out (Bridgeland, Dilulio, Morison, 2006). How could gifted services could

address this problem? Please explain.

5. Tell me how it is possible to misidentify a gifted student?
6. What could this school do better in your opinion to identify gifted students?
7. What universal protocols would reduce the number of non-identifications (make it easier to identify)?
8. What other things are relevant to the identification of historically underserved students that we have not yet covered?

Questions 1 and 2 sought to create a common definition of the importance of gifted education, separated from general education. The N.C. Legislature decreed that academically or intellectually gifted students require differentiated educational services, above and beyond those regularly provided by public school curriculums. Outstanding abilities are present in students within all cultural groups, and economic groups (N.C. Legislature, 2017. 1996, 2nd Ex. Sess., c. 18, s. 18.24(f)). Questions three and four cross reference answers in the first two, allowing the participants to creating a deeper rational for their beliefs, which may unearth latent and subconscious values sets that occur naturally and allow for higher identification(s) of historically unidentified gifted students.

Questions 5 through 8 allowed the participants to quantify their success, as they see it. Specifically, questions 5 and 6 were devil's advocate questions, engaging potentially controversial topics, and allowing the participants to speak from the positive side (Merriam, 1998). These questions also allowed for some rival pattern matching opportunities (Yin, 1994). Question 9 was a catch-all question allowing any elaboration from the participants.

Data Analysis

Case study uses phenomenological tools to analyze the data and in this case, it works well. This means the subjective experiences, feelings, and stories of the participants addressed the problem (Husserl, 1900). This researcher sought to make connections and draw meanings from the phenomenon by seeing as many different sides to the story as possible. "Imaginative variation is about trying to see the object of the study from different reference points" (Moustakas, 1990, pp. 97-98). It is important to understand that this study is a qualitative multiple-case study, and therefore while measuring and comparing sites, it was also giving voice to the participants at these sites. At its heart, the participants provided the data necessary to draw lines of interest, identify commonalities, and find results. Using qualitative tools was a must for this design. This allowed the researcher to stay attached to the phenomenon without broaching self-imposed bracketing and remaining non-judgmental. In qualitative studies analysis also happens simultaneously with data collection. Simultaneously data collection happens in and out of the field (Merriam, 1998). Data was analyzed and compared case-by-case, interview-by-interview, and inductively analyzed at a later time. It was important to be aware that analysis needs to happen during data collection in qualitative studies to avoid losing valuable insights (Merriam, 1998). Immediately after the conclusion of the interview, the researcher collected field notes as an additional observation tool to later reflect on the interview.

The researcher compared interviews from each site and across sites, as well as to and across focus groups. This is known as pattern matching logic in case study (Yin, 1994). This logic was the process of matching the literature and the interview data with and against the proposition that some schools may have unique criteria that increases the identification of historically underrepresented gifted students. By comparing empirical research with patterns in

the data it increased internal validity of the study (Yin, 1994). Yin (1994) also said that in an exploratory study, patterns may relate to all variables. Secondly to increase validity, rival pattern matching may occur (Yin, 1994), which in this case study involved the cases' data compared to the North Carolina Department of Public Instruction's aggregate demographic data of historically underrepresented gifted students. The comparisons were then aligned or misaligned with the stated proposition. To create efficient pattern matching connections from interview data, categories were coded in Ligre to look for common modes and themes that may provide insight into the phenomena.

Initial first cycle coding was designed broadly into seven categories: grammatical, elemental, affective, literary and language, exploratory, procedural, and themed data (Saldaña, 2012). The commonalities between sites were the connection that provided the most pertinent information to identify this phenomenon, especially when using pattern and rival pattern matching analysis. This revealed casual links that led to significant insights to the process of identifying academically gifted students (Yin, 1994). The final stage of analysis was the study's "trinity" where the researcher identified the three most important and impactful codes, categories, themes, or concepts of the study. Out of these three, an apex item was designated. Using this process, one could see how the data interrelated. The final method was to employ the touch test (Saldaña, 2012). Higher level thinking allows for the discussion of descriptive processes and phenomena in the abstract rather than directly topical. If it can be touched, it is a topic. For example, one may discuss poor people and identify a run-down home as an indicator. One can touch a home. A more effective discussion would be on the concept of poverty, which one cannot touch, and therefore can be described in a more deep and rich environment.

State, district, and school documents, which included population demographics, free and reduced lunch, and AIG percentage(s), were data mined to identify pertinent primary details of the sites and their performance. Most of these documents were in the public domain and are published each year. School documents were identified as well as related to state policies versus district and school policies to identify any possible discrepancies. These documents, interviews, and focus groups provided triangulation for the study. Data from these three sources were synthesized again to find commonalities of themes and patterns, which included policies, values, leadership techniques, cultural beliefs, or emotional reactions to the phenomenon.

Memos and Field Notes

As researcher, I kept both memos and fields notes, as well as my reflective log (see Appendix F). The reason for memoing is for reflection on coding process and choices. Additionally, it allows the researcher to muse on how the process is moving forward and leading toward a result or theory (Saldaña, 2012). The act of writing a memo is the site of a conversation with oneself about the data (Clarke, 2005). Coding and memo writing are concurrent forms of analysis where there is a relationship between the data and understanding of the phenomenon (Weston et al., 2001). Writing memos is a physical of act of thinking and good research is more about thinking than about methods (Stake, 1995).

Field notes are different from memos. Fields notes are immediate reactions to observations of a participant. These may include the researcher's objective and subjective interpretations of the interpretation and may provide valuable insights into for proper coding and reflection (Saldaña, 2012). Case studies often do not reveal specific answers, but casual links to phenomena that may reflect critical insights for processes, like the identification of gifted students. The best case studies use a theoretical framework, as this one does with SDT, and

creates a narrative set of significant propositions that may lead to recommendation for future change and policy improvements (Yin, 1994).

Trustworthiness

The ability to provide the study with a high level of rigorous trustworthiness is imperative. By allowing for credibility, dependability, transferability, and confirmability, the researcher can increase the prevalent use of the information produced in the study. Credibility, dependability, transferability, and confirmability are addressed individually.

Credibility

The researcher spent the necessary time engaged in the field collecting data as required to meet the case study's needs. All descriptions were rich and in-depth to provide for accuracy in the reporting and collection of information. The data was triangulated using document analysis, interviews, and focus groups to independently establish validity through pooled judgment (Merriam, 1998). Additionally, the researcher engaged in writing memos and field notes to allow for subjective interpretation and reflection (Saldaña, 2012).

Dependability and Confirmability

The researcher acts as the instrument and through analysis of documents, interviews, and focus groups via triangulation can improve dependability of the study (Merriam, 1998). The researcher stated his role clearly, as well as the theory (Social Dominance) guiding the study. In addition, he described events deeply and richly through social context to strengthen dependability and internal validity (Merriam, 1998). Due to the use of inference in case study when there are no direct contrasting observations, the use of empirical triangulation and pattern matching as an analytical tactic is a way of addressing both construct and internal validity issues (Yin, 1994).

All recordings were professionally transcribed to ensure accuracy. Full descriptions of data collection procedures, thematic categories, and how decisions were made were written throughout the study to make transparent the methods of the study (Merriam, 1998). Additionally, the researcher performed member checks to validate participant data and to increase internal validity and ward off issues pertaining to construct validity (Yin, 1994).

Transferability

This study used a replication logic (Yin, 1994). The investigation was designed so that it may be reconstructed in an objective manner and applied to schools that have not been successful identifying underrepresented gifted demographics using a deficit point of view by applying RQs of this study based on the positive information uncovered. It provided a thick and rich narrative for future use by other researchers on this specific issue to allow it to be used empirically, as well as pragmatically in addition to specific procedures outline above. Researchers who replicate this study under the same circumstances should arrive at the same results and increase reliability. Generalizations may be made to infer a larger and more broad population; however, generalizations are considered a limitation in this design and decay in time, therefore, they should not be considered as pertinent (Merriam, 1998). Specific techniques used to increase external validity were: thick and rich descriptions, modal categories, Ligre software, and a multi-site design (Merriam, 1998). The use of analytic memos as reflections drew connections to other populations and sites. Memos allow researcher to re-examine the results or theory to further speculate on potential behaviors and patterns that occur outside the scope of this multiple case study (Saldaña, 2012).

Ethical Considerations

There is a need for high ethical standards, and therefore the researcher obtained the following: IRB approval, permission from the principal to perform interviews, informed consent from the participants, making sure the participants were aware that they may withdraw from the study at any time if they wish. I assigned pseudonyms for all districts, schools, and participant names. I encrypted and password-protected all related documents. I also password protected computers and hard drives used for this study. All notes, audio recordings, and journals have been locked in my personal desk.

Summary

There is a disparity between the percentages of historically underrepresented minorities identified in gifted programs and this multiple case study explores how North Carolina public elementary schools identify gifted students who are historically underrepresented for placement in academically gifted classes. Specifically, the central question asked: What factors of identification procedures result in higher than average identification rates of historically underrepresented gifted students in three North Carolina elementary schools? This study was designed as an exploratory multiple case study recognizing no less than two to three elementary schools in North Carolina that have identified more than the average number of historical underrepresented gifted students. It used document and empirical literature triangulation, pattern matching analysis, as well as a replication logic. Questionnaires were provided to be sure participants at each site met criterion and two to five participants were interviewed per site for a total of 10 to 15 participants. Using diligence establishing high validity, the researcher increased the possibility the study will be transferable to future studies and may add to the lexicon of research on this topic.

CHAPTER FOUR: FINDINGS

Overview

This chapter presents the results of the research and corresponding analysis, while describing the participants to create a full picture of the data. It begins with a portrait of the participants. Providing a descriptive portrait of an interview participant derives from Van den Berg's description that qualitative research is more art than science, translated by van Manen (1997). Second, the chapter identifies the themes using pattern matching logic (Saldaña, 2012) as discussed in Chapter Three, and lastly reports the responses to the research questions. The purpose of this multiple case study is to explore how schools with a higher than average percentage of historically underrepresented students have identified them for placement in academically gifted classes.

Participants

The following narratives describe the individual participants as they were during the interview process. Since data resides within the participants, the responses to questions release the data and identify the phenomena (Creswell, 2003). The portraits of these participants are material in the qualitative description of the data, and therefore it is necessary to present the stories of these participants in detail (Moustakas, 1994). Pseudonyms have been used to protect their identities.

Amanda

Amanda is a kind, but serious White woman over 30 old. She looked younger than her years, her mind acute, and her thoughts focused. Working in a Title I school as a teacher informed her of the role as an Academically and Intellectually Gifted (AIG) Specialist, which was to decrease the gap between identified students amongst sub-groups. She had more than 16

years' experience in education, five as a specialist, and has worked both in and out of the district. She takes a serious approach to gifted students, believing that they need to be pushed as hard as those who are below grade level. She thinks support needs to flow in both directions. "AIG students are the underdogs. What I mean by that is the kids who are not on level, the kids that are falling behind, the kids who are right there at the edge, they get all the support." While Amanda was the only participant to directly say this, it seems to be an undisclosed truth common to many of the other participants as well. "We can't look at our AIG students and go they're going to be fine. I've heard teachers say it, [don't] worry about them. They're going to pass the test. What are you going to do for them?"

Amanda seemed to be as concerned about the definition of AIG as the gap in historically underrepresented AIG students. To merely consider them smart children who knew things is a mistake that leads to under-achieving gifted students. "They need something that is different. Not more, not something that's just harder, it's different for them the way they learn, the way they communicate, it's different and so somebody has to advocate for those kids." Looking at gifted students in a multi-dimensional way, regardless of race or socio-economic factors has the same effect as focusing on sub-groups. Observing giftedness by way of learning differences shows up in all cultures and races. Giftedness in her mind needed to be identified as a group of behaviors and learning specializations. Amanda did not appreciate the test. Many teachers, nearly all in this study don't like it, but find some silver lining. Amanda did not. In her experience she felt as if the test not only missed gifted children, but also misidentified creating false positives for students whose environments were laden with educational values on the forefront. While testing scores are completely objective, the subjective experience of each child

on a particular day created a varying experience and result of those test scores. Amanda said, "You had to feel good and be ready to take the test on a specific day or you are not gifted."

Cello

A cautious young woman under 30, Cello's background is unique as a Hispanic immigrant to this country and a naturalized citizen. This lens that she views the world through informed her zeitgeist in nearly every way, especially education. A gifted child herself, she directly dealt with the frustration of being gifted and ignored, because of her weakness in English, her second language. For years, even after learning the language, she languished in boredom as she finished her work far before her peers. With less than five years in education, she specifically targets intellect over the precocious use of language. "I look at my students beyond. Beyond what they can do." Cello lamented that the title of AIG left out a large portion of students she felt could be identified by other means rather than text-based tests that do not specifically look for unique abilities that may indicate giftedness. She did not like the title; it directly reflected how she was left out of the system – based on a title. She continued, "like putting these titles on our students. I use my quotation marks [air quotes], because it's important in the sense that informs us." What she did not come straight out and say was that some students labeled gifted were not, and some that were not labeled were and the lack of the title of AIG subconsciously impeded teachers from providing advanced rigor assignments, preventing some gifted students from being able to reach identification indicators. She seemed angry at the prospect there might be a subconscious reluctance to identify students based on socio-economics or race, "It's not fair just to think of our students that way into titles." Cello has clusters of AIG identified students in her class, but was unaware of who was who during part of the first quarter, which seemed to be a self-imposed ignorance. Those whom she believed performed at gifted

levels were not ultimately those already identified as gifted; however, because she was aware that some of her students were identified she provided the extra rigor for all her students, allowing those who could handle it to move on and those who could not to move at a slower rate. While some of the students were clearly gifted, they did not qualify or could not qualify based on the tests currently given, which are text-based. The ability for Cello to report potential qualifications based on portfolio work and non-text-based assessments helped her get these students into the nurturing program.

Data played a role in her determinations as well, but from a differing perspective. The AIG determination team at Newland viewed student data blind. No individual demographic information or names are shown (only subsets). After organizing the data across one grade level, "we noticed the data, that all of our Black students were underperforming across the grade." In this case the data identified a cultural deficiency across the board, which allowed the team to change the way they viewed the data.

Cynthia

Cynthia talked about the precociousness of students. It was ironic how precocious she presented as an adult. By far the longest interview, Cynthia, a White woman over 30, seemed to have an unending energy, which was no doubt incredibly useful in her job as AIG specialist with over 18 years of experience in and out of the state. Her approach to education was independent and unique. As a lateral entry teacher (a professional who becomes a teacher mid-career), she did not feel tied to any specific protocol or ideology and put students first. She aggressively instituted a nurturing program that she described as "casting a wide net." She discussed stories of her working extremely hard to get students qualified who did not fit common definitions. Cynthia realizes that the traditional way is not a defunct identification method, but it is limited.

She believes you can "identify in K-2 and you're catching kids who have a really good home life and advantages with a stay at home mom, who reads with them and tells them to do all their letters." However, this method also may tend to produce false positive identification, but for White middle-class students. False positives are rare for the historically underrepresented students, because of exposure to academic support: working parents, uneducated parents, financial inequity, lack of transportation, etc… While normally education may falsely identify high performing middle-class students as gifted, historically underrepresented students are usually completely missed. Much of this revolves around poverty.

Cynthia's strong inclination to identifying every single extraordinary student stem from her belief that greatness lies beneath the surface and that we need to look for it. More specifically it is the job of education to dig around and find those who have giftedness to fulfill a greater good in society. She believes that if we do not pay attention to children of other cultures or socio-economics, which are often the non-obvious gifted children, "I think we really discount a huge percentage of our population, because of socio-economic barriers and then they're only getting the worse of income disparity, the wealth gap."

Donna

Donna is a second grade teacher with 23 years of experience. She is a laid-back White woman, over 30, and just the kind of personality that is so needed in elementary schools. No matter the crisis or disaster, Donna seems like it would not phase her one bit. At first glance she did not seem to be the assertive type, but as the interview went on, her confidence became clear. After two decades in the classroom she was comfortable with her answers, even when she took long lapses of silence while thinking about what to say. She did not allow the pressure of the interview to rush her answers, and she did not seem to be worried about how her answered would

be received. Her answers were fact, period, and yet there was no arrogance in her personality. Donna believed in the observation of the teacher as an expert. She likes data, as it helps focus her re-teaching, but thinks that testing data is taken too seriously. Data is pervasive into today's education world, but is still seemed novel to her. Like many of the participants, Donna recognizes that potential gifted students are not always the best performers or most well behaved. "They're wiggly," she says and sometimes are bad at reading or math, but strong in the other. As a matter of fact, she specifically looks at kids who tend to solve problems differently, even if their conclusions are wrong. She feels that the different style of thinking is more indicative of giftedness than performance or testing data. She discussed one such student who is a good reader, but struggles in math. "He's not the person getting a hundred on every test, or every quiz, or every check-in, or every little assessment, but he's the one who has a different way of looking at things."

Donna believed in the gifted program, but she also felt the need to have gifted children in regular class setting for the other student's sake. She said, "Teaching them on a different track isn't important." What is important in her mind is for each child's individual need to be met. She meant that each child is unique in his or her giftedness and if their intellect lands within the normal range. To compensate for the relative range of intellects, have specialists and student coaches who push into the classroom helps identify needs and respond to them in real time. "I think it's important for every child to have their needs met. What I'm trying to say is that in the perfect world you would be able to meet all the kids needs in your classroom."

Flower

Flower is best described as high energy, perhaps bubbly, not pejorative, but with an intellectual twist. Her personality is catching, a hard person not to like immediately. She has

experience in and out of the state with affluent students and with those in poverty. A Hispanic woman over 30 with more than 13 years of experience, Flower specialized in the upper elementary grades, which allowed her to witness many students not identified that perhaps should have been earlier. It is interesting to note that Flower did not personally approve of the label 'gifted.' "I don't think the label is important to be honest with you. I think that the label makes people feel better, because it guarantees them higher level instruction." She felt it has become a moniker more important to parents or as a badge for AIG teachers. While she accepts the situation at hand, it goes against her personal experiences where a family member, who is now a bonified intellectual, was not only mis-identified, but nearly held back in school." The researcher must accept that this participant may be bias against the gifted program internally, but seems to readily and energetically provide gifted instruction. She understands AIG students slightly differently from the other participants, and therefore differs in her understanding of data indicators. "AIG should be classified as a special education. That is a different way the brain works and... and if done right it should kind of look like an IEP [individual education plan]." Flower's understanding of giftedness as a special education situation allowed her to look beyond the rigor of content or the speed at which content was learned into the process of the brain where there is no uniformity in the behavior of gifted students. It is ironic to note that AIG is considered a special education program, although it is not thought of in this way. The specific definition of giftedness based on assessments did not indicate giftedness to her, nor did the traditional identification methods, as a student may not be able to prove their giftedness based on the limited ability of the assessments to show giftedness. Flower commented:

> Right, you think about a blind kid is a special-ed kid, they can't be delivered written instruction. It does not mean they are not gifted. Like a deaf kid too, and it's like we

> shouldn’t be depriving these kids with special needs, because of a behavioral or medium, even though intellectually the brain is actually advanced, and it is that which with I struggle.

It was interesting that Flower did not know if there was a codified definition of giftedness in the state or a state-wide identification process, which included mandatory testing in third grade. It was her understanding that the district seemed to change its process every few years. Whether this is true or not, the perspective that things were in a constant state of flux is interesting. “I don’t know, actually all of our discussions here at the school are county definitions of AIG. I don't think there is a state identification for third grade.” Flower may not care about the specific definition, as she believes in providing all students with content that meets their rigor and beyond on an individual basis.

Ginger

Formerly a kindergarten teacher for more than a decade, Ginger is a White woman over 30, who now serves as an AIG specialist. She has nearly 20 years of experience all in this school. Ginger was uncomfortable in the chair and her answers seemed to come from intuition more than from any quantitative perspective, which makes sense as a former kindergarten teacher, at least to this researcher. She came off as much like a mother, as she did a teacher. This may have helped her identify potentially gifted kids as her perspective was on potential and not data. She lamented that the prioritized data indicators provided by the state as narrow and often times difficult to assign to students she saw as being potentially gifted. She believed schools had to look at the following:

> The whole child, in that they have they may not demonstrate it in a formal, you know a paper pencil reading test. There are some very gifted individuals that don't test. I mean, I know lots of people that do don't test well, but they're amazing and what they do.

To level the playing field, Ginger pushes into the younger grades and provides non-traditional activities meant to expose out of the box thinking by students. Ginger's motherly perspective was not only insight, but felt as if her ability to spot giftedness came from her personal experience with two of her own children being identified as gifted. One was a text book case and easy to identify, but one was not. The experience of getting one of her children identified that did not easily check state defined factors allowed her to expand the value set she brought to the nomination process at her school. "I think as a mom - both of my children are identified. My son could've been missed. He was quiet, kind of awkward, but he's had fantastic teachers that really were able to focus on him." Ginger understood that the lane of identification was often narrow and that is how students were missed. Giftedness sometimes takes "years to develop… it may show up later on, but they may have missed that window of identification."

Ginger felt strongly about continuity of staff, remarking more than once that she had been on staff for a long time. This time in one place allowed her one on one observation of students over the long haul (K-5), who are achieving at all levels, not just high levels on assessments. She felt her job was to identify potential academic behaviors that were abnormal and observe them for potential giftedness, despite academic testing indicators. Moreover, students should be given work on an independent level that pushed the limits of their rigor.

Kim

Kim comes off right away as kind and approachable, but it is also immediately clear that she is an intellectual. A White woman over 30, she weighs each issue with purpose. Even the

way in which she scheduled the interview was with exactness and purpose. She wears her experience lightly, but after 24 years, which includes time as an administrator, a district level coordinator, and time at the Department of Public Instruction in North Carolina, she may have the most 360 degree view of this issue. She recognizes from the beginning that AIG identification is a problem that began due to the attempt to segregate students within desegregated schools after desegregation. This racial issue was not the only separator, but also class separation.

> When you start talking about gifted education, you have to also start looking at socio-economic, you know resources as well, right? You know, like how many of our students are low SES, right, you know. We also talk about and how many are minorities you know, but how many minorities are high SES?

Kim understood that sometimes race, culture, and poverty all resulted in the same lack of identification, and therefore, instituted the nurturing program and trained her staff. Training is quintessential for gifted awareness.

> You know, like there was a big push from the district to just solely coach teachers to teach AIG in their classroom and well that's good, the regular classroom teacher needs to know how to differentiate, you know… it's still not the same experience as getting that social piece, you know all together.

Kim gave training to her staff for social and cultural awareness. This being said, there were no particulars or specifics reported as to what social training may look like. As for the nurturing piece, "I mean, we are [working] really hard to make sure kids get the services that they need at every level, you know, like kindergarten and we're feeling them out in first grade." This revealed an important aspect that acknowledged a core issue, how is giftedness and/or AIG

defined in the state? This was something that she has obviously thought about in the past, as she offered an easy smile, perhaps expecting the question. "Official state definition. You know, that's a great question, because I don't really know how they would actually define it."

As Kim was answering it became clear that she felt this lack of uniformity was ridiculous and perhaps an unforced error of some sort. "But I'm not even quite sure how it is officially, you know, defined, because I only I say that just because I see so much discrepancy between districts and how things are implemented." Kim takes responsibility, at least for the administrators, in that, despite there being no uniform definition and/or uniform set of protocols in place to identify a more broad demographic of gifted student, the responsibility continues to be with the leadership of each school. She understood that her responsibility at the building level was to put in place protocols that widened the net and developed more talent at an earlier age by giving potentially gifted children with diverse backgrounds that don't value exceptional academics the same chance as students with households that do. To accomplish that her staff needed to be trained to understand that these gifted children would look and sound differently.

Nancy

Nancy is a White woman nearing the end of her career with over 25 years of experience. It was definitely on her mind as she mentioned seeing the door crack open at the end of the line. In her opinion education has changed a lot since she began and perhaps, she was ready. She did not seem disinterested in AIG, but cared about it more as a function of her job, certainly less than some of the other participants in this writer's observation. Based on her experience as a public school student, it may have been thought of as unimportant. "I remember when I was in school. It [gifted and talented] was on the side, like a you know, you're here and you're here, no difference. But now we're able to pull the kids that maybe are gifted in one subject." She came

from a rural, but lower middle-class home. However, as land owners they climbed economically, and her father eventually became part of the local political scene, which increased her family's standing in the community. In her thoughts this helped teachers pay attention to her.

Although she was never identified as gifted, she did not think it mattered or had thoughts on if she considered herself so. Her position within society made identification a moot point in her mind. She does recognize this is not so with the historically underrepresented populations and that identification as gifted can be important to them personally, as well as to society. Despite seemingly low energy on the subject, she did begin to show her concern with under-privileged children. Seeing the obvious inequities bothered her. Nancy also acknowledged, now that her daughters are grown, that society is not the fairest. She is one of four sisters, has two daughters, and is aware of the gender gap, which she relates to unfair practices in this study, specifically on race. The idea of making a judgement on someone, especially an educational judgement based on looks nags at her. "If we don't tap into more kids, they're going to be bored and we need [them] to do some of this higher-level academic stuff in our world, because they have different abilities."

Nancy recognized that exceptional people who accomplish amazing thing, like curing cancer for instance, are needed in society. These exceptional people start out as students and being identified as gifted may be the catalyst to helping them meet their potential. A fair assessment is that this subject mattered to her more as a gender inequality. The data does not show that females are a historically underrepresented group as far as AIG identification is concerned; however, she did feel this way and perhaps it helps her connect with the larger problem. Despite that she may feel slightly ambivalent about the subject, she does follow the

programs set before her by the leadership of her school and it does not minimize the results her school has exhibited.

Samantha

A wide an easy smile decorated Samantha's face before, during, and after the interview. She referred to her students as friends. It was plain to see that she cares for them dearly. Specifically, she seemed near to tears when answering questions that discussed impoverished students with difficult home lives. The beginning of the interview was fraught with her being distracted in anticipation of an elementary school style calamity; however, none surfaced, and she finally relaxed as we began. A White woman over 30, she described her 15 plus years in education as a very positive experience, but not one she expected until her final year in college. She had the opportunity to teach in several districts, in both affluent schools, as well as Title I (impoverished) schools. This is one of those impoverished schools. Her current position as an administrator was a good move for her; however, she did remark that it has put an emotional strain on her as a wife and mother. Title I schools demand more time than non-Title I schools in her experience. Her main focus within the school was to focus her teachers on providing access to deeper content for a broader swath of students.

Samantha's responses satisfied all three sub-questions: prioritized data, state defined factors, and school-based values. The majority of her career was in first and second grade where gifted students are typically not identified yet, "but you have students who require differentiation. An extension of content and understanding the difference between extending content and giving them the next bit of learning." Samantha recognized immediately the definition of giftedness was far too narrow and did not take into account those who came from non-traditional homes with poverty as a major theme. Their backgrounds and lack of

experiences figured into a reduction of their assessments scores, which is the most prevalent traditional pathway to identification of AIG students in North Carolina. Therefore, a major factor in the under identification of gifted students, especially from minority and impoverished populations. Additionally, she felt that tested abilities centered around the intellect leaving out many other forms of giftedness. "Your intellect, the ability to consume new knowledge and acquire new things. Often times it can also be like a specific talent that you have that other students may not have, or a specific focus area where you excel." Gifts other than test measured intellect are not only un-valuable, but ignored, "they deserve the opportunity to have those talents nurtured and provide them the resources and the pathways to succeed with that talent as well."

As a leader she has strictly implemented a new district suggestion widening identification, but locally expanded into teacher observations and the reporting of previously thought unimportant data, such as visual problem solving over text-based problems. This allows her school to watch and nurture talent early, "we have been nurturing, which gives us an opportunity to work with kids before they really, you know, coming to the to the time when we typically would identify." All teachers are encouraged to report potential gifted students, even those that do not meet normalized standard assessment scores, to the AIG determination team for further discussion.

Winnifred

Winnifred was an interesting case, as she was one of only three minorities in the study. A Black woman over 30, her personal story was very much in line with a classic example of a historically non-identified gifted student, who went onto high school to succeed in the advanced placement classes and beyond. She has filled administrative positions in several schools across

the socio-economic spectrum and has over 20 years of experience. This participant was tight-lipped and did not easily offer up information. Her experience while growing up was as rural, share croppers, with a heavy responsibility on her to take care of her brothers and sisters. She reported it was understood she was different. "I was the smart one and that was okay, I wasn't special, just smart. My older brother was the athlete – see, we all had a thing." Poverty was obvious, but she did not seem to acknowledge it as if it were an obstacle, although it obviously was. Through school it was her responsibility to help her brothers and sisters with their school work. She described her father as a genius, who could barely read. He started his own business of machine repair and it was clear to this researcher that she held her potentially illiterate father in high regard as to his intelligence. It is perhaps this ability to see high intelligence beyond the core skills of reading that has helped her identify historically unidentified students so well.

She understood the importance of identification, but did disdain the popular parental view of the label being a badge of honor rather than a needs-based definition. "All parents think their children are special and they are, but they're not always gifted." She has two gifted children of her own but concedes that her son would not do well in the AIG program. "My daughter tested early and does well. My son, in some ways is more gifted, but can't do it, so he's in normal classes. But that is okay, because good schools and good teachers provide good content for all students."

Winnifred believes in the child first. Her experience makes her confident in the control of her school, so she does what needs to be done, which results in better than average identification demographics. She also believed in the hiring process. "Good teachers. You need good teachers to make it work." Winnifred spent a lot of time in the classroom and hallways. It was never specifically discussed, but she did not stay in her office and had a full schedule of

teacher meetings. She has training sessions every week to keep teachers on the top of their game. They're processing things different. Even pulling a student out and testing them for giftedness gives them a bit of confidence, because someone has shown an interest in them. These students are "having conversations with their teachers. So, they can start seeing [the] difference… they had that opportunity to be with their [gifted] peers and now they can then feel they have a cohort." Winnifred's expectations for teachers are high, but so are her expectations for students. Specifically discussing nomination reluctance based on socio-economics she replied, "If you expect failure, they will fail. I expect more. They know that." The topic was on students, but it may be fair to assume the same goes for her teachers as well.

Focus Groups

Two focus groups took place with four participants each. The groups were comfortable with one another and did not seem to hold back their opinions. Attitudes were congenial and even though it was at the end of the day, still fairly energized. The researcher was looking for commonalities and differences among the participants, as well as emotional reactions to different points of view, specifically where the participants disagreed. Additionally, the researcher was eager for the groups to take a longer view of consequences of under identification. The researcher's hope was that the added dimension of multiple participants would shake loose new revelations that would allow for a deep dive debate highlighting new or previously untouched data. The data did not result in new revelations, however, and the topics continued to come back to the center premise of immediate gifted identification rather than the longer view. The focus group mainly confirmed the data provided in previous interviews. However, as a second tier of data worked well for triangulation and for helping to independently establish validity through pooled judgment (Merriam, 1998).

There was one unique discussion about a more pervasive selection of demographics and how it would result in improved empathy. Providing gifted nurturing for a broader demographic, including Blacks, Hispanics, and impoverished students allowed for a setting that forced students together; affluent and impoverished. Ginger said:

> Kids who sometimes are not as socially or emotionally aware or adept as other as their peers learn empathy, because there is now in situations where they can see themselves struggling or others struggling. And [they] go back to the regular classroom, and hopefully they start to learn empathy.

The conversation was not centered on the identification of intellectual giftedness, but on emotional and social awareness of gifted children. Even Flower thought:

> Gifted kids need to know how to navigate a world that isn't populated with all gifted people. You've got to be able to go to Food Lion and deal with the cashier. Chances are that cashier is not a gifted individual.

This was an interesting and important line but existed mostly outside the purview of this study and was not pursued. This statement may be of interest for a future study.

One of the consensuses by the groups was the need concerning potential gifted students: training and resources. All administrators agreed that they needed access to additional licensed staff. "If we could have three more gifted specialists to work with the kids," Kim said. Samantha concurred and understood how thin the faculty was stretched.

> I think there's lots of things we can do better, specifically around identifying gifted kids. I think it's continuing to expand the nurturing peace, educate and do professional development with staff around, giftedness and intellectual ability… and trauma-informed

teaching and how those things manifest and exhibit themselves. I think that you can take pieces and parts of that and apply it here in the way that kids hide behind different things.

More resources do not seem to be on their way, however, as the district's gifted education line item budgets fell dramatically in 2017 from .91% to .1%, as shown in Table 4, and have continued in a negative trend . Despite the lack of budget, the nurturing programs at these schools have closed the gap in historically underrepresented gifted students.

Table 4

AIG Funding by Year

Year	AIG Funding	Total LEA Budget
2015	$387,969	$43mm
2016	$388,321	$42.5mm
2017	$44,252	$44.6mm
2018	$29,896	$45.4mm

Note. North Carolina Department of Public Instruction

As previously stated, most of the focus groups' data confirms the results of the interviews. The top three themes of the focus groups were culture, data, and nurture. Data and culture were referred to as obstacles to identification, and nurturing as a positive influencer to nomination. Flower, who does not necessarily agree with the AIG label, thinks that the services are imperative,

> Because of how we do things. […] If we did things differently then it wouldn't be imperative. So, if every teacher were licensed [in] AIG gifted services and ESL services and constantly doing all those things to serve all the students, it wouldn't be necessary.

Her point is that without the label of AIG, teachers do not give the most rigorous assignments and that this type of thinking is deficit thinking. Cello agreed with her: "So then yes, I do think that if we're going to continue to cluster and continue to do [it] this way, then yes it's [providing services] imperative." Cello was sure to make it known that she provided AIG rigor for all her students, so that they would not get over-looked for potential nurturing groups.

Results

Theme Development

The appropriate development of themes requires the researcher to make connections and draw meanings from the phenomenon by analyzing all sides. "Imaginative variation is about trying to see the object of the study from different reference points" (Moustakas, 1990, pp. 97-98) and giving full voice to the participants. The participants in this study provided interview and focus group data that clearly demonstrated three main themes that connected them all together. The main themes were: culture, data, and nurture. Nurture was the most prevalent among the themes and was the main driver behind how these schools identified a higher percentage of historically underrepresented gifted students compared to other elementary schools in North Carolina.

To find the most prevalent themes, as stated in Chapter Three, pattern matching logic was used, which is determining the most common and pervasive terms and phrases identified in all data, which could be identified as potential main themes. The initial broad set of terms and phrases found most commonly used in the data were: advocate, AIG, bias, Black, culture, data, EOG, gifted, Hispanic, language, Latin, low income, low SES, minority, nurture, pathway, portfolio, poverty, race, relationship, socio-economic, status, test, vocabulary. First, seven concepts were identified and then three main themes were derived based on recurrence and the

likelihood that they would adhere to the touch test (Saldaña, 2012). Seven concepts were ultimately codified: culture, data, giftedness, nurture, pathway, poverty, and race. The results are shown in Table 5.

Table 5

Pattern Matching Concepts Interview Data (Initial Cycle)

Concepts	Recurrence
Giftedness	18.6%
Data	14.9%
Race	8.3%
Poverty	14.6%
Culture	16.5%
Nurture	17.5%
Pathway	9.6%
Total	100%

Culture, giftedness, and nurture were selected from this codified group as the three most impacting themes and the others were removed. Giftedness prevailed as the most consequential and was then selected as the apex theme. To check the soundness of the theme, an analysis of the focus group data was run separately for comparison using the same seven concepts (see Table 6). The data did not concur, as the three most impacting focus group themes that emerged were culture, data, and nurture.

Table 6

Pattern Matching Concepts Focus Group Data (Initial Cycle)

Concepts	Recurrence
Giftedness	11%
Data	17.6%
Race	2.2%
Poverty	12.1%
Culture	23.1%
Nurture	28.6%
Pathway	5.5%
Total	100%

The touch test was then applied to the apex theme giftedness; however, it did not pass, as an examination of the interview transcriptions revealed that a majority of the gifted mentions were specifically descriptive of students. Higher level thinking allows for the discussion of descriptive processes and phenomena in the abstract rather than directly topical. If one can touch it, it is a topic (Saldaña, 2012). Therefore, giftedness was removed as potential theme and the analysis was run again on both interview and focus group data. The second cycle results are reported in Table 7.

Table 7

Pattern Matching Concepts Interview Data (Second Cycle)

Concepts	Recurrence
Data	18%
Race	11.4%
Poverty	17.7%
Culture	19.6%
Nurture	20.6
Pathway	12.7%
Total	100%

The top three themes that emerged out of the second cycle were selected: culture (33.9%), data (32%), and nurture (34.1%). These themes concurred with the second cycle focus group analysis and the findings were accepted as valid from all data sources. A final analysis using the replication approach was performed. This was to compare each case individually against one another (Yin, 1994). The schools did not perfectly concur; however, each school included both nurture and culture in the top three themes. The theme nurture was most prominent among them.

The last step was to select an apex theme. The top theme in the interviews was nurture (34.1%) and the top theme in the focus groups was nurture (41%). Comparing each case, nurture was the top theme at Edison and Newland and second at Big Hills. Nurturing was clearly the most prominent theme, concurred with all data, and therefore, nurturing was chosen as the apex theme. The final analysis from all data points is reported in Table 8.

Table 8

Final Themes All Data Points

Theme	Recurrence
Nurture	36%
Culture	34%
Data	30%
Total	100%

Culture

Culture was the second highest theme and a pervasive topic among the participants. It is important to note that many of the discussions of poverty were also discussions of culture, and therefore this theme will include the culture of poverty. This section will discuss how culture intersects with poverty, race, and social class.

Poverty is a pervasive social obstacle affecting transportation, basic human needs (food, shelter), and access to resources. While this is a known issue, poverty is insidious in the way it affects students. Largely the participants identified the home environment as a major factor that was an obstacle to students presenting as gifted. Most of the participants recounted anecdotes about poor children. These anecdotes included how they did not have access to a library (transportation) or internet and how absentee parents, due to shift work, often left them alone without supervision. These factors, and more, create a word deficit that compounds every year creating a huge gap in reading ability. This is the first gap, vocabulary, reading level, and comprehension. Without the access to books, the expectation of nightly reading, and the supervision to ensure reading at home, students immediately fall off the gifted radar as they cannot perform at higher levels.

Presenting as precocious or intellectual necessitates the ability to navigate and conceptualize issues via text. Without the tools to do that, giftedness cannot be identified using traditional testing, which is text based. Amanda said specifically about how parents in poverty may not express the values needed to inspire their children to do well.

> If you look at the kids who can pass a test and perform well and if you look at traditional cultures of White males there's a value there [at home], where some of our other kids of color, and even our girls, their values of their family may not be, 'yes do well on this test.' It could be that they value more - your communication, or that they value more your creativity. And so, I think that we don't have a system that's set up, even though those kids are just as smart, just as gifted. I don't think necessarily our identification system is set up to encourage or support them through that process.

Without the ability to read on or above grade level, students cannot decipher text in English classes or word problems in math classes. Several participants mentioned a common story concerning students who were good in math, but had issues reading. Once they understood what the math problem was, they solved it well, but understanding the problem through the text was often an impediment. These students were often referred to as being in impoverished situations at home. The problem compounds as these potentially gifted students get further and further behind, because they cannot qualify for the label gifted. Cynthia said,

> Poverty is a huge barrier to lots of gifted kids being identified and meeting their potential. Getting the services they need, even being recognized as performing at grade level in school. They may be brilliant kids. But if they don't have, you know, Maslow's hierarchy of needs, if you and your basic needs aren't met, these kids aren't even on your radar.

It is possible that the label itself creates the gap, as the children with the AIG label get the services they need, but poor students who cannot qualify and may be gifted do not, putting them further behind and less likely to be prepared for college. Cello thinks the label and the system is responsible for some of this when she said:

> And so, I think that the way our system is, that if you have that AIG title you would be receiving the services. So, many more of my students are receiving extra attention that they need and deserve, not just because they don't, some of them, don't have that title.

The answer to identifying gifted students who reside in poverty is upending bias and closing the skills gap. SDT theorizes that there are subconscious biases that reside in all human beings based on certain factors. Nancy noted that these must be faced straight on and dealt with openly.

> Just because you are a certain race or certain ethnicity, or sometimes a culture. If we look down on those people, we're not really looking at the kid - looking at them at face value. We don't see what's in their brain and when they're underrepresented, we're leaving them behind for not giving them the chances that were given all the others. And we need to give every child a chance no matter where they come from.

Winnifred and Flower concurred with Kim when she summed up the antidote nicely by facing the reality that poverty is an obstacle confronted by many students that school systems need to deal with. "When you start talking about gifted education, you have to also start looking at socio-economic, you know resources as well, right? You know, like how many of our students are low SES." The traditional means of identification have to be reckoned with at the outset. Every participant agreed that bias was an issue and that poverty had its own bias.

Recognizing a potential bias and working against it as a school culture could begin to push the needle up. Kim offered this as something that she reminded her staff about during trainings.

> Everybody comes into life with biases, right? You know, whether we think we'd like to say we have none, I think that everybody's wrong. You have some natural sense of bias, whether it be color, culture, clothes, car, whatever, you know, whatever it is. So biases, kind of come into the classroom. But it's our job to teach all kids, you know, so we've got to be able to overcome those biases and be aware of those right. So how that plays out in terms of identification, you know, we need to be aware of that. That's why I said I think here though is every conversation I had with teachers. It's almost like they need this, we need to do this [serve potential gifted students] for them, because you know, like I said, it's almost like a challenge like they want to fill that gap, you know, they see that as their obligation.

Social class and race intersect with poverty on a huge scale. There are 40.6 million people in poverty across the nation. The U.S. Census Bureau reported the following statistics per ethnic group (see Table 9).

Table 9

Poverty Rates by Ethnic Group

Ethnic Group	Poverty Rate
National Poverty Rate	12.7%
Blacks	22%
Hispanics	19.4%
Whites	8.8
North Carolina Poverty Rate	16.4%
Blacks in NC	22%
Hispanics in NC	27%
Whites in NC	11.6%

The statistical data above concurs with the historically underrepresented gifted data in North Carolina and a correlation seems likely to exist. Reading is a common issue among poor families and poverty runs a predictable line through minority communities as evidenced above. Each and every participant specifically mentioned that background environments were one of the most telling when it came to identification. Traditional testing data points did not find these students. While not every participant specifically mentioned race, it was clear that race and poverty were the two major concerns to a deficit culture when it came to education and gifted identification.

Data

Data is the most traditional and quantitative measure in identifying gifted students. It has, however, resulted in an identification gap, especially with Black, Hispanic, and impoverished students. The participants largely decried the test as being biased and ineffective

in measuring anything but a small percentage of the population. Amanda said, "Giftedness is defined as students who perform well on a test." Even the most basic understanding of learning styles would debunk the idea that a single test could identify all gifted students. "I feel like as an educational culture, we feel like everything has to be determined through test scores. We put so much emphasis on how students perform at a specific time on a specific day," Amanda continued and seemed to be unsure why a test score would provide so much false security to the educational apparatus.

Another reason using strictly data (testing) to administer gifted identification is language. As stated above, impoverished students often times lag in reading and comprehension, which would make them unlikely to be identified, but also those who have limited command of English, as ESL students who may have limited time in the country or do not use English at home. Cello can sympathize with this as an immigrant:

> From my experience, when I moved here, I took the gifted test or whatever. And I just moved here and spoke [some] English, but couldn't really read well and write well. It [the test] defined whether I was gifted for the rest of my experience in education based on my native language. So, if you don't speak English, you can't get to that.

On the other hand, Cello felt that data is useful if it is used to inform trends that show deficits that may indicate a failure on the part of the system. She said the data was showing that the [her] school was not meeting the needs of the Black sub-groups and that scores indicated a decline.

> So, I think it's [data] important in that sense, but so is identifying that hey, you know that low-income students aren't being identified as AIG, but I think that we need to figure out why - why are we not? What are we doing that's affecting that? It's not because

> they're not capable. It's something on our part that's happening. So, I think that people need to analyze themselves or their system or how they're doing to see how that's impacting that.

Data is a mixed bag. While all participants agreed that testing is not the answer to identification, it is still useful. Cynthia expressed an anecdote about a student who did not quality as gifted, but in her opinion was a gifted thinker. While he did not test well or perform well in the class, she saw him tackle problems in very unique ways. Regular testing and portfolio artifacts did not create enough evidence for the team to recommend him for services.

> I convinced the district to spend the money and get me a Ravens test, which is untimed and nonverbal. He scored in the 99th percentile for kids three years older than him. He was literally off the chart for his age group. I finally got him identified, but I was serving him the whole time. And that's the thing, if you see it [giftedness], and you know it, it's there. I think it's unethical and immoral not to develop it, just because they didn't check the box.

While this is an example of observation trumping testing, it is also an example of testing and data in a different form making the correct determination. Data has its place if it is used in accordance with how building level teachers can use it. The right test at the right time. Data can be used accurately to identify a segment of students and can be used to inform a more three-dimensional view of a student, giving the recommendation team a full-throated understanding of a potential gifted student. However, the singular use of data can be the cause of mis-identification as well. Donna understands that some students with a high level of readiness often present as gifted performers, but are merely good students. Parents who are able to be consistent advocates can use test scores as evidence, being close enough to be nominated as gifted.

> I think there's a lot of reliance on test scores and on where you are compared to the average student. So, I think there's a lot of kids whose parents think that they're gifted. I think almost every parent thinks that their kid is gifted, but maybe they're just, you know, maybe they just are a little bit ahead academically. And that could mean that they're gifted or could just mean that they are you know - just like some kids are taller than other kids. That doesn't mean that they're going to be the tallest kid or like some kids have lost more teeth. That doesn't mean that they are better at losing teeth. That just means they happen to be doing it a little bit sooner. So those could be indicators, but I think there are a lot of other indicators.

Data alone does not negatively or positively identify students accurately. Static history proves this. The bottom line is that data plays an important role in the overall nomination and selection of gifted students. The acceptance of reality that testing data is not always accurate and is culturally biased, but does add to the overall picture of a student's potential giftedness. This through line was not always specifically stated, but consistently implied throughout all the interviews especially Kim, Samantha, and Winnifred as administrators. The worth of data would be increased in the minds of the participants if there was a more consistent definition of giftedness in North Carolina. Kim especially wonders about the inconsistency of the definition of giftedness from district to district.

> Okay, just because I mean [one district] says things different than [this district] and things different in [that district], you know. Some of the way they approach how to serve, you know, gifted students tells me that there's a lot of variability, which means there's not any consistent kind of policy or standard operating procedure, you know from the district.

As it is now, data is sometimes an accurate information source and sometimes an obstacle. Both can be interpreted differently depending on the definition used by the district. Therefore, it can be surmised that depending on the definition of giftedness of the district, data can be more or less accurate.

Nurture

Nurturing is the apex theme for this study. Nurture is defined, for the sake of this study, as the idea that intellect is not tied to mathematical skill or reading level strictly identified by testing. Intellect can only be identified fairly and accurately when all skills sets have met a mutually equivalent level. All students do not come to school at the same level regardless of their intelligence, which is why these schools and participants all concur that nurturing a larger sample is necessary to increase the breadth of gifted identification. Observing students "that are different, and that do learn differently, and that are at a different level than their peers," is at the center of identifying more students, said Amanda. A nurturing program has been enacted in each school and is the prime factor in the exceptional identification of historically underrepresented gifted students.

The nurturing schedule works a little differently in each school, but essentially is the same. All kindergarten students are given non-text assignments that may stretch their cognition. As students exhibit observable divergent thinking or gifted behaviors they are tagged and included on a watch list. The students are noted by teachers, co-teachers, and AIG specialists. All the names are published to the AIG determination team for observation. In kindergarten, first and second grade these kids, along with already identified students, are pulled out of the regular classroom for differentiated instruction or an AIG specialist pushes in or both. Once again this is about meeting the needs of gifted students as well as identifying potential gifted bad

test takers. Cynthia said, "We are wasting talent. If we don't meet these kids where they are, rather than at what state standards they are, we're wasting their time and insulting their intelligence." To this end, students are getting services they need whether or not they qualify, while also getting extra attention on potential deficits (like reading and writing) due to cultural environments and conflicting value systems at home, which include poverty. Donna said:

> I can be the most brilliant kid on the planet. Does it mean that I'm prepared to take this test on the specific day? So, I think when we have our students that are in poverty, we have to look at them slightly differently and we have to fight for what we know about that child versus what that child did at a specific time of day.

The nurturing program removes many of the stigmas associated with underrepresentation by including them in advanced cognitive activities from an early age. This is how the participants believe the field is leveled, by inclusion not exclusion. Cynthia said about the need to teach and observe,

> They need to be nurtured whether they qualify or not. I need to see them, and they need more, so I'm taking students that, you know, maybe are testing in the 80-plus percentile, but they're performing. Many of them outperform identified kids.

Cello concurred and looked the through the lens of an immigrant who did not have mastery of the language. "We should be fostering all of our students. Like unique, abilities if a student does demonstrate that." More than that she thinks despite not being the most important label, that the label itself may provide attention to students who need the extra rigor. "I think that was all like ESL students, unless we give them that title, they might not be getting what they need."

The ultimate idea of the nurturing program is to find gifted students that do not check the traditional boxes of giftedness. Digging deeper than what regular tests provide and observing, preparing, and collecting data that ultimately show a fuller sketch of a potentially gifted student. Many of these students happen to fall into the minority sub-groups. Donna shared an anecdote about a student who was not quick in math, did not perform as a high achiever in class, but exhibited an interesting way of solving problems. She contacted the specialist to include him in the school's nurturing program.

> I wanted to have him challenged in different way to see if, you know, how would he react, how he would respond to that? You need to be able to be to take some chances to take some risks to give kids the opportunity, who don't follow the typical path. These kids, you know, some of them they may turn out to qualify for the gifted program or they may not, but it's important to spread your net wide.

The nurturing program does not only include historically underrepresented students, but all of them (including Whites) not yet nominated. This prevents some misidentifications. Cynthia said:

> They [intelligent, but not gifted students] might look precocious until their peers get a couple years of schooling and they're really high average, you know, kids with IQs of 115, maybe 120. They're hard workers they have a very good support network. They have opportunity and they have exposure, so they show up in school reading. That doesn't mean they're gifted.

Used in conjunction with the nurturing program is the portfolio pathway. Portfolios are effective especially for students with bad test taking skills or gifts outside of core academic performance like reading and math. It allows a student to be tagged for observation, receive

differentiated services and coaching for cognitive rigor. While the scores on standardized tests are not there, teachers, coaches, and specialists assemble a portfolio of work that exhibits exceptional thinking processes. This may be comparative art, or special reasoning, complex math via non-traditional processes, creative writing, leadership, etc…. The worth of the giftedness is evaluated by the AIG determination team combined with standardized test scores.

When students are given free reign within their gifted space, they can freely display their gifted natures. Cynthia watches for passion during certain activities to aid her in identifying a potential strength that may lead to a gifted behavior. This is why she likes portfolios. When offered the appropriate activity it becomes clear.

> They are driven, they are passionate, and if we were to just measure giftedness by test scores and quantitative data, we wouldn't have a Gates, or Thomas Edison, or Albert Einstein. I mean, we would exclude a lot of very prodigious thinkers. Intelligent people tend to make executive decisions and do their own thing, which is why the gifted population in the penal system is as high as it is. They [gifted prisoner] say that is a silly rule. So, I'm going to make a decision. Follow it or am I smart enough to beat the system?

Portfolios make for a tactile and physical representation of a student's potential gifted nature over a certain amount of time. This physical timeline can represent a deep-thinking process making certain gifted factors obvious to the determination team.

The nurturing program not only acts as a wide net to catch more potentially gifted students, it also specifically targets the top 5% of sub-groups, and fills in achievement gaps. Not all students who go onto the nurturing program are identified as gifted; however, it does decrease the word gap, increase cognition, and ultimately begins to level the academic playing field, while

eliminating potential misidentification. Students who do not meet the gifted qualifications still require challenging content. Nurturing provides the tools for them to remain interested and challenged.

Research Question Responses

The interview data is specifically meant to answer the central research questions of the study. The central and over-riding question is: What factors of identification procedures result in higher than average identification rates of historically underrepresented gifted students in three North Carolina elementary schools? To get to the core of the story, this researcher probed with three research sub-questions that would help peel back the onion of the story.

The first sub-question was: What data are prioritized by nominators and testers in the process of identifying gifted students? The participants seemed to have a mixed bag when it came to what was important, but it seemed due to a lack of a uniform gifted definition by the state, rather than a difference in personal feelings. These participants consistently understood that the limiting nature of achievement indicators resulted in an unbalanced identification demographics. Also, strictly adhering to the state defined data indicators sometimes resulted in false identifications. According to Donna, those who scored high on early indicators "could be someone who is academically gifted or could just be somebody who is reading a little bit."

Most participants acknowledged that cultural background experience, meaning early reading at home and conversation, often resulted in precocious academic behavior that wasn't necessarily giftedness. Donna said, "They're becoming more independent sooner, but doesn't necessarily mean that they're gifted, it seems like kids who are gifted aren't always the strongest academically, but they have the most divergent thinking." However, most identification mistakes, according to the participants, was a lack of identification for historically

underrepresented students and not misidentification (false positives). Each participant held a personal idea of what was important and reported potential giftedness based on their personal observations and beliefs, even if it was belied by the testing results. Winnifred remarked that something as simple as:

> humor, or a quick wit could be an indicator of intelligence. If a student misbehaves, is funny and sharp, but doesn't score well on tests it is incumbent on us to check that student out. You know? See what's under the hood before we dis-clude them.

The participants' priorities were evenly divided amongst the themes: nurture (34.1%), culture (33.9%), and data (32%). Without the proper data, students could not qualify for AIG services, and therefore, they need to be nurtured to level a very lopsided playing field. This is a Catch 22, because teachers need to recognize and be informed about a student's background (culture), whether it is racial, socio economic, or a twice exceptional disability. These issues needed to be taken into account when observations showed a potential gifted student, but scores were not being produced with qualifying results. The nearly even results show how difficult it is, according to the participants, to catch all gifted children and have the proper amount of time to prepare them for a fair evaluation. Children who have high IQs, but read three grade levels below their peers are difficult to get qualified for AIG services.

The second sub-question was: What state defined factors and values influence the process of identification in Newland, Big Hills, and Edison Elementary schools? The answer is a complete consensus of the participants. The participants gave near equal importance to the impactful theme, data (32%), identified in the analysis, which is the central district and state defined factor. While acknowledging testing can be racially and culturally bias, data itself (achievements scores, identification surveys, gifted ID instruments) still have a place in the

overall identification process and this fact is agreed in whole by the participants. Traditional data are not always indicative of giftedness, but are still necessary for identification. Kim said, "We measure that by what performance is in the classroom and test scores, you know. Traditionally, you know, you're looking at the thought processes and you know acceleration, you know beyond their grade level peers." What Kim sees is that data still identifies gifted children who out perform their peers by significant margins, while simultaneously understanding that these indicators do not work for all children. Ultimately, the paradigm of all participants is that data is an important piece of the puzzle and is the measure to which North Carolina school districts adhere. The partial reliance on data allows these participants to meet their state-mandated and defined factors without being limited by them.

The administrators in this study seemed to be sensitive to the fact that state policies be followed, but that district policies were more immediately important. That may or may not be completely honest, but it felt like a necessary statement for them to make. Subsequent remarks also showed that these administrators were mostly focused on their constituents. In the end, data points still identify a large group of students and although it does not identify all students fairly it is still a useful tool when combined with other observable priorities. According to Samantha, the data indicators are fairly accurate when students have "access to the content prior to that grade level. It's their ability to acquire this knowledge and be able to answer it in the standardized form," which identifies students from cultures that prioritize education or are able to prioritize education due to middle or affluent socio-economic circumstances. Samantha also said that accurate identification through traditional means often lends to environmental exposure.

> A student seeking out those things on their own through social media, through internet resources, through the texts they take out in the library, especially with mathematics. I

> think that some students are just limited by exposure. It's not that they can't acquire the knowledge, it's just that their conception and understanding of math, and the way that they understand numbers and the numeric system in the relationship between numbers that they may or may not have been exposed to.

The third sub-question asked: What specific school-based values are used to identify gifted students above and beyond the state definition? In each setting there was a very specific school program set up to nurture students. Typically, students are tested for AIG services in third grade; however, due to reading deficiencies this is not a fair or a complete indicator according to the participants. Cynthia said, "Standardized assessments, who's achieving in the classroom, but not achieving on standardized assessments? Because there's cultural bias in testing, anxiety and other factors that come into play. We are looking to push kids and to grow kids." Students are still nominated based on tests, but they also have two other pathways: nurturing and portfolios.

Summary

Each term and phrase used to codify the themes in their own rights is an important element in the identification of historically unidentified gifted students; however, the most impactful themes selected were culture, data and nurture. The voice of the participants reflects the importance of these themes as specifics factors. On nurturing Nancy said, "I really like the idea of just casting the net wide and having many people look at these kids." Donna said that some may "have radically higher IQ, but they just need a little bit of time to develop the skills that make it detectable in the second grade." The idea of nurturing is not wholly original to these participants, as historically underrepresented gifted students have the potential to be successful in gifted education, but limited family and school support may lead to underachievement in school,

low self-esteem, and lack of emotional support (Cleveland, 2017; Olszewski-Kubilius &Thomson, 2015).

On culture Amanda said, "So what universal protocols would reduce the number of non-identified gifted kid's program that turns up kids not based on their literacy level at an early age, but based on their thinking skills." Ginger remarked when discussing second language learners that she "couldn't keep up in a class in Spanish and these kids are doing that and they go home and their world is a different language. And you're telling me that they're not linguistically gifted?" Culture is a significant factor contributing to lack of identification. Underrepresented students require differentiated instruction and learning experiences that meet their cultural needs in a safe and supportive learning environment (Cleveland, 2017; Siegle et al., 2016). Participants bemoaned the lack of support from some households and acknowledged that a lack of educational culture is sometimes difficult to recognize.

On data Cynthia stated that "one-on-one IQ testing would be a great way to find all of those kids, because maybe you give everybody a Stanford-Binet when they start kindergarten, then you know exactly who you need to be tracking." It is clear based on the data that these themes are pervasive in identifying gifted students, but more so in the lack of that identification, which is the central purpose of this study. The participants, while coming at the problem from varying intellectual and social spaces, not only agree that a problem exists, but focus on solutions. Being aware of the racial and socio-economic impact is a common thread that these participants share in their educational zeitgeist. It is also clear, based on their interviews, that they all cherish children and share the desire to give all children a fair shake.

Separate analysis of the participant interview and focus group data yielded the same top themes, as well as the apex theme: nurture. The data analysis shows that schools who have an

existing nurturing program and execute the program with vigor have identified much higher percentages of historically unidentified gifted students than schools that have not instituted a nurturing program. The interview data supported that schools must impose ways of identifying potential gifted students that are not culturally bias, like standardized tests are. The common way of assessing performance to indicate potential giftedness is not accurate. "Gifted behavior rating scores, was not a predictor of student academic performance" (Cleveland, 2017, p. 71).

Equally the data showed that teachers must be aware of the inequity and being forward working to make changes. This requires training. It is not clear if a specific program like *Creating a More Respectful School System for a Diverse Population of Students and Families*, offered by the North Carolina's School Board Association or the creation of an Equity Task Force that disseminates its information to the district Superintendent down to the administrators is responsible for cultural awareness (including socio economics) or if the mere fact that building level administrators make their teachers aware of their expectations, which would indicate a high level of competent leadership is more effective. Having a good heart or wanting to change is not enough. Milner and Laughter (2015) in their article *But Good Intentions are Not Enough*, explained that teachers should be the focus of change, as follows:

> Teachers, many of whom have good intentions, report their relative under-preparedness to work with children living around and below the poverty line. These same teachers' concerns—most of whom are White—about teaching children who live in poverty pale in comparison to their concerns about teaching Black and Brown students. (p. 342)

CHAPTER FIVE: CONCLUSION

Overview

The purpose of this multiple case study is to explore how schools with a higher than average percentage of historically underrepresented students have identified them for placement in academically gifted classes. This chapter is organized in five sections: a summary of findings; discussion of findings in light of the relevant literature; empirical, theoretical and practical implications; an outline of delimitations and limitations; and recommendations for future research and summary.

Summary of Findings

The success of this study hinged on locating schools that have successfully identified historically unidentified gifted students. School district data was compared against one another using rival pattern matching (Yin, 1994). Three schools were found. Selections were made by finding schools that exhibited higher than average identification of gifted students from Black, Hispanic, and impoverished populations. These settings were compared (Yin, 2014) using the replication approach (Yin, Bateman, & Moore, 1983) to ensure that they met the study's parameters. The three elementary schools selected were: Big Hills, Edison, and Newland Elementary. Ten participants were chosen within these settings to do interviews and focus groups where connections would be made (Moustakas, 1990). To qualify, participants had to be licensed faculty or staff members and be able to nominate or have influence over the nomination process of potential gifted students. Potential participants had to successfully answer a questionnaire located in Appendix C.

Case study research is effective for investigation in exploratory, descriptive, or explanatory purposes (Yin, 1981a, 1981b). This case study used phenomenological tools, and

concentrated on the exploration of the participants' individual stories (Creswell, 2003). It is through their stories that we come to understand the cases as they see them. The interviews took place in the LEA settings and took approximately one hour each. Interviews were transcribed and analyzed using a pattern matching logic (Saldaña, 2012) to increase validity and ferret out the three top and unique themes out of seven broad concepts. The final cycle of analysis results were: culture (33.9%), data (32%), and nurture (34.1%). The focus group data was analyzed using the same parameters and concurred with the interview results: culture (33%), data (25%), and nurture (41%).

The final analysis on all data points was culture (34%), data (30%), and nurture (36%), located in Table 8. These were selected as the most impactful themes. The apex theme was also clear, and nurture was selected as the apex driver to identifying historically underrepresented gifted students in North Carolina.

Central Question

The central question asked what factors of identification procedures result in higher than average identification rates of historically underrepresented gifted students. The interview data specifically spoke to the apex theme, nurture. These three schools all have nurturing programs in place that actively observe children who do not all present as precocious, with a high vocabulary, or exceptional spatial reasoning and/or mathematical skills. The programs encourage the challenging of children who may not present in the traditional ways: for example, quick wit, good at puzzles, talent with constructing complex designs, color, music, etc…. Any skill or talent observed that may lay outside the norm is a potential factor to get a child into a nurturing program. Samantha said:

> They [potentially gifted students] may or may not excel in all areas, but we have to recognize the areas where they do excel. We don't always nurture that talent the same way that we nurture reading and writing, and math. But I do believe that they deserve the opportunity to have those talents nurtured.

At least half of the participants specifically spoke about giftedness in the same category as special education, which it is. These are not merely advanced students, but students with needs. Flower said, "Most of, like these kids have these types of needs, which just don't fall into the normal range of needs, and that we should adapt our education instruction to meet that students' needs differently than the others."

It is also clear that the participants were aware of the disparity in gifted identification and look for potential students who may not have the requisite knowledge base, but who believe that given a level playing field would qualify for gifted programs. It sometimes seems like an unsurmountable obstacle for kids in poverty. As Winnifred said,

> I think when we look at the test… we talk about the test not being bias. However, if it [the test] talks about the beach, we have kids in poverty in the middle of the North Carolina, who have never been to the beach.

It was a common theme among the participants that the nurturing program is a way of providing those students with the potential intellect a base of common knowledge that would allow them to compete for academic services in a fairer process, which includes testing. At the least, even if students do not qualify, it fills in knowledge gaps that exist outside of gifted identification.

Research Sub-Question 1

What data are prioritized by nominators and testers in the process of identifying gifted students? The prioritization of data used by nominators to identify these students became more

than traditional testing instruments for these schools. It is important to mention that each participant conceded that the tests are still valuable measurements, but not to all students as they are culturally biased, and therefore, less accurate for impoverished, Black, and Hispanic students. The schools developed multiple pathways for potential gifted students that did not prioritize one over the other. Ginger said of the processes in her school:

> What happens in K-2 and the younger grades, they have been through differentiation, providing experiences, enrichment, and stem activities. We try to provide children another opportunity to show their multiple intelligences. Their different gifts that they have, because later on it becomes a more formal process. But the younger grades are more about nurturing. [It's] one of the beautiful things of being on the needs determination team that we have here. Is that a lot of these kids I've seen in the lower grades, and so, when their name comes up later on, I'm like, hell yeah. I had that child.

Being able to analyze and track data is important, but the observations of multiple teachers in the classroom and through portfolios is just as important when conferring within the needs determinations teams. The pathways are: data (traditional testing instruments), progress in nurturing program resulting in nomination and acceptance by committee, and portfolio pathway (a collection of works by the student showcasing exceptional work over a period of time).

Research Sub-Question 2

What state-defined factors and values influence the process of identification in Big Hills, Newland, and Edison Elementary schools? Data is an important theme, because the state and districts still use data as a primary identification tool, and therefore remains an influencing factor. However, these selected schools augment the common data tools by adding the nurturing piece, which ultimately allow potential gifted students to catch up. The nurturing programs, in

the participant's opinion, make the data stronger if it is not used as a single data point. If it were up to Kim, "They would get enrichment in reading and math all week long, the whole school year, not on alternate Mondays, and I think you know, we don't just rely… on test scores," rather than take tests.

All three schools have adopted a portfolio style of collecting data that illuminates student progress in a multi-dimensional way, which is more accurate for bad test-takers, who often fall into historically underrepresented categories. The biggest issue with data is that it seems to be what the participants feel is the only real way to qualify a student based on state defined guidance, which excludes large portions of the population. Nancy said, "We need to have all ranges [or] we're going to lose them." It is clear that data is not a pariah among the participants, but that the common use of valuing it as the most important pillar for identification has led to what they see as a huge disparity in racial and socio-economic identification.

Research Sub-Question 3

What specific school-based values are used to identify gifted students beyond the state definition? School based values are far and away the clinching factor in identifying more traditionally underrepresented students according to the data. There is a culture in each selected school to find highly intellectual students who did or do not present early, but were identified later after being challenged in the nurturing programs. The school's values intentionally override potentially biased factors like race and poverty. Based on the interviews, the values that lead to higher percentages of historically underrepresented students being identified are driven by building administration and guided by district leadership. Kim specifically spoke about the responsibility of leadership to enact programs and train staff to recognize what the data shows when it comes to inequalities in identification.

> I think a lot has to do with the personnel who are in charge of those different programs. In some districts you have people wearing multiple hats, so when they're not focus on developing our [Academically and Intellectually Gifted] AIG students they can kind of be clouded.

It is implied in Kim's statement that her school's success was related to training the staff, but also the support of the district who made sure she had the resources to have a consistent nurturing program. Kim's administrative vision was shared by all the interviewed administrators in selected schools, but it was reciprocated by the district Superintendent, who ultimately made resources available for the programs to remain funded. The results of all three school programs led to highly increased percentages of historically underrepresented gifted students.

Discussion

The following discussion explores how the selected schools identified a higher than average percentage of historically underrepresented students for academically gifted classes. This section will be organized into two lines: empirical and theoretical.

Empirical

Giftedness seems to be an idea that clearly exists within the collective mind. Everyone has gone to school and therefore feels that they know what it means. However, specifically defining giftedness, at least for academic purposes, is ambiguous at best across the country and certainly within the state of North Carolina. Even the participants were hard pressed to have a cogent answer. Flower said, "We alternate you know? We would change it [definition] every couple years, whether we want to identify a third grader or nurture them." Samantha was even unsure about the subjects that were considered gifted, "I still don't believe that we recognize all talents as giftedness, but you know if I have a student whose expert in [drawing], I would call

it, like gifted in art, right?" In the 1940s, IQ was the single metric with a cut-off score of 130 (Hollingworth, 1943), whereas the average IQ in the United States is 98 (Lynn & Vanhanen, 2006). This type of quantitative and mathematically measurable scores has not changed very much in the subsequent 70 years.

Presently, the federal definition for giftedness includes students who have the outstanding talent and perform or show the potential for performing at remarkably high levels of accomplishment when compared with others of their age, experience, or environment (U.S. Department of Education, 1993). North Carolina defines it nearly the same way in Article 9B (N.C.G.S. § 115C-150.5). However, NC also explicitly says that each local education agency (LEA) determines how to identify and serve its own AIG student population. LEAs generally and broadly measure giftedness by scores that fall above the 95th percentile on standardized tests. In theory this means there could be over 100 definitions for giftedness in North Carolina. There may be positives and negatives associated with a vacillating definition; however, having a definition that is constantly in flux creates more subjectivity than a gravitational pull towards a common, fair, and equitable definition. The flexibility allows districts to create an environment where some schools have moved the needle closing the underrepresented gifted gap. Simultaneously, it allows other districts to continue imposing traditional definitions without regard for the gap in identification between affluent and White students versus top-performing minority students and those from a low SES (Plucker & Callahan, 2014). There are 115 school districts in North Carolina. Theoretically, each could have a completely different definition for giftedness.

Despite the lack of a universal and applicable definition for giftedness in North Carolina that takes into account race, culture, and poverty, these three selected schools have

acknowledged a gap in identification exists and have targeted the top 5% of each sub-group to remedy potential bias. One of the issues with nomination (conscious or subconscious) is negative stereotyping of underrepresented students, which impedes the ability of nominators to appropriately identify potential gifted students from historically underrepresented students due to a lack of understanding into the cultures of poverty and race (Cleveland, 2017; Ford, Grantham, & Whiting, 2008). Data shows that young and inexperienced teachers try to fix needy students rather than understand them culturally (Tomlinson & Jarvis, 2014). The leadership of these schools has provided training and awareness to circumvent the issue, because misunderstanding causes underestimation by nominators that perpetuates the cycle of non-participation for historically underrepresented gifted students (Olszewski-Kubilius & Clarenbach, 2012).

Identifying the top performers in each sub-group and eliminating reading as an obstacle to identifying intelligence bypasses culture underestimation and subconscious bias. Students in the top 5% of subgroups along with other students who have been observed and identified as having a unique skill or talent, or what Cynthia calls a "spark," are included in a nurturing program. This may consist of pull-out sessions or push-in sessions where nurturing students are given challenging work to push them. It also allows for remedial reading and math for highly intellectual students who are behind academically due to home environments: lack of reading, access to internet, other resources like food, permanent housing etc.… The use of this practice implies a deeper understanding of minority and impoverished students (Milner & Laughter, 2015). By district leadership providing resources and building level administration providing training for cultural awareness, individual nominators can reflect on personal values and ethics in effort to change behaviors in order to rectify the lack of diversity in gifted programs (Ward, 2013).

The data in this study concurs with the related literature. The underrepresentation of Black, Hispanic, and impoverished students in gifted programs dates back nearly 100 years (Brown, 2008). The methods used to identify giftedness has created inequities (Fischer et al., 1996; Ford, 2013), which includes North Carolina broadly evidenced by the Department of Public Instruction's AIG data. Specifically, these inequities are targeted on Blacks, Hispanics, and those of low SES who have not fared well with the identification practices, and have largely gone unidentified (Peters & Engerrand, 2016; Yoon & Gentry, 2009). Last, focusing on high stakes testing as an exclusive measure of giftedness produces outcomes contrary to its intent (Croft, Roberts, & Stenhouse, 2016; Ravitch, 2010; Sacks, 2001).

What the data in this study shows is that while all the above are true, the acceptance of these facts at the building level combined with the specific training of teachers to observe behaviors that are not currently and metrically attached to potential gifted students can drastically change the identification of historically underrepresented gifted students. Big Hill, Edison, and Newland Elementary Schools have all significantly increased identification by using standardized testing metrics as only a part of the identification process. They have developed an observation process that eliminates the biased lens of using strictly data via standardized tests to identify gifted students. This multipronged process includes the collection of portfolios and inclusion into a nurturing program meant to improve cognitive responses, reading levels, and math skills.

Theoretical

Social Dominance Theory (SDT - Sidanius & Pratto, 1999) is the lens this study looked through. SDT is the understanding that human cultures and societies organize themselves into group-based hierarchies. These groups are stratified with one hegemonic group and at least one

subordinate group (Brown, 1991, pp. 137-139; Murdock, 1956; Putnam, 1976). The basis for stratified positions are economic, racial, religious, and gender, based on the dominant group, while the other group(s) are oppressed (Engels, 1891; Mosca, 1896/1939). The stratified group is rewarded, and the oppressed group is disproportionately treated unfairly (Pratto et al., 2016). The United States has systemic issues of inequality for ethnic groups, which include Black, Hispanic, and impoverished groups (Alexander, 2010; Fredrickson, 2002; Jackman, 1994; Massey, Charles, Lundy, & Fischer, 2006; Mays, Cochran, & Barnes, 2007; Sidanius & Pratto, 1999). These oppressed groups fall prey to the same system within education. In other words, the groups discussed, Black, Hispanics, and impoverished peoples, are all historically oppressed groups within the educational apparatus (Wright, Ford, & Young, 2017).

What Big Hills, Edison, and Newland Elementary schools have done is recognize that this system of inequality exists in society in accordance with SDT and that this oppressive system does not stop at the front door of a school. Kim said when training her staff that they begin conversations about gifted nominations, "you have to also start looking at socio-economic, you know resources… and how many of our students are low SES… how many are minorities?" To this end each selected school identifies the top 5% of each sub-group for inclusion in the nurturing program, which allows them the space to grow and work towards gifted identification while getting the extra services they need. The nurturing program defies social hierarchies by ignoring the dominant group. Kim went on to say, "It really doesn't matter what they come with […] into the building. They are who they are, you know, and it's creating that safe space here for them to be who they are." Cynthia believes that universal protocols would reduce the number of non-identified students by, not testing "them on their literacy level at an early age, but based on their thinking skills, … deductive reasoning, … analytical reasoning, … convergent thinking,

divergent thinking, brainstorming, creative thinking, and visio-spatial logic. I mean, there's all these different components."

While much of the data in this study concurs with the many findings of other gifted studies and research into SDT, this study bridges the gap into education. SDT does not affect society outside of education, but within. Sidanius and Pratto (1999) stated the only way to deal with the oppression of groups is to identify that oppression exists in society. These schools deal with oppressed groups by accepting there may be bias (conscious or subconscious) and provides systems that bypass individuals from being able to singularly influence gifted nomination outcomes. Secondly and simultaneously, it empowers individuals to challenge a regressive system of data qualification based on bias standardized testing for inclusion into nurturing programs.

Implications

The implications section is organized into three sections: empirical, theoretical, practical. The empirical describes how the related researched supports implications. The theoretical section identifies how SDT's lens is applied to the research and how conclusions were drawn. The practical identifies action-based implications that may guide education leaders in applying pragmatic solutions to a similar problem in their LEA.

Empirical

Blacks, Hispanics, and those who suffer in poverty have been left out of gifted education, with predominately Caucasian and Asian students identified as gifted (Bernal, 2002; Ford, Harris, Tyson, & Trotman, 2002; Ford, Howard, & Harris, 1999; Grantham, 2003; Lee, Matthews, & Olszewski-Kubilius, 2008; Olszewski-Kubilius & Steenbergen-Hu, 2017; Worrell, 2007; Wyner, Bridgeland, & Dilulio, 2007). The majority of methods used to identify giftedness

has created inequities, which continues today and is based primarily on standardized testing (Fischer et al., 1996; Ford, 2013) and finds that Black students may be underrepresented in gifted programs by as much as 55% (Ford et al., 2008). These figures are accurate within the country, North Carolina, and the district where this study takes place (excluding the selected schools), which have identified extraordinary percentages of historically underrepresented gifted students. Based on the interviews all the participants agree that data does not accurately point to gifted students on a consistent basis.

A common element of confusion with nearly all the participants was a cogent definition of giftedness, and moreover the ability of LEAs to change that definition, which may consciously or subconsciously influence the ability to be nominated. A non-uniform definition of giftedness prevents the ability of faculty and district personal from identifying specifically underrepresented students for a program that has a flexible and ever-moving definition (Plucker, & Callahan, 2014). Samantha even had concerns about what or what could not be seen as giftedness, "I still don't believe that we recognize all talents as giftedness." Data was an impacting theme in this study; however, data as a singular pillar of identification was commonly thought of by all the participants as a weakness in the system and had to be manipulated or sidestepped for them to be able to nominate students who they observed to be gifted despite quantitative measurements that were often culturally biased.

Theoretical

Social Dominance Theory (Sidanius & Pratto, 1999) stated that societies are arranged within a stratified hierarchy. The four main identifiers for social hierarchy in the United States are age, affluence, gender, and race. Therefore, an older rich White male inhabits the top of the hierarchy as defined by SDT. This is the general idea. The participants were all very aware that

minorities and students who suffered from poverty have universally been oppressed by bias, lack of access, lack of resources, lack of support, early reading etc.…The acceptance and understanding by leadership was at the center of these school's success. The administrative participants in this study universally believed that they had to make accommodation for students who were culturally oppressed by a hierarchal system subconsciously supported by society as a whole (Sidanius & Pratto, 1999). Teachers and other faculty had to actively bridge the gap by being prepared to provide remedial activities (even to highly intellectual students), observe and identify alternate signs of giftedness, as well as build trust by developing relationships whereby these observations could be made. The cultural dilemma is that some students are not as prepared as others when they arrive at elementary school and that their intelligence could not be properly measured as compared to students who reside higher on the social hierarchy. Teachers who developed a trusting relationship with underrepresented students were an important factor, but it was more often implied rather than said. Gifted students "yearn for deep, meaningful relationships both with friends and with teachers" (Zabloski, 2010, p. 141). Without the unspoken and innate understanding that teaching is also relationship building, the gains made by these three schools would not have occurred.

Practical

There is a gap in identification of underrepresented students and the question is how did Big Hills, Edison, and Newland narrow it. The gap only narrows when school leaders explicitly accept that giftedness is a matter of intelligence and not a measure of math and reading proficiency, and that this cannot be fairly measured in an environment where certain groups are culturally oppressed. Leaders must accept that barriers exist that limit historically underrepresented gifted students from participating in gifted programs (Siegle et al., 2016). All

stakeholders should understand how the process of gifted identification would benefit from change. Data, as an impacting theme in this study, should not be used as the primary data point for gifted identification. Society is stronger for having gifted children in programs that include poor and minority students (Olszewski-Kubilius & Thomson, 2010). This process could begin by creating and defining giftedness in a universal way that takes in account racial and cultural elements. Data for the sake of data has contributed to the current lack of minority and impoverished participation in gifted programs.

Implicit in closing this gap is the need to level the academic playing field. Many students do not come to kindergarten prepared for school due to poverty and other cultural factors; however, they are tested for giftedness prior to being having the skills they need to achieve (score wise) what their intelligence may indicate. Underrepresented gifted students are outperformed by affluence and Whites on standardized tests based on numerous cultural factors including poverty, early education, and reading proficiency, not intelligence (Cornwell, Mustard, & Van Parys, 2013; Kurtz-Costes, Swinton, & Skinner, 2014). The nurturing programs of the selected schools are designed to increase cognition, decrease math and reading gaps, and to prepare potential gifted candidates to generate artifacts in a portfolio or perform on the standardized gifted identification tests.

Nurturing also creates an environment that creates better relationships between underrepresented students and their mostly middle-class teachers. The trust that develops creates confidence in gifted candidates who do not often get this reinforcement at home for many of the reasons already mentioned in this study. The three impactful themes of this study, culture, data, and nurture, are interlinked by the ability of teachers to create a space where race, culture, and poverty do not affect the ability of a potential gifted candidate to reach a level where they can be

identified. Nurturing is the apex, the growth of reading, math, confidence, inclusion, self-worth, trust and relationships with teachers. Zabloski (2010) stated gifted dropouts, "desired deep and personal relationships with their teachers" (p. 135). It goes on to say that the most frequently cited reason for gifted students dropping out of school was due to poor or nonexistent relationships with teachers (Davis & Rimm, 2004; Zabloski, 2010). School leadership and teachers must nurture relationships to open communication pathways to understanding. In a vacuum there is only misunderstanding that results in the under estimation by nominators, which perpetuates the cycle of non-participation for historically underrepresented gifted students (Olszewski-Kubilius & Clarenbach, 2012).

Delimitations and Limitations

Delimitations

This study was limited its scope by the selection of three North Carolina elementary schools, defined as kindergarten through fifth grade. All elementary school students are tested for gifted services in the second and/or third grade using the following standardized assessments: Cognitive Abilities Test (CogAT), the Iowa Assessment, and End of Grade scores (NC Public Schools, 2018) that are 95% or above. Students who have demonstrated an IQ of 130 or above, who have the outstanding talent and perform or show the potential for performing at remarkably high levels also qualify (U.S. Department of Education, 1993); however, IQ tests are not administered by the LEAs and are the responsibility of the parent. IQ tests are not covered in this study since the schools do not provide them and there were no examples within the settings.

Some students, however, are missed during normal testing and do not qualify for gifted services due to their rate of academic and/or emotional maturity being slower than their peers. Students learn and mature at different rates. Second and third grade may not provide the time

necessary for some students of high intellectual ability who have not acquired the background knowledge and academic skill sets essential to be documented as gifted (Siegle et al., 2016). Time for maturity and the acquisition of background knowledge is crucial for students from underserved populations who may have had fewer experiences and academic skills necessary to be recognized as gifted (Siegle et al., 2016).

Blacks, Hispanics, and those suffering from poverty are shown to receive lower scores on achievement tests than their White affluent peers (Plucker, Hardesty, & Burroughs, 2013; Valencia & Suzuki, 2001). Even students with an IQ above 130 who cannot read will not be identified via standardized methods, because reading level is not an indicator of intelligence and concepts look differently based on cultural differences (NAGC, 2017). Present day statistics show that obstacles persistent and limit participation of underrepresented students by the continual identification practices based around standardized tests (Siegle et al., 2016).

Limitations

In North Carolina approximately 80% of teachers are White, 14% are Black, and 4.9% are non-white or non-Black. Only 20% of all teachers are male. The participant pool in this study, while robust in information, was made up of 100% women. The study may have been limited by the lack of the male perspective. In addition, only 30% of the participants were people of color. More participation by people of color and male teachers may have added to the overall depth of the study.

Recommendations for Future Research

There are several areas of future study that would add to the existing lexicon of information. This section will be broken up into three sections: recommendations for administration, for teachers, and general.

Administrators

- Further study into how the process of casting a broad net via a nurturing program (like a farm system in sports) could increase nominations of historically under-identified students
- Study the implications of comprehensive training programs for teachers that recognize cultural differences that include poverty and/or personal ethos of administrator as a pervasive school standard

Teachers

- Granting more power to teachers as experts in identifying potential gifted students
- Limiting standardized testing data as a sole indicator for automatic nomination into gifted programs

General

Further study should be undertaken in middle school AIG programs in North Carolina to identify how nurtured elementary school students from underrepresented demographics perform in gifted classes. Research should be undertaken to establish if the nurturing programs have properly prepared students and if they have been identified or placed in gifted classes as high fliers. Studying the qualitative reactions of the students themselves may be the most informative. Additionally, the participants should represent a broader range of races and ethnic groups that specifically reflect underrepresented gifted populations, and that may also self-identify as having experienced poverty themselves.

Summary

The impacting themes in this study were culture, data, and nurturing. Nurturing is the main driver in identifying underrepresented gifted students. Nurturing was regarded as a positive attribute in the study, while culture and data were often discussed as weaknesses of the system. The focus on data as a primary identifier of giftedness, while culture was ignored (including race, ethnicity, and poverty) has created an inequity among gifted populations. The process of nurturing in the selected schools described by the participants denies bias by including students who may lack certain skills, but who have also been observed to have high levels of intelligence. "The notion that measured intelligence used as the primary or exclusive criteria for identification and entrance into gifted education is neither equitable nor indicative of best practices" (Wright et al., 2017, p. 46).

The success of the three elementary schools in this study has done three things: accept a problem exists, identified the top 5% of performers in each sub-group, and created multiple pathways to be nominated, which includes portfolios and a nurturing program. These ideas are not novel and exist throughout the state; however, these three schools have decreased the identification gap where others have not. The difference seems to be that the leaders of these schools executed these programs with vigor, followed up with staff training (including cultural awareness), and expected positive results. Secondly, each participant interviewed passionately desired that all children be offered a fair and equitable education. It felt like each participant was on a personal mission to open the door to opportunity and success for students who reside in a lower social strata.

The takeaway from this study is that gifted program identification policies need to be conscious of all economic strata, racial bias, and ethnic culture; however, people – human beings

– must believe and execute these policies, or they are not worth the paper they are printed upon. The participants in this study each presented a personal connection to their students, which indicated how important the relationships were and the desire to see the students succeed by being identified as gifted. The three schools' nurturing programs specifically target students who may be gifted but lack certain academic skills to present on standardized tests. Nurturing removes this and focuses on the unique way that students think and perform when allowed to participate on a level playing field. Professional teachers trained to identify academic behaviors exhibited in non-traditional ways (portfolios) removes reading as a pre-qualification for identification and simultaneously provides the extra tutoring needed to allow low achieving, highly gifted students to become identified and share in the rigor of gifted programs. This preparation allows for a smoother transition to middle school AIG clusters and high school AP classes.

Caring, trained teachers are the catalyst for the success of these schools and have broken down nearly a century of underrepresentation. The actions taken by these schools intentionally mitigated the gap between White and historically underrepresented AIG students. The relationships formed between the participants and students cannot be underscored enough. Students desire "deep and personal relationships with their teachers" (Zabloski, 2010, p. 135). The students who are not identified in this study for reasons of poverty, race, and culture are the gifted dropouts of tomorrow.

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APPENDICES

Appendix A

IRB Approval Letter

LIBERTY UNIVERSITY.
INSTITUTIONAL REVIEW BOARD

October 24, 2018

Michael D. Acosta

IRB Approval 3404.102418: Gifted Education: A Multi-Case Study on the Identification Process of Historically Underrepresented Students in Gifted Programs in North Carolina

Dear Michael D. Acosta,

We are pleased to inform you that your study has been approved by the Liberty University IRB. This approval is extended to you for one year from the date provided above with your protocol number. If data collection proceeds past one year or if you make changes in the methodology as it pertains to human subjects, you must submit an appropriate update form to the IRB. The forms for these cases were attached to your approval email.

Your study falls under the expedited review category (45 CFR 46.110), which is applicable to specific, minimal risk studies and minor changes to approved studies for the following reason(s):

6. Collection of data from voice, video, digital, or image recordings made for research

purposes.

7. Research on individual or group characteristics or behavior (including, but not limited to, research on perception, cognition, motivation, identity, language, communication, cultural beliefs or practices, and social behavior) or research employing survey, interview, oral history, focus group, program evaluation, human factors evaluation, or quality assurance methodologies. (NOTE: Some research in this category may be exempt from the HHS regulations for the protection of human subjects. 45 CFR 46.101(b)(2) and (b)(3). This listing refers only to research that is not exempt.)

Thank you for your cooperation with the IRB, and we wish you well with your research project. Sincerely,

G. Michele Baker, MA, CIP
Administrative Chair of Institutional Research
The Graduate School

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Appendix B

Participant Questionnaire

1. Are you a nominator for gifted students?
2. Are you a licensed faculty or staff member?
3. What is your position?
4. Do you have direct contact and/or influence with the gifted program or its students?

Appendix C

Interview Guide

1. Please tell me about yourself as an educator.
2. How long you have been in education?
3. Why did you choose education?
4. What is your role, what do you do?
5. Do you nominate students for AIG services?
6. Tell me about your experience in gifted education from your point of view?
7. How would you ideally define giftedness?
8. How do you think giftedness is defined in North Carolina education?
9. (if different) Why do you think your definition is different?
10. Do you believe gifted education is important? Why or why not?
11. In your experience, does this school exhibit values, in reference to gifted students, that others may not?
12. Explain how you understand the phenomenon of underrepresented students in gifted programs in North Carolina.
13. How do you define poverty?
14. Some people believe that there is a disparity between impoverished students identified as gifted in NC. What would you say to them?
15. There are those who believe that there may a subconscious reluctance to identify certain students based on socio-economics or race at some schools. How do you feel about this?
16. Please explain how you understand the process of this school in identifying gifted students.

17. Do you believe that this process differs from other schools? Why?
18. Suppose your school's process was the standard for all schools in N.C., please describe what that would look like in the state?
19. How would you describe underrepresented gifted students?
20. How does your personal experience inform your decision to identify students as gifted?
21. Beyond your licensure, how would you describe your personal qualifications to identify gifted students?
22. Tell a time when you believe a gifted student was not identified.
23. Tell me a time when you believe a non-gifted student was identified as gifted.
24. Why do you believe that some of the students you refer for gifted testing are not identified?
25. Describe how you believe poverty plays a role in a student's ability to be identified.

Appendix D

Focus Group Questions

1. Explain why gifted education is important in K-12 public education?
2. Why are these services important to individual students?
3. Research shows that 25% of gifted students are underachievers and their efforts often lead to lack of satisfaction, i.e boredom (Galbraith & Delisle, 1996). Do you believe that gifted education is an imperative service, why, and how does this information relate?
4. Data shows that 88% of high school dropouts had passing grades, but circumstances in students' lives and an inadequate response to those circumstances from schools has led to dropping out (Bridgeland, Dilulio, & Morison, 2006). How could gifted services could address this problem? Please explain.
5. Tell me how it is possible to misidentify a gifted student?
6. What could this school do better in your opinion to identify gifted students?
7. What universal protocols would reduce the number of non-identifications (make it easier to identify)?
8. What other things are relevant to the identification of historically underserved students that we have not yet covered?

Appendix E

Consent Form

The Liberty University Institutional
Review Board has approved
this document for use from
10/24/2018 to 10/23/2019
Protocol # 3404.102418

CONSENT FORM

GIFTED EDUCATION: A MULTI-CASE STUDY ON THE IDENTIFICATION PROCESS OF HISTORICALLY UNDERREPRESENTED STUDENTS IN GIFTED PROGRAMS IN NORTH CAROLINA

Michael D. Acosta
Liberty University
School of Education

You are invited to be in a research study to explore historically unidentified gifted students. You were selected as a possible participant because you have nomination or selection authority with respect to the gifted program at this Local Education Agency (LEA). Please read this form and ask any questions you may have before agreeing to be in the study.

Michael D. Acosta, a doctoral candidate in the School of Education at Liberty University, is conducting this study.

Background Information: The purpose of this study is to explore how schools with a higher than average percentage of historically under-represented students have identified them for placement in academically gifted classes.

Procedures: If you agree to be in this study, I would ask you to do the following things:

1. Complete an interview at your school or a place of your choosing. The interview may take up to one hour and will be audio recorded.
2. Participate in a follow up focus group. The focus group will be video recorded and will take approximately one hour to complete.
3. You will receive a professional transcription of your interview and focus group participation and be asked to check the transcription for accuracy. If the transcription is correct or you identify issues, contact me via email at macosta3@liberty.edu.

Risks: The risks involved in this study are minimal, which means they are equal to the risks you would encounter in everyday life.

Benefits: Participants should not expect to receive a direct benefit by participating in this study. Benefits to society may include the ability to close a historically underrepresented gap in gifted programs for public schools.

Compensation: Participants will not be compensated for participating in this study.

Confidentiality: The records of this study will be kept private. In any sort of report I might publish, I will not include any information that will make it possible to identify a subject. Research records will be stored securely, and only the researcher will have access to the records.

- I will use pseudonyms for all districts, schools, and participant names. I will conduct the interviews in a location where others will not easily overhear the conversation.

Appendix F

Reflective Log

The following is a transcription of an entry from the researcher's reflective log. It describes observations and feelings that occurred during the interview meetings. This entry was entered in November of 2018 at Edison Elementary.

This is a poor school. It brought back memories. From the art work curling on the walls to the looks of the kids themselves, so eager for a hug and attention. Even the second hand clothes were apparent (different from the other day). The teachers I saw were happy and nice enough, but they had less energy (they were tired). The principal was exceptional with a familiar story. Born poor, on a farm, father an illiterate genius and the responsibility to take care of her brothers/sisters, she was gifted. The only black child in a contained gifted class. She seemed aloof and very tired.

The front office was a constant flow of parents wearing tee-shirts and slippers. The deputy (SRO) was more of an emotional icon than of law and order. Kids actively sought him out for hugs and parents knew him by name. Even in Newland the deputy sat behind the desk like it was his second job. He joked and knew all the kids by name too. Why are the deputies so prevalent in the poor schools and not the affluent ones?