Leaders' Sensemaking and Sensegiving for Equity and Excellence in

K-6 Title I Advanced Academic Programs

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Capstone

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by

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Executive Summary

Dr. David Eddy-Spicer, chair

Nationally, students attending schools that serve higher percentages of economically vulnerable families have less access to talent development opportunities and advanced academic services (Yaluma & Tyner, 2018). Despite decades of research in the field of gifted education concerned with equity issues and historically underrepresented populations in gifted identification (Briggs et al., 2008; Bruch, 1975; Castellano & Chandler, 2022; Ford & Harmon, 2001), there has been a lag in the field of practice with varying and sporadic attention to updating policies and practices. Noted challenges to leading change in this area include: varying paradigms which all fall under the same term of "gifted" (Dai & Chen, 2013), seemingly paradoxical goals for standardization and equality versus honoring variable student strengths, interests, and needs (Peters et al., 2017), and the politicization of this area of public education (Colangelo et al., 2004). Further, there is also rarely professional learning in teacher or leader preparation around developing talent or serving students with advanced learning needs that might improve the current state (Rinn et al., 2018). The combined effect of incoherence in the overall field, longstanding inattention to gifted education in the field of practice, and institutional barriers to change is a disconnect between the field of research and field of practice that continues to result in excellence gaps that mirror the achievement gaps on which most districts focus school improvement efforts (Ford, 2012; Plucker & Peters, 2016; Wai & Worrell, 2020; Yoon & Gentry, 2009).

As districts have recently increased awareness and action to abolish inequity, this lag in educational practice has been highlighted and has resulted in some districts considering the elimination of gifted programming; however researchers caution such moves would merely hide inequities in opportunity and would be most detrimental to historically underrepresented student groups (Dixson & Peters, 2020; Dixson et al., 2020). Instead, they call for districts to enact practices that are more aligned with current research from the last several decades. Literature related to strategies for equity and

excellence can be categorized into three focal areas: 1) recognizing and correcting inequities in systems (Lohman, 2005; Pfeiffer, 2012; Renzulli, 2012), 2) reframing gifted education around services to match needs rather than labels (Adelson et al., 2012; Peters et al., 2014), and 3) accountability measures that go beyond identification numbers (Frazier-Goatley et al., 2022; Plucker and Peters, 2016).

This study attempted to understand how leaders at three positive outlier Title I schools in one district advanced the goals of equity and excellence through the advanced academic program opportunities in their individual schools. The study proposed a conceptual framework using the body of theory that looks at how leaders make sense of ambiguous contexts (Johnson & Kruse 2019; Weick, 2020) and support change in the organization through types of sensegiving (Maitlis & Lawrence, 2007; Vlaar et al., 2008). Through interviews with multiple leaders at each site and analysis of three years of related school documents, the comparative case study describes how leaders integrate advanced academics within the broader instructional program at the school, what influences their individual sensemaking, and under what circumstances and how they provide opportunities for collective sensemaking with various constituent groups (e.g. families, teachers, the instructional leader team).

Major themes from the study suggest successful leaders in elementary Title I schools balanced equity and excellence in advanced academic programs through a "both/and" approach. Leaders focused on providing access to rigorous instruction, implementing multifaceted programming, and setting high expectations for teachers to provide talent development opportunities and differentiate beyond minimum proficiency standards based on students' needs. The study highlights the persistent commitment and effort required by school leaders to shift mindsets and practices in gifted education, suggesting a need for broader field-wide support to overcome resistance and political challenges. Overall, the research contributes to the understanding of leadership in gifted education and emphasizes the importance of collective sensemaking to maximize student outcomes through the interdependence of equity and excellence in advanced academic programming, particularly in high-poverty schools.

Based on these themes, this study proposes five recommendations. The first three recommendations suggest field building involving multiple stakeholder groups (organizations, researchers, districts), working in collaboration to:

- Develop an organized framework of program types aligned to respective goals and practices that could support districts in connecting purpose to outcomes and communicating with families about updated conceptualizations of gifted education.

- Focus research efforts on defining excellence and high leverage accountability practices to move from a focus on identification to a focus on equity in student outcomes.

- Include content related to equity and excellence in advanced academics in teacher and leader preparation programs so that districts alone are not left to prepare educators to serve the diverse needs of special populations of students in today's inclusive classrooms.

The second category proposes two recommendations for districts:

- Use tools for school accountability, sustainability, and improvement related to the three focal areas of leading for equity and excellence in advanced academic programs.

- Create incentives to increase staff stability in Title I schools to increase the likelihood that students who are economically-vulnerable will benefit from a staff prepared to nurture cultures of deeper learning.

The last category proposes one recommendation for school-based leaders:

- Plan for distributed expertise to increase collective sensemaking opportunities across school staff. Until educator preparation programs do better to prepare teachers to develop student talent and provide advanced differentiation, staff will require frequent opportunities for sensemaking and scaffolding from the work of their professional learning communities (PLCs) so that they are ready to provide rigorous instruction for students.

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Leaders' Sensemaking and Sensegiving for Equity and Excellence in K-6 Title I Advanced Academic Programs

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Dedication

To Eddie, for your steadfast encouragement along this journey, and for enduring date night discussions about sensemaking and chapter progress updates.

To Eamon and Tess, for your patience as your mom took on this aspiration and spent many hours of extra weekend time reading, writing, and thinking about this work.

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Chapter I - Introduction

Gifted education has long been a contentious topic in U.S. public education, subject to debates about its advantages and disadvantages. Disproportional representation, differing constructs, and dichotomous opinions about whether gifted education is a frill feature or an essential form of special education have afflicted the field for multiple decades but have not garnered focused and widespread attention until recently. Historically, more affluent schools identify far larger numbers of gifted students in comparison to higher poverty schools which identify fewer or sometimes no gifted students. However, as a result of the recent rise in examining the role of schools in perpetuating institutional inequity, education leaders are probing more deeply into their personal beliefs and professional practices in many areas, including gifted education. Because educator training for meeting the needs of advanced learners in environments driven largely by standardized assessment is rare, most school leaders are left to implement and communicate to staff and their local communities about practices in gifted education based on their widely varied background experiences and lack of familiarity with current research. This study examines school leaders' sensemaking and sensegiving in three higher poverty elementary schools in a large mid-Atlantic school district. Selected schools were noted as positive outliers in working to advance and integrate a dual focus on equity and excellence through broad talent development opportunities and systems for differentiated instruction to meet the needs of advanced learners.

Problem of Practice

Achieving coherence around equity and excellence in the field of gifted education within U.S. public schools has been slow and restrained by forces both within the field of research as well as the field of practice (Ambrose et al., 2010; Callahan et al., 2017; Robinson, 2017; Subotnik et al., 2012). Except for historical events such as Sputnik, where the U.S. was perceived to have lost a competitive

edge, there has not been unified energy or messaging in U.S. schools around gifted education (Jolly,

2009). Competing constructs and foci and sparse urgency to attend to the needs of advanced learners

have made efforts to serve the needs of advanced learners disjointed in the field of practice (Hernández-

Torrano & Kuzhabekova, 2020; Plucker & Callahan, 2020; VanTassel-Baska, 2018). In many instances, the

sparse time spent focused on gifted education issues has attended more to identification and labels

disconnected from instructional implications to meet students' needs (Dixson et al., 2020; Hertzog,

2009; Heuser et al., 2017; Plucker et al., 2017; Subotnik et al., 2011). Without federal regulations or

consistent definitions to guide coherence to address the special education equity needs of students

working beyond grade level proficiency, policies and practices are fragmented and disparate from state

to state and are neither frequently nor consistently part of teacher or leader preparation programs

(Berman et al., 2012; Hodges et al., 2018; Rinn et al., 2020). Moreover, pedagogical approaches long

used in the field of gifted education (e.g. concept-based instruction, project based learning) provide

avenues for strengthening culturally responsive teaching practices to advance broader opportunities for

talent development. However, these approaches are sometimes confused to be an adequate alternative

for advanced learning programs versus one component of a comprehensive set of services to meet

diverse needs. As research progress is made, the field of practice is slow to enact updates that would

advance equity and excellence. Researchers note that the struggle is compounded by meager attention

to the needs of advanced learners in environments driven largely by accountability measures focused on

students who are not meeting grade level standards (Beisser & Jefferson, 2008; Borland, 2012;

Colangelo et al., 2004; Sternberg, 2012). However, as more attention is being called to gifted education,

leaders are put in positions that require leading for change in this area.

Tensions Around Equity and Excellence

Within the landscape of gifted education research, there has also been a great deal of concern

for multiple decades about underrepresentation of particular subgroups — students who are

economically disadvantaged, twice-exceptional, and culturally and linguistically diverse (CLED) (Briggs et al., 2008; Bruch, 1978; Castellano & Chandler, 2022; Ford & Harmon, 2001; Yaluma & Tyner, 2018). These concerns have crescendoed within the field of practice in the last several years as public school districts have intensified attention to equity (Burroughs & Plucker, 2014; National Association for Gifted Children, n.d.; Peters, 2022; Peters & Gentry, 2012). Data show gifted identification subgroup gaps mirror achievement gap data and reveal perpetuations of inequities that the field and school systems have a responsibility to remedy (Ford, 2012; Wai & Worrell, 2020; Yaluna & Tyner, 2018; Yoon & Gentry, 2009). These disparities force policymakers and education leaders to confront several aspects of their beliefs about public education. The ways that data is used surfaces examination of the core purpose of public education, such as whether it is centered around meeting a grade level proficiency benchmark or ensuring growth for all students no matter their starting point and learning rate. The focus on standardization prompts examining definitions of success and whether they are driven by an expectation of sameness or self-actualization of students on unique pathways. And the deficit-based focus on gaps invites critique of the ways proficiency accountability drives resources and instructional foci by calling into question whether methods used to produce passing test results are engaging, culturally responsive, and empowering for all learners.

Most recently within the equity focus on underrepresented populations in gifted services, the field has increasingly focused on two related issues — talent development (Ambrose et al., 2012; Horn et al., 2021; Renzulli & Reis, 2017; Subotnik et al., 2011) and excellence gaps (Plucker & Peters, 2016; Ricciardi et al., 2020; Rutkowski et al., 2012). Talent development frameworks use updated conceptualizations of intelligence, creativity, and motivation to redirect gifted education to account for the complex, diverse, and dynamic nature of developmental pathways and contextual factors, including school opportunities, that influence whether student potential is actualized as talent (Dai, 2010; Matthews & Dai, 2014). Such frameworks recognize the epigenetic nature of turning potential into

realized ability, including the role of environment and access to opportunity. Topics include aspects such as attention to culturally-responsive identification and programming, co-consideration of nature and nurture in talent development versus framing giftedness as a static trait, movement from identifying students as gifted to a process of matching student needs to different types of services, and considering students' learning needs within the context of local learning environments (e.g. local norming) to determine differentiation needs and promote more agile responsive instruction. A second focus, excellence gaps, calls attention to subgroup gaps in advanced achievement and the negative ways standardized, proficiency-based tests prominent since No Child Left Behind (NCLB) have slowed or stalled the growth of high-achieving students (Neal & Schanzenbach, 2010), particularly those who attend schools facing sanctions related to accountability in standardized testing (Yaluma & Tyner, 2018). Excellence gaps suggest a need for changes in accountability systems that measure not only grade level proficiency, but also promote higher expectations equally across all student demographic groups and propose expanding accountability focus beyond gifted identification data to also include accountability for advanced outcome measures that would presumably result from more equitable identification practices.

While several decades of research in the field of gifted education have centered around equity and historical underrepresentation of some demographic groups, the field of practice has lagged in its response. The effects of this neglect can manifest in missed opportunities for maximizing talent leaving the overall field of gifted vulnerable to sweeping reactions such as eliminating programs as districts increasingly reflect and act on equity policies and practices (Dixson et al., 2020; Einhorn, 2019; Peters, 2022).

Challenges to Leading Shifts in Gifted Education

Educators face multiple challenges in leading the advancement of both equity and excellence in gifted education reform efforts including finding clarity around multiple and potentially conflicting

approaches and unpacking seemingly paradoxical goals (Dai & Chen, 2013), managing increasingly complex learning needs in very diverse local settings (Peters et al., 2017), and managing nuance in a political environment that can be both resistant to ambiguity and even hostile to the notion of gifted education (Colangelo et al., 2004). Diverse personal and professional experiences likely influence how a leader has constructed meaning about gifted education or whether a particular paradigmatic approach – gifted child, talent development, or differentiation, described in an upcoming section -- has contributed to their understanding or views as they lead in their local environment. For example, if a leader has memories or awareness of which approach informed programming from their own compulsory student experience, that may contribute to their understanding or views. Second, whether the leader experienced coursework or other professional learning related to the needs of gifted learners or the various paradigms of gifted education in their teacher or leadership development, that may further contribute to their perceptions of whether gifted education is part of their purview as a leader. As a third example, the environment(s) in which a leader has worked -- such as one with a high degree of parental advocacy or push -- might contribute to their views about gifted education. Since there are many permutations of these experiences and varying awareness that there are different approaches, leaders' understanding is likely similarly diverse.

Paradigms and Paradoxes. Dai & Chen (2013) note that both gifted education practices and gifted education are socially constructed and thus influenced and conceptualized through priorities and values. They articulate three dominant systems of thought and practice, or paradigms, of gifted education. Education leaders' background experiences with gifted education may come from any or none of the paradigms noted by Dai & Chen (2013):

- The 'gifted child paradigm' emerged from 1920-1940 and focuses heavily on IQ scores in identification that is used to define differential educational goals.

- The 'talent development paradigm' emerged from 1980-1990 out of discontent with the shortcomings of the gifted child paradigm and expanded the scope of manifestations and domains of talent rather than focusing on measures of general intelligence.

- The 'differentiation paradigm' expanded on the long-existing notion of differentiation with a focus on the needs of gifted students around 1980-1990 as a critique of the inadequacy of pull-out program models and structure to provide learning environments that were more consistently responsive to the needs of advanced learners. It has more recently been connected to the Response to Intervention (RTI) approach in special education through tiered academic and social-emotional interventions for advanced learners that also account for Tier 1 instructional needs (practices in place for all learners) in the local context.

Layering on an equity lens to this complex landscape asks leaders to unpack what many may see as paradoxical goals of developing talent in and providing opportunities for all students equally while simultaneously ensuring continuous growth for students whose academic needs may require a different pace or complexity in comparison to the normative group. While the gifted child paradigm is more clearly articulated in its concreteness, it has blindspots such as not considering disparities of opportunity outside of school or the value of strengths such as being multilingual (Dai, 2010). Therefore, it is not sufficiently complete, particularly for districts interested in centering equity. The talent development and differentiation paradigms honor the uniqueness of individual students; however, each presents challenges of ambiguity and skill or will to implement in a standards-driven environment. The degree of heterogeneity and diversity of needs in many classrooms exceeds what teachers report the ability to manage effectively, with many noting that they do not feel their highly-able students are appropriately challenged (Hertberg-Davis, 2009; VanTassel-Baska, 2019; VanTassel-Baska et al., 2020). The driving force of standardization and closing gaps may be perceived as incongruous with recognizing students as unique individuals impacted by both innate abilities as well as environmental opportunities. Gifted

education is a form of special education; however, advanced learning needs and the needs of students with specific learning disabilities differ in visibility and urgency to address in the classroom. While there is general agreement and legal requirement to meet the needs of students with learning disabilities, there is not a similar commitment to or accountability for meeting the needs of advanced learners or going beyond grade-level standards (Dai, 2010).

Complex and Diverse Contexts. Education leaders are also impacted by the complexity of variations in local contexts as they lead instruction and develop school culture (Ganon-Schiller & Schechter, 2019). Local school contexts are far from identical and are impacted by diverse student needs for learning and for needs beyond the traditional purposes of school, such as providing social-emotional or basic need resources to students and families. These variations in context provide the environmental background for shaping and further informing educators' beliefs about gifted education. For example, if a context calls for significant knowledge and skill to serve culturally, linguistically, and ethnically diverse (CLED) students or students affected by poverty, the perceived need for advanced learning opportunities or the capacity to invest in learning in other areas, such as gifted education topics, may be less prioritized (Drago-Severson & Blum-DeStefano, 2017; Spiess & Cooper, 2020). For education leaders, many of whom do not have expertise or training beyond their personal experiences with gifted education (Rinn et al., 2020), decisions about whether or how to lead staff and community to advance gifted education reform happen within an ambiguous environment.

Managing Politics and the Institution. Leaders must also navigate complex political terrain concerning advanced programming. While there is a history of ambivalence and even contempt for gifted education in American culture (Beisser & Jefferson, 2008; Colangelo et al., 2004; Gagne, 2018), the goals of this area of special education are of concern to ensure attention to excellence and development at the highest levels of competitive international academic measures (Plucker & Peters, 2016). The tensions between not holding some students back while also maintaining egalitarian values,

particularly in a nation with a history of racism and social injustice, add to the challenge of leading

change in gifted education (Dai, 2010). Changing the system such that it honors both equity through

broad efforts to develop talent in all students and excellence through viable options that recognize the

differentiated instructional needs of advanced students is pushing districts and leaders to understand

and enact dual goals and shift the longstanding institutional focus on labeling students as gifted

(Ambrose et al., 2012) to updated approaches that broaden access and focus on instructional needs

(Plucker et al., 2017).

Such shifts in philosophy and approach frequently run counter to the gifted construct many

educators and parents are familiar with — the gifted child paradigm — and happen in an environment

with strongly differing public opinions about gifted education. This tension requires space to discuss,

negotiate plans, enact, and construct meaning. Stakeholder attitudes toward gifted education range

from seeing it as a necessary part of public education that invests in society's future to an unfair

preparation of a dominant class (Gagné, 2018). In the debate about whether to eliminate gifted

programs, some stakeholders perceive that a necessary service is being taken away while others believe

that continued pathways for advanced opportunity will perpetuate inequity and continue to reflect

subgroup gaps (Natanson, 2021; Prieb, 2021). Leaders must make sense of values systems that may be

perceived as competing and create environments that will benefit all students in their school, including

broader access to instructional strategies from the field of gifted education as well as differentiated

services for students with advanced learning needs (VanTassel-Baska, 2007). Impactful systemic reforms

to improve inequitable opportunities are more apt to find success and become part of a school culture

when championed by local school leaders who have processed their own sense of understanding to

support the same in others through reciprocal cycles of sensemaking and sensegiving (Wong, 2019).

Another challenging component to leadership for research-based practices in gifted education is

that these topics are not prevalent in teacher or leadership preparation programs (Callahan et al., 2014),

nor are they common in the climate of standardization and minimal proficiency data (Beisser & Jefferson, 2008); thus, it is left to local districts to determine whether to attend to this area of need for both teachers and school leaders. Leaders provide direct and indirect messages to staff and communities about their beliefs and commitment to talent development for all and differentiation for growth as they make decisions about professional learning priorities, grouping practices, and curriculum opportunities. Limited background training in gifted education approaches can result in the pitfall of lumping all approaches to meeting the needs of advanced learners into one overgeneralized area versus understanding the nuances and research base behind different approaches and may complicate how leaders determine pathways forward within their varying local contexts and communities (Plucker & Callahan, 2020). School leaders are often left to contextualize the tensions between equity and excellence for themselves as they lead shifts for their staff and community. Contextualizing a need for gifted education approaches in schools that have higher levels of poverty is an area that has contributed to current excellence gaps in education where deficit mindsets tend to hinder cultures of talent development (Plucker & Peters, 2016).

Purpose of the Study

The purpose of this study is to understand how elementary school leaders working in or with schools with higher percentages of students in poverty (Title I schools) in one district make sense of and frame gifted education reforms that advance equity and excellence for their staff and community. A persistent challenge to improving gifted education is the perception of elitism stemming from data showing subgroup gaps in excellence that mirror those of subgroup gaps in achievement. While many researchers in gifted education have been suggesting districts and practitioners reconsider outdated paradigmatic approaches to gifted education for many years (Ambrose et al., 2012), communities and districts have been slow to enact change. Now that there is heightened awareness around equity topics, some districts suggest more drastic solutions such as eliminating programs rather than incremental

strategies that gifted policy advocates believe will have more likelihood of creating the desired outcomes of developing talent in all neighborhoods and across all demographic groups (Dixson & Peters, 2020; Seale, 2021; Wai & Worrell, 2019).

This study explored how school leaders make sense of the conflicted terrain of gifted education and, in turn, attempt to portray a coherent landscape advancing both equity and excellence for stakeholders, including staff and the local school community. This study aimed to understand the internal and external influences on school leaders' sensemaking around shifts in gifted education approaches as well as the intentional and unintentional ways leaders frame and give sense to others. From an instructional leadership perspective, the pedagogical approaches long used in the field of gifted education provide avenues for strengthening culturally responsive teaching practices through the ways they center student engagement via empowerment, voice, and high expectations for reasoning and increased independence (e.g. concept-based instruction, problem and project-based learning, argumentation, and opportunities to develop creativity skills). Understanding whether and how leaders make sense of and lead talent development in schools experiencing higher levels of poverty is important because such sites are often connected to disparities in enrichment opportunities that can increase opportunity gaps (Haberman, 2010; Milner, 2012; Noguero et al., 2015; Spiess & Cooper, 2020). In addition to broad talent development, understanding how leaders provide for the instructional needs of students whose needs go beyond the normative group is another component to achieving educational equity through closing gaps in excellence gaps which currently show patterns of predictability in particular subgroups such as race, socioeconomic status, or for students receiving ESOL or special education services (Peters et al., 2017; Peters et al., 2021, Plucker & Peters, 2018).

Research Questions

To gain a deeper understanding of leaders' sensemaking and sensegiving of shifts in approaches to gifted education in one district as well as how that framing is taken up in others' work, I conducted a

qualitative study through structured interviews and documentary analysis to understand leaders' sensemaking, leaders' sensegiving, and potential environmental influences on each. My research questions were:

Primary Research Question: How do educational leaders advance the goals of both equity and excellence in advanced academic programs in Title I elementary schools?

Subquestion 1: How do school leaders integrate advanced academics within the broader instructional programs of the school?

Subquestion 2: How is the sensemaking of school leaders shaped by their prior experiences and current environment?

Subquestion 3: How do leaders frame a vision for equity and excellence in advanced academics for staff and community stakeholders?

Theoretical Framework

The conceptual framework presented in Chapter III draws on theories of sensemaking and sensegiving, including cognitive frames for managing tensions around old and new or equity and excellence. Sensemaking theory has evolved from strong cognitive origins to a social constructivist approach focusing on language rather than cognition as the locus of sensemaking (Colville et al., 2016). Sensemaking theory provides an analytic frame to examine leaders' processing and framing within the context of their personal and professional background, local environment, and political influences (Spillane et al., 2002; Wieck et al., 2005) as they lead gifted education or changes to gifted education in their schools. Sensegiving theory provides a lens through which to analyze the conscious and unconscious ways that leaders influence the meaning made by others (Gioia & Chittipeddi, 1991; Kraft et al., 2015; Maitlis & Lawrence, 2007). In the cycles of sensemaking and sensegiving in this problem of practice, leaders make gifted education sensible to themselves through their language and actions and thereby engage in sensegiving to others. The complexity of issues in gifted education including

identification and service delivery, disparate background knowledge from diverse stakeholders, and the political pressures on schools and school leaders create an environment of ambiguity. The task of framing ambiguous and seemingly unresolvable tensions such as old/new, talent development for all/differentiated service needs for some, or equity/excellence present opportunities for leaders to use either/or or both/and approaches to shape the enactment of advanced academic program goals in their local setting (Miron-Specktor & Paletz, 2020).

Background of the Site

This is a case study of leader sensemaking and sensegiving in three Title I elementary schools within one large U.S. suburban school district. In this study, I define educational leaders broadly and include executive level principal supervisors, school-based administrators, and school-level instructional leaders (e.g. instructional coach, gifted resource teacher, or lead teacher). Sensemaking and sensegiving of elementary school leaders provide one way to more deeply understand the ways that leaders process, select focal areas, and shape changes to approaches to gifted education within their local context.

The district was located in a state that mandates gifted identification and gifted services. State regulations require the district to submit a local plan for gifted education that describes how the district will meet expectations and collects districtwide data about referrals, identification, and types of services available in various state-defined domain choices (e.g. academic, performing arts). The district also signaled an intention to provide broad access to rigor and academic talent development for all students through the inclusion of a goal in the district strategic plan. In addition to this initiative, the district offers a continuum of advanced academic services at the elementary level from differentiated services in specific content areas (including Honors, Advanced Placement, and dual enrollment courses at the secondary level), part-time services working with an advanced academic resource teacher K-6, and full-time services in grades 3-8 for students who require a different educational placement for all four core

content areas. Full-time services in the district are delivered in a variety of grouping models including parent choice of school-within-a-school homogeneous classes at locations throughout the district or cluster groupings of identified students at the student's local school. Professional learning opportunities and materials on research-based practices and curricula designed to meet the needs of advanced learners in four core academic content areas are available to all teachers and students. As part of the district's strategic plan for talent development and desire to increase student opportunities for deeper learning, every K-6 teacher was expected to use a minimum of one advanced academic curriculum experience with all students quarterly at a minimum. All elementary Title I schools had a full-time gifted resource teacher to support grade-level teams and individual teachers in job-embedded professional learning to build capacity for using gifted education strategies and curricula. All Title I schools were aware of and enact, to varying degrees, a model to address gaps in the representation of particular subgroups (economically disadvantaged students, culturally and linguistically diverse students, and twice-exceptional students) in advanced programming called the Young Scholars model.

Methods

This study used a qualitative comparative case study approach (Merriam & Tisdell, 2016). Interview and document analysis explored the sensemaking and sensegiving of leaders in three purposefully-sampled Title I elementary schools with successful gifted programs and larger-than-average numbers of students from historically underrepresented populations. Sites were purposefully selected based on evidence of advancing equity and excellence in advanced programming. A minimum of three leaders, including the principal, gifted resource teacher, and one recommended leader or teacher leader, were interviewed from each site. An executive level principal supervisor connected to each school was interviewed. All interviews included member checks both during and after the interview process. Document analysis included school improvement plans, instructional leadership team agendas, work agreements between the administration and gifted resource teacher, and parent meeting

documents. Analytic memos were combined with raw data in a continuous, iterative analysis to update codebook categories related to research questions.

Limitations and Delimitations

This study sought to understand input into leaders' beliefs and sensegiving to others in gifted services through interviews with central office leaders, school-based administrators, and teacher leaders. The study took place in a very diverse district that had been engaged for over five years in deeper examination of multiple equity topics. Sites were selected because of their focus on equity and excellence in gifted services within the context of serving larger percentages of students who were economically vulnerable and/or culturally/linguistically diverse. Additionally, data collection for this study took place in spring 2023 as schools were continuing to recover from the impacts of the 2020 global COVID pandemic. Generalizability of qualitative studies is based on the development of a theory that can be extended to other cases (Maxwell, 2005). Several features can offer plausibility in case studies, including similarity of contexts, universality of the topic studied, and affirmation from other studies (Maxwell, 2005). This study offers limited generalizability to the extent that it tests the conceptual framework, which once verified may be applicable to exploring other settings.

The study does not observe classroom-level implementation or student achievement outcomes of practices. The study is also situated in the aftermath of the global coronavirus pandemic in which pressures to recover from perceived learning loss, often disproportionately impacting higher poverty schools, is a common refrain in the media and focus of school-based leaders (Goldhaber et al., 2022; McKinsey & Company, n.d.).

This study was delimited in that it only focused on three Title I elementary schools in one school district. I chose to study only the elementary level as the structure of secondary schools is distinctly different. At the elementary level, students are assigned by grade level and there is no assignment of specific courses such as honors or Advanced Placement to meet the needs of advanced learners as is

found at the secondary level, so the elementary classroom teacher is often balancing wide variations of student abilities in one class (Pedersen et al., 2021). I also chose to delimit the study to Title I schools as students in schools with higher percentages of economically disadvantaged students stand to benefit greatly from increased attention to the goals of updated gifted education approaches and I wanted to limit the scope of contextual variables for the study of leaders' sensemaking and sensegiving. The study was also delimited to a single district with uniform high-level policy environment and resources which impact school-based decision making around enactment. This delimitation helped isolate the effects of the specific policy or program being studied from potential confounding factors arising from variations in district-level policies and resources.

Role of Researcher

In qualitative research, "the researcher is the primary instrument for data collection and analysis" (Merriam & Tisdell, 2016, p. 16). While this affords several benefits including a richly descriptive product and flexible and responsive design, it also requires heightened attention from the researcher to potential subjectivities of biases they may bring to the study (Merriam & Tisdell, 2016). I have the dual role of both a researcher for this study and a practitioner, having worked for nearly two decades in multiple K-12 public school roles – general education teacher, gifted education classroom teacher, gifted education resource teacher, gifted education curriculum specialist, and most recently as coordinator for gifted programs in a large school district. In each role, I have consistently advocated for the use of gifted education strategies for all students for purposes of engagement and talent development. In my various roles, I have often experienced resistance to some of the tenets of updated research about conceptualizations of intelligence, the role of opportunity, taking an asset-based stance to develop talent and potential, and unbinding expectations for students from what is defined by minimal proficiency standards. In my experience, the resistance has frequently correlated with the degree of concern the school has about passing standardized tests, poverty, or enrollment in ESOL

services, with a few exceptions where school leaders have led with a focus on higher expectations. In the past five years, with the rise of awareness and alarm around inequities and disproportionality of gifted identification in the system, I have seen a shift in leaders' attention in this area that manifests in varied stances from eliminating opportunities to tasking their entire staff to become trained in using the pedagogies of gifted education. While these enactments may be spurred by the common environmental context of increased attention to equity, the leadership framing and instructional outcomes vary. I was drawn to this area of study to better understand the influences on the sensemaking of leaders, particularly those in higher poverty schools, to add to the field of research about the leadership of advanced academic programs that advance equity and excellence in tandem rather than in conflict.

Beyond my experiences in gifted education, I also bring bias favoring constructivist pedagogical approaches and a belief that our standards-based approach shortchanges many students for a variety of reasons. My early teaching experiences were in Maryland in the 1990s, which used the Maryland State Performance Assessment Program to assess school quality. This influence, in the years before the implementation of No Child Left Behind (NCLB), was formative to my constructivist philosophy and commitment to deeper learning and authentic, interdisciplinary, project-based learning and assessment. The power of these instructional approaches and the excitement and growth orientation I observed in students stuck with me, and as I transitioned to teaching in another state as NCLB became a stronger influence on instruction, I found myself drawn to coursework in gifted education as it aligned with what I considered to be powerful and engaging instruction. During my master's program for educational psychology with a focus on gifted education, I reflected on my own experiences as a student who skipped a grade in elementary school in addition to my experience as a classroom teacher noticing that I would have students each year who were outliers with regards to their instructional and social-emotional needs who often preferred to spend time with me as their teacher rather than with their same-age peers in the classroom and at recess. This reflection deepened my interest in not only

powerful instruction but also in a match for learning environments that include consideration of an academic peer group.

To address this bias, this study is designed to explore the ways leaders came to their thinking, how they influence the thinking of various constituents, and how they navigate challenges in leading for equity and excellence in advanced academic programs. Triangulation, debriefing, and maintaining an audit trail are techniques recommended to establish trustworthiness in qualitative research (Greene, 2014). During interviews, I was highly cognizant of reactivity during semi-structured interviews so that participants would not be influenced to answer in a particular way. I employed member checks within interviews and analytic memos and member checks after interviews. I also triangulated data from interviews with document analysis comparison of interviews from multiple leaders at the same site.

Summary

This study examined school leadership around changes in advanced academic programs in three Title I schools, including the ways leaders describe the influence of their prior experiences in selecting aspects of equity and/or excellence and the ways they stimulate sensemaking in others. Data was collected through interviews with district leaders, school administrators, and teacher leaders, as well as document analysis.

In the next chapter, I review the literature around the evolution and chronology of equity-excellence trends in gifted education and present three focal areas for moving research to practice. I also describe a small number of studies of leadership in advanced academics and note that although this is a gap area in the literature, interest in the area is emerging.

Key Vocabulary

- Advanced learner – Students who master basic skills with less practice and who exhibit advanced abilities in academic areas. Advanced learners are described as students who perform at an advanced level when compared with others of the same age, experience, or environment.

For this study, the terms advanced student and gifted student are used interchangeably, although some districts will have broad gifted programs or will define their gifted program around academics (advanced academics).

- Bracketing – Bracketing is a term from Wieck's sensegiving theory referring to sampling the environment and determining to what aspects to attend. It is the "saying" activity of sensemaking enactment. Bracketing can sometimes result in distortion (or Wieck's label of "deviation amplification"), through confirmatory bias (Eddy-Spicer, 2019).

- Coherence – Coherence is the integration of elements, relationships, and values, or a shared depth of understanding of the purpose and nature of work (Fullan & Quinn, 2016).

- Collective frames – Collective frames are shared cognitive filters that allow some elements into the sensemaking process and exclude others (Miron-Spektor & Paletz, 2020).

- Differentiation – Differentiation is the process by which curriculum, instruction, and assessments are modified to be responsive to the needs of advanced learners (TanTassel-Baska et al., 2020).

- Enactment – Enactment is a term from Wieck's sensegiving theory referring to "action that produces the raw materials that can then be made sensible." Sensemaking's raw materials come from acting *into* a situation. This occurs when what is expected encounters an environment that is ambiguous and leads to ways of exploring as a means of making it more familiar. Enactment is broken out into aspects of bracketing (saying), selection (seeing) and retention (what I think) (Eddy-Spicer, 2019).

- Equity – Equity in gifted education has held multiple meanings. From the origins of the field, it recognized gifted students as a marginalized group whose needs are not met in systems designed based on age-level norms. Over time, it came to be understood in terms of closing predictable subgroup gaps in identification.

- Excellence gaps – Excellence gaps are defined as differences between subgroups of students performing at the highest levels of achievement (Plucker & Peters, 2016).

- Gifted student – Students who perform or have the ability to perform at higher levels compared to others of the same age, experience, and environment in one or more domains and who require modifications to their educational experiences to realize their potential (NAGC, 2018). For this study, the terms gifted student and advanced student are used interchangeably. Advanced academics is a common service delivery focus of many district gifted programs, and is the service delivery focus in the district used for this study.

- Retention – Retention is a term from Wieck's sensegiving theory referring to an aspect of sensemaking that occurs after enactment and selection. In contrast to more rational models, sensemaking acknowledges unconscious elements of organizing and adjusting to ambiguous situatons and names retention as where the more conscious/cognitive aspect comes into view, or the "thinking" in a process of enactment, or *"How will I know what I think until I see what I say."* (Eddy-Spicer, 2019).

- School leader – School leaders in this study are defined broadly to include anyone with positional authority such as a central or school-based administrator, as well as other teacher leaders with influence such as an instructional coach, a gifted resource teacher, or a grade level team leader.

- Selection – Selection is a term from Wieck's sensegiving theory referring to an aspect of sensemaking as organizing that comes after the more unconscious element of enactment and bracketing as the "saying." Selection is the "seeing" aspect of enactment. It is followed by the more conscious aspect of sensemaking – retention. (Eddy-Spicer, 2019).

- Sensemaking – Sensemaking is a process of social meaning sparked by a critical or ambiguous event that results in cycles of enactment, selection, and retention to create plausible narratives

in an organization (Namvar et al., 2018). Individual sensemaking focuses on how individuals make sense of issues or events based on their own identity, experiences, and interpretations. Collective sensemaking involves multiple individuals in a group creating a shared understanding of issues or events (Maitlis & Christianson, 2014).

- Sensegiving – Sensegiving is an interpretive process of attempting to influence the sensemaking of others toward a preferred reality (Maitlis & Lawrence, 2007).

- Talent development – Talent development is working to build and grow the abilities and strengths of all students and focus on their strengths and interests to help each student realize their potential. It depends on broad access to early and frequent exposure and enrichment opportunities (Dingle Swanson & Van Sickle, 2021).

- Title I – Supplemental federal funding to districts and schools to be used to ensure economically-disadvantaged children receive an equitable, high-quality education and help close achievement gaps (U.S. Department of Education, 2018).

- Title II – Federal funding provided states and districts to strengthen instructional leadership and teacher quality in all schools, especially those with a high proportion of children in poverty. Funding supports a variety of activities such as teacher professional development for practices grounded in scientifically based research (Virginia Department of Education, 2024).

Chapter II - Literature Review

The purpose of this review is to better understand the complexity of topics in the gifted research that school leaders (e.g. teacher leaders, school-based administrators, and central office leadership) need to understand and be prepared to support in others' understanding if there is an expectation of enacting a focus on equity and excellence in gifted education. Leaders' sensemaking and sensegiving of these topics have the potential to advance (or hinder) the integration of equity and excellence through alignment (or non-alignment) between the fields of gifted research and practice.

While much has been written about ways to increase equity in gifted education, a focus on leadership in gifted education, including leadership for equity, is still an emerging topic. Within this review, I frame the span of equity and excellence topics by focusing on the purpose of various practices and efforts. This is especially relevant considering background and preparation in gifted education are rarely something that can be assumed (Clark & Callow, 2002; Loveless et al., 2008). The field of gifted research has had multiple equity focuses over time (e.g. modifications to identification systems, closing opportunity gaps, and addressing excellence gaps). Each of these areas of research has shown strategies to develop equity and excellence in gifted education, but within the broad landscape of school leaders' responsibilities, framing for coherence is easily obscured.

This review organizes actions recommended by research in gifted education into three focal areas that the literature suggests would likely be crucial for advancing equity and excellence in the gifted field from a systems and leadership perspective. The review also describes a limited number of studies related to leadership in gifted education, a noted gap area. The review begins with a rationale about the roots of gifted education in public education and an introduction of a chronology of equity-excellence trends in the field to provide context for how the two interdependent topics have emerged over the last five decades. I then identify focal areas of practices meant to advance equity and excellence in gifted education. Lastly, I describe the current state of leadership research in the field of

gifted education and suggest an area for further exploration in service of bridging the gap between gifted research and practice through the study of leaders' sensemaking and sensegiving to update practices in alignment with research.

Review Methodology

I began my search through the use of Google Scholar, Virgo, and EBSCO education electronic databases accessed through the University of Virginia library system, and dissertation search through ProQuest using the search terms: "leadership in gifted education," "equity in gifted education," "gifted education change," "paradigms of gifted education," "talent development," "gifted underrepresentation," and "excellence gaps." I selected articles by reviewing titles and abstracts that I considered most salient to my topic because they were tied to equity focus and were frequently cited or discussed. In reading through articles and books on these topics, particular strategies emerged more frequently as suggestions for the field of practice, such as "universal screening," "local norming," "culturally-responsive tools in gifted identification," "access to high-quality curriculum," and "opportunity gaps." I used those keywords to search for empirical studies and policy literature related to specific approaches to present a sampling of frequently cited studies. Additionally, as I read specific studies, I scanned bibliographies and identified additional literature to consider.

In my review of the literature, I considered how the field evolved over decades in the balance and meaning of excellence and equity and sought to contextualize the span of decades-old and more recent recommendations from the field concerning what aspects of the equity-excellence tension they address. Three focal areas emerged from the literature that connected various strategies to three intended purposes. To provide structure around the diverse strategies available in the literature, I organized specific strategies at the intersections of the chronology of equity lenses (excellence and/or equity) and the framing purpose (three focal areas for moving research to practice). In the chronology and organization of gifted equity topics, I noted that equity in gifted education is interpreted in multiple

ways over time (e.g. meeting the needs of advanced learners in systems that are designed for a majority-normed group; closing gaps in identification and participation) and noted chronologically where particular ideas emerged in the literature over the past five decades. I then grouped practices studied by researchers of equity and excellence in public school gifted education around common focal purpose areas and analyzed how the areas interact with one another and advance equity and/or excellence. I organized the various discrete strategies that educators may be asked to enact into three focal areas by the purpose of the strategy. I then created a crosswalk and categorized the intersections between the evolution of equity meanings in the field over time and the three overarching purposes for strategies as focal areas (Table 1).

The three focal areas that emerged from the literature which connect various strategies to intended purpose are recognizing and correcting inequities in systems, reframing gifted education around services with multiple entry points rather than static trait labels, and expanding gifted education accountability beyond identification outcomes. The first two areas focus on the interdependent relationship of identification and programming as it relates to broadening conceptualizations of giftedness, and the third area focuses on calls to hold public schools accountable for serving a broader need for challenge in all contexts. Table 1 illustrates the ways various strategies from the field of research are situated within the intersection of evolving definitions of equity and excellence over time and the focal areas that collectively move to better align practice to research.

Table 1.

Three Equity and Excellence Focal Areas for Moving Research to Practice

	Chronology of Equity Lenses in Gifted Education Research		
	Excellence Centered Environment and instruction to meet the needs of advanced learners	**Equity Centered** Closing predictable subgroup gaps in identification	**Equity + Excellence** Focus on closing currently predictable outcome gaps
Focal Area 1 Recognizing and correcting inequities in systems *How: Reorienting conceptualizations of giftedness during identification and closing opportunity gaps*		Universal screener practices Holistic screening with multiple data points Culturally responsive identification tools Accountability in closing opportunity gaps and ensuring instructional opportunities that provide space for talent to emerge and be seen	Access to rigorous and culturally responsive instruction to develop both latent potential as well as manifested abilities Systemic approaches to support retention and success for gifted students from historically underrepresented groups
Focal Area 2 Reframing gifted education around services with multiple entry points rather than static trait labels *How: Designing programs that support talent development and meeting needs for differentiated instruction*	Designing programs to meet a variety of needs through differentiation strategies (acceleration, complexity, depth, creativity)	Local norming considerations	
Focal Area 3 Expanding Gifted Education Accountability Beyond Identification Outcomes *How: Accountability for educator preparation and advanced outcomes*	Accountability in teacher and leader preparation to ensure a basic understanding of the cognitive and affective needs of diverse gifted learners		Accountability on student success measures related to growth vs minimal proficiency Evaluating how well programs nurture and develop talent in diverse populations

My searches on leadership in gifted education and leading equity and change in gifted education revealed scant literature. What emerged were studies about how to develop leadership in gifted individuals and guidance for gifted program structures and policy work rather than leading equity in gifted education. This review describes a few recent articles in this area; however, this is a significant gap area in the literature and prompted my interest in doing this study.

Background on the Need for Gifted Education

Identifying and developing exceptional talent that falls outside of the normative group traces long into history with early records dating to the Han dynasty and Ancient Greece in a variety of domains (Missett & McCormick, 2014; Ford & Harris, 1990). Interest in identifying and nurturing high abilities and creative endeavors is seen internationally both for reasons of economic competitiveness as well as for the rights of individuals to have special education to meet their unique needs (Persson, 2014). The Prussian "common school" approach, forwarded in the late 1800s, introduced the concept of universal education by placing students in grade levels by age without consideration of individual differences in content knowledge or learning rates. Although this structure had benefits such as efficiency for educating the masses, it neglected the needs of students whose learning needs fell above a grade level/age norm and prompted sporadic attempts at various efforts to serve students through approaches ranging from pull-out programs to special schools to meet the needs of gifted learners (Brody, 2017; Colangelo et al., 2004; Preston, 2020).

A Chronology of Equity-Excellence Trends in Gifted Education

Equity as a broad topic in public education has been a tangled concept to unpack as districts have engaged more deeply in reflection and areas for improvement, and the unpacking of what equity means in gifted education is no exception. In the broad public education landscape, the topic requires distinctions between equality and equity as well as the need to connect purposes with specific approaches such as multicultural education, social justice education, and culturally responsive education

(Hammond, 2020). Within the field of gifted education, equity is likewise examined through multiple lenses and therefore is worth defining specific to the field to contextualize prominent concerns within the equity-excellence discussion (Worrell & Dixson, 2022). Over the last century, the definition of equity as it relates to gifted education has broadened in scope. Originally, it was a focus on serving the instructional and social-emotional needs of learners who were not served in a system of age and grade-based structures. Later it evolved to focus on gaps in the identification of underrepresented student subgroups. Most recently, there has been an emerging focus on examining beyond the typical K-12 focus on achievement gaps more broadly into the area of excellence gaps. Each gifted-related equity focus contributes to the whole but is incomplete on its own, as noted in subsequent paragraphs.

Equity Targeting Students Not Served in Age/Grade-Based Systems

The origins of gifted education research and policy in U.S. public schools from the 1920s through the 1960s emerged from recognizing a need for instruction to meet the needs of advanced learners who were often marginalized within a public school structure as well as concerns for international competitiveness (Dai, 2020; Gallagher, 2012; Jolly, 2009; VanTassel-Baska, 2018). While this first lens addresses equity from the perspective of attending to the needs of gifted students who fall outside of a majority-normed group, it is primarily driven by concern for excellence, defined as *excel - "to surpass in accomplishment or achievement."* This lens has experienced alternating times of embrace and repulsion by educators and communities as fluctuating sentiments of "critical need" or "elitist luxury" have waxed and waned (Jolly, 2009). Taken alone, this perspective neglects acknowledging structural inequities in terms of methods of identification, disproportionate access to opportunities for enrichment, and culturally-influenced manifestations of exceptional ability (Dai, 2012; Sternberg et al., 2021).

Equity Targeting Identification Gaps of Underrepresented Student Groups

In the 1970s, a second lens of equity emerged in the field around identification gaps in underrepresented demographic subgroups (culturally and linguistically diverse, economically

disadvantaged, and twice-exceptional). While concern about such gaps has been discussed in the field of research for a longer period of time, it has risen to more prominent national attention in the field of practice with the more recent commitment to equity work in many U.S. school districts (Mun et al., 2020). While this area of study never intended to eliminate excellence in favor of equity, the heavy focus on identification has had some unintended consequence of sidelining discussion of what happens *after* identification and the outcomes and excellence potentially achieved from the services provided as a result (Sternberg, 2012).

Equity Targeting Excellence Gap Outcomes in Underrepresented Student Groups

A third lens within the gifted research field centers around efforts to expand the dialogue beyond identification and into the realm of student outcomes, an area that is not as widespread in the field of practice in comparison to identification gaps. Presently in public education, there is significant attention to achievement gaps but sparse attention to gaps in exceptional performance, also known as *excellence gaps*. Most accountability measures for the success of a school are focused on grade level proficiency, no matter the varied starting points for individual students. This fails to account for student growth or provide an option for out-of-level testing that would give a fuller data picture of the outcomes of public education. Plucker & Peters (2016) argue this area potentially unites the interdependent nature of equity and excellence within the field.

Three Focal Areas for Equity and Excellence

As with most equity-focused efforts, desired results are rarely the result of single, silver-bullet efforts but rather combinations of strategies that converge based on contextual variables. While there are many strategies from the field of research available to advance equity and excellence in the field of practice, effective results require matching a need area with a strategy for improvement. As noted in the review methodology section, the equity focus in gifted education over time has evolved -- from attention to designing learning environments for students who were not served, to a focus on closing

subgroup gaps in identification, and most recently to expanding gap data beyond identification the root causes of excellence outcome gaps for students. Three focal areas for advancing the field from a systems and leadership perspective include: recognizing and correcting inequities in systems, reframing gifted education, and expanding gifted education accountability (Table 1).

Focal Area 1: Recognizing and Correcting Inequities in Systems

The first focal area is recognizing and correcting inequities in systems by reorienting conceptualizations of talent and closing opportunity gaps. Two examples of systemic inequities are the traditional methods that have been used in gifted identification processes and broader inequities in opportunity — both in and out of school environments — that feed into achievement and excellence gaps. This focal area advances synergies of equity and excellence in gifted education by promoting identification practices that are more inclusive of diverse cultures and frontloading enrichment to reduce opportunity gaps that often widen over time from both in and out-of-school experiences.

Improvements to Identification Practices. Since at least the 1970s, researchers have called attention to the ways identification systems disadvantage students from particular marginalized groups, such as those from low socioeconomic backgrounds or culturally and linguistically diverse (CLED) learners, and suggested alternative measures that would increase representation and equitable identification results (Briggs et al., 2008; Ford, 2010; Ford & Harris, 1990; Peters & Engerrand, 2016; Siegle et al., 2016; Yoon & Gentry, 2009; Yaluma & Tyner, 2021). Scholars have recognized that the idea of giftedness — how we define it and how we measure it — is a human construct shaped by cultural values (Costa & Faria, 2018) resulting in expanded conceptualizations of talent. Rather than taking an entity perspective with a concentration on IQ scores as a driving means of identification, researchers suggest that identification practices consider additional measures to find students who might need gifted services for exceptionality in areas such as domain-specific aptitudes, gifted behaviors, creativity, leadership, or task commitment (Dai, 2020; Olszewski-Kubilius & Subotnik, 2022; Reis & Renzulli, 2010).

Additionally, in service of strengthening broader talent development efforts, identification should not rely solely on manifest abilities — exceptional achievement that students are already exhibiting in comparison to their peers —but also on latent potential, or finding students who have the capacity to achieve at exceptional levels in comparison to their peers if services are provided (Lohman, 2005; Pfeiffer, 2012).

Over time, a recurring discussion in the field has called attention to the role of non-traditional measures beyond intelligence testing in closing identification gaps but has yet to produce a process or instrument that completely eliminates disparities (Erwin & Worrell, 2012; Worrell, 2009). A meta-analysis of 54 gifted identification studies in the U.S. between 2002-2015 synthesized the proportionality of underrepresented groups (Black, Hispanic, and Native American students) to overrepresented groups (White, Asian) and found overall that underrepresented groups were one-third as likely to be identified compared to overrepresented groups (Hodges et al., 2018). While non-traditional identification methods like student portfolios and affective checklists may narrow proportional identification gaps compared to traditional IQ and standardized achievement tests, these practices alone are not able to fully address the gaps in equitable representation. The analysis by Hodges et al. (2018) contradicted the claim that nonverbal ability tests are a strong strategy to close identification gaps. The meta-analysis found variances in success in closing identification gaps with nontraditional measures with more progress in the south and southwest compared to the midwest and suggested that a closer study of policy differences on how measures are used might bring further insight.

Although studies to date show no single strategy is a panacea, various studies have been shown to advance some improvements in identification gaps and offer some steps forward (Cao et al., 2017; Card & Giuliano, 2016; Flynn & Shelton, 2022; Hamilton et al., 2018; Lakin, 2016; Lewis et al., 2007; Morgan, 2020; Pereira, 2021; Peters & Gentry, 2013; Vahidi et al., 2018). The following explores the

most common areas of practice recommended to reduce systemic inequities in identification: universal screening, holistic review of multiple data points, and use of tools that are inclusive of diverse cultures and expressions of gifted behaviors. I discuss each of these in turn.

Universal Screening. Studies document that identification methods that rely on teacher or parent referrals produce disparities in representation. The use of universal screening practices — providing an abilities test for all students rather than just those who are first referred — increases the identification of students from historically underrepresented groups (Card & Giuliano, 2016; Hamilton et al., 2018; Lakin, 2016; Morgan, 2020; Yaluma & Tyner, 2018). In one large urban Florida school district, researchers studied the impact of universal screening and found increases in identification for all subgroups, but most notably for economically disadvantaged students, ELLs, Black and Hispanic students, and girls — all groups that tend to have comparatively fewer parent and teacher referrals. The study noted that factors related to race and culture likely play a role in lower numbers of referrals and recommended cultural competence training for teachers (Card & Giuliano, 2016). Universal screening addresses systemic inequity by equalizing barriers associated with a referral/nomination-first approach, such as teacher bias or degree of parent awareness of opportunities; however, universal screening can also be very costly for school districts (Cao et al., 2017; Lakin, 2016; Siegle & Powell, 2004). In fact, the Card & Giuliano (2016) study spanned two years of positive impacts from universal screening as well as several years where the practice was eliminated due to budget cuts, during which time positive identification impacts were negatively reversed. Studies suggest that an important consideration for districts implementing universal screening is to select and use a test that will serve multiple purposes that span beyond use solely for gifted identification such that it will provide valuable data to classroom teachers that might shield it from lean budget years (Lakin, 2016). Other researchers note the need for continued study and sharing in this area to avoid premature abandonment of practices when they may not yield a silver bullet solution (Olszewski-Kubilius & Subotnik, 2022).

Holistic Review of Multiple Data Points. While universal testing can help ensure some students are not missed from a nomination-first approach, many scholars have noted the overreliance on standardized tests for gifted screening and recommend the use of multiple measures and non-traditional assessments (Borland, 2012; Flynn & Shelton, 2022; Harris et al., 2007; Hodges et al., 2018; National Association for Gifted Children, 2018; Rotatori et al., 2014; Vahidi et al., 2018). Studies emphasize that the use of multiple measures broadens both the lenses and the opportunities through which exceptional talent and potential for talent can be identified. Researchers note several caution areas in using multiple measures including ensuring a match between services and identification tools used, examining the risk of time-intensive processes that may exceed value gained, and avoiding the trap of converting multiple data points into a point-driven matrix which creates a false perception of objectivity (Callahan & Hertberg-Davis, 2017; Moon, 2017).

Holistic (non-matrixed) reviews without hard quantitative cutoffs are often critiqued for subjectivity; however, researchers note that hard numbers only give an illusion of objectivity but are not necessarily valid, which should be the criteria by which to judge identification processes (Borland, 2012; Moon, 2017). In *Confronting Dogmatism in Gifted Education* (2012), Borland states that the best measures are not always the objective ones and recommends a review of multiple objective and subjective data by a committee as a more valid approach to identifying students for a programmatic match. Borland (2012) suggests one reason why matrices or cutoffs persist in many systems:

> Of course there is another explanation as to why educators prefer objective measures to subjective ones, even when the latter are superior, and this is grounded less in dogmatism than in expedience. The more identification relies on objective measures and procedures, the easier it is to explain identification decisions to parents and others. The typical matrix approach to identification has so much error variance built into it that many placements are the result of chance … However, the matrix approach yields a score, however psychometrically meaningless,

and a cut-off score, however arbitrary, and an administrator can explain to disappointed parents

that … the numbers simply fell the way they did. … What I see as a psychometric and

educational liability thus becomes a political asset. … Dogmatic thinking, which valorizes

objectivity in identification of gifted students, makes this difficult and, thus, lowers the standard

of our practice. (p. 21)

The tension between the recommended practice of holistic data review versus matrix or relying on

perceived objective measures for concrete answers can be a struggle for leaders whose communities

demand concrete criteria which conflicts with the complexity and spirit of using multiple criteria in

decision-making. This review focuses primarily on the purposes of updates to gifted education that

school leaders might keep in mind, but it is worth naming that a significant force in leaders' ability to

affect change in many cases comes from their efficacy and willingness to engage in difficult

conversations to update community perceptions about gifted identification practices. "Tiger parents"

who prioritize "academic push" in the family culture or even seek ways to advantage their children in

identification systems are a reality that further complicates an already complex landscape and

discussions of equity (Ho, 2019; Labaree, 2010; Peters, 2022).

 Attention to Cultural Inclusivity in Assessment Tools. While it is important to use multiple data

points in screening, selecting research-based tools with a focus on reducing cultural bias is critical. Over

time, assessment tools used in identification have been called into question for cultural bias given the

outcome differences in scores (Rotatori et al., 2014). Two examples of attention to cultural inclusivity in

assessment tools commonly used in gifted identification are standardized abilities tests and gifted

behaviors rating scales.

 Group or individual standardized abilities tests are almost always used in gifted identification

but have been debated as problematic due to differential patterns in subgroup scores whereby Black,

Hispanic, and Native American students have scored lower overall in comparison with other

demographic groups (Lewis et al., 2007; Naglieri & Ford, 2003). However, a study of approximately 900

students with diverse subgroup representation revealed that subgroup gaps in ability test scores mirror

gaps in standardized achievement tests and that there are deeper roots for disparities in scores than

whether tests contain biased items (Erwin & Worrell, 2012; Harden, 2022). While research finds

intelligence tests as one of the most established tools with predictive validity for finding potential,

researchers note the complicated nature of variables that result in later success (Erwin & Worrell, 2012;

Lee et al., 2021; Sternberg et al., 2001). While it is important to assess items for cultural bias and

equalize the playing field for students whose primary language may not be English, Erwin & Worrell

(2012) suggest not eliminating the tests themselves but rather the practice of using strict cutoff scores.

Additionally, they emphasize that any use of test data is part of a multiple-measure approach in the

identification process.

Beyond ability tests, other assessment tools — like gifted rating scales — need to be examined

for cultural inclusivity. Gifted rating scales are often used to gather observational data that broadens

possibilities to spot exemplary behavior and identify students from underrepresented populations (Cao

et al., 2017). The HOPE Scale is an example of a gifted rating scale developed to identify low-income

and/or culturally diverse elementary-aged students for gifted services. It is designed to be used

alongside other ability and achievement data to help identify *potential* in advanced academics and

interrupt the cyclical effect of patterns often seen in low-income students whereby underperformance

results in going unnoticed for gifted programs even though they may benefit (Peters & Gentry, 2010).

The survey tool is completed by teachers and focuses on two categories of gifted behaviors — academic

and social. While teacher referrals and ratings are an area of caution due to the possibility of unchecked

biases or conceptions of what constitutes giftedness (Briggs et al., 2008), initial results showed that with

proper training, teacher observation data can be helpful in gifted identification of low-income students.

A six-week, one-time administration of the scale by 349 teachers who completed the HOPE Scale on

5,995 ethnically and economically diverse students from three rural and two metropolitan school districts in the Midwest showed promising first results in creating a more culturally sensitive teacher rating scale for gifted identification. The study showed that the HOPE Scale was not a biased instrument for students from low or high-income situations; however, it did show income-related patterns that revealed next steps, including a need to add additional Social items and the need to norm the tool by specific intended groups (Peters & Gentry, 2010).

The next iteration of the HOPE Scale was tested with 71 teachers completing the scale on 1,700 elementary-aged students from similar districts as the first study, with additional attention to the predictive relationship between the HOPE Scale and state measures of math and reading achievement (Peters & Gentry, 2013). Similar to the first study by Peters & Gentry (2010) which focused on low-income student identification, Pereira focused on the use of the HOPE Scale with a different underrepresented group — English Learners. The study was conducted with over 70 general education and ESOL teachers completing the scale for approximately 1,400 students and had similar findings to the original studies for the identification of low-income students, suggesting again the importance of norming on the specific group rather than comparing students as one large group (Pereira, 2021).

The findings of these studies of the HOPE Scale exemplify a consideration that is commonly noted in definitions of giftedness — that students should be compared to others of similar age, background, and experience (Davidson Institute, 2021; National Association for Gifted Children, 2022); a point which when operationalized inevitably brings up debate surrounding positionality of equity and meritocracy in identifying latent and manifest talent. Findings show a need to support educational leaders in navigating the tensions of equity and excellence to update entrenched thinking and practice. The research on use of teacher rating scales also shows that their ability to improve issues of underrepresentation depends on the accompaniment of quality professional development to use the tool effectively (Pereira, 2021).

Universal screening, holistic review of multiple data points, and attention to the selection of culturally inclusive tools are some of the numerous attempts to eliminate systemic inequities by reorienting conceptualizations of giftedness and applying an equity lens to close predictable subgroup gaps in identification practices. Next, I discuss the ways school districts can chip away at systemic inequities by recognizing and closing opportunity gaps.

Recognizing the Interdependence of Nature and Nurture in Talent Development. Another example of the focus on closing inequities in systems asks educators to take a less crystallized and more fluid understanding of how opportunity, both in school and through extracurricular experiences, shapes development and shows up over time in achievement and excellence gaps (Horn, 2015; Matthews & Dai, 2014; Olszewski-Kubilius & Clarenbach, 2012; Olszewski-Kubilius, 2014; Siegle et al., 2016). More current research on ability distinguishes between latent and manifest ability and recognizes emergent talent through an epigenetic lens that is dependent on the opportunity to unlock potential (Dai, 2020; Simonton, 2017). In his *Evolving Complexity Theory* of talent development, Dai (2020) describes a push-sustain metaphor that integrates the traditional component and process models of talent development:

To use the language of ecological psychology, environmental press *affords* certain opportunities to learn, develop, control, enjoy, and achieve certain personal ambitions; at the same time, however, it sets constraints and conditions (i.e. challenges) that need to be met in order to materialize the affordances in question. The nature of such a person-environment transaction determines, first and foremost, that a talent is not innate but the result of self-organized, self-directed adaptive responses to environmental opportunities and challenges. I use the "push-sustain" metaphor to denote this need-evoking, action-sustaining process. (p.11)

The push-sustain metaphor moves away from the gifted child paradigm and a crystallized view of intelligence and focuses instead on talent development as a broader scope that centers talent as an open and adaptive system. The push aspect of the metaphor describes the environmental press of

opportunity and challenge and the sustain aspect recognizes the role of socio-cultural mediators like

resources or values. Together, the two forces work to shepherd an aptitude or disposition to maximize

potential (Dai, 2020). Understanding Dai's (2020) theory of how environmental push and individual

aptitudes collide to unveil and advance talent should prompt reflection and critique of standards-

focused public school learning environments. Since the advent of NCLB, the instructional focus has been

molded by standardized testing reforms to a large degree (Dugan& Safir, 2021; Noguero et al., 2015).

This focus inadvertently has the effect of limiting opportunity, capping push, and focusing on deficits

rather than assets that are important in talent development (Moon et al., 2002; Olszewki-Kubilius &

Clarenbach, 2012). Reflection and critique of this dynamic are especially necessary for schools with

higher percentages of students living in poverty (Siegle et al., 2016). The types of pedagogical practices

in classrooms of high-poverty schools range broadly, but overwhelmingly include a menu of more

directive practices such as giving information, reviewing assignments, or asking lower-level questions.

These practices, often aimed at maintaining control and focusing on testing outcomes, comprise what

has been coined "the pedagogy of poverty" and focus instruction on teacher actions for accountability

rather than student actions for learning (Haberman, 2010). While standardized test scores and a focus

on achievement gaps provide one vantage point for understanding student learning, they only report a

narrow dimension and miss the complex reality that includes opportunity gaps (Milner, 2012).

Next, I describe examples of approaches in gifted education and beyond to frontload deeper

learning curriculum opportunities critical to closing enrichment opportunity gaps during school hours

and beyond. Additionally, I describe more concerted multifaceted and systemic approaches for

observing potential, supporting success, and retaining the participation of students from

underrepresented populations in gifted programs.

Front-loading Enrichment to Close Talent Development Opportunity Gaps During and Beyond
the School Day. Front-loading is defined in the literature as purposeful early talent development

opportunities prior to gifted identification (Briggs et al., 2008). In *Reexamining the Role of Gifted Education and Talent Development in the 21st Century* (2012), Renzulli describes observations of talent through the interactions between above-average ability, task commitment, and creativity within a particular problem situation that create fertile ground for observable gifted behaviors to emerge (Renzulli & Reis, 2017; Renzulli, 2012). The Enrichment Triad Model, a subsection of the Schoolwide Enrichment Model (SEM) focusing on curriculum and instruction, delineates the use and benefits of deductive and inductive learning experiences. A synthesis of forty years of research on the SEM shows a variety of benefits including providing important data in gifted identification processes, increased student efficacy, creative productivity, positive feelings about the learning environment, and impact on students' college and career aspirations (Reis & Peters, 2021). Whereas deductive models are based on a more standardized factory model of leading learners through prescribed training regardless of their interests or learning styles, inductive approaches focus on students' *need to know (or do)* for a given purpose. According to Renzulli, inductive approaches are found most often outside of formal schooling (2012), thus are less equitably available to all students depending on access to enrichment experiences outside of school. Renzulli's enrichment triad model lays out three types of *in-school opportunities* for in the enrichment triad model — exploratory experiences designed for exposure and exploration (Type I); individual and group training experiences that vary in complexity to develop necessary cognitive, meta-cognitive, and affective skills intended to move students from inspiration to action (Type II); and individual and small group investigations of real-world problems with no existing or unique solutions, whereby students shift from consumers of curated lessons to first-hand investigators and producers (Renzulli, 2012).

In addition to broad enrichment frameworks for increasing in-school opportunities to develop talent, specific curricula have also been noted to have positive impacts in raising critical thinking skills for high-potential, low-income elementary-aged students. Three examples of specific curricula that have

been impactful stem from studies funded by the Javits Gifted and Talented Students Education Act

(Siegle et al., 2016):

- Project M^3: Mentoring Mathematical Minds curricula uses an investigative approach

  with a combination of acceleration, depth, and complexity and was shown to have

  significant pre-and-post impacts on students' mathematical reasoning in elementary

  school (Gavin et al., 2007).

- Project Athena is a research-based language arts curriculum that promotes deeper

  reading comprehension, literary analysis, and persuasive writing. Its use showed

  positive impacts on students' critical thinking and analysis skills as well as teachers'

  ability to differentiate instruction with increased fidelity of implementation (VanTassel-

  Baska, 2014; VanTassel-Baska & Stambaugh, 2006).

- Project Clarion is a concept-based Science curriculum that focuses on developing

  student inquiry and science expertise through early elementary-grade problem-based

  learning experiences. A study on the use of Clarion curricula in kindergarten through

  grade two showed increased critical thinking ability, deeper conceptual understanding,

  and contributed to the equalization of science achievement scores for students in

  historically underrepresented groups (Bland et al., 2010).

In-school instructional opportunities are one pathway for enriching experiences, but one cannot

ignore that outside of school, opportunities are frequently less accessible for students in low-income

households. A study of parental spending on children from 1972-2007 showed a shift from past parental

spending occurring primarily in the teen years to redistribution to the most parental spending before

age 6 and in children's early 20s (Kornrich & Furstenberg, 2013). Further, spending on various types of

enrichment also increases with family income, shifting greater responsibilities to schools to close

opportunity gaps and meet the diverse differentiation needs of students (Duncan & Murnane, 2011).

Studies suggest considering beyond-school opportunities as a way to correct systemic inequities and mitigate differences in access to enrichment from parental spending beyond what happens during the school day. Two studies of such frontloading programs demonstrate this approach's promise in closing the opportunity gaps for students from historically underrepresented populations — Project EXCITE and Project Spark.

Project EXCITE is an example of an extracurricular enrichment intervention that successfully narrowed gaps in gifted minority students' advanced achievement in STEM areas (Olszewski-Kubilius & Steenbergen-Hu, 2017). EXCITE is an example of practice-embedded educational research (PEER) (now more commonly referred to as "research-practice partnership") a sustained partnership between practitioners and researchers centered around a problem of practice. The 14-year EXCITE partnership between Northwestern University and a local K-8 school district sought to use STEM enrichment learning beyond the school day to prepare high potential minority students, particularly those from disadvantaged backgrounds, for higher level courses in secondary school, reduce achievement gaps between minority and nonminority students, and increase minority representation in gifted programs. The multi-year partnership provided over 400 hours of required, supplemental learning through after-school, weekend, and school breaks for students and their families in grades 3 through 8, as well as offering 180 hours of optional learning activities. The project collected data on standardized achievement, grades, student and family interviews, and college placements and conducted multiple studies on impacts. Studies found a 300% increase in the percentage of minority students qualifying for advanced math programs (Olszewski-Kubilius et al., 2004); positive social-emotional impacts such as readiness for advanced coursework and networks with other gifted minority students and their families (Lee et al., 2009; Lee et al., 2010); and closing achievement gaps within the district and higher achievement gains compared to surrounding, non-participating districts (Olszewski-Kubilius et al. 2016).

Some participants did report challenges balancing their academic and social time and reported that they often had to explain to friends they weren't available for social activities (Lee et al., 2009).

Another study of frontloading enrichment to close opportunity gaps was done through summer mathematics enrichment experiences in Project SPARK (Little et al., 2018). The summer learning experience was modeled after aspects of the Young Scholars model, discussed in an upcoming section. SPARK sought to promote gifted identification and readiness for advanced coursework for students in underrepresented groups, particularly students from backgrounds of poverty, as well as promote professional practice for the identification and development of emergent talent. Ten schools across two districts that do not have gifted instruction support participated in the study in which selected teachers received professional development on developing gifted potential in CLED students and participating students received approximately 50 hours of summer enrichment. Approximately 110 out of 220 first and second-grade students, 84 of which received free or reduced-price meals (FRM), received the summer enrichment treatment using research-based Mentoring Young Mathematicians (M^2) curriculum, a primary version of the Javits Project M^3, which focused on conceptual understanding and inquiry through a story-based approach. Spring to fall math achievement testing showed that students who received the enrichment curriculum in the summer program made significant gains compared to students who did not, including students who received FRM. During the school year, achievement testing from fall to spring did not show differential scores between the intervention group and control group, which raises the question of how to increase opportunities for more sustained opportunities for gifted students from historically underrepresented groups over time.

Systemic Approaches and Cultural Shifts for Talent Development. Indeed, the call for increased opportunity for deeper learning and inductive, student-centered learning is not unique to equity-minded experts in the field of gifted education but has been a mantra of many public education experts who

critique ways standardized minimum proficiency tests fall short of equitable opportunity and talent development. In *Equal Opportunity for Deeper Learning*, Noguero et al. (2015) write:

> In short, recent policies have created a vicious cycle that exacerbates existing inequities. Evidence suggests that even when these policies do lead to a momentary bump in scores on low-level tests of basic skills, the lack of access to a broad liberal arts curriculum and to opportunities to engage in complex problem solving ultimately contributes to poor performance on gateway tests for college and in college courses that require deeper comprehension skills and higher-order thinking (Conley, 2014). To the degree that deeper learning remains unavailable to students of color and children of low-income families, America will never be able to solve its equity dilemma. The evidence is clear: students will only acquire the skills to be truly college and career ready if they have access to a higher-level curriculum. (p.4)

Whereas particular pedagogical approaches that advance deeper learning have been part and parcel of gifted education practices for decades, research has shown that siloing their use to students identified as advanced or gifted rather than using them as Tier 1 instructional practices for all students has exacerbated inequitable outcomes (Noguero, 2015; Ritchhart, 2015; Thadani et al., 2010). One study revisiting Haberman's "pedagogy of poverty" found that teaching in higher poverty schools was more didactic and that when the intervention of "socially just pedagogy" focused on inquiry in science learning experiences was used, the positive impact was greatest in higher need schools. However, in addition to the benefits, the study noted challenges, including both shifting teaching practices as well as the conventional viewpoint that low-performing students must first master basic skills before accessing deeper learning experiences. Authors note the insidious nature of the pedagogy of poverty due to it being a systemic "product of teachers, students, communities, and societies, and includes each of these constituents' beliefs and prior experiences" (Thadani et al., 2010). The breadth of the challenge is described in *Creating Cultures of Thinking* (Ritchhart, 2015):

Nonetheless, such environments aren't the norm for many students. Low-performing schools often lack the energy for learning; high-performing schools may narrow learning to simply preparing for tests. In both cases, and those in between, we as a society should want more for children. Indeed, the twenty-first century will demand that we rethink the purpose and promise of schools. (p.6)

Data around success on grade-level proficiency tests can be deceiving in that scores for a school investing heavily in test preparation may appear strong, but the promise of schools to inspire lifelong learning and problem-solving required for success beyond standardized testing is lacking (Berger et al., 2016; Mehta & Fine, 2019; Moll, 2004; Nieto, 1994; Ritchhart, 2015). To transform systemically, Ritchhart (2015) proposes a conceptual framework of eight cultural forces requiring examination for true transformation: expectations, language, time, modeling, opportunities, routines, interactions, and environment. Each force plays a role in creating a larger culture that situates the core purpose of school around student thinking and growth versus static age-normed achievement elements. A study focused on teacher perceptions of the eight forces for a culture of thinking found that while teachers generally perceive that they are creating a culture of thinking in their classrooms, when it comes to specific evidence areas, such as whether a visitor would be able to observe language, modeling, or routines that contribute to an overall culture of thinking, they are less confident (Andersen, 2018). The survey was conducted with over 1,500 K-12 teachers enrolled in graduate school programs. Anderson noted that the areas of concern the survey surfaced are not necessarily "low-hanging fruit" and would require significant commitment, practice, and leadership support to create change.

Similar to the concern regarding the level of commitment required to create a deeper learning culture, creating a culture of talent development in historically underrepresented populations is likewise not necessarily "low hanging fruit" as it requires mindset shifts, grappling with multi-faceted complex problems, and tolerance of nuance and wrestling with ambiguity. In other words, a commitment to

talent development will likely require multiple angles of focus, including but not limited to commitment to opportunity and access to the pedagogies of gifted education. The Young Scholars model is often cited as a more comprehensive approach to talent development in historically underrepresented populations (Horn, 2015; Little et al., 2018; Olszewski-Kublius & Clarenbach 2014; Oszewski-Kublius & Clarenbach, 2012; Plucker & Peters, 2016; Siegle et al., 2016; Wright & Ford, 2017). The model proposes four levers for systemic change including: committed professionals (shared ownership, mindset, and cultural shifts to support the mission); find/identify (updated ways of identifying talent and potential); nurture/guide/support (ongoing opportunities for enrichment, academic support, and retention efforts); and essential elements (professional learning, parent engagement, summer opportunities) (Horn, 2015; Horn et al., 2021). District identification results over 14 years of program implementation show a 565 percent increase in the number of Black and Hispanic students receiving gifted services in high school compared to before the model was implemented. Results go beyond enrollment and show that 75 percent of the Young Scholars students in advanced coursework in high school achieved grades of A's and B's (Horn, 2015). The Young Scholars model is deliberately named not as a *program*, but rather as a *model* with interdependent levers that allow schools and districts to assess strengths and areas for growth to produce the desired change. In addition to addressing inequities in identification systems and opportunities for higher-level curriculum and enrichment, it also addresses concerns of retention and wraparound supports for students as they develop in adolescence through context-specific strategies such as cohorting students who are Young Scholars together in advisory sections, using mentors to have check-ins about grades and progress, providing Saturday tutoring options, and engaging parents (Horn et al., 2021).

Summary. Strategies such as universal and holistic screening practices, ensuring use of culturally responsive tools, and closing opportunity gaps that allow for talent to emerge are all examples of using an equity lens to close predictable gaps in gifted identification. Strategies such as ensuring frequent

doses of rigorous and culturally-responsive instruction and providing wraparound support for success

are examples of an equity and excellence lens on closing predictable outcome gaps, also called

excellence gaps. Together these strategies work to recognize and correct inequities in systems by

reorienting conceptualizations of giftedness and creating environments that support not only manifest

potential but also latent potential. Next, I discuss a different focal area in more current gifted research

— reframing the notion of gifted education around services with multiple entry points rather than static

labels. District and school leaders will also need to attend to this area to address gaps in talent

development.

Focal Area 2: Reframing Gifted Education

The second focal area is reframing gifted education around services with multiple entry points

rather than labels and designing programs that support talent development and students' differentiated

instructional needs. Since the 1980s, the research field began to focus not only on the idea of manifest

abilities but on a paradigm for identifying and developing talent potential (Passow & Frasier, 1996;

Renzulli, 1994). Rather than focus on identification alone, it attends to the importance that identification

aligns with available services and shifts attention from labeling students as gifted or not to options that

define gifted education in terms of talent development and meeting students' needs for differentiated

instruction.

Gifted Education as a Service Instead of a Label. The range of definitions of "giftedness"

complicates coherence in the field of practice with differing focus on ability, achievement, performance,

potential, and development along the lifespan in a variety of domains (Cohen, 2012; McBee & Makel,

2019; Sternberg, 2012). Practitioners and communities may often not be speaking with a common

understanding in designing programs or their accompanying identification processes. A quantitative

analysis of four influential definitions was assessed to compute the giftedness rate in populations and

found anywhere from 0.5% to nearly 87% of the student population would meet the criteria depending

on modeling variables in the definition (McBee & Makel, 2019). This variance exemplifies two things —

the importance of attending to a match between service design and identification, and the possibility

that any process has the potential to under or over-identify "giftedness." The former is troubling in that

it leaves talent undeveloped, and the latter is troubling because it is too broad to be able to serve in a

meaningful way.

The challenges associated with the label of "gifted" present an ongoing conundrum in the field

of gifted education, with many agreeing it is a distracting problem with no clear resolution. Dixson

(2022) argues that achieving equity in gifted education would require not only a renaming of the gifted

label but not replacing it with an alternative, noting research on the ways the label confers social status

and exclusivity for which parents with means vie for their children (Grissom et al., 2019) and distract

from the purpose of matching students to instructional needs. Whether to abandon the term *gifted* and

is an area of debate that prominent leaders in the field do not agree with and are conflicted by. The

evolution and variety of terms over time has included: genius, precocious, talented, talent development,

domain specific versus general intellectual ability, and advanced academics. Some researchers feel

engaging in "terminology acrobatics" is not a good use of time, arguing that the conceptual, policy-

related, and operational implications are more complex than they are fruitful; others argue the field

needs to catch up to the more nuanced definitions as has the field of special education and noting that

the broadness of the term demands more description and that not changing is a barrier to both clarity

and acceptance of the needs of gifted populations in the educational landscape (Makel et al., 2023).

Labels of all kinds are described by Mica Pollock as a "core tension" in her book *SchoolTalk* (2017) due to

the inadvertent messaging that comes with any educational label. While labels are considered useful for

both the purpose of ensuring students receive needed services and to have concrete data to drive

continuous improvement, attention to unintended ways labels of any kind have the potential to become

barriers to equity and/or excellence is necessary.

In *Beyond Gifted Education: Designing and Implementing Advanced Academic Programs* (Peters et al., 2014), researchers make a case for a need for gifted programs in climates where perfect differentiation is out of reach but critique specific foci in both the fields of research and practice which have held back the whole. The authors distinguish between two primary research groups interested in giftedness — psychology and education — and note that the priorities of each area of research result in distractions to progress in educational practice. The lens brought forward by researchers in psychology emphasizes definitions and diagnosis of the complex construct of giftedness as a trait, which complicates enacting the needs and focus of education practitioners. In contrast, educators' priority and focus are more on program design and instructional models to match learners' needs in a local context:

> The categorical label of gifted does not inform the educator, parent, or administrator about what it is the student needs, or the programs in which he or she would be successful. To remedy this deficit, we suggest that the act of identifying a student should look more like a needs assessment — determining a student's specific needs so that he or she can be matched with appropriate programming. (Peters et al., 2014, p. 30)

Rather than continue to focus on giftedness in terms of labels, some researchers advocate for focusing on services designed to meet the needs of students in local contexts via total school cluster grouping and acceleration (Brulles et al., 2010; Gallagher, 2012; Gentry et al., 2014; Peters et al., 2014). However, arguments for a universal differentiation approach note barriers to such a shift, including both the difficulty of effective differentiation on a large scale and dogmatic thinking in the communities which focus on homogeneous classes (Borland, 2012; Dai, 2012; Manning et al., 2010). Studies show that when teachers differentiate instruction, it does not tend to include gifted students or high-ability learners, but rather differentiation efforts focus on struggling students in the classroom due to the belief that gifted students do not *need* differentiation (Brighton et al., 2005). Hertberg-Davis (2009) noted the ways standardized testing has shaped how we "do school" and created a climate where teachers find it

difficult to attend to the needs of advanced learners and do not perceive that to be a need given the scarcity of their planning and instructional time needed to support struggling students. Researchers caution that while a standards-driven, factory-like, social efficiency model is not effective, "detracking without proper measures to respond to the needs of advanced learners will shortchange their education and jeopardize excellence in the name of equity" (Dai, 2012, p.98).

The idea of focusing on matching students to services and offering multiple entry points or levels of services for talent development rather than focusing on a gifted label is not new and was brought forward decades ago by Passow (1981) and Treffinger (1998). When the Response to Intervention (RTI) and Multiple Tiered Systems of Support (MTSS) approaches emerged in special education, their focus was on determining local normative groups to define Tier 1 instructional needs as step one and then determining smaller groups of students who might need different approaches or interventions. While initially launched around remedial and special education needs, many gifted educators drew connections and saw the opportunity to connect the locally focused approach as a way to include the needs of advanced learners in discussions of high-quality Tier 1 instruction and considerations of differentiated approaches to meet student needs beyond Tier 1. Examples of states or districts that have connected RTI to gifted education are scarce. The Florida Department of Education specifically references connections to services to meet educational needs of continued growth and using educational plans (EPs) that tailor services to student's specific strength areas and include plans for students to be "grouped with their intellectual peers for a significant part of their instructional day" (Florida Department of Education, 2019, p. 18). Despite the opportunity to use this approach to address the needs of the spectrum of learning needs from remedial to advanced, the RTI approach has been almost solely focused on the needs of struggling students and has faced several barriers to becoming prominent in the field of practice and community expectations (Seedorf, 2018). A study examining the approach in Colorado uncovered four independent themes in interviews and focus groups with

educators if this approach were to advance: broadening the scope of RTI to include meeting the needs

of advanced learners, multilevel support to ensure the needs of gifted students are clearly articulated in

administrators' and teachers' areas of responsibility, professional development on understanding and

providing appropriate differentiation for advanced learners, and time for collaboration and

implementation (Seedorf, 2018). This list of themes adds to the list of tasks that are not necessarily

"low-hanging fruit" and further illuminates the challenges of change in this area.

Given the challenges, a group of gifted education researchers has proposed a model for gifted

education that "is proactive and locally focused on students' present needs in specific domains" (Dixson

et al. 2020). The model would include proactive talent scouting, a focus on current domain-specific

needs over a static label, and a focus on local context and maximizing learning whether in the regular

classroom or a more intensive environment if needed. This focus on local context and domain-specific

needs is aligned with the goal of gifted and talented services — "to challenge students who would

otherwise go under-challenged and undereducated" – is aligned to updated research on talent

development, and has the potential to advance RTI and aligned programming based on evidence rather

than continuing with practices that are not showing outcomes aligned with intent (Adelson et al., 2012).

> We believe, and have personally experienced, that discussions of meeting student needs are
>
> much easier to have with parents of advanced students as well as school officials than are
>
> conversations about "giftedness." The question of "I see my student has scored in the 99th
>
> percentile in reading. How is that being addressed in the classroom?" is much more
>
> straightforward than "I have a gifted kid. What are you going to do about that?" … The construct
>
> of gifted is simply too complex and is interpreted in too many different ways for it to yield
>
> meaningful information about instruction. It also dredges up too many political issues of race
>
> and equality that only serve as roadblocks that further delay some students from receiving a
>
> proper education. (Peters et al., 2014, p. 182)

A shift from a discussion of a label that is ill-defined and perceived by many as elitist to a discussion about students' instruction, environment, and growth supports more concrete and defined understandings of advanced learners' academic and social-emotional needs. Next, I discuss research around considering the local context in more depth as one component of a shift to reframing gifted services to better align with the purpose of maximizing learning.

Shift from National Norm Perspective to Considerations of Local Learning Environment. Data on representation gaps reveal that national trends often fall short of providing the most useful information and that disaggregation at increasingly local levels can provide more nuanced information such as the impact of income disparity even within racial subgroups (Lakin & Wai, 2022; Yoon & Gentry, 2009). Hand in hand with the shift away from the term or label of "gifted" due to the problems it incurs, the shift to considering advanced differentiation needs as a local versus national matter has been increasingly explored theoretically and in some school districts in the U.S. and internationally. The use of local context in identification and services ties directly to the reason that gifted education emerged as a need — meeting the instructional needs of students who are not part of the majority/normative group and moving away from the one-size (or set of standards) fits all factory model (Dai, 2012). However, rather than using a broad-stroke approach (typically through national measures) to finding and serving students with advanced differentiation needs, it focuses on the local context.

One emergent approach in gifted education literature which is not yet widely implemented includes the use of local norms (Peters & Gentry, 2012; Yaluma & Tyner, 2018). A local norming approach responds directly to longstanding patterns of identification that are highly correlated to socioeconomic advantage (Hamilton et al. 2018) and instead assumes that local contexts need to be more responsive to advanced learning needs in all schools, even if those identified with need may have different profiles in different schools (Peters et al., 2021). Local norming is a way to make the elusive enactment of differentiation for advanced learners more likely by finding clusters of students within the

local context whose differentiation needs are outliers (i.e., needs that fall outside the local norm of Tier

1 instructional practices on the advanced side of the local continuum of student needs). While research

has shown that the more heterogeneous a grouping the less likely it is for advanced learners' needs to

be met (VanTassel-Baska et al., 2020), using local norming to cluster group students provides a

compromise which makes differentiation more likely compared to not using grouping considerations,

while not requiring homogeneous grouping which may result in systems of tracking and problems

related to equity of access (Brulles & Winebrenner, 2019; Gentry et al., 2014; Brulles, et al., 2010;

Shahar & Harel, 2022). In addition to yielding a more equitable representation of culturally, linguistically,

and socioeconomically diverse students for services, a local norming approach also makes more direct

connections to identification practices and service delivery which is not always a part of more traditional

national-normed approaches to gifted education.

Modeling one form of the practice in a school district that had only been using national norms

showed 213% and 270% increases in African American and Latinx identification respectively. Another

diverse school district in Colorado, which experienced gifted identification coming from a small number

of schools while other schools had zero identified students, piloted the use of local norming in schools

with historically low numbers of identified students. In the pilot, underrepresentation rates decreased

for Latinx students from 17% to 7% and from 6% to 2% for African American students. The district is

expanding the pilot to more schools as a result (Peters et al., 2021).

There is a not a standard practice from district to district or state to state when it comes to the

use of norms in gifted identification. While many states do not specify whether to use national or local

norms in gifted identification, some states' mandates (e.g. Illinois, New Jersey, Virginia) and the National

Association for Gifted Children's definition recognize the local contexts through phrases that call out

comparisons of *students with similar age, experience, or environment*. The practice of local norming

commonly brings up the concern of transferability — that a student who is identified at one school or

one district may not be at another, which is perceived as *de-gifting*. However, proponents of local

norming are clear that this practice is different from diagnosing a student as gifted — a construct of

greater concern in the field of psychology — and is more aligned with the purpose of identifying

students for advanced academic interventions — of greater concern in the field of educational

practitioners providing services to meet student needs (Peters et al., 2021).

Summary. With diverse expectations regarding the purpose of gifted education, research

suggests designing programs that are broad enough to develop talent in any student showing potential

exceptionality in a particular domain as well as ensuring each student can maximize their learning even

when that goes beyond grade-level standards. Reframing gifted services to recognize multiple needs and

entry points rather than static labels and examining the role of Tier 1 instruction and appropriate RTI

approaches when Tier 1 is not meeting those goals is more aligned with current research and defensible

and inclusive practice. An important consideration in those determinations cannot leave out the local

context, which also calls on gifted education to be more deliberate about programming to meet needs

for differentiation rather than rely on arbitrary national cut scores. Next, I discuss a different focal area

in more current gifted research to which district and school leaders would need to attend for a balance

of equity and excellence in schools — expanding accountability focus to include outcomes for advanced

learning.

Focal Area 3: Expanding Gifted Education Accountability

The third focal area explores research that intends to move the field of practice into better

alignment with the field of research by expanding accountability beyond the current focus on

identification measures. Two policy-related accountability areas that may contribute to improved

coherence in the gifted field of practice are educator preparation standards and including improvement

goals to close advanced learning gaps in school success reporting (Berman et al., 2012). Rather than

solely attending to identification gaps, attending to excellence gaps holds schools accountable for

growth and excellence in all student groups. In other words, expansion beyond the current focus on closing minimal proficiency achievement gaps and gifted identification gaps, higher expectations, and accountability goals to close *advanced* learning gaps would demonstrate a commitment to equity *and* excellence rather than equity *or* excellence. Adding such measures would signal shared responsibility among most educators for serving the advanced learning needs of diverse groups of students rather than solely among a small subgroup of educators. More comprehensive accountability would impact educator preparation programs and ongoing professional learning opportunities so that teachers are prepared to both recognize and serve the needs of diverse advanced learners in ways that close excellence gaps.

Accountability Via Measuring and Reporting Excellence Gaps. The concept of excellence gaps has emerged relatively recently in advanced education research discussion as a contrast to focusing solely on identification and participation gaps in gifted data (Wells & Plucker, 2022). 'Excellence gaps' refer to differences that contribute to advanced academic performance gaps in the U.S. (e.g. financial security, early childhood education, access to enrichment outside and within school), and the resulting advanced performance gaps that are pervasive across grade levels and content areas on broad measures such as the National Assessment of Education Progress and Programme for International Student Assessment (Plucker et al., 2017; Rutkowski et al., 2012). The suggested expansion would make reporting excellence gaps data part and parcel of the commonly used definition of educational equity: "eliminating the predictability of outcomes based on a student's racial, cultural, or economic identity" (National Equity Project, 2022). Excellence gaps benchmark impactful practices by focusing on student outcomes and more longitudinal measures of success from participation in various forms of gifted education. Excellence gaps are also an important national marker as demographic trajectories indicate historically underserved subgroups will grow in numbers, and the United States already has considerably larger gaps in advanced achievement compared to other industrialized nations (Plucker & Peters, 2016).

This area of research focuses the field on a backward design that balances maximum opportunity and participation with rigorous standards, thereby honoring both equity and excellence through accountability and reducing the chance that talent will go underdeveloped (Dai, 2012).

Excellence gap researchers highlight the impact of a longstanding focus on minimum proficiency standards in U.S. public education that results in concentration on remediation rather than growth (Neal & Schanzenbach, 2010). Plucker & Peters (2016) note decades of policy beginning around the time of the 1964 Civil Rights Act has resulted in a limiting mindset in U.S. public schools because districts are most accountable for closing achievement gaps by bringing students who are below grade level to minimum proficiency. Although the intention of this legislation was intended to design a floor rather than a ceiling, it has instead resulted in narrowing the curricular focus to mathematics and reading. This excludes a broader range of content that might capture a range of students' strengths and attention for talent development and sets the bar at leveling the playing field at minimum proficiency to the neglect of students who easily meet or exceed grade level proficiency. Plucker & Peters (2016) call this phenomenon "the soft bigotry of minimum competency" (p. 10) and contextualize the current emphasis as insufficient. While minimum proficiency has its place and relevance, they argue through available large-scale data sets, including international comparisons, for a broader scope of attention that includes gaps at higher levels of achievement. A 12-year international multilevel model study of TIMMS data from 59 countries showed the focus on improving the performance of low-achieving students and concentrating on minimal proficiency is an incomplete story; gaps in high-achieving excellence gaps have been increasing in the U.S. (Rutkowski et al., 2012). A focus on excellence gaps helps calibrate a broader picture of achievement that is more inclusive of the range of students both in the U.S. and internationally.

In *Excellence Gaps in Education* (2016), Plucker & Peters reviewed available research on strategies to close excellence gaps. While they found few empirically supported interventions, they

categorized six intervention areas of promise, including closing opportunity gaps, universal screening with local norms, flexible ability grouping, K-12 accountability systems, educator training and support, and psychosocial interventions. Many of these areas of promise are connected to the first two focal areas of reorienting conceptualizations of giftedness in identification and closing opportunity gaps and designing programs around responsive services rather than static traits; however, a focus specifically on accountability for educators' preparedness to work with advanced learners and for evidence of desired outcomes highlights an overarching need that could drive change and provide evidence of what works within the chaotic national landscape of gifted education.

Accountability in Teacher Preparation Programs and Professional Learning. Understanding the needs of and skills to work with advanced students is not a considerable focus in teacher preparation programs (Hertberg-Davis, 2009; Hock, 2022; Rinn et al., 2020). Anecdotal accounts of more than 100 in-service teachers pursuing master's degrees in curriculum and instruction revealed that "licensed general educators have very little awareness, and are just beginning to realize, that [gifted and talented] GT students have unique needs in their classroom settings" (Berman et al., 2012). Other studies have also noted that teachers are often hesitant to alter learning materials and assessment practices to meet advanced learners' needs and that differentiation for gifted learners is very limited (Brighton et al., 2005; VanTassel-Baska & Stambaugh, 2005). The Council for Exceptional Children and the National Association for Gifted Children created PreK-Grade 12 teacher preparation standards for knowledge and skills necessary for educators to effectively teach gifted students (NAGC/CEC, 2006), however the latest State of the States data collection on gifted education reveals this expectation has not become the reality in general teacher education programs (Rinn et al., 2020). In fact, some teacher preparation programs narrowly define equity and inadvertently position gifted education as counter to equity rather than as a critical element in achieving equitable opportunity in public schools (Hock, 2022).

A qualitative study of pre-service teachers sought to capture the beliefs they held about advanced learners as well as to see if a course in teaching young gifted learners would impact teacher candidates' willingness to differentiate to meet advanced learners' needs. The study found that life experience seemed to be the largest contributing factor to the preconceived notions about giftedness and that personal definitions of giftedness were often connected to myths about giftedness that exist in the literature such as "everyone is gifted at something" or that gifted students "don't need special services because they will 'get it' on their own." Professional learning about gifted learners did show impact on teacher awareness of the needs of gifted learners, but many named hesitations about the workload that planning to serve advanced learners would entail and the ways that attending to advanced learner needs would detract from time they felt should be spent with students who were behind (Berman et al, 2012).

In addition to developing the will, dispositions, and skills to consider serving advanced learners as part of classroom teaching, studies suggest that deeper mindset work is required to reconceptualize gifted education with equity at the center. Noting the positive impact of general cultural competence and responsiveness components to pre-service teachers' understanding, researchers recommend critical reflection, discussion, and dialogue about pressing issues in gifted education in order to contribute to change:

> In cultivating dispositions, it is important to consider not only how teachers construct their understandings of the teaching learning process, but to realize one's dispositions are also affected by their life experiences prior to entering the classroom. For example, a teacher who has a long-standing belief that students from low-income environments will rarely if ever achieve at the same levels as their more privileged peers, must transcend this belief and adopt more inclusive practices, believing that all students —regardless of circumstance —can achieve at the highest level. (Stephens, 2019, p.193).

In one urban school district in Louisville, Kentucky, researchers noted that the district had employed "the low-hanging fruit" of universal screening and reviewing local norms, but it wasn't until they initiated Project RAP, modeled after the Young Scholars program in Fairfax County, Virginia, that deeper cultural transformations began to take shape:

> Equity and excellence require climates that recognize talent in students from all backgrounds and seek to provide students opportunities to develop their talents through meeting academic needs. Critically, professional learning (PL) must be ongoing. To shift practices to schools and to eliminate potential biases, PL must occur for all administrators, teachers, and staff. (Frazier-Goatley, et al., 2022, p.116)

Gallagher (2005) notes the gap in preparation to serve *all* students in the classroom, including students with advanced learning needs, contributes to inequitable outcomes and excellence gaps. The federal Higher Education Opportunity Act (HEOA) that became law in 2008 includes a requirement for teacher training programs to embed learning about the needs of advanced learners, differentiating instruction for advanced learners, and reporting about how the criteria were being met and evaluated; however, most state reports make little reference to assuring teaching candidates are prepared to serve gifted students (Plucker & Peters, 2016). Beyond teacher preparation programs, districts are left to do this internally. Case studies note a "dissonance between principals' and teachers' perception about differentiated pedagogical strategies" (Chandra Handa, 2019, p. 109) as stronger in cases where they lack sufficient background and experience in teaching gifted students. Plucker & Peters (2016) suggest states require districts that use Title II funds to include how the funds include efforts to increase the capacity of teachers to find and serve diverse groups of students who are gifted and talented.

Summary. A focus on excellence gaps holds at its center the valuable tension of equity and excellence through measuring exceptionality in outcomes while also centering impacts for historically underrepresented populations. With little to no measure of advanced learning outcomes and evidence

that few teachers are prepared to develop the potential of students whose learning needs go beyond

grade-level standards, it is hard to imagine widespread improvement without accountability. Emerging

literature suggests expanding accountability beyond capturing data about identification of students and

into the realm of capturing data on excellence gaps between subgroups and contributing factors such as

teacher preparation and professional learning.

Leading Gifted Education in U.S. Public Schools

While there is not an abundance of studies on gifted education leadership, there are a small

number of studies regarding principals who are effective in gifted education settings as well as emerging

interest in the area of equity leadership in the field.

Effective Gifted Education Principals

One small case study of two principals leading schools specifically serving gifted and

academically talented students — one in private school and one in public — examined the unique skills

required to lead with advanced learners in mind (Weber et al., 2003). In both cases, strong

communication skills, an understanding of the social-emotional needs of advanced learners, and a

strong understanding of ways to individualize instruction for matching levels of challenge were noted.

Both administrators also noted plans to continuously evaluate the curriculum that was in use, its match

to student needs, and professional development for themselves as well as their staff. The primary

difference between the two was that the private school administrator said that her ability to attend to

these aspects became significantly more manageable when she moved from a public to a private school

setting.

Another case study of two Midwestern principals in rural schools with positive gifted programs

analyzed the principals' skills and dispositions held that may have contributed to their successful

programs (Lewis et al., 2007). Both were supportive of gifted learners, and one had a master's degree in

gifted education while the other participated in ongoing training around differentiation strategies and

tiered lesson planning. In both cases, principals used data to ensure student growth for gifted students, set goals, and continuously monitored programming. Additionally, they were both intentional in their communications with staff and community to develop a climate and culture that supports student needs but avoids "the stigma of elitism" (Lewis et al., 2007, p. 61). The study noted the need for principals to focus on the learning of every student served in the school, including gifted learners, in order to be an effective school, and said that "...without the school principal's support, services for gifted learners will continue to be disjointed and piecemeal at best" (Lewis et al., 2007, p. 62).

Culturally Relevant Leadership in Gifted Education

A literature review of 24 references of culturally relevant leadership for identifying and serving CLED gifted students identified themes, gap areas, and recommended best practices (Mun et al., 2020). Within the literature review, one theme was the capacity of leaders to recognize and negotiate the political terrain concerning issues in policy and practice on systemic bias. A second theme was around the need for district and school leaders to create climates that support both equity and excellence. Recommendations included the hiring of diverse and competent candidates who know the importance of acceleration, providing teacher training on the needs of gifted students in diverse groups, and focusing on curriculum and progress monitoring. A third theme called attention to the pervasiveness of deficit thinking and suggested leaders ensure teacher training to help recognize and correct this through a shift to focus on student strengths and examine assumptions, particularly regarding students from low-income backgrounds. Lastly, the review noted the importance of creating parent and community networks to raise parental awareness of opportunities for CLED students. The analysis noted "a critical need for gifted education and educational leadership scholars to work together to address these important needs" (Mun et al., 2020, p.135).

In order to influence school staff, leaders need to be aware of factors that have been found to increase participation of CLED students in gifted programs and sound professional learning practices for

change (Briggs et al., 2008). In order to advance this support in service of identification and retention of

CLED students in gifted programs, researchers integrated multiple standards related to culturally

responsive teaching, equity, and professional learning from the National Association for Gifted Children

(NAGC), Learning Forward, and equity research to name seven principles for systemic change, including:

pre-assessing participants' cultural knowledge, creating differentiated and targeted professional

learning plans, creating safe environments for difficult discussions, exploring deeper cultural

understandings, bolstering school-home relationships, sharing successes and challenges, and

engagement in critical debate and reflection (Novak et al., 2020). Researchers propose the use of case

studies as a way to integrate the dual needs for professional learning on topics related to gifted CLED

students:

> Case studies can provide opportunities for educators to explore how a collective and
>
> collaborative responsibility regarding equity and access can help meet the diverse academic and
>
> affective needs of their students. Case studies provide an opportunity for teachers to imagine
>
> themselves in settings they might not have encountered, have yet to encounter, or have
>
> encountered and are not sure how to proceed. (Lewis et al., 2020, p.241).

As more emerges on leadership for equity in gifted education, researchers note the complexity

of challenges that leaders face, including the tension of equity and excellence in environments of scarce

resources. In the tension of the two, gifted advocates worry that the immediacy of equity problems will

overtake the long-term importance of excellence in the struggle (Gallagher, 2005). Studies suggest gifted

education leaders need to be able to balance political contexts against research-based practices as they

navigate dilemmas such as: perception versus empirical evidence regarding the benefits of acceleration;

rigid identification systems that do not take into account the evidence regarding identifying

economically disadvantaged students; or perceptions that teachers do not need specialized training to

differentiate for advanced learners versus empirical evidence of the efficacy of curriculum models in

gifted education. Navigating and contextualizing the complexity of multiple meanings of equity noted early in Chapter II demands particular skill from school leaders to communicate in such an ambiguous and charged environment.

> Leaders in gifted education, possibly more than other fields, must be resilient because they are advocating for a special interest group of students who display exceptional cognitive ability yet challenge the sensitivities of critics who contend that appropriately differentiated academic experiences for highly able children are somehow unfair to other children. (Brown & Rinko-Gay, 2017, p.124)

Public education and the jobs of school leaders are fast-paced and pulled in many directions from multiple stakeholders. Maintaining focus on the ways public schools serve *all* students, including advanced students, happens within a context often rich with misunderstanding and diverse opinions.

Synthesis and Implications

Leadership to set direction to update practices that advance both equity and excellence is complex. Equity encompasses multiple lenses and finding the match between a suggested strategy and the need within a local context will hasten improvement in an area overdue for change. This reflection and planning occur within a segment of special education that is not typically a focus for many school leaders but which likely impacts both immediate and long-term achievement. As a whole, the strategies from the literature suggest three focal areas for reflection and action, including recognizing and correcting inequities in systems, reframing gifted education around services with multiple entry points rather than static trait labels, and expanding gifted education accountability beyond identification outcomes.

As district and school practitioners engage in what this means, they are influenced by both personal perspectives and diverse stakeholder interests that require them to negotiate the shape of gifted practice in their local context. For some stakeholders focused on equity without ample

attendance to excellence, gaps in subgroup identification are justification to suggest gifted programming

should not exist; for others focused on excellence without ample attendance to equity, the rhetoric of

meritocracy ignores what the research shows about the complexity of talent development (Smarick,

2019). Leaders' processing and integration of changes in advanced academics are contextual and local.

In other words, leaders' perceptions and actions are based on their diverse background experiences

both personal and professional, as well as their current environment. With each new experience,

leaders assess what is compelling to change and how to frame change to influence the understanding

and likelihood of acceptance from other stakeholders.

Fullan (2015) notes that "educational change is technically simple and socially complex" (p. 67).

While it could be argued that some of the changes recommended to advance equity and excellence

require a great deal of skill and may not necessarily be technically simple, there is little doubt about the

social complexity required. As leaders and followers adjust their understanding in light of new

information, perceive the legitimacy of the change as well as the balance of personal and organizational

capacity, and test and revise actions based on experience, a new narrative is formed. Within the field of

practice, given the dearth of research-based learning, leaders are likely to rely heavily on their past

personal and professional experiences as they learn about research-based recommendations. What is

selected to act upon and how that is framed for stakeholders will be influenced by those experiences as

well as environmental contexts.

In Chapter III, I outline the overall conceptual framework to examine leaders' sensemaking and

sensegiving around the tension of advancing equity and excellence in the field of advanced academics in

higher poverty schools and explain how this framework will be used to shape the methodology of my

study.

Chapter III - Conceptual Framework and Methodology

As Chapter II illustrates, the field of research in gifted education has been calling for increased

attention to equity issues for over forty years; however, the field of practice has only more recently

begun to engage with meaning-making and action. The literature review shows the complexity of topics

for school leaders to grasp to support all students in reaching their potential – both those identified for

gifted education services and those who are not. The purpose of this study is to investigate and describe

how school leaders in Title I elementary schools in one district make sense of and enact equity and

excellence in their setting considering recent increased political and practitioner attention to equity in

gifted education. The conceptual framework for this study uses theories of sensemaking, sensegiving,

and cognitive framing to investigate and describe the influences on leaders' beliefs and views about

gifted education, the ways leaders enact programs in contexts with historically underrepresented

populations, and how leaders frame gifted programming for stakeholders.

Conceptual Framework

The conceptual framework for this study integrates scholarship from theories of sensemaking

and sensegiving presented in Chapter I to analyze the role of school leaders as they lead the

implementation of updates in gifted education to better align the field of practice with the field of

research and advance equity and/or excellence. Schools as institutions operate based on beliefs,

structures, and practices that are long-held and widely accepted even when they may no longer be

appropriate (Bridwell-Mitchell, 2019). There is a tendency within the education community to reify

particular ways of operating and sit in the "gravitational force that perpetuates the status quo" (Johnson

& Kruse, 2019, p. 6) — until an event or series of events arise that compels an individual or organization

to reexamine, make meaning, and possibly reconstruct existing beliefs (Maitlis & Christianson, 2014;

Weick & Sutcliffe, 2005). Attention to systemic inequity and predictable disparities in schools and

districts has risen in the past decade (Burnette, 2019; Khalifa, 2016; Meckler, 2022), and leaders are

making personal meaning and shaping the meaning of the communities in many areas, including gifted education.

Sensemaking

Sensemaking theory is grounded in social constructivism and is concerned with how a group or an individual constructs meaning from something unexpected or unclear; in this case, evolving expectations related to gifted education philosophy and practices. Alignment of policy intention with practice depends on the match between the demands and a specific school's culture (including political forces), goals, and practices. Determining the ways that a district's policy, philosophy, or structures intersect with these aspects in individual schools is a top-down/bottom-up negotiation (Honig & Hatch, 2004). Weick's definition has evolved and he has most recently articulated it as "the ongoing retrospective development of plausible images that rationalize what people are doing" (Weick, 2020, p.1421). Rather than consider *organizations*, Weick is concerned with *organizing* as a negotiated construction within individuals and as a group (Johnson & Kruse, 2019). Equity work in general, and equity work in gifted education more specifically, cannot be made by policy mandate alone but requires deeper introspective work so that individuals can break down and rebuild plausible updated narratives.

The topic of gifted education often brings up strong emotions from stakeholders with diverse perspectives connected to their past and present experiences. Organizational change in situations with this degree of ambiguity will not follow a straight path and will require opportunities to hear alternative narratives and reconstruct schemas and identities (Kraft et al., 2015; Sandberg & Tsoukas, 2020; Steinbauer et al., 2015). Sensemaking theory is important in its pragmatism that reaches beyond purely rationalized approaches and recognizes the complexity of organizing. Sensemaking theory is interested in the contextual features that shape decision-making (Ganon-Shilon & Chen, 2019).

As Chapter II illustrates, there are myriad opportunities for advancing equity in gifted education that the field of research has made available to district and school organizations. Sensemaking theory views organizing as a "snapshot" of something that is in a constant state of evolution and emergence:

> For Weick … organizations are sensemaking systems that perpetually create and re-create
>
> conceptions of themselves and their environments. Whereas other theorists define
>
> organizations in terms of structure, Weick views them as a collection of sensemaking activities.
>
> For this reason, organizations are for Weick more process than structurally driven entities.
>
> (Johnson & Kruse, 2019, p.10)

Weick (2009) defined this iterative process as "a diagnostic process directed at constructing plausible interpretations of ambiguous cues that are sufficient to sustain action" (p.55-56), or more simply, "navigating with a compass rather than a map" (p. 264). Sensemaking is made up of three continuously activated parts: enactment, selection, and retention (Figure 1).

Figure 1.

*Wieck's Slow-Motion Look at Sensemaking Through Conscious and Unconscious Aspects of Enactment,
Selection, and Retention*
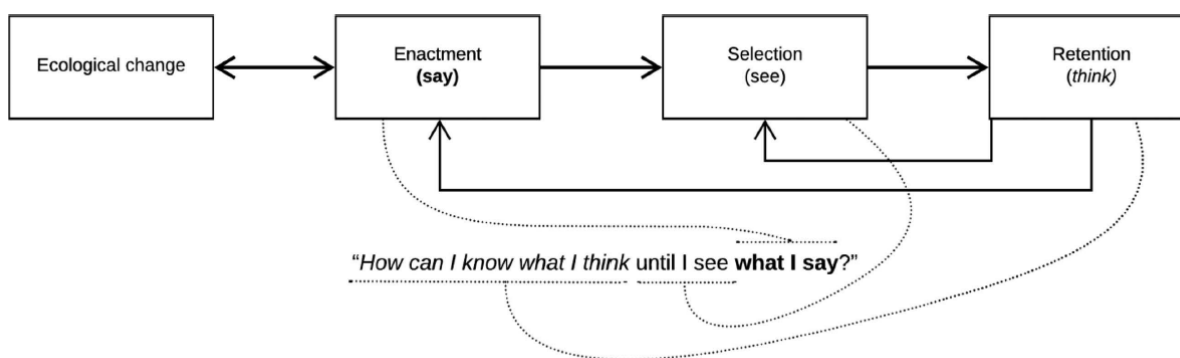
Source: Eddy-Spicer, 2019, p.101

Particular triggers will cause individuals to act into their environment (enactment), make sense of what is happening through meaningful chunks (selection), and label and connect them in the form of

cognitive "cause maps" (retention). As individual cause maps converge into collective shared maps, organizing occurs. "Sensemaking is social, retrospective, grounded on identity, narrative, and enactive" (Sandberg & Tsoukas, 2014, p.S8). Enactment, selection, retention, and the narratives to describe why or how gifted education practices will vary from one local school to another. This study attempted to document sensemaking processes related to addressing inequities in historical approaches to gifted education and reframing and expanding accountability for gifted services, particularly in Title I schools where historically there are fewer students identified for and served by advanced academic services (Yaluma & Tyner, 2018).

Studies of sensemaking in organizations have most frequently been applied to organizational strategy and change but have also been conducted around crises, organizational identity, and organizational learning. A review of 147 studies identified five "constituents" of the sensemaking perspective (Sandberg & Tsoukas, 2014):

(1) is confined to specific episodes (major or minor planned or unplanned events)

(2) is triggered by "disruptive ambiguity" which forces actors to retrospectively make sense of the disruption and restore order

(3) occurs through specific processes (bracketing and noticing cues, interpretation – initial sense), and enactment (further actions by actors in order to see what will satisfactorily restore the environment)

(4) generates outcomes that provide sense (or non-sense) that may or may not be accurate so long as it provides a plausible account that enables the actor to create a narrative to act into and

(5) is influenced by situational factors that can be varied but tend to fall into the areas of context, language, identity, cognitive frameworks, emotion, politics, and technology. (p.S12)

This study sought to document school leaders' processes of updating schemas and narratives about topics and issues in gifted services in an environment concentrating on change and updates through an equity perspective. More frequent equity conversations in the district have prompted "disruptive ambiguity" in multiple areas, including advanced academic programs. This examined the situational factors that influence sensemaking and sensegiving from school leaders. When it comes to implementing policy changes, such as changes in approaches in gifted identification or service models, Spillane et al. (2002) articulate a model integrating not only cognition, but also affect, in studying how educational leaders notice, frame, interpret, and construct meaning from messages. From the cognitive perspective, implementing agents notice and interpret based on their prior knowledge, beliefs, and experiences as well as the specific context they are in. These schemas provide the background in which leaders look for patterns in ambiguous information and process both cognitive and social input. This is of particular importance considering the varied models of personal experiences leaders may bring related to gifted education as well as the paucity of focus and opportunity to learn professionally about research and best practices. Research also suggests that the conservation of existing frames of understanding is a significant force and a typical approach to processing policy change is less transformative than it is preservational; this tendency may result in more superficial features rather than deeper principles of the intended policy (Spillane et al., 2002). Given this "partiality to similarity" whereby "people strive for a minimum of jolt, a maximum of continuity" (Weick, 2020, p. 1424), it is not surprising that decades of research on inequities in gifted education went largely unchanged until the recent rise in the urgency of many U.S. school districts pushed it to the forefront of the attention of a broader group of educators and other stakeholders.

Complicating the process, interpretations of equity-focused changes are open to more than one interpretation, giving rise to ambiguity. Weick (2015) states that "high reliability organizations react to ambiguity by increasing it momentarily" such that more of the situation can be "grasped" (p. 117).

> To grasp ambiguity is to refrain from the simplifications inherent … Instead, one settles for a
>
> workable level of ambiguity, but no more. To grasp ambiguity is to impose a plausible next step,
>
> but then to treat plausibility as both transient and as something compounded of knowledge and
>
> ignorance. Grasp is the acceptance that behind ambiguity lies more ambiguity, not clarity
>
> (Weick, 2015, p. 117).

In the fast-paced or pressured environment of school leaders in public education, the degree to which

individuals can refrain from simplification and tolerate ambiguity likely impacts leaders' sensemaking

and framing for stakeholders.

Beyond the cognitive aspect, affective elements such as identity, values, motivation, and

emotions come into play as individuals and groups go through cycles of sensemaking. In the balance of

reasoning, an individual's own experiences are given greater weight than external experts, and

motivation is a driver to either change or perpetuate the status quo (Spillane et al., 2002), or create a

self-reinforcing prophecy (Weick, 2020). However, the emergence of understanding the importance of

minority voices and experiences in U.S. educational institutions has created a "jolt" that has many

systems examining outdated inequitable practices in many areas, including gifted education.

The mix of cognitive and affective variables creates a narrative. When that narrative meets with

something unexpected or not yet understood, it prompts a circular response of enactment — acting into

an environment through exploration and bracketing (Eddy-Spicer, 2019). In the case of gifted education

reforms, there are several interruptions of the status quo for leaders to process, including changes to:

conceptualizations about who should receive particular types of instruction, conceptualizations about

intelligence, reliance on oversimplified identification data or processes, examination of service delivery

models, and the question of whether grade level proficiency is a meaningful measure of a successful

instructional program.

Sensegiving

Initiatives for change are at risk of failure if leaders cannot motivate and convey reasoning to stakeholders. As the literature reviewed in Chapter II suggests, there is evidence of the need for systemic change to address inequities in gifted education, yet research on managing the complexity of systemic change and overcoming resistance is still emerging (Smylie, 2016). Sensegiving is noted as a key leadership skill in times of change (Gioia & Chittipeddi, 1991; Kraft et al., 2015). In addition to processing their own intra- and interpersonal meaning about the systemic changes required to implement more current research in gifted education, leaders will play a key role in broader organizational sensemaking through the formal and informal influence on meaning made by others, or "sensegiving." Sensegiving strategies might include: disseminating a vision or beliefs to shape others' understandings, providing descriptions or explanations, and projecting narratives or symbols such as slogans, metaphors, or artifacts (Vlaar et al., 2008). In the case of intercepting old notions and supporting new understandings, leaders might also engage in "sensebreaking," which reframes and problematizes previously held conceptions and creates "a meaning void that must be filled" (Vlaar et al., 2008, p.241). Reframing how a school community recognizes individual responsibilities to correct systemic inequity, reframe gifted services, and expand accountability for serving advanced learners likely requires leaders to engage in sensegiving and/or sensebreaking.

However, sensegiving and sensebreaking are not done solely by school leaders and decisions about whether to engage in these actions are influenced by contexts. Both leaders and other constituents (e.g. teachers, community, district) impact change and a definition of reality in the organization through language, construction of narrative, and other devices (Maitlis & Lawrence, 2007). Leaders may provide sources for others' sensemaking and shaping interpretations of changes which become part of reciprocal processes or feedback loops (Gioia & Chittipeddi, 1991; Kraft et al., 2015; Maitlis & Lawrence, 2007). Literature on sensegiving notes this reciprocal nature in that leaders'

sensegiving can be important in gaining community acceptance or energy for change, and stakeholders' sensegiving influences what leaders decide to attend to (Maitlis and Lawrence, 2007).

Triggers and Enablers of Sensegiving. A study of conditions for leader sensegiving found particular triggers and enablers related to sensegiving context (Maitlis & Lawrence, 2007). Important triggers for sensegiving were that the leader perceived an issue was uncertain, ambiguous, or unpredictable, and that the issue was associated with complex stakeholder interests. With regards to leader sensegiving enablers, two conditions improved a leader's ability to shape others' interpretations, including the degree to which a leader had issue-related expertise and the availability of an environment ready for engaging in sensegiving about that issue.

The degree of threat and economics of time in complex environments weigh in leaders' decisions to engage in or prioritize sensegiving in any area of staff focus. In the context of focal area actions for practices in gifted education to be better aligned to gifted education research named in Chapter II – reorienting conceptualizations of giftedness, designing programs that both develop talent for all and differentiation for the needs of advanced learners, and expanding accountability for implementing gifted services – one can start to see how the context of particular communities, the pressures of standardized testing, and whether or not a district or leader engages in equity examinations may influence decision making to focus (or not focus) on updated research in identifying and serving advanced learners. For example, if a school has many students who perform above grade level, have extracurricular opportunities, or if the school has a culture of academic push, leaders may decide not to engage in any sensegiving about updated notions of gifted education. Or perhaps, in a school with similar conditions, the leader is triggered by the emergence of an unhealthy culture of focusing on labels and student stress in the community and might engage in sensegiving about reframing gifted education through an RTI/MTSS approach that redefines Tier 1 instruction with greater intensity of pedagogies to meet the needs of advanced learners rather than focusing on identification. In an alternative context, if

a school is experiencing intense pressure to raise standardized test scores, and the local community is not demanding talent development initiatives, the environment may not be triggering or enabling meaning-making or strategic actions related to closing opportunity gaps. Or perhaps, in a school with similar conditions, the leader has been triggered by equity conversations and might engage in sensegiving about shifting from a pedagogy of poverty to more culturally responsive teaching practices that center student agency and higher-level thinking. All of these examples assume that a leader is even aware of the current research about best practices in gifted education – the enabling condition of issue-related expertise – which is not a safe assumption to make given the research on significant gaps in educator preparedness for integrating gifted education into the scope of serving the needs of all students in a school (Beisser & Jefferson, 2008; Callahan et al., 2014).

This study examined sensemaking and sensegiving in Title I schools which serve higher percentages of students in poverty. One reason for the lag in gifted education practice and the perpetuation of underrepresentation in particular subgroups (students who are culturally-linguistically diverse, economically vulnerable, or twice exceptional) might be connected to an absence of triggers and enablers for school leaders. Since this study examined Title I elementary schools that have been successful in advancing equity and excellence in gifted services, understanding the role of leaders' sensegiving, including triggers and enablers, was of interest to shed light on what school leaders describe as facilitating (or creating barriers to) leading various stakeholders through changes in advanced academics.

Cognitive Frames and Paradoxical Sensemaking. As leaders decide whether to engage the tensions of equity and excellence and lead shifts from past schema to current research in gifted education, they will process personal cognitive frames and attempt to shape the cognitive frames of others or engage in sensegiving. Recent news stories in various parts of the United States are shaping narratives and providing frames around the tensions of equity and excellence (Arnett, 2022; Closson,

2022; Einhorn, 2019; Truong, 2019). How this is framed in the news or by school leaders supporting their community through change can take the shape of multiple cognitive frames. One study identified three archetypes of frames, which researchers labeled: either/or, dialectic, or paradoxical frames (Miron-Specktor & Paletz, 2020). Either/or frames resolve tensions by choosing one or the other – in this case, a focus on equity *or* excellence. This stance takes a zero-sum frame and prioritizes equity over excellence or vice versa. In reality, this stance might look like paralysis to change entrenched practices to reflect updated research; or conversely, it might sound like calls for the wholesale elimination of gifted services without a plan in place to develop talent or meet the needs of advanced learners. Dialectic frames accept the tension as irresolvable and seek harmony – in this case, see the pushes for equity and excellence as co-existing but not necessarily interconnected. In an elementary school setting, dialectic framing might mean enacting more enrichment opportunities for talent development and maintaining a status quo of differentiated service delivery. Lastly, paradoxical frames accept the tension as irresolvable and seek strategies that promote synergy through a "both/and" integration and create space for deeper perspectives on situations and tensions, such as those with advancing equity and excellence. Organizations that can employ both/and thinking to manage paradoxical tensions are more agile in learning, improvement, and innovation (Miron-Spektor & Paletz, 2020; Sparr, 2018). Leaders with a paradoxical cognitive frame for the issue at hand would see how equity and excellence, perceived by some as an irresolvable tension, are interdependent and work hand in hand. Leaders with paradoxical cognitive frames may employ the flexibility to be strategic about adjustments to the system based on results they see from the success (or failure) of various enacted strategies for change and improvement in gifted services in their schools.

Sensegiving can influence individuals' reactions to change positively by stimulating engagement with paradoxical sensemaking. Paradoxes — defined as "contradictory yet interrelated elements that exist simultaneously and persist over time" (Sparr, 2018) — are of particular interest in managing

organizational change as leaders guide followers through the tensions of old and new and the struggle

to adapt while also seeking order and stability. Paradoxical tensions trigger evaluations of fairness which

then moderate whether the change is perceived positively or negatively by followers. The framing and

modeling that leaders provide, particularly through an 'and' perspective rather than an 'or' perspective,

supports followers in integrating the demands of the old and new (Sparr, 2018). This is relevant to this

study of leaders' sensemaking and sensegiving not only because of the tensions of old and new but also

because of the tensions often experienced in simultaneously addressing equity and excellence. Leaders'

sensemaking and sensegiving "are consecutive and recurring processes. Only if the leaders themselves

engage in paradoxical sensemaking can they help their followers switch from an 'either/or' frame to a

dialectic or paradoxical 'and' frame" (Sparr, 2018). The leaders' sensemaking frame – either/or, dialectic,

or paradoxical – will influence stakeholders' (staff, parents) collective sensemaking, as they reconcile the

tensions and paradoxes of equity and excellence, talent development for all and differentiation to meet

unique needs, or other institutional changes.

Conceptual Framework of School Leaders' Sensemaking and Sensegiving

The conceptual framework for this study proposed that sensemaking and sensegiving about

updated notions of advanced academics operate in a cyclical process (Figure 2). Leaders' sensemaking

about gifted education happens within the context of their personal experiences and beliefs, local

influences on their sphere of influence, and the broader environment of different paradigmatic

approaches. As leaders bracket and enact their sensemaking through language, symbols, expectations,

and structures, they offer cognitive frames for followers to compare to their own sensemaking that

might be either/or, dialectical, or paradoxical. Depending on whether followers choose to integrate that

frame or not provides feedback to the leader's sensemaking as the broader school community

determines what to retain for the new narrative about gifted education in the school.

Figure 2.

Conceptual Framework of School Leaders' Sensemaking and Sensegiving About Equity and Excellence in

Gifted Education

School Leaders' Sensemaking and Sensegiving About Equity & Excellence in Gifted Education

Gifted Education Paradigms

Gifted child

Talent development

Differentiation

Local Influences

Parent demands

District initiatives

School culture

Regulatory context

Leader's Sensemaking

- personal and professional experiences with gifted education
- orientations to equity and/or excellence
- beliefs and values about grouping practices and/or core purpose of public school instruction and student outcomes
- anticipation and self-efficacy to respond to stakeholders (i.e. teachers, students, parents, school board, community organizations)

Leader's Sensegiving and Cognitive Framing

Language

Symbols

Expectations

Structures

Ineffectual (No Frame)

Equity

Either/Or

Dialectical (co-exist) *or* Paradoxical (synergy)

Either/Or

Excellence

Research Questions

The following questions guided my research:

Primary Research Question: How do educational leaders advance the goals of both equity and excellence in advanced academic programs in Title I elementary schools?

Subquestion 1: How do school leaders integrate advanced academics within the broader instructional programs of the school?

Subquestion 2: How is the sensemaking of school leaders shaped by their prior experiences and current environment?

Subquestion 3: How do leaders frame a vision for equity and excellence in advanced academics for staff and community stakeholders?

Research Design

This study focused on school leaders' sensemaking and sensegiving about equity and excellence in gifted education in Title I elementary schools. It was done through a qualitative comparative case study of three Title I elementary schools in one school district that had evidence of advancing equity and excellence in advanced academic services. Case studies allow for in-depth study of a bounded unit of analysis where separating the phenomenon from its context is often not possible (Hancock & Algozzine, 2017; Merriam & Tisdell, 2016). The phenomenon of interest in this study – sensemaking and sensegiving of school leaders who advance equity and excellence in higher poverty schools – helped to gain insights through in-depth study that accounted for the complexities of the topic and the environment. Over time, higher poverty schools have tended to identify few to no students with advanced learning needs (Crabtree et al., 2019), but the sites selected for this study were of interest as "positive deviants," or successful exceptions that work under the same constraints as sites who struggle, yet find a way to succeed (Pascale et al., 2010).

Case studies are best suited for studies of "how" or "why" (Hays & Singh, 2012; Yin, 2006). Multiple case study approaches have two stages of analysis – *within-case*, whereas in this study each site will be a bounded system, and *cross-case*, conducted after each individual case where the researcher seeks to build abstractions that build an explanation that fits across cases (Merriam & Tisdell, 2016). This exploratory study was about *how* school leaders make sense of changes over time in gifted programming, and *how and why* they lead and frame those changes for others. Studying three schools/multiple sites led to the ability to describe across cases and surface themes. Multisite comparative analysis can be used to support the development of a theory that can be extended for consideration in other cases with similar contexts for corroboration (Maxwell, 2005).

Site Selection and Sampling

The study took place in Taldev Public Schools[1], a large, suburban, mid-Atlantic school district in the United States with more than 140 elementary schools, approximately 40 of which receive Title 1 grant funds based on serving higher percentages of economically disadvantaged students. Data collection for this study took place in spring 2023 as schools were continuing to recover from the impacts of the 2020 global COVID pandemic. Both prior to the pandemic and in the aftermath, the Taldev district had been focused on equity in gifted programs in multiple ways, including measures in the district strategic plan; however equity in gifted programs were just one of a number of priority areas for the district. The district was also undergoing an intensive shift to bring evidence-based practices of the Science of Reading to scale at the time of the study.

The district's gifted programming focused on two goals — talent development for all students and differentiation to meet advanced learners' needs through a continuum of services. The continuum addressed a range of student needs such as specific academic area strengths and general intellectual ability in the four core content areas — Language Arts, Mathematics, Social Studies, and Science — through part-time or full-time service delivery models. The talent development and continuum approach provided multiple matches to students' needs as well as multiple pathways for students to access advanced coursework at the secondary level through open enrollment. At the time of the study, the district measured three equity points related to advanced academic programming in the district strategic plan — increasing use of gifted curricula in universal/Tier 1 instruction in all K-6 classes for the purposes of broad academic talent development; expanding access to full-time gifted services to all elementary schools to ensure access to the full continuum of services locally so that students would not have to leave their neighborhood school for services; and implementation of a model for finding and

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[1] Pseudonyms have been assigned to place names and proper names to maintain the confidentiality and privacy of research participants.

nurturing talent in historically underrepresented student groups (economically vulnerable, twice exceptional, first generation college), referred to as the Young Scholars (YS) Model. In addition to teacher professional learning about the YS model, schools in the district started receiving per pupil allocated funds for the last two years in order to provide extracurricular and summer enrichment opportunities for students identified as YS.

I used purposeful unique sampling with several criteria to identify three Title I schools – Castellano Academy, Ford Academy, and Gentry Academy. A unique sample is based on rare attributes of the phenomenon of interest (Miriam & Tisdell, 2016); in this case, higher poverty schools that had evidence of advancing equity and excellence in advanced academic programs. Title I schools were selected because the literature notes that higher poverty schools often lag in opportunities and access to gifted services relative to schools who don't serve higher numbers of students who are economically vulnerable (Yaluma & Tyner, 2018). The first criterion was that the school needed to offer the full continuum of elementary advanced academic services the district offers locally. The second criterion was that the school should have district data confirming purposeful actions related to equity and excellence in processes, programming, and outcomes, such as implementing part or all elements of the Young Scholars (YS) model, broadening advanced curriculum access, or closing participation or outcome gaps in advanced learning, or excellence gaps. The third criterion is that the school-based administrator at the school has worked in the district for a minimum of five years so that they have context for describing whether and how they may have experienced change over time with their staff and community.

Castellano Academy

Castellano Academy was a school of (approximately) 700 elementary students. The mobility rate of the school was 30 percent, 70 percent of students received free or reduced meals, and 70 percent of students received ESOL services. The school's published operating principles centered around a safe and

encouraging learning environment to build love of learning for students and adults, high expectations

for students to achieve their potential, partnerships with families and community, and diversity as an

asset to the learning community. Castellano was an early adopter of the Young Scholars model as well as

in the district's efforts to offer full-time advanced academic services locally. They had a local full-time

advanced academic program in place for approximately 15 years at the time of the study. Within the last

five years, an average of 64% of families with students eligible for full-time services (46 students)

elected to stay at Castellano (the neighborhood school) instead of attending a center-based program at

another school. This data was greater than the 37% average in the district to elect local services and the

percentage trend at Castellano had been stable for the last five years. Castellano Academy had a dual

language immersion (DLI) program starting in kindergarten. Students who participated in DLI had the

opportunity to also receive full-time advanced academics in the target language for two of four content

areas if identified.

Ford Academy

Ford Academy was a school of (approximately) 700 elementary students. The mobility rate of

the school was 18 percent, 60 percent of students received free or reduced meals, and 45 percent of

students received ESOL services. The school's published operating principles at the time of the study

centered around targeting and working with families to meet students' needs and curriculum to develop

students both academically and social-emotionally. Ford Academy had participated in Young Scholars

summer learning opportunities for more than 10 years. Ford's offering of local full-time advanced

academics was more recent and had been in place for approximately five years. Within the last five

years, an average of 87% of families with students eligible for full-time services (36 students) elect to

stay at Ford (the neighborhood school) instead of attending a center-based program at another school.

This data was greater than the 37% average in the district to elect local services and the percentage

trend at Ford showed an upward pattern of the number of families who elect to stay for local full-time

services over the last five years. In addition to offering local full-time advanced academics, Ford Academy had a dual language immersion (DLI) program that started in kindergarten. Students who participated in DLI had the opportunity to also receive full-time advanced academics in the target language for two of four content areas if identified.

Gentry Academy

Gentry Academy was a school of (approximately) 600 elementary students. The mobility rate of the school was 22 percent, 60 percent of students received free or reduced meals, and 45 percent of students received ESOL services. The school's published operating principles centered around partnerships with families and developing students as lifelong learners. Gentry Academy had participated in Young Scholars summer learning opportunities for more than 10 years. Gentry Academy's offering of local full-time advanced academics was also more recently started and had been in place for less than five years. Within the last five years, an average of 45% of families with students eligible for full-time services (43 students) elected to stay at Gentry (the neighborhood school) instead of attending a center-based program at another school. This data was greater than the 37% average in the district to elect local services and the percentage trend at Gentry had been stable over the last five years. The principal was new to the school in the last three years, making it the only school of the three with a principal leadership change while the school was beginning implementation of the local full-time advanced academic program.

Table 2.

Descriptions of Schools

School name	Demographics	Published Operating Principles	Advanced Academics History	Additional Information
Castellano	700 students 30% mobility 70% FRM 70% ESOL	Safe and encouraging learning environment High expectations for students	Early adopter of district Young Scholars model (>15 years) Local full-time advanced academic program in place for approximately 15 years	Dual language immersion

School name	Demographics	Published Operating Principles	Advanced Academics History	Additional Information
		Family and community partnerships	64% of approximately 45 eligible students selected local program option	
		Diversity as an asset to the learning community		
Ford	700 students	Family partnerships	Young Scholars model in place for approximately 10 years	Dual language immersion
	18% mobility	Academic and social emotional curriculum to meet students' needs	Local full-time advanced academic program in place for approximately 5 years	
	60% FRM			
	45% ESOL		87% of approximately 35 eligible students selected local program option	
Gentry	600 students	Family partnerships	Young Scholars model in place for approximately 10 years	Only school with principal leadership change during beginning years of local full-time program
	22% mobility	Developing students as lifelong learners	Local full-time advanced academic program in place for less than 5 years	
	60% FRM			
	45% ESOL		45% of approximately 45 eligible students selected local program option	

Data Collection and Participants

This study relied on two methods of data collection — semi-structured interviews and document analysis (Table 3). Using multiple methods of data collection increases credibility of the findings through triangulation (Merriam & Tisdell, 2016). Interviews surface deeper information and uncover the meaning structures individuals use to organize and make sense of experiences in ways that are often implicitly known by participants and difficult to capture from observation alone. Semi-structured interviews use guiding questions in a formal interview structure, but also allow the ability to probe more deeply into areas by following the participants' leads in particular areas (Hatch, 2002). Semi-structured interviews are well-suited for case study research in that they allow for follow-up questions to areas of interviewee interest and allow interviewees to express themselves more freely (Hancock & Algozzine, 2017).

Semi-structured interviews were held with 13 leaders, including three school-based leaders per school site and four executive leaders who supervise principals. "Leader" for this study is defined as any

actor who has an influential role schoolwide or within specific teams. At the school level, leaders may

have included school-based administrators or school-level instructional leaders such as instructional

coaches, gifted resource teachers, or grade-level teachers who were team leaders. For each of the three

sites, I interviewed three leaders with different roles including the principal as the primary school

leader, the gifted resource teacher who coordinates local school programming and processes, and at

least one other staff member they recommended interviewing from a leadership and implementation

perspective at the site (e.g. another school-based administrator, an instructional coach, a team leader,

etc.) (Appendix A). I also conducted four interviews with executive principals who supervise school

principals to gain their perspective on leading diverse school contexts and to probe whether and how

they influence the focus and outcomes of the leaders in the schools they supervise (Appendix B).

At Castellano Academy, I interviewed the principal, the gifted resource teacher, the literacy

resource teacher, and two executive leaders who supervised the school. At Ford, I interviewed the

principal, the gifted resource teacher, the assistant principal, and one executive leader who supervised

the school. And at Gentry, I interviewed the principal and two gifted resource teachers, and one

executive leader who supervised the school. Interviews lasted approximately 50-60 minutes each. All

interviews were recorded using transcription in Zoom video recording, and included paraphrasing of

ideas for synchronous member checks. After each interview, transcriptions were reviewed to develop

tentative ideas about categories and relationships (Maxwell, 2005). Participants were sent transcripts

and questions for clarification asynchronously for post-interview member checks to determine if the

analysis captured their perspective or needed further clarification, which they could provide either in

writing or by follow-up phone call. Member checks during the interview, in the transcript review, and in

summary memo review increase internal validity (Miriam & Tisdell, 2016).

Documents and artifacts are part of the natural setting, are less obtrusive and accessible for

collection, and reflect value systems operating within institutions (Hatch, 2002; Miriam & Tisdell, 2016).

Schools were requested to share documents or communications related to the research topics and were presented with the following possibilities: school improvement plans, community newsletter articles, email communications, team planning agendas or notes, school newsletters, work/goal agreements between principal and gifted resource teacher, professional learning materials from school-based staff learning opportunities, displays within the school, and any other documentation that the school leaders feel could be relevant for the topics discussed. For document review, each of the three schools sent at least three years of school improvement plans and the annual agreement forms completed between the principal and the gifted resource teacher that describes the focus and expectations of the role of the resource teacher. In addition, one school sent parent advisory group agenda documents, and two schools sent slide decks related to advanced academics that were used with the instructional leadership team at the school. Public website information about the school, such as mission statements or school focus descriptions, were also used. All data were stored on a password-protected laptop computer using pseudonyms for interview content.

Table 3.

Data Collection and Rationale Connected to Research Questions

Research Question	Method	Rationale
Primary Research Question: How do educational leaders advance the goals of both equity and excellence in advanced academic programs in Title I elementary schools?	Semi-structured interviews	Semi-structured interviews with a variety of types of school leaders (school-based administrators, instructional coaches, team leaders) at each site allow for discovering ways that leaders have processed the changes in approaches to gifted education.
	Document analysis	Document analysis allows for analysis of concrete resources that highlight sensemaking and sensegiving at the site.

Research Question	Method	Rationale
Subquestion 1: How do school leaders integrate advanced academics within the broader instructional programs of the school?	Semi-structured interviews	Semi-structured interviews provide opportunities for participants to reflect and describe conscious and unconscious ways they enact a particular paradigmatic approach with aspects of equity and/or excellence in their local context. Interviews with multiple leaders at each site provide information about the collective sensemaking comprising the school culture and goals.
	Document analysis	Document analysis allows for analysis of concrete resources that highlight enactment, selection or retention in the local site.
Subquestion 2: How is the sensemaking of school leaders shaped by their prior experiences and current environment?	Semi-structured interviews	Semi-structured interviews provide opportunities to describe a variety of contextual influences over leaders' individual perspectives as well as their integration of ideas about how gifted education has changed over time.
Subquestion 3: How do leaders frame a vision for equity and excellence in advanced academics for staff and community stakeholders?	Semi-structured interviews	Semi-structured interviews provide opportunities to hear the leaders' perspectives on ways they have framed change to advanced equity and/or excellence. Interviews provide data on the cognitive frames of leaders.
	Document analysis	Document analysis allows for analysis of concrete resources that highlight the method of framing (structures, language, expectations) or the cognitive frame (either/or, dialectal, paradoxical) selected by the leader.

Data Analysis

Analysis of case study data is a recursive process involving ongoing examination and interpretation of the data. While the researcher has identified a problem and selected a sample, it is unknown what will be discovered. Throughout the process, it is important to focus regularly on the research questions to ensure alignment and manageability of voluminous data (Merriam & Tisdell, 2016). The recursive process may result in updates to research questions in light of new information or a management system for tracking information that is used or not used according to relevance (Hancock & Algozzine, 2017).

Data for leaders' sensemaking and sensegiving for equity and excellence was analyzed inductively or from a "careful study of a contextualized phenomenon" rather than driven from a more positivist approach of testing a hypothesis (Hatch, 2002, p.162). Case study research is emergent because the researcher does not know in advance what challenges or issues might arise (Hays & Singh, 2011). Elements from the literature review and the conceptual framework provided initial codebook categories (Appendix C). Analytic memos were combined with raw data in a continuous, iterative analysis of primary data to update codebook categories as needed. Key updates included adding a category around integration of advanced academics as well as collapse the more detailed sensemaking and sensegiving key words into the two broad categories respectively (Appendix D). As particular patterns, commonalities, differences, and relationships between variables emerge, analysis through categorical aggregation, direct interpretation, pattern identification, and naturalistic generalization can begin to shape a set of findings (Hays & Singh, 2011).

For this study, a field memo was written following each interview, the interview was coded using the initial codebook in Dedoose, and emerging patterns of similarity and uniqueness at sites were captured in analytic memos. To answer the primary research question, I first analyzed each of the subquestions by site. I started with subquestion 1 about integration of advanced academics at the site in order to provide a contextual backdrop for the state of advanced academics at the school, including information from document analysis: school improvement plans, leaders' written reflections on school improvement goals, school agreement forms, and other documents provided from leaders at the site, such as instructional leader meeting slide decks or agendas for parent meetings related to advanced academics. For subquestion 2, I analyzed leaders' individual sensemaking in order to look for relationships to their past personal and professional experiences with gifted education and to begin to see if/how collective sensemaking themes might emerge. For subquestion 3, I described the topics that leaders named as requiring sensegiving site by site. Lastly, for the primary research question, I described

commonalities and differences across the three sites with relationship to the three subquestions and how leaders framed a vision for equity and excellence in advanced academic programming at the participating Title I elementary schools.

From this data, I identified themes for the discussion through analysis of the focal areas from the literature review in comparison to which areas leaders spoke about in interviews. During interviews, leaders all shared examples of situations or topics that required their sensegiving for various constituents. Some more common areas of sensegiving, and thereby collective sensemaking, emerged and were connected to the primary audience (e.g. parents, teachers, instructional leadership team) as well as whether the topic was focused primarily on equity, excellence, or a combination. The strength of evidence was further unpacked based on how many leaders from the school discussed it and whether discussion was in-depth or brief. Based on the two criteria, the sensegiving and opportunities for collective sensemaking were categorized as *modest*, *moderate*, or *concentrated*. For example, if an area was described by multiple leaders (collective sensemaking) and was described in depth, it would be noted as *concentrated* sensegiving. If an area was described only by one leader (individual sensemaking) but in depth, the discussion would be noted as *moderate*. If an area was mentioned by one leader but was not described in detail, it would be noted as *modest*.

Limitations

While case study research does provide for rich description of a phenomenon, it is context bound (Hancock & Algozzine, 2017). As noted in the conceptual framework, there are multiple personal, local, and paradigmatic influences on leaders' sensemaking of equity and excellence in gifted education. This number of variables within a sample of just three Title I elementary schools within one district is not broadly generalizable to all Title I schools. However, the generalizability of qualitative studies is based on the development of a working theory that can be extended to other cases (Maxwell, 2005). Several features can offer plausibility in case studies, including similarity of contexts, universality of the topic

studied, and affirmation from other studies (Maxwell, 2005). This study is also delimited to the study of

leaders and does not seek to study the impact of their sensegiving on followers. While leaders were

selected based on data showing their schools were outliers with positive impacts on advancing equity

and excellence, the case study did not include observations in classrooms or interviews with a broad

range of stakeholders. The goal of this study was not to generalize leaders' sensemaking and sensegiving

to all schools but to understand what may be happening in the leadership of sites that are positive

deviants as noted from evidence of positive changes in gifted services for historically underrepresented

populations. The three schools had similar contexts in that each serves a higher number of economically

vulnerable families (Title I), each served students in the elementary grades (K-5/6), and each had

evidence of successful implementation of gifted services. Findings could be useful to inform the work of

other Title I elementary schools to positively shift equitable access to gifted services.

Researcher Bias

As noted in Chapter I, Role of the Researcher, I have a dual role as a researcher and a

practitioner in gifted education. I held several biases for which I remained mindful. Throughout the

study, I was aware of reflexivity around my preference for deeper learning approaches to close

opportunity gaps and develop talent broadly and my ambivalent feelings about the impact of the

standardization movement on the types of learning students experience. I have a strong orientation to

believing all students should experience instruction that supports their continuous growth, even if their

needs exceed those of the age-based norms established by minimum proficiency standards. As part of

that, I believe that students with advanced learning needs require not only differentiated instruction

that flexibly adjusts depth, complexity, pace, and creativity, but also access to an ample academic peer

group. I believe some intentional structure for cluster grouping is important for students' sense of

belonging, for the benefit of student-to-student feedback and growth, and to facilitate teachers' ability

to reasonably plan for and manage a differentiated classroom given limited time and human resources. I

recognize that I am oriented towards a both/and approach to broad talent development and meeting the learning needs of students advanced learners. To address this bias, this study was designed to probe the diverse ways leaders' background, local context, and cognitive frames for equity and excellence frame their leadership in this area. I employed member checks both within and after interviews and triangulated data gained from interviewing multiple leaders at individual sites and documentary analysis.

Summary

The purpose of this study was to examine leaders' sensemaking and sensegiving of equity and excellence in gifted education in Title I elementary schools. It used a qualitative, case study approach with data collection of interviews and document analysis to explore the sensemaking and sensegiving leadership at work in schools with successful gifted programs and larger numbers of students from historically underrepresented populations. The study investigated leaders' beliefs, influences on those beliefs, and described how they frame their vision for equity and excellence in gifted programming for followers in their schools.

Chapter IV – Findings

This study examined leaders' sensemaking and sensegiving about equity and excellence in advanced academic programs in Title I elementary schools, particularly those who have been positive outliers in three focal areas noted in chapter II: recognizing and correcting inequitable practices, reframing advanced academic education such that practices are better aligned with current research, and expanding accountability in advanced academic education. The study design and data collection from the three schools centered around the primary research question: How do educational leaders of model advanced academic programs advance the goals of both equity and excellence in three Title I elementary schools? The primary research question is supported by three subquestions: 1) How do school leaders integrate advanced academics within the broader instructional programs of the school? 2) How is the sensemaking of school leaders shaped by their prior experiences and current environment? and 3) How do leaders frame a vision for equity and excellence in advanced academics for staff and community stakeholders? This findings chapter begins with a high-level review of district context followed by deeper descriptions of each of the participating schools to answer subquestion 1 regarding how each school integrates advanced academics in the broader instructional context. Site descriptions on how advanced academics are integrated at each school will be followed by a summary, school-by-school findings and collective summaries for subquestions 2 and 3 regarding leaders' sensemaking and sensegiving, and overall findings of the primary research question. I interviewed four principal supervisors associated with the participating schools and found that the research questions were better answered at the school level. Their answers are not reported here.

Integrating Advanced Academics within the Broader Instructional Programs of the School (Subquestion 1)

As detailed in Chapter III, all three schools in this study implement aspects of the Young Scholars (YS) model and offer the full continuum of advanced academic services locally; however, the schools

vary in the number of years that the full continuum of advanced academic services has been in place and range from being well-established for over a decade to being in the process of adding grade levels to full implementation as described below. A commonality identified at all three schools was an instructional leadership team that focused as a team on school implementation of initiatives, including but not limited to advanced academic improvements. The local school instructional leadership teams included school-based administrators and various types of instructional coach roles, including the advanced academic resource teacher(s); however, the number of years this had been a practice varied from school to school.

Professionals at all three schools noted that their progress towards equity and excellence in advanced academic programming, including the degree of integration, had been negatively impacted by the ongoing challenges from the global COVID pandemic, including: schools' lack of ability to maintain contact with families who did not have ready access to technology, staff turnover and training gaps due to challenges to holding professional learning, inconsistent student attendance, a shift in focus to address learning loss and recovery from the decreased standardized test pass rates, and the use of teacher coach roles (including the advanced academic resource teacher) as substitutes for either teacher shortages or increased absences due to classroom teacher illnesses. Additionally, schools noted that the district focus to bring to scale the evidence-based practices of the Science of Reading put a strain on teacher bandwidth for professional learning in other areas. As a result, some expectations related to advanced academics were loosened or lessened. While interviewees in all three schools noted backslides in progress, they expressed continued commitment and optimism that their schools were getting back on track with the visions for integrated advanced academic education approaches in their respective schools, which I unpack in the next section about how leaders reflected on advanced academic education in each of the schools.

Next, I describe how advanced academics was integrated into the broader instructional focus of each of the three participating schools – Castellano, Ford, and Gentry Academies[2] – in order to provide contextual background for leaders' sensemaking and sensegiving at each of the three sites. For each school, I start with naming the roles of staff who were interviewed and the types of documents reviewed, provide a brief history of advanced academic programming at the site, and report on how advanced academics was represented in school improvement plans.

Castellano Academy

For the study, I interviewed three Castellano school leaders — the principal (Karla), a literacy coach (Joy), and the advanced academic resource teacher (Sue). I also reviewed school documents, including: three years of school improvement plans, school agreement forms between the principal and advanced academic resource teacher, and a presentation for the instructional leadership team about YS implementation. Castellano Academy is a well-established Title I school within the district with regards to integration of advanced academics, having worked on this topic for 15 years. Interviewees identified their most recent priorities in advanced academics as resetting staff understanding of the YS model, providing K-2 opportunities in advanced mathematics, and adjusting the full-time advanced academic program to meet the needs of students coming out of the learning disruptions from the pandemic. Documents such as the school improvement plans and slide decks from leadership team meetings pinpointed focus on access to rigor through use of advanced academic curricular materials and resetting understanding of the YS model.

The principal is a former gifted resource teacher and has prioritized the integration of advanced academics since she became the school leader over 10 years ago. In her interview, she recounted how she formed a collaborative instructional leadership team, including the advanced academic resource

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[2] Pseudonyms have been assigned to place names and proper names to maintain the confidentiality and privacy of research participants.

teacher, at the start of her tenure as principal. She wanted to ensure common and coherent messaging and support for teachers regarding instructional expectations. She shared that she desires for school staff to obtain endorsement in gifted education and that she holds expectations for time within PLCs to attend to growing teachers' capacity for Tier 1 access to advanced academic curriculum approaches. She commented, "It took a while to hire teachers and to support the program and the vision that I had … it was a mindset. It was training. It was persuasion." During grade-level PLC meetings, time is allotted for teachers to talk about how to adjust the curriculum from the district's advanced academic curriculum framework to be used in Tier 1 instruction. She described, "They'll talk about scaffolding and differentiating. They'll talk about 'well my group is here, this group is here — How can we tweak this?'"

Pre-pandemic school improvement plans and documents of school reflections on the plan's progress, including successes and challenges, included evidence of high expectations and building growth mindsets in students, as well as family engagement efforts. In the area of Tier 1 access to advanced academic curriculum, pre-pandemic literacy goals for Castellano included the strategy of having the advanced academic resource teacher lead work to integrate critical and creative thinking strategies and Language Arts curriculum from the district advanced academic curriculum framework into grade level PLCs. School access and opportunity goals included an expectation that 100% of classes would "engage in instructional experiences using advanced academic curriculum at least three times a quarter throughout the school year." This frequency exceeded the district minimum expectation of one time per quarter. Reflections within the school improvement documents revealed teachers used a variety of advanced academic curricula in multiple subject areas and that by the end of the year, 69% of teachers used advanced curricula at least once per quarter, falling short of both the local school goal and the district minimum goal. School improvement plans two years post-pandemic did not explicitly state frequency expectations with regards to using advanced academic curricula; however, the principal shared in an interview that the expectation for the most recent school year was for classroom teachers

to provide talent development instructional experiences at least three times over the course of the school year, one less than the district minimum. She was optimistic about raising the bar in this area and said that she planned to double that expectation to six times for the next school year, which would set a bar higher than the district minimum expectation. The agreement form between the advanced academic resource teacher and administrator stated a commitment to attend 3-4 PLC meetings per week and work with each grade level in the school a minimum of one time per month.

Tier 1 access to rigor is a marker of integration of advanced academics and was noted as a priority by the principal in her interview. At the time of the study, the district had an explicit Tier 1 access to rigor goal in the district strategic plan, and Castellano's access for all students to use advanced academic materials improved over a three-year period from a baseline of 20% to 78% of classrooms meeting the minimum access goal the district set for broad talent development. While Castellano has been committed to Tier 1 access to advanced academic curricula, all three leaders interviewed noted the post-pandemic challenges resulted in taking a step backwards on expectations about how frequently experiences would happen. The literacy coach noted, "Because instruction is multiple years below [grade level] and there's so much new for literacy as a focus — advanced academics is not as integrated as it has been in previous years. Before COVID, we were able to do a lot more." While the advanced academic resource teacher noted that teachers are open to learning how to use aspects of advanced academic curriculum, she also noted that in the last year, the access and opportunity goals were treated by some teachers more "as a checkbox" versus the intention of providing equitable access to talent development and higher-level thinking. She hypothesized that that mindset was connected to the amount of things teachers were being asked to do related to literacy and learning loss initiatives, as well as a reduced amount of professional learning compared to prior years due to substitute and teacher shortages related to COVID recovery.

All three leaders at Castellano noted challenges with both aspects of advanced academics integration — YS model implementation and offering local full-time advanced academic programs — despite the school being an early adopter of both initiatives. With regards to implementation of the YS model, both the advanced academic resource teacher and the literacy resource teacher noted the challenge in frequent staff turnover and how the model had become confused and misunderstood over time. The advanced academic resource teacher shared that not having an understanding of the ways to identify aptitude led to an overidentification issue which in turn led to teachers feeling like the identification was not meaningful or useful instructionally. With regards to challenges with offering local full-time advanced academic services, all three Castellano leaders interviewed noted the struggles related to the district policy offering family choice of local or center-based options for full-time advanced academic services for eligible students. They contend that the policy has created a struggle to maintain a critical mass of students who stay at the local school so that they can create clustered cohorts in their local full-time program.

Key takeaways of the integration of advanced academics at Castellano include the challenge to maintain high expectations for talent development over time and the struggle to sustain a full continuum of services imposed by district policies around school choice. Of the three schools, Castellano had the longest standing principal leadership with a vision for opportunity, yet the commitment to that work was notably impacted by issues such as competing initiatives and teacher retention. Rather than being integrated, high expectations for talent development efforts were sidelined when the district literacy focus demanded attention shift to training and implementation of Science of Reading practices and gaps resulting from the interruptions to learning during the pandemic. Additionally, the literacy teacher shared that annual teacher attrition, including multiple advanced academic resource teachers over the last several years, was a challenge to keeping momentum. The principal named the work of advanced academic integration as mindset and persuasion work, revealing a need for ongoing

sensemaking opportunities over time with staff to maintain even basic goals for talent development. A second takeaway at Castellano was the struggle to keep buy-in for a full continuum of services locally when the local district policies maintained a family choice for service location. With many families annually choosing to attend the center-based program, having a critical mass of students identified for full-time services created frustration and impacted the degree of buy-in for the work required to offer a full-time service delivery model.

Ford Academy

For the study, I interviewed three Ford school leaders — the principal (Jason), an assistant principal (Caleb), and the advanced academic resource teacher (Saira). I also reviewed documents including three years of school improvement plans, school agreement forms between the principal and advanced academic resource teacher, and agendas for a local parent advisory group about advanced academic services. Interviews and document analyses highlighted ways that Ford Academy has been working to improve the integration of advanced academics for the last eight years, since the current principal was hired. The focus has evolved from improving mathematics opportunities primarily at the start to growing into services branching all academic content areas with multiple entry points for talent development and differentiated instruction. Although the district emphasizes a continuum approach, the primary access for students needing advanced academic services at Ford was to go to another school for a center-based full-time program. Neither Tier 1 access to rigor nor subject-specific differentiation were a focus prior to the hire of the current principal. The principal noted that he established a vision for ensuring advanced mathematics opportunities, a subject-specific service, within the neighborhood school, because that had not been accessible to students unless they went to the center-based site for full-time services up to that point. After finding success in offering advanced mathematics, the principal notes that the assistant principal urged him to expand to other academic content areas. As a result, one year prior to the district strategic plan goal to offer full-time advanced

academic services locally at all elementary schools, interviewees described how Ford staff undertook the process of learning about advanced academic curriculum in language arts, social studies, and science. At the time of the study, Ford had a relatively new but fully established local full-time advanced academic program in grades 3-6.

Both interviews with the principal and assistant principal as well as detailed school improvement plans with frequent reference to advanced academic goals reveal the administrative team is collectively committed to access to rigor, advanced differentiation, and integrating advanced academics in the instructional work of the professional learning community. The interviews with school leaders revealed varying depth of knowledge regarding implementation but all three shared a common overarching philosophy of the importance of access for equitable talent development and two expressed wanting to ensure fidelity of implementation for identified students. Within the last three years, interviewees described how the school has established a staff YS committee to increase collective awareness and responsibility. Within the last year, the school established an advanced academic parent advisory group to support parent understanding of vision and practices to maintain a healthy learning community. Additionally, the assistant principal pointed out that a cohort of school leaders meet "at least once a quarter and more intensely in the summer" to self-assess and set goals around integration of advanced academics, including touching base on how communications are being received by stakeholders and evidence of implementation. At the time of the study, the school had two advanced academic resource teachers — one staffed by the district and one that Ford Academy funded using their Title I budget. The resource teachers are part of the instructional leadership team and work through coaching cycles with teachers as they use advanced academic curriculum in Tier 1 instruction. With regards to Tier 1 access to rigor and the district strategic plan, Ford's school plan reflection indicated improvement over a three-year period from a baseline of 14% to 78% of classrooms meeting the access goal to promote talent development.

Ford Academy's pre-pandemic school improvement plan included both direct and indirect goals related to advanced academics. Explicitly, the plan names that the school will meet the district minimum strategic plan talent development goal of one advanced academic curriculum experience per quarter K-6; however, for grades K-2 and 5-6 it lists the minimum quarterly expectation while naming a more ambitious goal of daily opportunity for students in grades 3-4. Later in the school improvement plan, the increased frequency in grades 3-4 was explained as a targeted area of the advanced academic resource teachers' time since those grade levels offer the start of the full-time service option and the resource teacher did not have enough time to work that intensely with every grade level. Actions connected to this goal included: attending professional learning with follow-up support for using advanced academic curriculum and improving understanding the YS model, continuing committee work to build teacher capacity and provide structure for vertical collaboration, monitoring progress of students with the YS designation, and strengthening partnership and communication with families. Of the three schools studied, Ford Academy's school improvement plans were written with more specificity and integration with other goals in the school plan. The plan included specific articulation of collaboration between the advanced academic resource teacher and reading specialist, specific advanced academic curriculum units that would be focused upon on various grade level teams, and high-level notes about implementation within structures like reading or math workshops. In addition to explicit call-outs to Tier 1 talent development opportunities, use of advanced curriculum was also listed within specific reading goal interventions, to include the use of multiple Language Arts enrichment materials to ensure the inclusion of higher level thinking and attending to the needs of dually-identified students in work to close achievement gaps.

Although there was robust articulation of the role of advanced academics in the pre-pandemic school improvement plan, the format and structure of plans in the two years coming out of the pandemic were tightly tied to spending of Elementary and Secondary School Emergency Relief (ESSER)

funds and did not mention access to rigor or use of advanced academic opportunities. Post-pandemic academic plans at Ford included heavy emphasis on the teacher learning and implementation of practices aligned with the Science of Reading and better understanding tiered strategies for remedial interventions to close gaps within multi-tiered systems of support (MTSS). Other areas of emphasis in the plan included social emotional learning and building the attributes of goal-directedness and resilience among students. The agreement form between the advanced academic resource teacher and administrator stated a commitment to attend five or more PLC meetings per week and work with grades 1-4 a minimum of one time per month.

Interviews with the principal also indicated the impact of the pandemic on progress the school had been making on increasing integration of advanced academics schoolwide. He emphasizes, "There's definitely room for improvements, but I feel like we're getting a really good grasp on how to seamlessly integrate advanced academics so that it doesn't look like something separate. That's my intention." He noted his optimism and strategic hiring of support to get the school back to pre-pandemic levels of integration:

> When I started as principal, I would say that we were at a 0 [in terms of integration]. It wasn't even part of the conversation … [Just] prior to the pandemic we were probably a 4 approaching a 5 [on a 5-point scale]. With the pandemic and all of the other needs that come with it … our attention has been pulled a little … That's why we've added the second [resource teacher], so that we have two people that can keep their eye on that ball while the rest of us are putting out fires everywhere else … The early successes afforded us a lot of opportunity and a lot of good will which we used well and built on.

The principal is aware that the level of student needs after the pandemic is a threat to the progress of the school to integrate talent development but committed extra human resources in an effort to protect the goal of deeper integration of opportunity in all classrooms. Rather than seeing talent development

as an optional extra that might go by the wayside in the face of "fires" that pull administrator attention, he wanted to increase the level of support knowing that administrators' attention could be diverted in dealing with post-pandemic challenges.

Beyond talent development goals, the administration also noted a need for increased resource teacher support for the local full-time advanced academic program. Because Ford's local full-time advanced academic program needs to serve eligible students who are in the dual-language immersion (DLI) program as well as students who are not in DLI, there are additional teachers who either need to be ready or who will require support to enact advanced academic curriculum full-time. The split of students who participate in DLI or not creates additional complexity in the grouping scenarios faced by school-based leaders when creating class groups with their given staffing. According to the assistant principal, Ford groups eligible students together into DLI and non-DLI classes and fills the remaining seats in each class at each grade level with students who have been identified for part-time advanced academic services to ensure ample-sized academic peer groups that would otherwise be difficult given the number of programs the school offers.

Key takeaways from Ford's integration of AAP center around higher degrees of strategy to protect progress towards the vision. In comparison to other schools in the study, there was a greater degree of planning for vulnerabilities to the vision. The administrators were aware of the fragile nature of the progress and were strategic in securing their commitment to the vision of desired outcomes, including fidelity of implementation of both talent development and advanced differentiation goals through detailed school improvement plans and the use of Title I funds to ensure resource teacher support for classroom teachers. Of the three sites in the study, Ford's articulation of expectations for whole school participation and accountability for opportunities to use curriculum that promotes deeper learning and complex thinking in school improvement plans was the most robust, except for the year the plan was driven by connections to ESSER spending. In addition to the role of the advanced academic

resource teacher, who naturally focuses attention in this area due to the nature of their job description and more intense professional learning opportunities, it is notable that Ford was also the only school with multiple administrator-level leaders who were aligned and focused on the goals of talent development and advanced differentiation with fidelity. However, when the administrators predicted that their attention was likely to be stretched in some other areas due to the ongoing impacts of the pandemic, they used Title I staffing to hire a second advanced academic resource teacher to mitigate any potential regressions or plateaus of the progress they had been making as a school. This planning showed that although they recognized students and families had very real challenges coming out of the pandemic, student opportunities for deeper learning were still a priority. Additionally, the school improvement plan and agreement forms between the advanced academic resource teachers and administrators noted thoughtful use of the two advanced academic resource teachers to work with specific grade levels more intensely as high leverage points for progress as a school.

Gentry Academy

For the study, I interviewed three Gentry school leaders — the principal (Erica) and two advanced academic resource teachers (Kelly and Elle). I also reviewed three years of school improvement plans, school agreement forms between the principal and advanced academic resource teachers, internal communications about cluster grouping, and a presentation for the instructional leadership team about Tier 1 access to rigor. Interviews highlighted that Gentry Academy has been engaged in work around equity and excellence in advanced academics for just under 10 years through implementing a new local full-time advanced academic program; however the school had recently undertaken more integrated work prompted by the vision of a new administrator and teacher leaders in the most recent three years. Prior to the current principal joining the staff three years ago, interviewees noted that the advanced academic resource teacher had not been included on the instructional leadership team and the advanced academic focus had been primarily on starting a local full-time

program which ran separately, rather than in collaboration, within grade level teams. As part of moving to a more schoolwide and integrated approach, the school has recently changed the grouping model for local full-time advanced academic services. The principal stated that moving to cluster grouping was part of efforts to make advanced academics less separate, by making planning time across classes more collaborative and shifting to a cluster grouping model so that more teachers were responsible for delivering a full-time advanced academic experience for the benefit of identified students as well as other students in the class.

The principal described how three years ago, in her first month in the role, she was contacted by parents who perceived the placement of students in the extra class spots as favoring families on the PTA board and that some families had alleged that class placements were discriminatory against students of color. The principal met with the school board member and families several times to unpack perspectives. According to interviewees, the original grouping model used when Gentry's local full-time program began was more homogeneous, grouping all eligible students who choose to stay at their neighborhood school for services and filling remaining spots in the class with students who were eligible for part-time advanced academic services. At the same time that parents were raising the concern about who was selected to be in the advanced class, the district began to provide choices of grouping models for local full-time advanced academic programs ranging from more homogeneous (i.e. placing all students identified for full-time and part-time advanced academics together), as Gentry had been doing, to cluster-based (i.e. keeping a minimum of 6-8 students who need similar services together and allowing for eligible students to be in different classes). Principals could choose the grouping model that would work best for their school provided there was strong communication with families and commitment to increased teacher training to ensure more teachers would be prepared to teach full-time curriculum in all four academic core areas. This study took place during the first year Gentry moved

from a homogeneous to a cluster grouping model, an initiative for which the principal received significant community pushback, which is discussed later with regards to leaders' sensegiving.

School improvement plans showed two "raise the bar" goals for the year. One noted that all K-6 students would participate in one science-focused project-based learning (PBL) experience for the year and included actions related to teacher professional learning in this area. Reflections on the goal within the school improvement documents revealed teachers noticed increases in student engagement and ways of sharing their learning. A second "raise the bar" goal was around increasing student discourse through engagement with a "communicator" rubric and student self-assessment process three times a year. As with other participating sites, the most recent school improvement plan migrated to a format that focused on ESSER spending and goals. In ESSER-focused school improvement plans, academic goals were related to closing achievement gaps, the shift to evidence-based practices in the Science of Reading, and Tier 2 and 3 remedial interventions in MTSS. Gentry's most recent school improvement plan, like the pre-pandemic plan, included a focus on student reflection and had shifted into the work of doing student presentations of learning at two of the grade levels. School improvement plans showed that Gentry's Tier 1 access to rigor measure for the district strategic plan improved over a three-year period from a baseline of 22% to 81% of classrooms meeting the district minimum access goal for talent development.

Also during this time, the principal shared that she decided to invest Title I funds to have a second advanced academic resource teacher to support multiple equity efforts related to advanced academics. The agreement form between the advanced academic resource teachers and administrator stated a commitment for each advanced academic resource teachers to attend five or more PLC meetings per week. The advanced academic resource teachers were each assigned specific grade levels to work with K-6 and planned to attend a minimum of one PLC meeting per month for each of their assigned grade levels. However, one of the resource teachers noted that the PLC time is scarce,

particularly coming out of the pandemic and with new literacy instruction expectations. She comments, "It's been a tough year for teachers. There's been a lot that has come down the pipeline that is new. So I think a focus [in PLCs] is really understanding those new changes." She also noted that the work and focus of PLCs is very grade-level specific with regards to focus and mindsets, but that she sees most of the school focused on the full continuum of student needs rather focusing just on gaps and remedial needs. "The majority of the school really [looks] at the continuum -- not just focusing on filling gaps, but really pushing [advanced differentiation] forward … We only have two [grade levels] that still need help with the [advanced] end of the spectrum." With regards to the level of integration of advanced academics in the school, the principal also noted room for improvement but was optimistic that she knew what next steps were needed.

> One place where I believe we failed to support [a team where integration didn't go well this year] was that we didn't explicitly describe what that might look like … We didn't say [what] curriculum [we expected] or the frequency and duration … So we're working on that right now — better defining what we mean.

This highlights how the principal was reflective in monitoring progress of moving in the direction that she feels is best for talent development across the whole school. When the outcome did not meet the high expectations of her vision, she did not abandon the cause and took responsibility for the support she realized teachers would need going forward to operationalize the higher dosages of opportunities she thought were important.

Three unique aspects of school context came up in interviews with Gentry leaders — a PTA-funded focus on afterschool opportunities, a village approach to being responsible for student success, and a stable staffing situation. With regards to the partnership with the PTA, one of the advanced academic resource teachers noted the principal was "doing a wonderful job of parent engagement and community outreach … There's a lot of neighborhood involvement in our school and a lot of school

pride." The principal reported that the PTA consistently raises approximately $20,000 a year to run afterschool enrichment programming, including scholarships for students who may need support to attend. In addition to this leadership advocacy resulting in extracurricular opportunities for students regardless of their ability to pay to attend, the during-the-school day culture was also one that signaled a community of care. One of the advanced academic resource teachers described a culture of schoolwide responsibility for student success and a staff that is supportive of one another. "At Gentry, this is not Teacher A's class — These are fifth grade students. We're all going to be involved. We all care about all students. The teachers work well to communicate and collaborate in [professional learning communities]." Lastly, the principal described the staffing of the school as very stable and experienced — "teachers stay here forever … most have 15 or more years' experience" which is not always typical in schools with higher numbers of students affected by economic vulnerability, and was cited by one other school in this study as a significant challenge.

A key takeaway at Gentry was a multi-layered aspect of making change to deepen integration of advanced academics at the school. Gentry was the only school out of the three that was undergoing a shift from more homogeneous grouping to cluster grouping which prompted questioning both from teachers as well as families. Balancing two goals of talent development for all advanced differentiation for students identified for a need for more frequent use of complex curricular challenges requires both broad and clear articulation from a leader as well as unpacking specific expectations about what that looks like in planning and classroom time. While leaders are supporting teachers to advance this vision, they are also managing messaging to families and the broader community. Although politics were part of the stories of all three schools who participated in this study, the temperature of the politics at Gentry was notably more intense for the leaders at Gentry in comparison to Castellano and Ford Academies, which is discussed further in upcoming sections on leaders' sensemaking and sensegiving.

Integration Summary

For subquestion 2 regarding how schools integrate advanced academics within the broader instructional plans of the schools, findings reveals that all three schools were on a journey to integration regardless of having been focused in this area for decades or implementing newer aspects of integration. The three schools were selected for the study for being positive Title I school outliers, with the level of forthright commitment from school-based administrators' being above average relative to other Title I schools in the district. Data from school interviews and school documents reveal that even as positive outliers, integration of advanced academic education goals in a Title I elementary school is a journey that will experience both progress and challenges, thus requiring monitoring and strategic thinking from school-based leaders. Each school showed specific ways that the schools' leaders were monitoring progress towards their goals and either correcting, communicating, or growing with regards to integration. Castellano, the longest established site in the study offering a full continuum of advanced academic services determined that a reset was required to ensure buy in to programs like talent development opportunities or the YS model. Ford leaders assessed vulnerability in the face of distractions of other initiatives or pandemic-related challenges and were strategic to increase and focus supports in particular areas. And Gentry leaders experienced unexpected resistance that pushed their communication of big picture vision while simultaneously realizing a need more detailed articulation of expectations about classroom practices for the coming year. Collectively, these points illustrate that integration of advanced academic goals is not a set-it-and-forget-it endeavor, which is a challenge given the many areas of attention for which leaders in Title I schools are responsible.

The next section presents findings related to how leaders' sensemaking is shaped by their prior experiences and current environment (subquestion 1) at each of the three sites.

Leaders' Sensemaking About Equity and Excellence in Advanced Academic Education (Subquestion 2)

This study seeks to learn from Title I elementary schools that have been recognized as moving towards advanced academic education practices that are better aligned to current research. Leaders described how they came to their current thinking about advanced academics by reflecting on their personal and professional experiences with advanced academic education and how those experiences connected to areas they prioritized in their work. Findings explored below suggest that regardless of the type of background a leader initially had with advanced academic education, their sensemaking included a consciousness about shifting paradigmatic approaches away from the gifted child paradigm (focusing on unnuanced labels) and active reframing of advanced academic education as multifaceted based on a variety of student profiles, contextual to opportunity, and responsive to student needs. In all three school cases, there were experiences that prompted leaders to consider the part they wanted advanced academic education to play in their school, whether it was recollection of not having their own needs met as a child, observations as teachers about whether they felt equipped to meet advanced students' needs, influence of other staff members on their thinking, or making sense of current districtwide initiatives. All leaders described a strongly held value around the importance of opportunity in talent development that they came to understand over time. Differences at schools included variations on ways of resolving the tension between the paradoxical goals of talent development for all students and more intense advanced differentiation needs of some students when it comes to creating a school culture that is driven by both equity and excellence.

Castellano Academy

All three leaders from Castellano stated that they had been identified for advanced academic programs as students, had participated in professional learning about advanced academic education, and had taught advanced academic students when they were classroom teachers. Although all three leaders interviewed at Castellano had these things in common, there were differences with regards to the types of advanced academic services they participated in and how they felt about it. There were also

differences in their professional pathways prompting them to learn more about meeting advanced learners. Processing of these background experiences revealed variations in their focus of school implementation of advanced academic programs.

Principal Experiences and Perspectives. As a student, Karla recalled that gifted services were tracked classes and as a child felt like services were about an alternative class placement. She recalled the teacher calling her mom to suggest they should move her to another class because her needs were different from others in the grade level class. According to Karla, she was "finishing her work before everyone else," her work was qualitatively different and very "detail-oriented," and she was "crying all the time" from not fitting in with the other students. Karla recalled that after moving to another class where she had academic peers, "they said I flourished — probably about grade 3."

In her professional journey, her official teacher and leader preparation classes did not include content on meeting the needs of advanced learners. Karla was hooked into learning more about the needs of this population of students during her time as a teacher when the district was beginning to implement the YS model. "It was super exciting because we were learning about … how to create the conditions for students through exposure, and that's stuck with me. As a principal, that's what I've been striving for." Karla decided to pursue taking district-funded courses to get her endorsement in gifted education and became a gifted resource teacher before going into school administration. She described herself as compelled to reach students that other teachers were challenged by through advanced academic education approaches. She explains, "[I've spent time] really understanding that there are children who don't necessarily fit the mold or characteristics of what a gifted and talented student is. Because I was the disciplinarian and strong teacher on my team, they assigned me the kids that had behavior problems … I wanted to channel their energy in a different way."

Karla's sensemaking was influenced by experiences as a student receiving advanced academic services, her desire as an educator to meet students' needs while also using advanced academic

pedagogy approaches to provide opportunities to students who were being overlooked due to student behaviors, and her own initiative to learn more through the professional learning the district provided. Her focus in implementation was on both the talent development and differentiation paradigms.

> Every learner learns differently. Every learner's rate is different — so I can't say that all my kids are going to reach this high [place] because there's a bell curve, so that's not possible in life. We have to realize that. But I don't want to be the one that has not given them that exposure, or that chance … So my goal is to expose them to as much as possible, and let the chips fall where they may, and then build on it. You know, capitalize off those little starfish that are ready for it, and keep clustering and looking [for] starfish, as we put it all out.

Her comment articulates the role of opportunity in talent development, and the responsibility she feels to give many exposures. With regards to the differentiation paradigm, she describes an expectation of variable outcomes in her mention of a bell curve with regards to how students might respond. This mindset breaks beyond the typical aspiration of mastery that is focused on, or constrained by, age-normed/grade level standards, and opens the possibility of presenting beyond grade level to see what students can do. Her reflections revealed a strong equity focus through her elementary leader lens, as well as recognition of how outcomes to equal opportunities would naturally vary; however excellence was less defined or distinguishable from equity. Her descriptions of advanced academic education in the interview indicated recognition of both/and nature of serving needs and seeking needs to be served through availability of differentiated services and frequent talent development opportunities.

Literacy Coach Experiences and Perspectives. In contrast to the separate class/full-time approach that Karla experienced as a student, Joy's experience as a student involved multiple schools that used a pull-out service delivery model with classes approximately once a week or month. From her memories as an elementary student, she recalled that "In my regular class, I was sort of a teacher because I was helping other kids in my class and knew that I understood things a little bit differently."

Joy expressed some feelings of confusion about being not being identified as gifted when she switched school districts. "I switched schools, and because my previous school district didn't take the same test, I wasn't classified. I didn't know why I wasn't pulled out [for services] with other kids I felt were similar to me." The following year, she began receiving services again and felt that the part-time pull-out program she experienced was beneficial because she got "extra opportunities" while also being a part of a heterogeneous class. Joy was the only school leader interviewed for this study whose teacher preparation program included content about the needs of advanced learners. She attributed that to attending a college that had a center for gifted education within the school of education, and professors from that part of the school would present in her classes even though she was not majoring in gifted education specifically. She defined gifted education as a way to meet the needs of students with "strong academic skills … who need their instruction differentiated." Joy reflected on how most of her career had been "focused on the other end of the spectrum." She said that as a reading recovery teacher, "I definitely was focused on the kids that struggle"; However, when she co-taught in a two-way immersion class with a cluster of students identified for advanced services, it prompted her to learn about curriculum designed for gifted students so that she could better meet their needs. "It was definitely an area of growth for me to learn more about supporting them … I felt like that year, I had the opportunity to walk the walk, so then I could talk the talk even better."

Joy has worked in three school districts in the last 28 years and shared that she has experienced multiple models of gifted service delivery, including pull-out, students being bussed to another school for services one day of the week, and the model in Taldev that, within its continuum, offers choice of center-based or local-based full-time services. She expressed worry that the center-based model gives an unintended message to students that "if you're smart, you don't belong here … It really bothers me. I think kids should be in their neighborhood schools with their friends." Although pull-out services are not part of the Castellano continuum, Joy expressed multiple reasons for preferring part-time/pull-out

service delivery, including her own positive experience, her belief that students needed to learn to work with people with diverse abilities, and a noticing that when students at a smaller school are clustered for multiple years together, their familiarity can result in some behavior issues. That said, she did say that gifted education was necessary to "make sure our students are on a level playing field when they go on to other opportunities … It puts our kids at a disadvantage if they're not being exposed to [what kids at other schools might be] exposed to." She also noted that in the course of her career she has seen "a much greater understanding of what the characteristics of giftedness looks like," especially around the characteristics of twice-exceptional learners, noting that those had not been an emphasis early in her career.

Joy's sensemaking was influenced by comparing her experiences as a student receiving gifted services with the multiple ways she saw giftedness defined and services delivered in various school districts that she has worked in her career. Although she had a background in gifted curricular approaches from her teacher preparation, it wasn't until she was tasked with co-teaching an identified group of students that she put those principles into action, having focused more of her teaching with reading recovery. She wrestled through considering the balance of time with age peers versus academic peers, as well as the impact of identifying larger numbers of students for programs. She described the teachers at her school as having an "asset-based lens" which was an advantage, but brought with it a challenge that they were referring too many students because of familiarity with the context of just one school. "Our staff's understanding depends on how long they've been here and what their experiences have been … some of our staff have been here a long time and they see more advanced academic-ness than necessarily exists." She described that past a certain tipping point of identifying too many students, some teachers begin to distrust the identification or ignore the identified needs. Her focus in implementation is on learning and being influential in the school's instructional leadership team as the school works on self-assessing and goal setting to rebuild advanced academic programs that have been

impacted by annual staff turnover and teacher workload with district-mandated language arts changes. She stated, "Right now ... I think we aren't necessarily providing as high a level ... of rigor as we should be. It puts our kids at a disadvantage."

Advanced Academic Resource Teacher Experiences and Perspectives. Sue's perspective on pull-out service delivery models contrasted with Joy's. As a student, Sue was part of a magnet program. "It's trained in my brain that when I think 'gifted education,' I think 'oh - it's a separate program.'" As a student, she didn't perceive the separateness as much as she says she does now, reflecting on it as an adult and thinking about "how it must've felt for students" who were not pulled out for services. "I can only imagine ... [feeling] left behind ... Reflecting back now, seeing how gifted education has evolved, it's kind of shocking to think back how it used to be." Although understanding and serving the needs of gifted students was not part of her teacher preparation program, Sue sought out learning more on topics in gifted education from the experience of feeling unprepared to meet the needs of students in her first class as a new teacher:

> It became so apparent - a couple of students were really standing out, and they had these academic needs that I was struggling to meet because they weren't the same as the rest of the class. They were just clearly picking up the content really, really, quickly. They were bored ... and I was like — What should we do for these kids? What do I give them? And it's again the same thing as if they needed an IEP. They just have needs that are not being met.

Sue was noticing the variance in learner needs that she felt unprepared to address. She further recalled seeking help from her mentor as a first-year teacher, asking about what she should do with students for whom the general curriculum was not a fit, but found her mentor also didn't have background in working with students with aptitudes beyond their same age peers. "Honestly, I was so overwhelmed trying to manage behaviors that there wasn't a lot I could offer ... My math coach was able to provide me with some advanced math games, but that was the extent of it my first year." It is worth noting that

Sue was spotting potential and aptitude in the class that didn't have the gifted cluster. The next year, she was assigned the class with the gifted cluster group where she said she "took it upon myself to educate myself on what enrichment strategies I should be using." However, her lens during that learning was not just about serving the identified cluster, but also taking a talent development approach with the whole class. "I was doing different things than the rest of the third-grade classes because I wanted to expose my class to that. And then the small cluster group needed [those approaches] even more." As a teacher, Sue felt her mindset about differentiation was different than most teachers' focus:

> The emphasis when [most educators] talked about differentiation was clearly on students who needed special education services and there wasn't so much an emphasis on the students who needed enrichment. And it's tough, because you look at these children, and you ask yourself '*Who has the highest need?'* I feel like as educators, we look at students who might be reading or doing math way below grade level, and of course … we need to get them on grade level … But at the same time, [you think] -- wait, there's this other group of kids that are not reading below grade level. What are they doing? Are they developing their talents? Are they improving academically as well? And so it's hard to kind of shift that mindset to them being equally as important.

Sue's observation about educators' mindset regarding whether advanced learning needs are optional or core to the mission of each student's growth also surfaced at another site in the study where a principal named the vulnerability of talent development and advanced differentiation in the face of increased demands on the local environment, such as those stemming from ensuring students who are behind are brought to grade level proficiency or from bouncing back from stressors such as those seen from the COVID pandemic.

Sue expressed ongoing consciousness of managing persistent first associations with the term *gifted* to the more current structures in her school that reflect talent development paradigms:

[My initial first thoughts] honestly come back to where I started — what gifted education used to be — and it's just, really, everybody's still battling that perception. And when you immediately think about advanced academics or gifted education, you think of something separate, and you think of a specific type of a child who immediately stands out from the crowd. They're getting A's on all their tests. They're the type of child that most people stereotypically think of ... And so it's battling that, and really retraining our brains to search for a different way and reframe that in our minds — To be open to searching for talent and seeing it broadly.

Her comments reflect the hold that the 'gifted child paradigm' can have, whether from past experiences or from the question of whether all educators stand ready to serve the needs of advanced learners, even for educators committed to talent development or differentiation paradigms of gifted education. In fact, her further comments reflect continued reflection between her childhood experiences and what she is experiencing in her current district as a teacher. "My brain has kind of gone back and forth on it a couple of times," she said, wondering whether gifted education is a good thing or not. In the end, she says she does think that it's necessary, and sees it as similar to why we need identification and special education services for some students, saying that "[strategies and curriculum] do need to be accessible to everybody, but for some students it's a *need* … and they need more frequency and intensity." Her description is aligned with some of the more current thinking in the research field connecting advanced academic services to RTI or MTSS approaches which is less focused on labels and more concerned with degrees of intervention based on student needs. This paradigm shift, however, is less concrete and often more difficult to quantify for teachers or families than separate programs or separate curriculum.

Of the three leaders interviewed at the school, Sue's wrestling with leading advanced academic education seemed to be more intense. This may be due to the nature of her newness to the resource teacher position where her leadership focus is naturally more concentrated relative to other school leaders and confers more frequent opportunities for district-led professional learning with others in the

same role who are wrestling with the same questions. Being in this role naturally provides time for more social and collective opportunities for sensemaking compared to individualized sensemaking. Her implementation focus was balanced between talent development and differentiation paradigms. She clearly articulated the cyclical and evolving nature of her thinking about gifted education overall as she learned about approaches beyond the gifted child paradigm, as well as the responsibility she felt to support the staff's understanding and enactment of programming in alignment with the learning she participated in at the district level.

Castellano Sensemaking Summary. All three leaders interviewed at Castellano brought diverse personal and professional background experiences to the collective leadership group at the school. Their childhood experiences provided a raised level of awareness regarding understanding that students may require differentiated services to meet differentiated needs, and when faced with students for whom they were not prepared to serve, took initiative to seek out professional learning to increase their efficacy. While childhood experiences seemed to provide an anchor for considering the type of programming each leader felt would be appropriate, the daily triggers for continuing to wrestle with programming direction and communicating with the broader community about it correlated with the role of each leader.

The leaders differed in the degrees of engagement in individual sensemaking based on their position and each held slightly different perspectives and focuses related to supporting advanced academic programming at Castellano. The principal and advanced academic resource teacher were more directly responsible for implementation of advanced academic services; therefore their time spent making sense of whether and how to lead advanced academic integration was greater in comparison to the literacy coach. Their professional experiences, the nature of their positions, and their participation in ongoing district-led professional learning increased their opportunities for sensemaking both individually and with others. While the literacy coach brought past personal and professional

experiences and influence as a member of the local school instructional leadership team, her

opportunities for sensemaking with updated research or district initiatives seemed primarily to be in the

time that the advanced academic resource teacher brought topics to the instructional leadership team,

which were notably limited based on available time and competing needs. The literacy coach had a

variety of experiences as a child and from her teacher training program; however, she was the furthest

removed of the three leaders at the school with regards to articulating how her views may have changed

over time. The principal's main emphasis in the interview was on talent development and opportunity,

which did not seem to have a direct connection to her childhood experiences but rather more to do with

her feeling of connectedness to district-level professional learning when she was a teacher. Of the three

leaders at Castellano, the advanced academic resource teacher, the role which requires more frequency

and depth of framing of programming for the broader community, described her sensemaking with the

most complexity and nuance.

The principal level leadership at Castellano had been stable and steady with a vision for

providing talent development and advanced differentiation for several years, but the vision faced

challenges such as beginning versus deepening work on talent development and differentiation due to

staff turnover, maintaining momentum on high expectations in the wake of increased need for

remediation, and the impacts of the district policy on family choice to access full-time advanced

academic services locally or at a center-based program outside of Castellano. In spite of challenges, the

leaders at Castellano all named reengaging with pre-pandemic efforts to ensure a talent development

mindset and strong continuum of services as goals for the following school year, signaling the realization

that further collective sensemaking with the staff would support refocusing on equity in advanced

academics. At the end of the school year and at the recommendation of the advanced academic

resource teacher, the leadership team was beginning to recalibrate topics of identification and service

delivery, offering additional opportunities for collective sensemaking. The principal was ready to

reinstate pre-pandemic goals in school improvement plans and was providing space in the instructional

leadership team meeting for the administration and coaches, including the literacy coach, to reset

around the advanced academic resource teacher's leadership; however, at the end of the school year

there was turnover in the resource teacher role. How the leaders' sensemaking played out in their

actions was not as evident as it was in other schools; however, the actions that were taking place are

described more in the upcoming research question related to sensegiving.

Ford Academy

Of the three leaders interviewed at Ford Academy, two had been identified for gifted services as

students, although their experiences differed. They each participated in varying degrees of professional

learning about advanced academic education, primarily in the form of district-provided learning for

administrators and advanced academic resource teachers. The advanced academic resource teacher

was also in the process of earning her advanced academic endorsement through classes offered by the

district. All three leaders were initially engaged in leadership in this area by interest and concern about

access to advanced learning opportunities and pathways in mathematics, which eventually expanded to

efforts to lead opportunities in multiple content areas.

Principal Experiences and Perspectives. The principal of Ford Academy had not been identified

for gifted services as a student; however, he did recall feelings about what it meant to be identified and

being bothered that he was not getting opportunities other students were getting. Recollecting students

being pulled out for the district's GATE services, he said, "they would do cool activities, and then they

would kind of come back and rub it in all of our faces … I remember feeling like *that looks like fun*." He

added that the GATE-identified students were the only students who got to work on the one or two

computers that the school had at the time. He started his career in special education, and although he

said it was mentioned in his courses that gifted education is classified as a form of special education, he

did not receive coursework on the needs of advanced learners in his preparation program, which

focused on federally-mandated special education content. He recalled that it wasn't until he became an assistant principal and the district started to identify twice-exceptional students that he became more aware of the needs of advanced learners. Jason said, "Thinking back, there were some students in special ed who were so smart, and they just had a really hard time fitting into the school model." He added since then he has learned more, "Most of what I know about gifted education, I've learned from the [district] and through other people who have been part of those programs."

When Jason was interviewing for the principal position for his current school, his suggested plans for school improvement included wanting to bring advanced mathematics access to the school because there had not been access for students who needed that subject-specific instruction without going to the center-based school. "Advanced programs were not really part of the culture or a thought here because our school was always right on that accreditation line." He credits the assistant principal with expanding his original vision beyond a mathematics focus and into the other content areas. "I will admit I just didn't have that vision at the time … that's not where my thinking was. But when he described … what it would look like, it was kind of a no brainer for me." Jason shared that his views on gifted education have changed over time. "I saw it as a gatekeeper … I see it now as the opportunities that all students deserve. It doesn't have to be a gatekeeper. All of our students can access some form of advanced academic education."

Jason's sensemaking was largely focused on talent development and was influenced by his past experiences of either personally or professionally feeling like opportunity was not equal. He emphasized, "That was the driving factor for me in 2014, and it's the driving factor for me in 2023 — that these kids deserve opportunities and it's up to us to help them and show them they can do it." While he was aware that he didn't necessarily have the background to lead the change alone, he had a vision and surrounded himself with likeminded leaders on his team to take up the task of broad opportunity and local access as a core equity focus at the school.

Assistant Principal Experiences and Perspectives. Caleb was identified as an elementary student for "academically talented" services in a pull-out service delivery model. His earliest memories are of it "being an exclusive thing" because identified students got to do special things; in secondary school it became a tracked system of advanced coursework. Later, as an elementary teacher, he felt the focus was on screening and identification and what he was guided to look for as a teacher. In identification practices, he elaborated remembering being told, "It's more than do they get right or wrong answers — it's how are they approaching it? … Are they asking questions in creative ways? Are they motivated to do work outside [of school]?" Caleb said the guidance around identification helped him to shift to defining "gifted education as being about differentiation for kids at the top end … about students having access to different materials that would support where they were and starting to look past grade level for students that needed it." His descriptions reflect a reframing about the purpose of advanced academic education from his childhood experiences with the gifted child paradigm to one centered around differentiation. As a teacher, he recounted ways he had to differentiate instruction for a student who craved more self-directed learning than her same-age peers and struggled to engage in the regular class, discussing how he had to design alternative plans and systems to keep her growing. He reflected on the murky debate about the core purpose of public schooling. "We need [gifted education] as long as our goal continues to be getting the best out of the kids we have. If the goal is to deliver the same exact thing to everybody all the time, then [we don't need advanced academic education.]" His reflections articulate the tension between equity and equality as well as whether advanced learning needs are part of equity or discounted in equity discussions. Caleb shared that there was not anything related to gifted education in his university teacher and leader preparation programs. He shared that the professional learning he's had has primarily come from the district central office, with mathematics being an entry point for his learning. He noted, "Math specifically really formed a lot of my thinking that I've applied to all different areas of advanced academics."

Caleb's sensemaking revealed an equity mindset through multiple lenses. He was conscientious of both the opportunities students were or were not getting as well as the needs to foster growth in every student even if that means going beyond grade level standards – representing both the talent development and differentiation paradigms. He also described the challenge of defining excellence. He elaborated:

This is where we get into that debate of holding high standards, and at the same time allowing access. I think the easiest way to get high test scores would be to exclude lots of kids, right? To me that's so far away from the point of public school. I think, if the only way we're measuring excellence is in the test scores, then things like that lead us down a strange path of not considering all sorts of equitable outcomes. A better way to measure excellence isn't just "did we get the highest test scores as a school or as a county, as compared to the nation" but things like "[have we] made a lot of progress for the kids that we have?" This is public school, and these are the kids that we have.

Caleb is one of only two leaders interviewed for the study who was muddling through defining excellence through a lens of student outcomes, while other leaders' discussion of excellence was synonymous with their definitions of equity, naming it primarily as whether (or not) a school offers opportunities.

Advanced Academic Resource Teacher Experiences and Perspectives. Saira said she was identified for gifted services in second or third grade but there was no space in the program, so she did not receive services. She recalled being in trouble for "playing around with friends because I was finished with work and there was nothing else for me to do." In junior high, she recalls learning to quiet herself and doodle or read a book when she finished more quickly. In high school, friends would copy her homework because she could do it very quickly. She experienced a friend who had copied her work being moved to the advanced courses while she remained in standard courses and had to defend herself

against accusations of copying work when she had been the one from whom classmates were copying. Saira said her earlier experiences of feeling like instruction was not meeting her needs came into play when she heard others, and even herself, saying that they "don't have time" to attend to the needs of advanced learners. She said, "You know – it's not a 10-year-old's job to teach somebody else how to read or how to do math problems, so I really tried to focus on that. It pushed me to advocate for our kids."

She did not have any coursework on working with advanced students in her bachelor's or master's degrees. Like others interviewed, she shared, "The only classes that I have taken are when I came to the district and that was by choice -- you know, me saying 'these are things I want to know.'" She noted the focus in required professional learning in the district is on supporting struggling students and named knowing how to serve students with advanced learning needs as a "gap area I had to fill for myself." Like the other leaders interviewed at Ford Academy, she said her entry into *wanting to know about advanced academics* was first connected to learning how to meet students' advanced learning needs in mathematics. While she prefers for advanced academic education to not feel separate, she said that "Unfortunately, we do need to have some separate programming [right now] … We have teachers who are really struggling … The [students] who are far ahead are often by themselves or sitting around and waiting." She felt that until teachers are better able to manage helping a range of students in their classes to grow from wherever they are, separate groupings are needed to ensure advanced learners are challenged.

Much of Saira's sensemaking from a leadership perspective was focused on how to help teachers see and include advanced learners in their instructional planning. As a student who herself was not seen or served, and who even had to battle bias about her academic abilities, she holds firm that the student experience in schools where she has influence must be different, even if that means separate programs for now while schools work on shifting mindsets and skills for differentiating up. She views

commitment to meeting the needs of advanced learners as part of equity along with equitable access to opportunity.

Ford Sensemaking Summary. The three leaders at Ford Academy each brought diverse personal background experiences that shaped their collective vision for advanced academic services at their school. The principal was not identified for advanced academic services and was left troubled by gaps in opportunities that later prompted him to create a different experience for students in his charge. The assistant principal was identified as part of a tracked system but came to understand updated elements of identification and characteristics of advanced academic students that helped him to shape a different mindset at the school. And the advanced academic resource teacher vividly remembered the frustrations of having work as a student that was easily and quickly completed and the need to try to quiet herself and regularly wait for other students to catch up so that she wouldn't get in trouble at school, which has instilled in her a strong feeling of making sure school is a place for learning for students who fall outside of the normative group.

Similar to the leaders at Castellano, childhood experiences with advanced academic services provided an anchor in terms of understanding what was perceived as just and/or necessary (or not) about advanced academic education, but leaders used their experiences as a contrast for the integrated advanced academic programs they wanted to provide rather than as programming they wanted to replicate. Although all three leaders experienced the gifted child paradigm with a focus on separate programming growing up, the leaders abandoned that paradigm and collectively framed a vision for the school that incorporated both talent development and advanced differentiation paradigms. The balance of each leaders' attention between the gifted education paradigms were slightly different with the focus of the principal leaning primarily into talent development and advanced differentiation in mathematics, the focus of the assistant principal between broader talent development efforts and ensuring fidelity of services for students identified for full-time advanced academic services, and the focus of the advanced

academic resource teacher on talent development and supporting grade levels with learning to provide advanced differentiation in specific content areas. All three leaders shared the importance of district-level professional learning in their sensemaking as none had received background in identifying or serving gifted students outside of those learning opportunities. Each engaged in varying degrees of district professional learning ranging from pursuing a multi-course endorsement and sessions designed to learn to use gifted curriculum, frequently attending administrator networking and learning, or infrequently attending administrator networking and learning.

In the case of Ford Academy, the assistant principal and advanced academic resource teacher were more directly responsible for implementation and leadership of advanced academic services. The principal, once ensuring his vision was aligned with other leaders, tasked the assistant principal with monitoring the progress of talent development and differentiation services as well as starting a parent group which is discussed later with regards to leaders' sensegiving. The day-to-day triggers for collective sensemaking at Ford were closely connected to program monitoring and adjustments based on how the vision was or was not manifesting, which then required leaders to respond to the mindsets, knowledge and skill, or questions from staff and families. These situations prompted the leaders' decision making in the midst of multiple concerns whether to satisfice with the current state or create space for learning and feedback, collective sensemaking with staff, which is discussed further with regards to the research question on sensegiving.

Gentry Academy

Of the three leaders interviewed from Gentry, only one had both been identified for gifted services as a student. None of the interviewees had advanced academic topics in their teacher preparation programs. The principal and advanced academic resource teachers participated in district-offerings of professional learning on topics, and both advanced academic resource teachers had earned their advanced academic endorsement. All three leaders were initially engaged in leadership in this area

based on interest and excitement to broaden access to enriching learning opportunities. All three leaders also expressed surprise that not all teachers were equally excited about the approaches and that some of the programming communications became very politically charged.

Principal Experiences and Perspectives. The principal at Gentry Academy had not been identified for gifted services as a student but did recall family discussions about testing and services. Her father worked in the school system and had expressed frustration, in her presence, about how some tests revealed that she was "off the charts" in Language Arts, and that he felt that she should be in the program. She described feeling confused about the importance she sensed from her parents, "I didn't know why it mattered so much to my dad or why people would spend so much time and energy on gifted education." However, she expressed feeling neutral about the experience overall because as an adult, she held the perception that the gifted program didn't eliminate her from having opportunities. "There were no barriers in high school for me as a result of not getting into gifted … I don't even think that there was a well-formed program for advanced academic students, so I don't think the impact was significant at the time. I think they went on a field trip." The principal expressed that her focus in her leadership was more centered around opportunity as the thing that mattered more than identification. She grew up in a very rural area and attended a Title I school as a student and noted:

> I have a strong belief that opportunities really matter, and the best way we can work towards excellence is giving everyone every chance in the world. I don't think I had that growing up, and I didn't see that for my classmates … I grew up where education was important but not the most important thing – it's about the skills you gain so that you can survive, like knowing how to get food and go deer hunting. My dad taught welding … All to mean that -- to work towards excellence, I believe that giving kids skills they will need to allow each of them to excel is important.

Erica describes feeling an obligation to prepare students for life beyond school by providing opportunities that may lead to excellence. Her discussion of excellence from this topic revealed consideration of excellence as something related but distinct from equity, which was not prevalent in all interviewees' reflections. While the assistant principal at Ford focused his definition of excellence connected to growth and progressing to the next level of academic learning, Erica's discussion revealed conceptualizations of excellence that went beyond academic growth and were connected to maximizing student potential with a developmental lens. Her sensemaking indicated that excellence was about outcomes, which is aligned with literature on excellence gaps (Rutkowski et al., 2012) and on the literature about talent development from novice to expert or talent to eminence (Olszewski-Kubilius & Subotnik, 2022). Defining excellence in this way – as the school's job to give the skills that will allow students to *develop into* excellence or viewing excellence as a developmental journey – was not prevalent in all interviews. In terms of what that looks like in her own school, she says she thinks those opportunities come from frequent opportunities to use advanced academic curriculum. "I think the curriculum is vital. I think all kids should have it and it should just be the way we do business … It pushes the bar. It raises the ceiling every day."

Professionally, Erica did not experience gifted education topics in her university experiences for teacher or leader preparation, sharing that most of what she has learned has been through district-led learning and networking opportunities with other school-based administrators. "The district provides connections with subject matter experts like [advanced academic resource teachers] that I would count as a type of training. It's not formal, but it does help." She described that when she first came as a teacher to Taldev District, she perceived the continuum approach with multiple types of services as complex, sharing that it took a while to understand who was responsible and what the different opportunities meant. Her memories of what she learned at the time center mostly around identification.

"I remember filling out rating scales … but I didn't have a great sense of anything outside of my own classroom [for instruction]."

In her third year as a classroom teacher, her thinking and instruction was impacted by collaboration with a teacher who had a gifted education background. "The teacher and I decided we would collaborate and team teach, so we did some literacy and math on our own, and then for science and social studies we combined our students … It did shape and help me better understand … elements of advanced academic-ness." She noted that she thinks a lot of teachers misunderstand those elements, instead "identifying advanced academic-ness as great behavior or strong organizational skills" rather than as students whose needs are different due to being out of sync from same-age peers in their cognitive or affective development. Her definition of gifted education now centers around differentiation and what is done with students. "It's about differentiation … Gifted education allows us to do that for our strongest, our quickest students … who want to passionately focus on a topic. So often we have to work to just cover the curriculum, and this gives us the opportunity for students to go further." Her comments reveal the tension of whether the way we use standards limits opportunity or raises the bar as well as recognizing that students' needs are not standard, but rather vary. Her description of differentiation was connected to the tenets of differentiating up rather than for remedial needs, and she cued into one hallmark of advanced academic pedagogy that is not exclusive to being good for advanced students but is part of the balance she is trying to lead in her school. "I've learned over time that it's open-ended tasks that allow kids to go as deep as they want … I can't tell you where I learned that it's very student-centered -- I've just picked up pieces along the way." She prioritizes tasks from gifted curriculum as the opportunity, explaining that, "Our [standard level] curriculum hasn't always done that, and when we use [the gifted curriculum], it allows us to have every child have a rigorous experience." She expressed wanting all students to have opportunities with rigorous tasks as part of talent development, but also noted the role that grouping structures play in balancing equity and

excellence. She comments, "Grouping actually helps us do things, but everybody should have access to the things. One is about *what* we do, and the other is about the *structures for getting it done*, and both of those things make up gifted education." Erica's discussion reveals sensemaking in a way that considers a paradoxical or both/and relationship, as noted in the conceptual framework in Chapter III. Her thinking shows wrestling with the notions of equity versus equality or equity and excellence, and determining that neither works in isolation, but rather with interdependence.

In making sense of how she wants advanced academic education to look in her school, Erica noted that lately, she has been spending the most time considering the delivery model for how to achieve talent development and differentiation in the school. She elaborated:

> There's so many different priorities in the division right now, but our instructional focus has been around matching student needs … We've worked really hard to design systems where we can see what skills students bring to the table, develop those talents further, and match their next step in their lessons.

Erica's description reveals a consciousness similar to that of the Ford leaders regarding the ways leaders may need to maintain focus in the myriad of district priorities, including attention to system design and student assessment that goes beyond what an equality-focused standardized minimum proficiency approach might demand. She noted that not only is this difficult because of the competing priorities imposed from the district, but also shared her surprise about resistance from various partners.

> It's a lot harder than I ever expected it to be. I never thought advanced academics would take up so much of my time; like just to be clear about that – I was shocked. I sometimes get caught off guard because I don't even imagine that what I'm thinking is going to upset someone. People have really strong beliefs around this — parents, staff — and in all groups there are very diverse perspectives. It's fascinating to me.

Erica described underestimating the resistance she would face from trying to make change that was backed by the district with her local stakeholders. Her reflection illustrates the literature that was noted in Chapter II regarding leader resilience required to align school practices to more current research in gifted education when many people have longstanding beliefs that require time and discussion to influence change (Brown & Rinko-Gay, 2017). Also of note is her mindset about the pushback she has received. While she noted that advancing updates has been surprisingly difficult and time-consuming for her as a leader, she has focused that challenge into curiosity and fascination rather than letting it deter her vision.

Advanced Academic Resource Teacher 1 Experiences and Perspectives. Resource teacher Kelly York shared that her views on advanced academic education have changed a lot over time and as she has experienced a variety of contexts for teaching. As a student, she recalled that there was not a lot of diversity in her community and that one of her parents mentioned wanting more challenge for her in school. At some point, she was moved to another class, but she was not sure if it was for gifted or not and said that her experience then was very different from what she sees now as a teacher. "I don't remember the way that the kids talk today about advanced academics. Nobody said 'I'm in the gifted class.' I don't remember those conversations at all." She did recall the talk among students related to specific honors courses students would take in middle school, but the focus at the elementary level is more in the consciousness of students she teaches now compared to her memory of it as a student herself. Kelly did not recall a process for gifted identification in her first teaching job in another state, which was also where she grew up. "[The idea was] that you would just differentiate in your classroom – which we did. But I will reiterate again – it was a very homogeneous group of students – their needs were not that different." In that setting, her view of gifted education was that it was "almost like an IEP, where this child is protected because they need this particular thing, but it was very few and far between."

When she moved to the state she lives in now and into an area with more diverse teaching environments, she began working in Title I schools. She worked in Title I schools both in a district adjacent to Taldev as well as Taldev as the time of the study. She named this as a time when she started to see things differently. Having grown up in what she described as a relatively homogeneous community, meeting students' needs, in her opinion, was more manageable than in her current context, where student needs were more extremely diverse:

> I am not fully convinced that any kind of advanced differentiation would happen in ways that we could count on without [advanced academic] programs. In my [first] teaching situation, it was easier because students were coming from similar backgrounds … When I came to [Taldev] and started working in a Title I school, I could see that there was this diverse population of students who really needed a lot more than their peers were ready for.

She said that teaching in Title I schools gave her a different lens in defining gifted education. "My definition broadened, and so now it's this idea of any student who needs differentiated services above what their peers are receiving – that needs to be protected by some sort of process in advanced academic education." She described advanced academics as a way of ensuring students' needs are met, noting that she thinks the protection is necessary "in some way, shape, or form, so that teachers can quickly see that educators have screened [the student] … and can move forward without them having to go through figuring it out or waste the student's time." Even though Kelly says her definition of gifted has broadened, she was similar to other leaders interviewed who still were conscious of the remnants of an older way of thinking about gifted education, like the gifted child paradigm. She said that her first thought is, "honestly, the stereotypes, you know, like Big Bang theory … [that it's for students] with this uncanny ability" even though she has a broader frame of understanding now.

Kelly named how the context she experienced in a more diverse Title I school with highly variable opportunities outside of school impacted her desire to become an advanced academic resource

teacher and her commitment to talent development. "I [wanted] the chance to help other teachers bring [gifted curriculum] to the general education classes … I wanted to help teachers to identify the strengths kids had that maybe we weren't seeing because they weren't being given that access." She did not have gifted education topics in her university teacher preparation, but like most others in the study, she decided on her own to take courses to earn her advanced academic endorsement. As a resource teacher, she says she is still learning – spending a significant amount of her professional development time learning about curriculum resources to use with advanced learners. She focuses in this area so that she can be supportive of teachers across all grade levels of her elementary school who, like her, also did not have gifted education topics as part of their undergraduate teaching preparation. "There's so much out there. I find that to be challenging. To be a good [resource teacher], you need knowledge from kindergarten through sixth grade and need to know what to use each quarter … I'm still learning after two years." In addition to continuously learning about resources, she has spent time trying to understand why advancing access to rigor is a struggle. She described:

> The hardest part to tease out in my brain is why we don't just do this for every student? These are good things in my mind. It just makes logical sense that every teacher should just be doing this … I definitely was naïve in my thinking that everybody would want this. Why would anyone disagree? … And so I think that hindered my ability to lead some people in a way that they needed because [their pushback] didn't make sense to me, and I'm sure that came across in my attitude.

Kelly was surprised that something that made such logical sense to her was not a commonly held belief. However, she was not alone in experiencing that not every teacher wants to learn to use advanced academic resources, which is discussed further in the upcoming section on sensegiving.

Advanced Academic Resource Teacher 2 Experiences and Perspectives. Resource teacher Elle Tyler also shared that her views on gifted education have changed over time. Growing up in another

East Coast state, she was identified for gifted services in a private school that she characterized as "elite," attending classes that were small (only 6-7 students), where test scores were the identification measure, and the expectations were very high. As the daughter of two parents who were both first generation college students, she said she experienced a lot of pressure from home to perform well in school and described her parents as "helicopter parents." Reflecting on her experience as a student in gifted services, she said, "I don't look back on my time in elementary and high school as being very positive. It was mostly just 'you will read this – who will do this – you will get straight A's' … you didn't bring anything less than that into my house." Elle's experience exemplifies the gifted child paradigm and "tiger parent" literature from Chapter II, yielding a less than positive experience which she said, "definitely led to some anxiety as a kid." She noted that as she got older, she did get more choice and time to explore, which she continues to do as an adult through reading and documentaries. "I really love learning with these gifted students who want deeper conversations. I like seeing [their] excitement in wanting to go beyond basic standards … I want to give them a better experience than what I had." Elle processes her childhood experiences and uses them as her motivation to create advanced academic experiences that she would have found to be more meaningful than she herself experienced.

Her first teaching job was in the Southeast U.S. where she co-taught in general education with a special education cluster and said she really thought she wanted to go into special education and wasn't interested in gifted. In that state, gifted services were primarily for a very small group (top 2%). "They would just skip to the next grade level … There are pros and cons with that." Elle did not have gifted education topics in her teacher preparation programs but did think that her background as a student in gifted services would prepare her to meet advanced learners' needs. "Knowing my background as being in gifted … I thought maybe I would see some sparks in kids and I would kind of self-extend, just kind of like 'Hey, you need some harder numbers or here's a harder book.'" However, she described that she did work with students for whom she knew her skillset without further training was not enough. "I had a

few children through my years … They were just so far and above and beyond. And I did worry that there was not enough for them."

When she became a teacher in Taldev district, she started to see gifted education differently. "My understanding of giftedness has totally changed." She said the district professional development played a big part in her evolving view. "[Through] the classes I've taken in the district, I've really come to understand that giftedness really truly is a more broad term. It's not this elite small group of children … Kids show their strengths in many different ways." She described the importance of opportunities for exposure and for growth and said that the professional learning on these topics have "been very rewarding because – especially working in a Title I school – I feel very strongly that kids may be missed [without this]." From firsthand experience in providing advanced opportunities to more students, she said, "I've been surprised by a lot of kids." In this regard, she appreciated the approach to gifted education that Taldev was taking. "It wasn't until Taldev that I experienced a structured plan to help students succeed … we're meeting kids along the whole way – there's a lot of opportunity, entry points, and ways of looking at gifted needs." She recounted experiences with new to the country English Learners for whom she had to strongly advocate for their participation in advanced academics when others in the school were fearful that they were not yet ready. While she does prefer the broad lens taken in Taldev, she did share some reservation. "I do worry about that very, very small percentage that some people have defined as gifted … I do worry that there might not be enough for them." Elle's sensemaking reveals a tension that there is variation of need within the needs of advanced learners – that not all gifted learners are the same. This connects to the struggle described in Chapter II in defining *gifted* with a singular term when there are variations not only in areas of giftedness (e.g. intellectual, artistic, leadership) but also in degrees of differentiation needs (e.g. depth and complexity, single content area acceleration, grade level(s) acceleration, alternative placements for specific talent areas) (Cohen, 2012).

In addition to sensemaking around the variations on what advanced learning services will match the variety of student needs, Elle's sensemaking in the area is connecting to the nuances of distinguishing features between equity and excellence. While she worries about whether broad talent development efforts address meeting the more intense needs of some students, she noted that in the end, she feels that the continuum approach in Taldev helps to resolve some of that tension, though still with complexity. "It's great we have a continuum of services … I'm hopeful it reaches [all needs] because we have so many structured things in place … There's a lot of opportunity, entry points, and ways of looking at [students'] gifted needs." Her elaboration on the topic revealed connections between equity with regards to both opportunity and matching to students' needs and the resulting excellence we hope to see:

> Excellence is really seeing kids thrive. That could mean thriving in many different ways. So I think if you don't give kids equal opportunities to explore many different subjects in many different ways … then you're never going to see that excellence because it's not the old school mindset of excellence is a on a test … That used to be excellence, but that's not the excellence we're going for right now … I love to reference people like Steve Jobs and other very successful people with my students and be like, yeah, just because they didn't get straight A's in school does not mean that they were not thinking critically or creatively in something that they were passionate about, and look at where they are now. So just giving them the equal opportunity to even try to reach for that excellence, whatever that excellence might be for that child.

Elle described excellence as actualizing potential and reflected on the interdependence of equity of opportunity and talent development to achieve excellence outcomes. Her sensemaking is outcome-focused, but highlights the challenge of outcomes that are unique to individuals versus those that can be captured on tests; tests which even if they go beyond minimal proficiency as most school-based measures currently do, will not reveal the diversity of strength areas contained in any human

population. While quantifying excellence is a gap area in the efforts of U.S. public education as noted in the literature in Chapter II (Rutkowski et al., 2012), her sensemaking brings up the challenges of tracking the influence variables that impact outcomes on students' individual pathways.

Gentry Sensemaking Summary. The three leaders at Gentry Academy each brought unique personal background experiences to contribute to the supports they provided the rest of the school with regards to advanced academic services implementation. Similar to Ford Academy, the principal was not identified for advanced academic services; however she did not perceive that as a barrier to her realizing her own personal potential. She described the impact of working with a knowledgeable colleague in learning to meet the needs of advanced learners as a teacher. Her focus as a leader of advanced academics in her school was on the role of opportunity on the development of students' working towards excellence. Both resource teachers had taught in a variety of states and settings, each naming some pivotal moments in their evolving individual sensemaking about gifted education in addition to their childhood experiences. One resource teacher noted the ways context influences program design and saw a relationship between the degree of homo/heterogeneity of the student population as driving the degree of need for intentional structures to support meeting diverse student needs. The second resource teacher was driven to make advanced education more meaningful in comparison to her experiences in high pressure contexts as a child and was continuing to wrestle with the wide-ranging needs of students within the gifted population and whether or not the system was meeting the needs of more profoundly gifted students.

The descriptions of the gifted paradigms of the principal and one of the resource teachers were difficult to decipher based on services they received as students since the programs were either minimal doses in the case of the principal or not prevalent in memory in the case of the resource teacher. However, the principal did recall a focus on test scores for identification and a cut score that kept her out of programs even though close, indicating elements of the gifted child paradigm. The second

resource teacher's description revealed a strong gifted child paradigm aspect which influenced her in the direction of wanting to avoid the way programming was implemented. Similar to the leaders from other schools, the leaders at Gentry described a vision of broad talent development as well as degrees of advanced differentiation and said that their current understanding was highly influenced by district professional learning in principal networking opportunities, advanced academic resource teacher professional development, in-services on specific curriculum, and courses towards gifted education endorsement. Their collective sensemaking about how to provide services to accomplish these goals was influenced by areas of resistance they experienced, triggering their decision to engage in sensegiving and continuous assessment as to how to ensure students' needs did not go left unmet while working towards the vision of more integrated advanced programming in the school. All three leaders interviewed were regularly engaging in collective sensemaking discussions at the instructional leadership team level as well as with teachers and families, which is discussed further with the findings related to sensegiving.

Sensemaking Summary

For subquestion 1 regarding leaders' sensemaking, findings showed that leaders process a number of different experiences and sources of information as they make sense of the purpose and implementation of advanced academic education and how they want that to look in their school. They bring together their background experiences, both personal and professional, to operationalize their values and beliefs around complex and interrelated issues such as achievement and ability, standardization and personalization, the intended and unintended consequences of grouping practices, and the roles of families and schools in equalizing opportunity to develop talent. The sensemaking they described was formed from individual experiences, collective experiences on the leadership team, and collective experiences with the staff.

Overall, for the positive outlier schools participating in this study, there were three areas of influence on leaders' individual sensemaking about advanced academic education based on professional experiences — 1) experience working with students who were outliers and recognizing their different needs, 2) self-selected forms of professional learning for which leaders chose to engage, and 3) district-level initiatives related to equitable advanced academic programming. Findings did not reveal that leaders held the (further-removed) influence of state regulatory expectations prominently in their sensemaking, but rather that those were filtered down through the district central office.

With regards to their personal experiences as students in advanced academic education, all leaders interviewed, regardless of identification as students, expressed early memories of programming reflecting aspects of the gifted child paradigm, with frequent mention of separate structures and a focus on test scores in identification. Of the nine school-based leaders who were interviewed at schools participating as positive outliers, six disclosed they had been identified for advanced academic services as students. At each of the three sites, there was at least one school-based leader who was identified for services as a student. Of the leaders who were identified for advanced academic services, their experiences ranged in service delivery, with some experiencing full-day homogeneous grouping while others experienced pull-out programming. Findings suggest that it is not necessary to have been identified for gifted services as a student in order to be a leader who advances equity and excellence in Title I advanced academic programs; in fact, the drive to broaden opportunities that had only been conveyed to identified students was a driving force for talent development for some leaders. However, all of the instructional leadership teams in this study had at least one member of the team who had participated in gifted services as a child. All childhood experiences described by leaders participating in the study contained elements of the gifted child paradigm which they had moved away from in their visions for their school, yet continued to hold as a reference point to name what they collectively did not want to create as part of their vision for the school.

All but one of the nine school-based leaders interviewed could easily recount an experience working with a student who was an outlier with regards to learning needs beyond most other students in a class and expressed a belief that advanced academic education was, at this time, a necessary focus area in public education to meet outlier student needs for matches to instructional approaches and environments. Some expressed early experiences with students who stood out from the start of their career while others didn't come across cases where they saw differences until later in their teaching experience. Additionally, some leaders who had been identified as students expressed that their own educational experiences influenced their commitment to learning about and planning for student needs that go beyond standards-driven (or normative group-driven) instruction. These leaders saw themselves as advocates for including the needs of advanced learners in planning.

All but one of the leaders interviewed for this study expressed that they did not have learning in advanced academics as part of their educator preparation programs. That said, all but one leader expressed that they had taken the initiative to seek out opportunities to learn about advanced academic education topics and participated in district-led professional learning topics in this area, at a minimum; five of the nine leaders interviewed (all the advanced academic resource teachers and one principal), elected to earn an endorsement in advanced academic education. Most school-based leaders spoke about talent development with a common narrative, with some speaking mostly in abstract terms and some speaking in much greater practical detail, seemingly correlated with the intensity of their professional learning on the topics and the degree of involvement they had with teachers' implementation of efforts. Each of the three schools held space for collective sensemaking about access to rigor and talent development in time with the instructional leadership team; however, there were differences in the cadence and quality of collective sensemaking time. While individual sensemaking revealed an understanding of the need for differentiated instruction to meet students' needs, it was less apparent as a collective sensemaking topic in comparison to talent development opportunities.

The next section describes findings related to how leaders frame a vision for equity and excellence in advanced academics for staff and community constituents (subquestion 3) at each of the three sites.

Leaders' Sensegiving About Equity and Excellence in Advanced Academic Education (Subquestion 3)

Interview questions prompted discussion to help understand the ways leaders frame a vision for equity and excellence in Title I schools and the sensegiving tools into which they leaned. Questions addressed the proactive and reactive reasons for engaging in sensegiving, including decision making on whether to engage depending on a combination of leaders' efficacy and the economics of their time, energy, and focus. Interview participants shared how long they had been a school leader, described their leadership style, and reflected on engagement with constituent partners (e.g. staff, families) on issues related to gifted services at their site, such as changes they have tried to implement and actions they feel have led to positive impacts for students in the area of gifted programming.

Castellano Academy

Leaders at Castellano Academy included the principal, literacy coach, and the advanced academic resource teacher. The degree of their experience as school leaders varied from over two decades to the first year in an official leadership role. The literacy coach described her style as "a loving advocate" and felt strongly that she was called to do the work she is doing in a Title I school. The advanced academic resource teacher was in her first year in a resource role, having just come out of the classroom, and described herself as finding her way about what it meant to be a school leader. She shared that she had mixed experiences with trying to be proactive with teachers and at the time of the interview, felt that she was more impactful through being available for real-time coaching moments with teachers through approachability and openness to collaboration as teachers showed readiness. All three leaders discussed sensegiving for teachers related to reframing definitions and raising the opportunity bar, and the principal and advanced academic resource teacher additionally discussed

sensegiving through continuous monitoring and collaborative sensemaking alongside teachers as issues arose. With families, all three leaders discussed a focus on helping families understand advanced learning at the local school in an effort to have students remain at the local school for advanced academics instead of choosing the district's option for a center-based program. Additionally, the principal described the need to engage in sensegiving with students to build confidence in taking on challenging work, which did not come out in interviews with other schools.

Leaders' Sensegiving for Teachers. Castellano leaders described three primary sensegiving areas in their work with teachers – understanding the role of raising the bar and providing opportunities for higher level thinking, reframing updated definitions about advanced academics, and continuous monitoring and collaborative sensemaking as issues arose.

Raising the Bar and Students' Opportunities to Experience Challenging Curriculum. As discussed in subqueston 2, Principal Karla has a strong conviction in the importance of opportunity for students, even if they are not currently on grade level. For multiple years, she included goals around using advanced curriculum in Tier 1 instruction in the school improvement plan as a signal of the expectation and growing teacher capacity to add more tools to their teaching skillset in this area. She noted, "Coming out of the pandemic has been a bit of a backslide – but this year there are minimal three experiences and I plan to double that next year to six experiences, at each grade level." Karla sees a potential growth trajectory for teachers to learn to use teaching strategies for deeper learning and is chunking the expectation based on teacher workload, with an expectation of continuous growth. As discussed in prior subquestions, the turnover rate at the school and the disproportionate impacts of the pandemic on families who are economically vulnerable has impacted the ability to continue to grow in this area of need. As principal, Karla said that she keeps teachers focused on this area in two ways. First, she conveys the need to start with advanced learning opportunities with both exposures during Tier 1 instruction and cluster grouping based on students' needs beginning in kindergarten. Karla explains,

"We had to give early experiences … in order to prepare them for grade 3. So we have an advanced math starting in kindergarten, and I try to cluster those kids together because we're constantly identifying, so we can build." This approach signals the long game involved in closing opportunity gaps as well as a both-and approach to raising student achievement through both remedial and enrichment rather than needing students to be on grade level before offering advanced opportunities. When teachers would express wanting to abandon opportunity goals because of larger numbers of students being below grade level coming out of the pandemic, she reframed the conversation around scaffolds and supports that might be needed as a bridge with the opportunity expectation still in mind. Second, she used the data of increased student identification over time as persuasive evidence of the impact of the opportunities students are receiving. She elaborated, "As long as I present the data to them, you can't argue with the data. I'm very skilled with that. So I will present [it] … and then we'll talk about instructional practices and classroom environment."

In addition to the principal's setting of expectations and consistent messaging around the importance of opportunity, the literacy coach (Joy) and advanced academic resource teacher (Sue) also described opportunities for supporting teachers' understanding in this area. Similar to the principal, Joy described the need for sensemaking with teachers around opportunities for deeper learning. She shared the numerical expectation of a minimum expectation as well as having a PLC structure for accountability signaled to teachers the expectation of school leadership. "Our goal was to incorporate at least one resource every quarter, and they would come into our PLC meeting and teach us about that resource and how to use it." Multiple schools commented that time in PLCs was scarce, so it also signals a priority that Karla and other instructional leaders built in time to work on access to rigor as a talent development expectation in the PLC structure. Joy said this expectation was particularly helpful when she encountered teachers who questioned whether students who are below grade level needed deeper learning opportunities. She explained, "There have been years where teachers pushed back a great deal,

saying 'My kids are at least a year below grade level. This is not the best use of their time.'" She shared

that she did not think this was the prevailing sentiment at the school, but it was a barrier to efforts and

felt that it was important that expectations were presented around wanting to give every single child

opportunities "to show us their curiosity and creativity and the ways that they think in different ways. As

long as we scaffold this, we help all of our kids to be successful." Having the accountability to report

about the frequency of opportunities helped to ensure that, whether a teacher felt it was a good use of

time or not, the expectation could not easily be ignored for a remediation-only approach. Sue shared

that because the school cluster-grouped students identified for full-time services, some of the teachers

who did not teach the cluster class did not perceive that the expectation applied to their classes as well,

opening the door for conversation about Tier 1 access to rigor for talent development and its

connections to the Young Scholars model:

> [The teachers] are not understanding that they too are still supposed to be searching for
>
> aptitude in their students, so I need to help them really understand what that looks like and how
>
> to do that … I think our next step is really educating on what wrap around strategies will help
>
> and who is involved [in providing those]."

Sue stated that she needed to continuously prompt for an asset-focused mindset in teachers to connect

the purpose of talent development with the actions. She explained that the school population was

largely composed of students from historically underserved populations and she regularly worked side-

by-side co-teaching with teachers to demonstrate how to scaffold higher level curriculum experiences to

maintain high expectations with supports. While the school improvement plan and principal set the

vision and frequency of opportunity expectations, Sue was available to directly support teachers in

understanding the practical aspects of offering higher level opportunities to students who were

considered below grade level in other standardized measures. That Sue was used as a coach and

support, as opposed to the older versions of such roles that focus on pull-out groups just for identified

students, was also a signal to the staff about expectations for the broad staff to be learning about

providing talent spotting and development opportunities.

  Reframing Updated Definitions. All three leaders at Castellano talked about sensegiving for

teachers around older definitions of gifted. For Karla, she noticed outdated notions of defining gifted

from her start at the school as principal many years ago and said that is why she had the school adopt

the YS model early on in her time there. With the challenge of annual teacher turnover, sensebreaking

and reframing definitions of gifted characteristics has been a continuous endeavor. Most recently, she

encountered teachers with a misperception that students identified for advanced academics would not

have behavior problems. She also said that both she and her teachers were together coming to better

understand students who might be twice-exceptional (advanced but also in need of special education

services). "I need to help them really understand that there are children who don't fit the mold or

characteristics of [what they think] a gifted student is." Her comments reveal that there is a persistent

perception of a typical profile that is not inclusive enough, in her opinion. Both Sue and Joy talked about

helping teachers understand a different type of dual exceptionality – English Language Learners who are

also advanced learners. Joy shared, "My main push this year has been asset-based language. What

talents are you seeing? … So where there are small moments throughout the year when it pops up, I

shift the conversation to talking about where the students' strengths are." Joy was engaging in

sensebreaking, not just of definitions aligned with the gifted child paradigm, but also from the starting

point of teachers' descriptions and mindsets of students and whether they start with what students

can't do yet or with a lens that prioritizing assets when discussing students.

  Similarly, Sue stated "I've learned from leading the screening process that there's still a lot of

people not on the same page or having the same understanding of who we're trying to identify and

what that looks like in different types of students." Sue recognized that there were multiple layers of

messiness in getting on the same page, including not just that some were operating on less inclusive

definitions of identifying an advanced learner, but with additional complexity of understanding taking a multicultural or a multi-exceptionality perspective in spotting students who may be outliers in the class.

Sue reflected that many of the sensegiving opportunities she had with teachers needed to come in one-on-one conversations because of how busy teachers were, and that she was using two concepts to help reframe. One, she used the YS model to help reframe conversations around potential versus manifest ability. "Not all, but many [students] face barriers that might mean that their aptitudes might not be developed if we're not paying close attention to the supports they might need." In her first couple of months in her new position and placement at Castellano, she picked up on this and said that there were many conversations but that it was important for her to work beside teachers to understand how to support students. She shared this was also an area where she had to engage in collective sensemaking with the instructional leadership team at the school, helping counselors and others to see their roles in supporting students with advanced aptitudes who might face barriers to reaching the advanced potential teachers were noticing while they were younger students. Since she was new to the position, she was learning about the YS model herself and engaging in sensemaking with instructional leaders at the school based on the professional learning she was getting from the district. Karla was supportive of the mindset around integrating supports rather than exiting identified students from services. When teachers may suggest that a student not receive services she said she expects "a high bar – a preponderance of evidence" that the student cannot be successful, including showing evidence of providing supports. This is an example of sensebreaking that the leader provides by inserting MTSS discussions to discuss what identified students need for success and changing practices to fit the needs of the student rather than assuming a student doesn't belong because the methods used to date are not effective.

Second, as the district shifted to local building norming to align services with the philosophy of the differentiation paradigm, both Sue and Joy noted the need to help teachers understand the school

contexts beyond their single classrooms in distinguishing exceptional/outlier responses to Tier 1 access to rigor that might prompt them to consider referring a student for a need to be cluster grouped for more frequent access and similar peer group. Both the literacy coach and the advanced academic resource teacher noted that those conversations needed to take place as a full grade level instead of with individual teachers, a signal that collective sensemaking may bring coherence to the goal of providing differentiation through cluster grouping student needs.

Continuous Monitoring and Sensemaking Through Challenges. During continuous monitoring of implementation, all three leaders described several opportunities for sensegiving while working through challenges that emerged. Each leader conveyed that while they did not have all of the answers, they were ready and willing to work side-by-side with teachers to support them in problem-solving along the way.

For Karla, she set the vision but then let teachers share their thoughts on how it would be implemented. "It's seeking feedback from staff --looking together at models and letting them try their ideas. It was about getting our hands dirty. If it works, it works. If it doesn't, we rebound." Karla described one issue that came up early in the school's journey was a resistance to referring students for services because teachers did not want to lose children (and the higher standardized achievement test scores they tended to earn) if they moved to another class for advanced services. The teachers were worried that their class data would not look as strong, so the principal decided to look at data from a team perspective rather than from individual teachers. "Our [school improvement goal] is now a team goal, with individual contributions towards their team, so when you put it that way it's not you being held accountable … you're working as a team to get it done." In addition to team goals, Karla also implemented structures for vertical articulation of student growth from year to year that signaled an expectation of collective responsibility not just at the grade level, but as students moved from year to year.

Joy shared that an area of implementation challenge she felt impactful in supporting was around the perceived readiness of students receiving ESOL services to use advanced learning methods, given the large population of English language learners at the school. She said, "Writing is the last domain for English learners to develop ... That is particularly challenging for us. When it can be something that's done in drawing or orally, that's fine. The teacher may scribe for them, but then it's not necessarily independently done or all their thinking." She described that domains of English language development and choosing accessible products for students to show their thinking as need areas for deeper staff learning. Joy's sensegiving in this area was very hands-on and she went into the classrooms to co-teach and coach with teachers and together they were trying and learning how to scaffold the use of gifted curriculum according to students' needs. She admitted, "It was definitely an area of growth for me to learn how to support them." Similarly, Sue described that she was often leading work that she herself did not yet feel she had expertise. She said that district-provided professional learning was helping her to theoretically understand, but she still needed to learn to implement what talent development looked like in the context of her new school. She noticed discrepancies between the staff's understanding of the YS model and the professional learning at the district level for resource teachers in her role. In talking to teachers, she realized that because the designation was given to large numbers of students, it had come to not hold meaning in the eyes of teachers. "It was as if nobody was getting [served] because too many had been identified. It was definitely not as effective as it could be." Sue started to figure out where some misunderstandings were and reframed the ways to identify YS students and what their services should look like after being identified. "There's been a huge push to re-evaluate our understanding … Teachers were identifying many students but they weren't providing more advanced opportunities or supports. It was like we were forgetting about the advanced services that were supposed to come with the YS identification." Understanding how to use advanced academic teaching methods was a gap area for teachers, and that gap was layered by another weak area of efficacy – not

knowing how to scaffold for students who were multilingual or had learning gaps. Sue needed to work side by side with teachers to learn together how to serve both needs.

Leaders' Sensegiving for Families. Castellano leaders described the most prevalent sensegiving areas in their work with families was helping families understand the services at the local school so that they might choose to stay at Castellano rather than go to the center-based advanced academic site at a different school. All three leaders described spending time helping reframe perceptions about service delivery options. The principal shared the need to help families understand that their students could access similar advanced academic services at the local school instead of attending a non-neighborhood school for services; however, it was hard to compete with the center site which offered homogeneous classes of identified students. Karla shared that although the offering of local services was not new at the school, the struggle to keep families at the local school was longstanding, which in turn made it more challenging to sustain a full-time service delivery model since there was not a guaranteed critical mass of students. Her capacity to have those conversations to assure families has decreased since COVID since more of her "energy is going to safety" on a daily basis. Karla said she hears from families that some perceive getting services at another place as a way to "escape behavior problems" at the middle school level that have increased coming out of the pandemic. Joy shared similar perceptions about the struggle. "We work really hard to share with parents all the things the kids can get if they stay here … and trying to make sure that extra things entice them; but many of our families are concerned about middle school." Sue said that there were several district-provided tools that supported her capacity to communicate with families about service options, including translation tools for texting, translated documents and presentations, and charts that articulate what different services are. She said the charts have helped even the staff understand the intersections and distinctions of services. "We all had this kind of revelation … It was stark because it's not what parents think … We show the benefits of staying in the community school, but it's just big mindset shifts everywhere that need to happen." One

effective strategy she said supported sensegiving was having families and students tell the story instead

of the school. "We've had parent panels and students have recorded videos … just having them share

their experience. I think families hearing different sides of the story firsthand helps them understand."

While Sue expressed the ways family-to-family testimony has built trust in local service delivery options,

she also said it was frustrating and too much to expect from the local schools that are already stretched

thin.

Leaders' Sensegiving for Students. Castellano was the only school that spoke of the need for

sensegiving opportunities for students, and it was only the principal of the school who brought it up. She

said that focusing on cluster grouping was an important structure to help with this:

> For students, it's about reassuring them that they can do it. Sometimes students don't feel like
>
> they're successful … So for that, when we cluster our students and we talk about community, we
>
> talk about helping each other. We talk about mistakes as the best way to learn. We talk about
>
> how learning comes from you. Learn when you make a mistake, and you redo it, and you repeat
>
> it versus getting things right easily all the time … Nobody's perfect. It's going to be hard. You
>
> need to practice. It's not just school practice --- it's all practice --- and you can make it.

The principal's perspective on sensegiving for students in terms of the benefits of challenging curriculum

and situating effort and the role of mistakes in learning was not mentioned by other schools. There was

not a specific probing interview question about this, but it is notable that it was only mentioned by one

interviewee as a potential area to explore to balance the focus on impacts to students and student

identity in equity and excellence work.

Summary of Castellano Sensegiving. The leaders at Castellano described sensegiving primarily

in focal areas 1 and 2 – recognizing and correcting inequities in systems and reframing gifted education

around services with multiple entry points rather than static trait labels, respectively. The first,

sensegiving for recognizing and correcting inequities in systems, took place in supporting teachers'

understanding and skills related to providing increased Tier 1 opportunities for challenge as well as supporting success for students identified for services from historically underrepresented groups. Additionally, Castellano's principal was the only leader to mention the need to support students' sensemaking. These sensegiving opportunities support a combination of advancing both equity and excellence simultaneously as they recognize both the role of opportunity and the variability of student needs that necessitates a continuum of services. The second, sensegiving for reframing the purpose and implementation of gifted services with multiple entry points, took place in the equity-centered area of helping teachers understand the role of local norming considerations in developing talent and differentiating instruction. While there was evidence of intent to address focal area 3 – expanding accountability measures for teachers beyond identification outcomes – interviews revealed this to be an area impacted by the pandemic and did not take place. The principal shared she intended to revisit the accountability expectations for teachers' integration of rigor in Tier 1 instruction the following school year. The sensegiving actions of leaders at the school are consistent with their intention with regards to equity; however at this time the intention and actions for sensegiving for excellence are not you carried out in robust ways.

Ford Academy

Leaders at Ford Academy included the principal, assistant principal, and the advanced academic resource teacher. The degree of their experience as school leaders varied from over fifteen years to the second year in an official leadership role. The principal described his leadership as "leading from the front" and taking risks himself to encourage the same from staff members. The assistant principal described his leadership as based on relationships, development, and high expectations, and shared that people will often follow his instructional suggestions based on that relationship because they trust him. All three leaders discussed sensegiving for teachers related to raising the opportunity bar through broader and locally available services. The assistant principal and advanced academic resource teacher

described sensegiving through redefining elements of identification practices for services. The assistant principal also described sensegiving through continuous monitoring of program goals. For parents, the assistant principal described most of the sensegiving opportunities through an advanced academic parent group that he initiated, which was in its second year of running. The parent group discussed a variety of topics over the course of each school year.

Leaders' Sensegiving for Teachers. Ford leaders described three primary sensegiving areas in their work with teachers – understanding the role of raising the opportunity bar and providing a full range of services at the local school, redefining elements of identification practices, and continuous monitoring of program goals.

Raising the Opportunity Bar Through Broader and Locally Available Services. All three leaders at Ford described sensegiving around raising the opportunity bar and range of services available at the local school. The principal, Jason, began the journey with staff when he was hired at the school and wanted to change the lack of access to advanced mathematics specifically and expanded that in later years to expand the continuum of services and use cluster grouping beyond mathematics and to all subject areas (language arts, science, and social studies). Jason was explicit with the staff about his intention to update the advanced mathematics access at the school with messaging that his school was a place where staff should believe in providing and supporting students with opportunity or should consider finding another school to work the following year. At first, he worked with the early adopters – teachers who held strong equity orientations at the school and who were willing to try out new ways to support students while increased access was integrated into school scheduling and structures. He explained:

> Originally, we targeted some people who really believed in what we wanted to do. I don't
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> pretend that I'm the best principal, but I believe in these kids … And that's really worked for me
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> as an administrator. That's really what I was looking for when we were starting these programs

– are people that didn't just do it because that was their job — they did it because they believed that the kids could do it, and that [the students] deserved that opportunity. That was really my mindset in setting these things up and who we put in the positions.

Jason recognized the importance of having the right staff in place and was realistic that some would be ready from the start, some would be convinced over time, and some may not change their mindsets. He started with who was ready and gave others time to come on board, but when they did not come on board, he worked directly to name the misalignment as a reason that they were not a good match as a Ford staff member. "The first advanced academics resource teacher that was here when I started definitely didn't believe in kids the way that I did … She didn't last long because I wasn't having that at all." The advanced academic resource teacher who was there at the time had a mindset more centered around the gifted child paradigm rather than notions of talent development. When she was not willing to update her mindset, he counseled her to find another school; and as a result, she decided to retire at the end of the year. When the school was ready to move beyond the increased access in mathematics and broaden the availability of the full continuum of services offered in the district's elementary schools, including full-time services in core content areas, Jason also used Title I funds to hire a second advanced academic resource teacher. "We have been intentional about funding that and using our Title I money [this way] … We wanted that reach to be as far as possible, but also as targeted as necessary." Jason considered this significant in signaling his expectations as well as the commitment to supporting the staff in actualizing his vision for schoolwide work.

The assistant principal, Caleb, described more deeply the types of sensegiving that were required beyond setting the vision and into the area of implementation. Launching from the district measurement for Tier 1 access to rigor, Caleb described pushing teachers' thinking from providing a minimum number of opportunities to flipping to starting with high level tasks based on advanced academic curriculum from the start of unit planning:

We've been trying for a few years to shift the balance, and are seeing some success with, instead of a minimum number of lessons that you must do every, however often -- which is still our school goal and we keep data on — to take the opportunity to shift some teams … to just saying 'Hey, why doesn't the whole team just look at this advanced pacing guide and start there instead of starting with general pacing guide and trying to differentiate up. Why don't we start with this so that the team is all in the same place, and then we can adjust that as needed?'

Caleb noted that this was easier to do in the grade levels that had classes with students identified for full-time services because of the availability of a guide that used gifted curriculum on a full-time basis. The sensebreaking that this approach prompts with teachers hinges on the view of enrichment as a broad talent development opportunity versus a reward for having shown mastery of grade level standards. One view results in some students never getting access because the pacing guide requires moving on to the next topic once the basics are mastered due to time constraints, while the other lifts the ceiling for a "teaching up" approach that starts with enrichment and challenge and then figures out the scaffolds that some students will need to progress. Sensebreaking and reframing this approach to instruction also assumes a focus on growth and progress towards a goal beyond a grade level standard rather than standardized mastery of grade level content, which runs counter to the prevalent focus on grade level proficiency. Caleb named an additional challenge with this coming from the district level was that there were two pacing guides – one designed for full-time advanced academics and one designed for general education. While the full-time advanced academics guide was accessible and available to any teacher, he said that some teachers viewed it as not for them. "We've had some success with saying, 'hey – what if I gave you permission to just go off script and do the whole advanced learning unit instead of flipping back and forth between this [gen ed] curriculum?'" Caleb added that he would like for the district to make a guide that used an approach of teaching to high level tasks from the start and then named possible scaffolds teachers could employ as needed because the current set-up was a teacher

workload challenge; in other words, making a guide that focuses on "teaching up," implementing scaffolds where needed, and having growth be the accountability rather than one that imposes ceilings based on standards-driven grade level proficiency.

Caleb noted that sensegiving in this area is strengthened by coordinated and frequent messaging from multiple members of school leadership to sensebreak the notion that this work was mostly the purview of the advanced academic resource teacher as the staff member responsible for all things talent development and advanced differentiation:

> We've had our instructional leadership team really well integrated -- that's an action that communicates how this is important, and we really put a lot of emphasis on that. One of the big things we worked on this year, and we'll continue into next year, is bringing together our coaching team. We have a huge coaching team here and we're continuing to emphasize that the advanced academic resource teachers alone are not the only ones responsible, but also our reading coaches can be doing that when they're sitting in a [PLC]. They're never going to have all the information an advanced academic resource teacher might, but they have enough information. The same thing for math and other coaches in the building. That's something that we've had some success with this year is just bringing them along and saying, 'Hey, we need everybody on this message.'

The role of the advanced academic resource teacher was framed as a support for staff learning and development in the two areas rather than as the delivery mechanism for schoolwide goals, including learning for the instructional leadership team since the resource teachers receive continuous professional development from the district. Another structural change that provided sensegiving at Ford was around using grouping to support manageable differentiation alongside increased opportunities. "We began to consider how we were putting classes together … It was a conversation that started around advanced math … We messaged the reason was we'd like to give more kids opportunities."

Caleb shared that the school leadership was upfront with staff that "it may not work out the way we think, but we'll see," modeling risk-taking and openness to trying and adjusting new approaches as the teachers were being asked to do. Lastly, he shared that teachers were expected to engage in professional learning so that they were part of achieving schoolwide goals in the two areas. "We've made this a focus in professional learning – not saying that things are just for certain kids. It might be something that comes to us through the advanced academic curriculum, but it's good instruction for everybody." As noted in Chapter II and in the earlier Chapter IV data on leaders' sensemaking, teachers rarely receive professional learning on topics related to instructional methods for talent development or advanced differentiation (Rinn et al., 2020), so the school is electing to maximize the available professional learning that the district provides by messaging that it is for all teachers and will benefit all students in addition to the local supports of the school's coaches. Caleb noted that ensuring "teachers in the pipeline who have a good understanding of what we're trying to do" is challenging in this area, especially during the teacher shortage coming out of the COVID pandemic. "We have people who don't have an education background at all. They have no idea about advanced academics ... Bringing them into the culture we have here and learning all they need to learn – it's different than in the past."

Closer still to the implementation process is the advanced academic resource teacher, Saira, who described challenges and opportunities for sensegiving despite feeling support and collaboration with her school administration and other instructional coaches in the building. Saira described the need for coaching not only how to use materials but also in mindsets for higher expectations required of her as she supported teachers' implementation of expectations for use of curriculum designed for talent development and advanced differentiation. School leadership had already framed the district's frequency expectation as a minimum rather than an aspiration. Saira explained, "The broadest part of our plan is that everyone gets a bare minimum gets what's required by the county, but we also tried to amp it up and have access for all at least once a week." However, that did not automatically mean all

teachers bought in immediately, and she needed to work side-by-side to show them how it could be done. She elaborated, "We have some strong resistors who are like 'But when I was in school,' … But many do make a kind of shift – That's where I get the bid and say 'Let's work together. Let's talk some more.'" Saira said she feels the more dramatic mindset shift impacts from one-on-one conversations, which can be a challenge given the scheduling of her other responsibilities in the school, like covering teachers' planning time and lunch duties. "I need to be present with teachers to support shifts in thinking … Some conversations are crammed in in the hallway or in spaces that feel rushed." Time is a constant struggle in the days of elementary educators. While one-on-one conversations may not be the most efficient way to scale change, Saira reflected that they do allow individual coaching to get at the deeper mindsets and possible misperceptions to complement the co-teaching element of supporting capacity growth for teachers to develop talent and differentiate with advanced academic opportunities and needs in mind. At this time, Saira said that in very small instances, she is starting to see the coaching for equity approach taken up by some teachers in talking to one another after they participate in coaching cycles. "I do kind of encourage them to share with the rest of their team. Some people are starting to feel safer to have hard conversations." She added a belief that team dynamics play into this happening more often as well. "Because the teams are also starting to turn over a little bit more, so it's not just one newer person or one person that's caught the bug … It's spreading out more." Saira's reflection indicates a deeper integration of equity into school and team culture when teachers become more comfortable or feel more responsible to challenge one another's mindsets about what students can do, amplifying the impact of the one-on-one conversations she is having in the school.

Redefining Elements of Identification Practices. Both the advanced academic resource teacher and the assistant principal discussed supporting teachers' sensemaking around updates to district identification practices and notions of whether students who were identified truly belonged in the services for which they were found eligible.

When the district moved to a local building norms approach to identifying students who would be automatically screened for services, an approach connected to the differentiation paradigm, some teachers took it that they were being asked to fabricate evidence for the screening process, an indicator that their thinking may have still been connected to the gifted child paradigm. The district requires that the top 10 percent of students in each school, based on test scores, automatically be screened because it is an indicator that the student may need advanced differentiation within that context; however students can still be found either eligible or ineligible after looking at a fuller portfolio of data. In the identification process, the assistant principal noted a need to support teachers' thinking around changes using communication strategies such as analogies. "We got some pushback from teachers early on … but because of the way the screening process works, and we require [them to submit] work samples and [rating scales]. Some perceived that we were forcing them to find students eligible." Caleb noted the need to clarify and continuously communicate through the change, including sharing how thinking in the field, district, and his own mind have evolved over time as well as parsing out the differences between potential and performance to be able to see talents in students. "I use an analogy of looking for keys under the streetlight even though you dropped them way up the street. If we're looking just under the light, … we're not seeing all we need to see." Caleb had to bring clarity to what they were being asked to do --- note potential strengths and areas of need for differentiation --- to quell a narrative that using local building norms was a less valid approach that using nationally normed ability test data.

Saira shared she has had pushback from teachers who question whether a student "belongs" in the group of identified students even though they have been through the identification process by a committee trained to look at holistic student data. Saira used inquiry to unpack teachers' questions and discomfort with changes in identification practices and their beliefs about students' abilities, similar to her use of probing questions about access to opportunity in Tier 1 instruction. In those instances, she creates a sensemaking environment to reframe deficit mindsets and engage the teacher in problem

solving to meet the student's needs rather than jumping to the conclusion that the student doesn't belong. "I start to dig a little bit deeper and ask other questions like 'What makes you think that way?', 'What strategies have you used so far?', or 'Where do you see the student's interests or engagement?'" She shared that she doesn't do it in a combative way, but is "trying to tease out their core beliefs" so that she might offer another perspective. She noted that she's often looking for a deeper why underlying the generalization a teacher might make about a student's abilities or fit. She added, "It is still a big charge of mine – some of our teachers are still emphasizing test scores and I need to help them understand that isn't the totality of the student's ability to show what they are able to do." Saira is reframing more narrow notions of talent from the gifted child paradigm which relied primarily on test scores to more holistic evidence of students' abilities. Additionally, she said that she is often reframing teachers' misconceptions that gifted students are always paying attention and compliant. "I'm trying to help teachers understand it's not just 'the good kid.' Sometimes it's the kid who's acting out and we need to dig deeper to understand why." She has also found that sometimes teachers are protective of students and feel that the local school is the only place where they can thrive. She said:

> I'm battling teachers who think that because we are a lower-income school that students are just 'good enough for here' – and thinking that if they ever left, they would bomb. I really try to push their mindset of 'What makes you think we aren't preparing them for thriving outside of these walls?'

Saira describes teachers who do care a lot about their students but as a result of feeling nervous or protective, hold them back from opportunities. She has to reframe the ways the school is preparing students for rigor to help the teachers feel comfortable to let students who may not have an ideal set of support structures access the programs and opportunities for which they are entitled.

Caleb also noted times when teachers would push back because a student did not come with a level of background knowledge for which the teacher assumed they would have because they were

identified for advanced academics. Teachers have approached him to say they think a student should go

back to the general education classroom because they are struggling, but the school uses MTSS to dig

into underlying reasons for the gap and better understand what is happening for a student identified for

advanced services just as they would for a student who struggles to meet grade-level standards. "We

have pushed back on [removing students]. Come to your team. Have a Kid Talk. Then put in a referral to

MTSS or to local screening. We have to get past the first reaction that they no longer belong." Caleb

noted that rarely, but sometimes, they will determine to adjust services if it is best for the student. This

approach, however, acknowledges that being identified for services is not a reward and that the school

centers the student's needs rather than only continuing services for those who fit into a preconceived

notion of what an advanced student should be.

    Continuous Monitoring of Program Goals. Lastly, the assistant principal was the only leader

who discussed sensegiving through continuous monitoring of program goals. "One easy way we

measure success of our program is how often the teachers are engaged in activities that provide kids

access to higher level curriculum." The frequency of access is a concrete measure in an area where both

the district and many schools focus; however, it stays within the realm of equity without attention to

excellence. However, Caleb also explained that at Ford, a continuous monitoring includes growth of

students over time with the higher-level curriculum:

    Another measure we use is *How are kids doing year over year with those types of activities?* …

    It's always difficult when it's the first year, the first time that kids have ever done [something

    like Socratic Seminar]. And I think what we've seen here is this group of kids — They've been

    doing these often enough over a couple of years and we've seen more and more success from

    the kids … Seeing the growth of the students, you would never have believed that they could

    participate in something that is so rigorous, right? … So I think it's seeing the growth of the kids,

    not just in their academic achievement … but really seeing their growth [in] how they approach

things, or how they are able to participate in thinking activities differently, year over year, when

they've done them for a while … That is really encouraging for us.

Ford is one of the few schools that talked about looking at student progress in this way – as a type of

program impact on student learning – possibly because measuring growth in thinking skills is more

complex and less easily quantifiable than more traditional measures found prevalently in current

standardized measures.

Leaders' Sensegiving for Families. The assistant principal was the primary leader who described

sensegiving for families, which was done through an advanced academic parent group that he initiated

out of a need at the school for more two-way engagement throughout changes. The forum provided a

venue to discuss programming that was different from parents' expectations based on prior experiences

with gifted education and created a positive space for engagement that was mutually beneficial for

school leaders and families. Topics ranged from deeper understanding of identification and curriculum

used to what families could do to support their learners at home to answering questions. Through his

own core beliefs and the district professional learning, he felt confident to explain to parents, in very

student-centered ways, what gifted programming was about at Ford Academy:

We spent a lot of time trying to explain to our parent community about why the advanced class

has an intervention block, like all the other classes … We had to explain that those two things

aren't mutually exclusive … That misconception is the hardest thing to work through with

parents. They have this old conception of everybody in the advanced class having no gaps, no

challenges, that they're well-behaved all the time. Sometimes if a kid has done something

wrong, they expect that that student will get kicked out of advanced academics and we have to

say 'No – that's a behavior issue, and just like every other person in the universe has to work

through that, advanced students might have to too.'

The assistant principal offers an alternative perspective of a stereotypical notion of a student with advanced learning needs and reframes the class as a place where students will make mistakes, might have gaps or remedial needs side-by-side their advanced learning needs, and who are developing asynchronously, an oft-misunderstood characteristic of advanced learners.

Summary of Ford Sensegiving. The leaders at Ford described sensegiving in all three focal areas – recognizing and correcting inequities in systems, reframing gifted education around services with multiple entry points rather than static trait labels, and expanding gifted education accountability beyond identification outcomes. In the first, sensegiving for recognizing and correcting inequities in systems, all three leaders spoke about the equity/excellence-balanced actions related to raising the bar on opportunities for rigorous instruction and supporting students from historically underrepresented groups. For the second, sensegiving related to reframing gifted education, leaders spoke about the excellence-centered availability of programming that will meet a variety of student needs from Tier 1 access to rigor to subject-specific to full-time advanced academics, as well as the equity-centered practice of using local norming instead of static trait labels to drive advanced differentiation. Lastly, Ford was the school who focused more than others on continuous monitoring of program goals through both equity and excellence accountability measures. While they are still working on determining meaningful accountability measures related to growth, it is a question that interview and documentation data revealed is consistently discussed and integrated into the core purpose of the overall school culture, which was not found in the other two schools at the time of the study. The school data showed consistent evidence of balancing both equity and excellence-centered sensegiving for constituents.

Gentry Academy

Leaders at Gentry Academy included the principal and two advanced academic resource teachers. The principal used Title I funds to have a second advanced academic resource teacher to support the staff, a sensegiving tactic in itself, by prioritizing human resources to achieve goals she held

related to advanced academics in the school. The principal held over six years as a building administrator but was in their third year at Gentry. Both resource teachers were in their first two years of the position, coming from classroom teaching positions prior to taking the resource positions. The principal described her leadership as collaborative and as someone who is constantly trying to stay ahead of the latest research and figuring out how to turn theory into action. One resource teacher described her own leadership style as direct, encouraging, and as being a capacity builder; the second said she listens for entry points in working with colleagues so that she can help people grow from wherever they are. For families, leaders described the need for sensegiving for a variety of parent constituents, including families who were historically marginalized as well as parents who held more social capital and were resistant to changes to the status quo regarding grouping practices. All three leaders discussed sensegiving for teacher constituents around grouping practice changes as well as understanding and implementing talent development efforts. Gentry leaders described complexity in the sensegiving required of them while navigating politics, agendas, and trust with family constituents holding a variety of perspectives, some of which were misaligned with the district's philosophy and design. As noted in earlier chapters, gifted education was an elevated educational topic nationally at the time of the study and there was an undercurrent in the district and all of the schools in the study of the debates about equity in programming; however, the degree of politics and levels of troubling accusations described by Gentry leaders were more intense in comparison to the other schools in the study. Lastly, the resource teachers discussed sensegiving related to increasing coherence on the instructional leadership team.

Leaders' Sensegiving for Historically Marginalized Families. The principal, Erica, shared that she came into a "pretty significant challenge" in the first two weeks of her principalship at the school. "[There were] accusations of racism … from families who perceived that the only way to be admitted into the local full-time [advanced academic] program was to be on the PTA board or white!" Her first

step was to hold meetings with the families who held this belief and involve the school board member representing her area. After listening, she followed up by looking at data. In fact, she "uncovered that many of our students who were living *outside* of poverty, who spoke English *as their first language* – They were assigned to the rooms [with full-time services], even though they were not eligible." While it was expected that students who were not eligible for services would be added to the class to ensure a full class size, the data the principal had did reveal that students who were economically vulnerable or who were ESOL were not being included, creating a stark composition of "have/have not classes" across grade levels. This prompted her to reconsider the ways class rosters were constructed and shift to a cluster grouping approach, which required sensegiving not just for families, but also for teachers, which will be described in an upcoming section. Her sensegiving in this area, for families who have historically been marginalized, included listening, taking action, and reporting back to ensure the families felt heard and valued in the family-school partnership.

In addition to correcting the inequitable class grouping practices, Erica also described ways that the school needed to support parents' understanding of available services and the option to attend Gentry for full-time services if eligible rather than attending a center-based program. This was a challenge for all three of the schools participating in the study, and the principal characterized the communication challenges at Title I schools as more extreme than other schools, as well as becoming especially pronounced during the pandemic. "Our families don't have email accounts … They don't have professions where they [need] that type of tool available. So we had to set up opportunities for them to come in and set up email for them." The principal noted that many families put enormous trust in the schools and did not necessarily consider the gap to be negative, but the pandemic created "just one more layer" to school-family communications. This also showed up in some families' understanding of accepting services if their student was found eligible, a requirement embedded in state policy. In realizing the confusion, the school decided to set up a time to bring families into school to work with the

family liaison to understand what their student was found eligible for and to document their acceptance of services. The principal noted that "[the advanced academic resource teachers] spend so much time trying to figure out how to guide them through that." Leaders' sensegiving in this area involved problem-solving to remove barriers that some families faced to actively demonstrate the commitment to serving families who had not been served prior in this community.

Leaders' Sensegiving for Families Upset by Changes to the Status Quo. Of the three participating schools, Gentry was the only school that had made a change to grouping practices from a more homogeneous grouping to cluster grouping, defined as grouping approximately eight students with similar academic needs together in an otherwise mixed-ability class. The principal believed that the shift to cluster grouping would solve several problems --- both to resolve the accusations that some families who held more social capital were being advantaged more than others as well as to advance her goals to increase access to rigor in all classrooms and create flexibility for class groupings for times when individual students may need to be separated. With the other grouping model, the principal explained, "They have the same peer group for years. When it comes to friendships, it can create … challenges in the classroom. In growing this cluster grouping model, you can move kids but still maintain a cluster of academic peers."

All three leaders noted how some families who were initially concerned with the change were settled after additional communications and information was shared. Sometimes the communications took multiple back and forths. Kelly noted, "They believed we were changing a program and part of what we needed them to see or understand was that we were not – their student would get the same curriculum with cluster grouping." Additionally, they noticed that when families started seeing the work that students were doing, they were further assured the change would not be detrimental to their child's opportunities. Kelly emphasized, "The biggest part was them seeing the work and the concepts they were understanding very deeply." Sensegiving by showing evidence that the student work

happening in the classroom was still high level even with the grouping change was all the evidence some families needed.

However, not all families agreed even after receiving additional rationale and evidence, and some continued to be very upset about the change. Some assumed the change would mean their student would have less opportunity, some perceived a loss of prestige of a model where one class "receiving something special," and some were concerned about the program becoming "watered down," or less rigorous. The principal shared, "They threatened to bring news cameras on the day of our open house — Our biggest parent event of the year. How dare I change the model or put their children with *those kids*. They wanted exclusivity." Erica's attempts at sensegiving for parents included helping families understand how their own student would continue to receive robust opportunities and full-time curriculum with the switch from homogeneous to cluster grouping. However, Erica described the persistence of some parent efforts to reverse this practice – including accusations that she was lying, efforts to request a specific teacher, and email tactics seeking to acquire data about students in their child's class that violated student privacy regulations.

When the principal reached the limits of her ability to be transparent while maintaining student privacy, she reiterated the commitment to identified students receiving the full-time curriculum in the cluster setting, but let persistent families know that they have the option to "do what matters to you," even if that means choosing the center-based site instead of the local school. She conveyed that she hopes that they choose to stay, but that that is an option for them if they need it. "There are families who may perceive that their children are better than [others] – because of behaviors, language, or financial divide … They think 'How can I give my child so much and then have *this kid* in class with them?'" Kelly noted that the pervasive nature of thinking from the gifted child paradigm feeds the elitist notions some parents hold. "There's definitely some elitism and it comes from home – we actually had some emails from parents that said, 'This should be an elite class.'" She added that that notion wasn't

always coming from the parents of students who were eligible for services, but also from parents of students who had been included even though they were not eligible by way of their parental influence over class placements. Kelly emphasized that inconsistency at the national level about the definition and purpose of gifted education makes the jobs of schools more challenging in this area. "As long as we all define things differently, we'll get push back from staff and parents … We're all talking a different language." She shared that they work with parents and students to name focusing on comparing yourself to others as an often unhealthy practice, not just in this context, but in other areas of life – and the need to replace that comparison with a focus on individual growth and goal setting.

The principal's interview went into the most depth around sensegiving in this area, but she reiterated that she could not understate the resolve it took for her and the advanced academic resource teachers:

> [The advanced academic resource teachers] fight this battle every day, and it is hard work … I'm continuing to try to anticipate who may react in what way … I feel that having 2 [resource teachers] really helps because then they at least have a colleague to go and ask 'Am I crazy?' and they can tell you you're not crazy. This is the right work, and we are going to keep moving forward, step by step, inch by inch, but I don't have another position like theirs [in the school], where the values and beliefs about the program upset parents and staff no matter which way you go.

Erica emphasized the need for her resource teachers to have a support system when facing highly charged political situations. She is a seasoned leader who has worked in multiple district leadership roles and locations, but her story reveals the strength and perseverance required to make change to the status quo in some schools – time and energy that she noted takes away from other areas where she would prefer to be working. However, because she is a strong frontline, she can protect at least some of

the resource teachers' time to focus on instruction through their work with teachers rather than being

consumed with parent issues.

Leaders' Sensegiving for Teachers. All three leaders at Gentry described sensegiving

opportunities with teachers. Some topics overlapped with those they needed to work on with parents,

including understanding changes to grouping practices as well as raising the bar and mindsets about

student abilities. In addition, the resource teachers described sensegiving to help the instructional

leadership team understand the dual goals of talent development and differentiation and more in-depth

use of advanced academic strategies and curriculum.

Cluster Grouping. Parents were not the only constituent group who required sensegiving

around the change from homogeneous grouping to cluster grouping – some of the teachers were also

uncomfortable at the start. The principal focused sensegiving efforts on the teachers who would

suddenly be expected to be using advanced curriculum more often. Her messaging centered on telling

the why of the change – a desire to expand talent development as well as increase the potential class

composition flexibility for times when some students may need to be separated over multiple years of

services. She explained that they would be making clusters across the grade level based on whether

students were identified for full-time or part-time services. For example, 20 students who were eligible

for full-time services were broken into two clusters of 10 in two classes and other classes at the grade

level would contain clusters of students eligible for part-time services at the grade level. With this

model, all teachers at the grade level would be expected to be using advanced curriculum – some on a

full-time basis and others on a part-time basis (or more if appropriate).

This made sense to some teachers, but for other teachers, the grouping plan required further

sensegiving. With many different aspects and expectations going on, Erica needed to break down the

intersections and overlaps to the goals. "The grouping helps us to do things, but everybody should have

access to the things. One of them is about *what* we do, and the other one is about the *structures for*

getting it done … We need to allow for multiple entry points." With an either-or mindset, some may interpret use of advanced curriculum as binary yes or no rather than considering *how much*, *at what pace*, and *with what supports*. Erica was shifting thinking to both-and and recognizing that while she wanted all classes to be using advanced curriculum, use of cluster grouping would allow teachers to tailor the implementation based on clusters of common student needs in how to interact with the curriculum.

Further along and once classes were made, Erica learned that a different subgroup of teachers – those who had been the teachers of more homogeneous classes in past years – were not happy about the change. She explained, "They were disappointed in the way it rolled out. They wanted more input and some were hesitant and really felt a need to only offer the opportunity to the highest performing students." In digging deeper, she found out that some of those teachers felt suddenly undervalued, as if the time that they had spent learning about how to work with advanced learners was diluted. Erica reflected that she realized after this sentiment surfaced that she focused only on talking to the teachers who had not been using advanced curriculum prior and neglected to talk to the teachers who had expertise. Erica had to reframe for the teachers who had had deeper coursework to let them know that she saw their deeper expertise in the area and valued their mentoring of other teachers as they built their skillsets. Her sensegiving in this area attempted to move teachers from a binary, all-or-nothing mindset to one that showed gradations of depth and valued the deeper knowledge and experiences they brought to the team.

Understanding the Importance of Talent Development Opportunities. Sensegiving around the talent development efforts of the school included supporting teacher understanding of why and how to use resources as well as shifting to asset-based mindsets about student abilities. As mentioned in the earlier subquestion about advanced academic integration, Gentry's principal documented expectations about access to rigor in the school improvement plan. However, there were teachers who had not used

advanced curriculum in the past and were dubious about the principal's expectation of expanded use of materials. All three leaders interviewed talked extensively about sensegiving efforts to move the school forward with regards to increasing opportunities for rigorous learning experiences and broadening mindsets about student abilities.

The principal used sensebreaking to name her expectation as a key equity move in the school. She said, "There should be opportunities for all kids to have the chance to approach challenging tasks … but our curriculum has not always done that." For some teachers, the mindset had been that the advanced curriculum would be offered if a student first showed they knew grade level standards, but the principal framed it as removing that barrier and giving students a chance to show what teachers might not yet know about a student's abilities instead of assuming that because the student(s) might have gaps in some areas, that they would not benefit and show talents. She named that her decision to allocate Title I funds to have a second advanced academic resource teacher was also meant to convey to staff her prioritization of developing the ability to offer opportunities across all classrooms. She stated, "Paying for the extra position was vital because that allows teachers another teacher to be able to go in model the lessons and co-plan. They feel supported, and they get the skills that they need to meet students' needs." Resource teachers named their sensegiving role as explicitly helping teachers move from theory to action through tailoring materials, modeling and unpacking how to use resources in PLCs, as well as a gradual release model that moved from modeling to co-teaching to providing either teacher or student feedback once the classroom teacher took over primary responsibility. In addition to becoming familiar with the advanced curricular opportunities, resource teachers named supporting teachers with effective use of small groups to differentiate instruction as well as the importance of building relationships with students in order to build on interests and strengths.

The principal and resource teachers all named ongoing monitoring as a way of keeping expectations at the forefront, while also acknowledging the need as leaders to find the right amount of

"push" that didn't tip into "overwhelming." The principal related that she was trying to find that zone

for teachers and conveyed that she would like for them to find that zone for students as well. She noted,

"I use the Goldilocks analogy – that we have to determine what our kids need and want to make sure

we're pushing everybody." Resource teachers discussed purposefully collecting data about the

frequency and content variety of advanced curriculum opportunities to measure the progress of the

school, as well as the engagement and effort variances across teams, with some teams building their

capacity and enthusiasm for offering opportunities and others being less engaged.

The principal also used impact data showing how the increased use of advanced materials had

resulted in better diversity in student identification to further persuade teachers about the importance

of frequent opportunities for rigor. This was particularly impactful when it came to making sure ELLs

were getting opportunities. She noted, "Children pick this up and soar … so oftentimes I let the work

that our children do tell the story, and I don't have to do it. It's powerful when we evaluate their work in

ongoing progress monitoring." An important component of that, she shared, is naming a mindset of

looking for strengths instead of a mindset of looking for gaps. "We put the work samples into stacks

about which ones stand out … and so that begins to speak about their talents." In addition, she

connected ESOL tools like the WIDA "can do" descriptors to open discussions about how to provide

opportunities not only in English but also in students' first languages. In this regard, resource teachers

said that one of their measures of successful coaching is the ratio of asset-based language and how

teachers talked about students at the beginning of the year compared to later in the year.

Building the Capacity of the Broader Instructional Leadership Team. Resource teachers

attributed some of the team variance in engagement to some incoherence in the broader instructional

coaching team, stemming from gaps in knowledge to misalignment in philosophy with one member of

the team who continued struggled with either-or thinking about addressing gaps or providing rigorous

learning opportunities. When mixed messages were going to some teacher teams because of the

misalignment, the resource teachers found that they needed to "work around" one of the other instructional leaders, resulting in stepping back expectations and using less inclusive delivery models like pull-out to ensure identified students received services. However, most of the instructional leadership team came along and made great progress throughout the year. Resource teachers noted that conveying goals around broad talent development required multiple conversations and collective sensemaking opportunities over time and that they could see team coherence and understanding grow over the course of the year as evidenced by "speaking about experiences with more positivity and confidence." Resource teachers supported the group by providing concrete and explicit information about what access to rigor might look like, sound like, and naming who was responsible.

Summary of Gentry Sensegiving. The leaders at Ford described sensegiving in all three focal areas – with robust sensegiving related to recognizing and correcting inequities in systems and reframing gifted education around services with multiple entry points rather than static trait labels, and light sensegiving related to expanding gifted education accountability beyond identification outcomes. In the first, sensegiving for recognizing and correcting inequities in systems, all three leaders spoke about the equity/excellence-balanced actions related to raising the bar on opportunities for rigorous instruction, and the principal spoke about use of ESOL tools integrated with advanced learning tasks to ensure responsive instruction. For the second, sensegiving related to reframing gifted education, leaders spoke about the excellence-centered availability of programming that will meet a variety of student needs including Tier 1 access to rigor and cluster grouping of students for delivery of part-time and full-time advanced academic services. Lastly, while not a robust focus, there was mention of evaluating student work, which could eventually lead to more robust practices that begin to evaluate program impact on student outcomes for talent development and continuous growth. The school data showed evidence of balancing both equity and excellence-centered sensegiving for constituents.

Sensegiving Summary

Findings suggest strong equity mindsets shared by participants in all three schools as they try to increase opportunities and reframe constituent views, including those held by both staff and families, about the areas of focus in advanced academic programs. At two of the schools, leaders expended efforts to persuade and increase expectations about access to rigorous opportunities schoolwide talent development by creating concrete goals and directing the role of resource teachers to support increasing teacher capacity. Where the schools varied were around the leaders' ability to keep focus on the goal in the face of other needs at the school and in applying the use of data in their efforts to convey the impact and rationale for talent development goals. All three schools worked with family constituents to reframe views about the focus of advanced academics, but in diverse ways – with Castellano focused on conveying to families that the quality of services was equal to a center-based program at another school, Ford partnering with families to create space for ongoing learning and partnership to support student needs, and Gentry attending to unifying a split community whereby some families had been marginalized and others held elitist views of advanced academic programs. While all three schools had the beginnings of accountability elements, primarily in the area of talent development, expanding accountability beyond identification was a less developed area of sensegiving.

Advancing the Goals of Equity and Excellence in Advanced Programs (Primary Research Question)

The primary research question of this study was to understand how leaders at three positive outlier Title I elementary schools advanced goals of both equity and excellence in advanced academic programs. The primary research question was supported by three subquestions which examined a) how leaders integrated advanced academics into broader instructional programs, b) how leaders came to their thinking regarding advanced academics over time, and c) how leaders framed a vision for equity and excellence for staff and community constituents. Data collection through school-based documents and interviews with three leaders at each of the three sites came together to suggest several findings

towards the primary research question of how leaders advance the goals of both equity and excellence in Title I elementary schools. To describe findings for the primary research question, I begin by describing the similarities and differences across school leaders' framing of their vision and integration of advanced academics, including primary means and messaging about advanced academics, followed by similarities and differences across schools of leaders' collective sensemaking of advanced academics over their personal timelines of experience.

Framing a Vision and Setting Expectations for a Multifaceted Advanced Academic Program. Leaders at all three schools framed a vision, set expectations, and persisted in the face of challenges as they led their schools to increase the integration of advanced academics and thereby advance elements of equity and/or excellence. Their framing included explicit communications about a multifaceted program, including expectations for schoolwide talent development as well as differentiated instruction for students identified for the full-time advanced academic program. Across schools, leaders shared that teachers required more sensegiving for changes promoting talent development and expanded local services for identified students and families requiring more sensegiving for articulating changes to service delivery models.

Commonly, leaders framed their vision for talent development through sharing school-specific data about underrepresented subgroups in local school programming, sharing their beliefs that talent development opportunities are a key equity move for which the school was responsible, and including accountability for the frequency of opportunities for academic rigor through advanced curriculum use in school improvement plans. Each of the principals directed focused priority areas for the role of the advanced academic resource teacher to allocate ample time in their schedule to build teacher capacity to offer challenging opportunities in Tier 1 instruction. In some schools, leaders also framed the vision by ensuring some of the PLC time either whole school or on specific grade level teams was spent supporting planning use of lessons from advanced academic materials. In other instances where PLC

time was not possible, resource teachers worked with specific teachers. Two of the schools included a more specific layer of framing their vision for talent development. One of the schools held more frequent check-ins with the instructional leadership team so that the responsibility for building a culture of talent development was shared more broadly. Instructional leadership team meetings included ongoing discussions about observed progress and areas of need. Leaders at a second school layered in additional framing by not only having teams plan for use of rigorous learning materials, but also engaging in evaluation of student work to make sense together about the strengths students were exhibiting as a result of the broadened access.

A second area of framing mentioned at all three schools related to the service delivery models used for full-time advanced academic programs, with parents being the primary audience for sensegiving. The common sensegiving topic at all three schools was around efforts to help families understand the local full-time programs and how they compared to the choice of the center-based full-time program. However, the needs of families and ways of engaging in sensegiving were different across schools, with one school needing to address concerns about student behaviors at the local school option, the second school bringing families in for topical monthly meetings, and the third school providing samples of high level student work to help gain trust that the move to cluster grouping in the local model was not watering down the rigor of the academic work.

A common thread in all three schools' framing was the persistence in the face of challenges required of leaders. The common challenges from school to school included the concerns about teacher workload and competing districtwide initiatives which made it difficult to ensure teachers had the training necessary to provide robust doses of talent development or a full-time advanced academic program with fidelity. At one school, this was exacerbated by annual teacher turnover, making it difficult to grow beyond the beginner stages of talent development and fidelity of full-time programming. At two of the schools, leaders reported there was not a lot of turnover, which is noteworthy given that Title I

schools tend to have higher turnover rates than non-Title I schools. In addition to the common challenge of teacher preparation, schools also experienced context-specific challenges that leaders needed to navigate, including parents' perceptions about behavior problems at Title I schools, accusations of discrimination based on practices from prior leaders, and pressure from parents who wanted to maintain more elitist models of service delivery.

Relationships Between Leaders' Sensemaking and Vision. All but one of the leaders from the positive outlier schools participating in the study had experiences as a student with gifted education as a student, with six having been identified, two who had not been identified but had recollections of programs existing, and one who was not identified but also did not recall a program existing in their time as a student. Eight of the nine leaders interviewed were able to easily recall teaching experiences with students whose needs fell outside of the normative group that helped them see a need for advanced academic programming, but they also brought with them a perspective of the incomplete nature of the gifted child paradigm, which relies heavily on testing and labeling, and sought to improve areas of inequity from their past experiences. Five of the nine leaders held an endorsement in serving the needs of advanced learners and two were mid-coursework in earning an endorsement. All of the school-based leaders who were interviewed participated in district-provided professional learning in the form of leaders' networking, inservice sessions, or coursework. Collectively, the leaders each brought a perspective and influence to the leadership team which represented experience and rationale for the role of programming for this special population of students. However, rather than wanting to replicate their past experienced, each sought to improve upon some past practices by taking steps to diminish outdated practices that fed inequity.

While there was not an exact background that predicted leadership in the areas of equity and excellence, there were common mindsets that all leaders arrived to through a variety of pathways. To varying degrees, each of the leaders held the tension of broad access to rigor for talent development

and the understanding of student variability that required differentiated services to meet student needs simultaneously. Whether it was from being a student whose needs were different growing up or from working with students who fell outside the norm, they held advanced academic needs as legitimate even if the broader accountability focus from their executive leaders in the district, state, or federal levels did not emphasize or require it. At the same time, they also felt compelled to create a culture of opportunity and talent development even while recognizing the challenges of filling gaps in teachers' skills in the area in an environment that was already saturated with other professional learning needs. While acknowledging this concern, they kept a steady and measured pressure to continue to grow in the direction of their vision even if the pace of reaching expertise was slower than ideal.

All of the participating schools were identified as outliers in progress in the areas of advancing equity and excellence in Title I schools' advanced academic programs, and were able to identify three educators who were taking leadership in the school in this area, suggesting progress at a school likely benefits from multiple individuals with a common vision working together. Collectively, the leaders were triggered by past personal or professional experiences to engage in varying degrees of learning in the area that were not part of their university-level teacher and leader preparation programs. In this particular study, leaders had ample opportunities and opted to participate in district professional learning opportunities to support their personal drive to develop their efficacy to advance equity and excellence in advanced academic programs in their schools.

Summary

This chapter explored how leaders at three Title I schools framed their visions, set expectations, and persisted in the face of challenges as they worked to integrated advanced academics into their broader school culture and structures. Leaders framed multifaceted programs by communicating expectations for schoolwide talent development and differentiated instruction for identified students. They navigated challenges like teacher workloads, competing initiatives, and parent concerns while

drawing on experiences and professional learning to guide their vision. Notably, most leaders had experience with gifted education as students or teachers, and shared mindsets about balancing broad access with differentiated services, thus leading with a balance of equity and excellence. This chapter highlighted the collective sensemaking required to make deeper change to the pervasive and dated perspectives held over from the gifted child paradigm as school leaders support their staff and community to adopt talent development and differentiation mindsets. In Chapter V, these findings are placed in discussion with the relevant literature around advancing equity and excellence in advanced academics, leadership in advanced academics, sensemaking, sensegiving, and the conceptual framework that was formed using that research. The result of this discussion is the emergence of high-level themes that can inform the work of the broader field as well as school leaders to inform practical recommendations to advance equity and excellence in Title I gifted programs.

Chapter V – Discussion, Recommendations, and Action Communication

This study's purpose was to examine leaders' sensemaking and sensegiving about equity and excellence in advanced academic programs in Title I elementary schools. The study attempted to understand how leaders in three positive outlier schools came to their current thinking about advanced academics and worked to better align the philosophy and programs in their schools with current research in the field, particularly through the intersectionality of equity and excellence. In this chapter, I discuss the findings from Chapter IV and how they interact with the literature review of evolving paradigms, equity and excellence, and leadership research in the field of gifted education as well as the conceptual framework for this study. This discussion is organized into two high-level themes focused on leaders' sensemaking of equity and excellence and the complexity of leadership in this area. After discussing major themes, I present five recommendations for leaders at multiple levels of influence in the field of gifted education in order to maximize the synergistic relationship of equity and excellence in schools serving higher numbers of students who are economically vulnerable.

Discussion of Themes

Major themes from this study mirror the organization of the literature from Chapter II in that they fall into two broad areas, the first related to taking a both/and approach to leading for equity and excellence in the field of advanced academics and a second describing the need for sustained sensegiving to shift paradigms of gifted education in practice. The themes from this study add to the literature by providing an organizational frame to assess the ways equity and excellence are juxtaposed to increase potential impact and by documenting the ways school-based leaders attempt to influence mindsets and shifts in practice within their own sphere to promote a school culture and advanced academic program aligned with current research in gifted education.

Theme One: A Both/And Approach to Leading for Equity and Excellence

One section of the literature in Chapter II was organized around three focal areas and their connections to excellence, equity, or a combination of the two: 1) recognizing and correcting inequitable practices (Ford, 2012; Peters & Engerrand, 2016; Siegle et al., 2016; Sternberg et al., 2021), 2) reframing advanced academic education such that practices are better aligned with current research (Gallagher, 2012; Gentry et al., 2014; Peters et al., 2021; Sternberg, 2012) , and 3) expanding accountability in advanced academics beyond identification (Berman et al., 2012; Callahan et al., 2017; Plucker & Peters, 2016; Van Tassel-Baska & Stambaugh, 2005). One of the findings from the primary research question from this study was that leaders at all three schools framed a vision and set expectations for multifaceted programming at their school, demonstrating that leaders were taking a both/and approach to their framing of the purpose of advanced academic programs in their schools. The majority of their collective sensemaking and sensegiving concentrated on the two extremes of the continuum that the district offers – Tier 1 access to rigor on the one hand and a full-time service delivery model on the other.

The theme of leading for a both/and approach with regards to equity and excellence in advanced academics was derived from analyzing leaders' sensegiving and collective sensemaking through each of the focal areas from the literature review. Site by site, the topics that leaders described were captured with regards to who was the primary audience for sensegiving and whether the topic connected primarily to equity, excellence, or a combination, according to the organization of literature in Chapter II. The strength of evidence was further unpacked based on the number of leaders from the school who discussed it and whether discussion was in-depth or brief. Using these two criteria, sensegiving and opportunities for collective sensemaking were evaluated to be modest, moderate, or concentrated. For example, if an area was described by multiple leaders (collective sensemaking) and was described in depth, it would be noted as "concentrated" sensegiving. If an area was described only

by one leader (individual sensemaking) but in depth, the discussion would be noted as "moderate." If an

area was mentioned by one leader but was not described in detail, it would be noted as "modest."

Collectively across the three sites, topics within focal areas 1 and 2 represented areas of more

concentrated sensegiving efforts with more modest evidence of attention in focal area 3 (Appendix E).

Table 4 spotlights the topics from each focal area that were most discussed across the three sites.

Table 4.

Specific Aspects of Focal Areas Most Commonly Discussed Across Three Sites

Focal Area from Chapter II	Most Commonly Occurring Topics in Study Data	Related Research from Chapter II
Focal Area 1: Recognizing and Correcting Inequities in Systems	• 7 of 9 areas described by leaders attended to a combination of equity and excellence • 2 of 9 areas were equity-centered • Most common area across 3 sites: access to rigorous and culturally responsive instruction to develop latent potential and manifested abilities • Constituent group: teachers • School by school analysis of most common area: Castellano (modest); Ford (concentrated); Gentry (moderate but from multiple sensegiving angles)	Lohman, 2005; Pfeiffer, 2012; Renzulli, 2012
Focal Area 2: Reframing Gifted Education Around Services with Multiple Entry Points	• 8 of 13 areas described by leaders were excellence-centered • 3 of 13 areas attended to a combination of equity and excellence • 2 of 13 areas attended were equity-centered • Most common areas across 3 sites: multifaceted programs and the role of local norming • Constituent groups: teacher and parents, but more concentrated in supporting parents' understanding • School by school analysis of most common area: Castellano (modest); Ford (moderate); Gentry (moderate)	Adelson et al., 2012; Passow, 1981; Peters et al., 2014; Peters et al., 2021; Treffinger, 1998
Focal Area 3: Expanding Gifted Education Accountability Beyond Identification Outcomes	• 3 of 9 areas described by leaders were excellence-centered • 6 of 9 areas attended to a combination of equity and excellence • Most common area across 3 sites: accountability in teacher and leader preparation • Constituent group: teachers • School by school analysis of most common area: all three schools had moderate sensegiving in this area	Frazier-Goatley, et al., 2022; Plucker & Peters, 2016

- **Focal Area 1: Recognizing and Correcting Inequities in Systems -** Of the nine areas described by leaders as requiring sensegiving in focal area 1, seven could be classified as attending to both equity and excellence and two were more equity centered. The most common area discussed by leaders across schools that aligned with the literature was access to rigorous and culturally responsive instruction to develop latent potential and manifested abilities (Lohman, 2005; Pfeiffer, 2012; Renzulli, 2012), with teachers as the constituent requiring the most sensegiving within this study. Across the three sites, Castellano discussed access to instruction less frequently, although it was highlighted in their school improvement plan and discussed with relationship to teacher mindsets. Ford had very concentrated discussion on the topic by all three leaders. Gentry had moderate discussion of the topic but from multiple angles on the topic including desire to break down have/have not situations, overcoming deficit mindsets, and initiative overload.

- **Focal Area 2: Reframing Gifted Education Around Services with Multiple Entry Points -** Of the thirteen areas described by leaders as prompting sensegiving in focal area 2, eight could be classified as attending to excellence, three as a combination of equity and excellence, and two as equity centered. The most common areas discussed by leaders across schools that aligned with the literature were related to multifaceted programs (Adelson et al., 2012; Passow, 1981; Peters et al., 2014; Treffinger, 1998) and the role of local norming (Peters et al., 2021). Sensegiving needs within this study were required in these areas for both teacher and parent constituents, but more concentrated in supporting parents' understanding. Across the three sites, descriptions of Castellano's sensegiving in this area were modest, while descriptions at Ford and Gentry were moderate.

- **Focal Area 3: Expanding Gifted Education Accountability Beyond Identification Outcomes -** Of the nine areas described by leaders as requiring sensegiving in focal area 3, three could

be classified as excellence focused and six as a combination of equity and excellence. The

most common area discussed by leaders across schools that aligned with the literature was

accountability in teacher preparation to ensure basic understanding of the cognitive and

affective needs of diverse gifted learners (Frazier-Goatley, et al., 2022; Plucker & Peters,

2016). Teachers were the primary constituent group requiring sensegiving. All three schools

described moderate sensegiving in this area.

Before further describing the themes of equity and excellence efforts that were common and unique to

the three schools participating in the study, it is worth noting that the schools exist in a district that has

implemented many equity-focused approaches from the literature – use of universal and holistic

screening practices (Borland, 2012; Card & Giuliano, 2016; Flynn & Shelton, 2022; Hamilton et al., 2018;

Harris et al., 2007; Hodges et al., 2018; Lakin, 2016; Morgan, 2020; National Association for Gifted

Children, 2018; Rotatori et al., 2014; Vahidi et al., 2018; Yaluma & Tyner, 2018), use of culturally-

responsive screening tools (Cao et al., 2017, Peters & Gentry, 2013), use of structures to promote

closing opportunity gaps (Briggs et al., 2008; Mehta & Fine, 2019; Noguero et al., 2015; Renzulli & Reis,

2017; Ritchart, 2015), and use of local building norming (Peters et al., 2021; Yaluma & Tyner, 2018). The

district also uses an excellence-focused structure to meet student needs through a system with multiple

entry points (Adelson et al., 2012; Passow, 1981; Peters et al., 2014; Treffinger, 1998) available through

the district continuum of services. With the backdrop of district initiatives and regulatory context

contributing to individual leaders' sensemaking, positive Title I outlier schools participating in this study

continued to advance the areas described above through leaders' sensegiving and collective

sensemaking. Leaders at all three sites were addressing multiple need areas that represent a balance of

equity and excellence topics and demonstrating a both/and approach to programming rather than an

approach that prioritized one at the expense of the other. In their both/and leadership approaches, the

most common topics within each focal area respectively included: access to rigorous Tier 1 instruction

(equity and excellence centered), messaging around local norming and a continuum of services (equity and excellence centered), and teacher preparation (excellence centered).

Access to Rigorous Tier 1 Instruction. Tier I access to rigor is a key talent development move that is situated in the realm of focal area 1 – recognizing and correcting inequities in systems by reorienting conceptualizations of giftedness during identification and closing opportunity gaps. Increasing access to rigorous instruction is rooted in the talent development paradigm that emerged from 1980-1990 (Dai & Chen, 2013). The focus on talent development opportunities through Tier 1 access to advanced learning materials is a strong example of equity and excellence because the access focuses on using rigorous and culturally responsive instruction to develop both latent potential as well as manifested abilities.

The leaders' focus in this area across all three schools ranged from modest to concentrated. Many described their value of this aspect connected to wanting to create programs that made opportunity more broadly available than what they experienced as students identified for gifted services growing up. While they were all committed and even created school goals to exceed the minimum expectation set by the district for opportunities to use advanced academic materials in Tier 1 instruction, they described challenges about creating a culture of high expectations, particularly with teacher turnover and the competing demands of other initiatives. Leaders worked to mitigate challenges by using data to convey an expectation to shift from deficit to asset-based mindsets, hiring of staff with aligned mindsets where possible, investing in extra support for teachers by using Title I funds to hire additional advanced academic resource teachers, protecting the focus of the resource teachers' work in the face of competing demands, and including the advanced academic resource teacher on the instructional leadership team both as an advocate with particular expertise as well as to build the capacity of other instructional leaders. In some cases, leaders described having to "work around" staff who did not buy in to the vision by reverting to older, less-integrated practices such as a pull-out models

or focusing capacity-building efforts on grade level teams that were more aligned to talent development mindsets. Leaders at the three sites did note the impact of time scarcity due to other district initiatives (e.g. changes to literacy instruction) and pandemic impacts (e.g. increased social-emotional demands of both students and staff) as limiting factors to meeting some of their aspirations or spending the time it would require to do the deeper mindset work of collective sensemaking on the topics. In these cases, they described satisficing with goals by reducing or maintaining progress for talent development rather than increasing doses, protecting teachers from burnout, and holding intent to revisit or increase goals when demands on teachers were reduced.

Leaders described efforts to consistently attend to talent development despite facing challenges and setbacks; however, leaders were often starting from square one in their efforts to maintain strong cultures of talent development for two reasons. First, consistent with the literature cited in Chapter II, teachers were not coming out of teacher preparation programs understanding the value of talent development or with entry level strategies for developing talent in Tier 1 instruction (Hertberg-Davis, 2009; Frazier-Goatley, et al., 2022; Rinn et al., 2020). Second, schools with larger numbers of students who are economically vulnerable experience higher levels of teacher turnover (Carver-Thomas & Darling-Hammond, 2019). Leaders noted the cyclical nature of working to shape teachers' mindsets and skills only to have staff turnover and need to start anew almost annually. Reorienting conceptualizations of talent and closing opportunity gaps is foundational to creating a school culture of equity and excellence, upon which other focal areas can more naturally expand and be strengthened. When staff in schools are transient, it is difficult to move beyond the level-setting of a foundational premise such as access to challenging Tier 1 instruction. Frequent staff turnover stifles leaders' ability to advance the school to a more robust and integrated environment of advanced academic programming. Leading to increase access to rigorous Tier 1 instruction is an example of leadership for equity and excellence because it recognizes the long-term implications of unequal opportunity and uses the school as a lever

to remove barriers, raise expectations, and promote broad talent development and higher-level thinking.

Managing Messaging Around a Multifaceted Program and the Role of Local Norming. A second area of leading for equity and excellence relates to highlighting the purpose of advanced academic education and distancing it from the field of practice's historical focus on labels and nationally normed test scores as a focus for identifying who to serve in local contexts. Literature in Chapter II names the "categorical label of gifted" (Peters et al., 2014) as ineffective to inform educators, parents, or teachers about student needs given the broadness of the term and suggests moving to more nuanced approaches to services such as using an MTSS approach to match students to a variety of more specific needs (Passow, 1981; Treffinger, 1998; Peters et al., 2014). Focal area 2 concentrates on ways to reframe gifted education around services and the local needs at a school versus a categorical label that is not nuanced enough to be effective. Each of the Taldev leaders described professional experiences with gifted students, but the profiles and needs of the students they discussed were not homogeneous. In the study, the district employed a continuum of services approach for varied student needs and approached advanced academics as a system with multiple entry points versus a more tracked system of labeling students as gifted/not gifted (Adelson et al., 2012; Passow, 1981; Peters et al., 2014; Treffinger, 1998). Because this approach differed from the experiences of most staff and parents, it required regular sensegiving and the creation of opportunities for collective sensemaking by school leaders. This study found similar challenges to those identified in the research due to the hold that the older gifted child paradigm, which focuses on test scores and labels, has on educators and parent mindsets from their earlier experiences (Dai & Chen, 2013). The pervasiveness of this mindset is exacerbated by the sparsity of teacher preparation to meet the needs of advanced learners (Seedorf, 2018).

In the study, leaders describe several sensegiving approaches they had developed to persuade teachers to serve advanced students whose profiles do not fit a stereotype based on high ability test

scores or consistent strengths across all content and skill areas. Rather than exiting a student from services or allowing a teacher to lower expectations, leaders upheld high expectations for students through modelling the use of MTSS when discussing students' needs to access higher level curriculum, pushed teachers to explicitly name what they needed from their leadership in order to be able to better support students, set up PLCs such that the needs of advanced learners were included frequently in conversations to convey a commitment in this area, and highlighted success stories of students with non-stereotypical profiles. This study revealed an additional area of challenge that required leaders to support parents' understanding of programming that was beyond the binary *gifted* or *not gifted* and instead matched students to domain-specific needs or general intellectual ability needs through part or full-time services.

In addition to the continuum of services, the district's use of local building norming created a need for leaders' sensegiving for constituents in this area. Notions of giftedness that are binary rather than complex are less useful in the context of instructional practice than they may be for a psychologist's perspective who is concerned with diagnosis (Dai & Chen, 2013). In a school setting, identifying if a student's needs fall outside of the norm are most reasonably based on the local context and are informed by multiple data points to determine how different a student's needs are or in what area(s) a student might need services (Peters et al., 2014). This shift challenges constituents whose notions are tied to more binary/diagnosis-type expectations which have historically been tied to nationally normed ability test scores despite the field of research having moved past this notion (Peters & Gentry, 2012; Peters et al., 2019; Yaluma & Tyner, 2018). The district in the study had used a holistic data portfolio approach for more than 15 years and had shifted to use of local norming practices in identification within the last three years of the study taking place. According to the leaders interviewed, some teachers had not yet made the shift to focus on a broad data portfolio and assessment of availability of an academic peer group locally and were still focusing on nationally normed ability test

scores. At times, leaders reported teachers would push back about whether an identified student belonged in services for which they had been identified. Parents similarly faced a dissonance with the paradigm change that took an MTSS-like approach to defining tiers of advanced academic intervention beyond Tier 1 access to rigor.

To support staff, leaders described sensegiving and creating collective sensemaking opportunities through PLC discussions to norm and understand outliers and their differentiation needs at the grade level and working side by side with teachers to reframe and unpack ambiguous areas in their understanding. To support collective sensemaking with families in this area, leaders described dialogues that tried to distinguish or get to the heart of what the parent was asking for and why – did they need assurances about the right level of challenge for their student, or were they seeking a label? Once ensuring that conversations were focused more about meeting student needs and not labeling, leaders described successful shifts in collective sensemaking through naming a commitment to making classes with clusters of academic peer groups in mind, as well as showing evidence of student work that assured families of the match to rigorous instruction for which their student had been identified. Leaders did note that while this satisfied most families, there were some families who remained focused on the label, some believing that it would impact students' future ability to take advanced coursework despite the district's open enrollment policy for secondary advanced coursework.

The leaders in this study were able to overcome several types of binary (either/or) thinking in their leadership of advanced academics in their schools – having visions for their programs that included both talent development *and* services based on need, and seeing equity as applicable to both underrepresented student groups *as well as* students who were not challenged by grade level curriculum or did not have an academic peer group. When presented with situations giving rise to a need for sensegiving, they were able to support staff through dialectal and paradoxical cognitive framing (Miron-Spektor & Paletz, 2020), helping staff discuss the interdependence of talent development and

differentiation approaches rather than viewing advanced academics as an either/or endeavor. By leading programs that have multiple access points for services and supporting sensemaking to use local building norms, leaders were working towards the dual goals of equity and excellence. While excellence was not yet a well-formed notion in the schools participating in the study, the existing scaffolding created by the leaders' work in sensegiving on other paradoxical topics (e.g. talent development and differentiation) creates space for a possible next step in sensemaking around the relationship between equity and excellence.

Accountability in Teacher Preparation. Accountability beyond identification outcomes -- focal area 3 -- was the most modestly discussed topic by leaders in the study. The literature mentions two policy-related accountability areas – educator preparation standards and improvement goals to advanced learning gaps in school success reporting (Berman et al., 2012; Wells & Plucker, 2022). Although only two leaders interviewed were at a beginning stage of thinking about what accountability around student outcomes might look like, several leaders interviewed were describing accountability efforts to ensure teachers understood and were better prepared to serve the needs of advanced learners. However, the absence of teacher and leader preparation programs that include this content puts the onus on districts or individual schools to prioritize and/or provide even basic understanding of equity and excellence in advanced academics for educators. Aligned with the research showing this is a gap area (Hertberg-Davis, 2009; Rinn et al., 2020), only one in thirteen of the participants interviewed for the study had gifted education topics in their teacher preparation and none of the leaders who had been through leader preparation programs experienced topics related to the needs to advanced learners. The overwhelming majority had to seek out knowledge in this area of their own initiative through opportunities offered by the district.

To make up for the gap in teacher preparation at their schools, principal leaders at all three sites created supports for teacher learning and held expectations that teachers would use instructional

materials for advanced learners in Tier 1 instruction based on the supports provided, although those expectations faced significant challenges. All three principal leaders used the role of the advanced academic resource teacher to build capacity of teachers and embed collective sensemaking time around Tier 1 access to rigor and supporting readiness to teach in the full-time advanced academic classroom. One principal leader used Title I funds to have a second advanced academic resource teacher so that each grade level could receive more frequent support in PLC planning time as well as co-teaching in order to not only learn about how to use rigorous learning materials, but also to increase collaboration to discuss observations of student assets, strengths, and talents in diverse student groups. One principal leader verbally conveyed an expectation that when advanced academic professional learning was offered by the district, they expected broad teacher participation from their staff if they were available, not just the teachers responsible for full-time program delivery. Lastly, one principal leader named the expectation to earn the full advanced academic endorsement as part of the hiring process, conveying a commitment and expectation to teachers who were new to the staff even before their hire. In diverse ways, the principal leaders were setting teachers up for opportunities for collective sensemaking to make up for the gap in teacher preparation in this area.

Neither the district nor the school leaders interviewed for the study have implemented accountability through reporting or goal setting of excellence gaps. Only two leaders interviewed for the study were muddling through defining excellence through the lens of student outcomes more consistently with the literature on excellence gaps, while others' definitions of excellence were synonymous with and indistinct from equity and centered around a school offering opportunity. It is not surprising that focal area 3 was the least discussed sensegiving area for school leaders for three reasons. First, excellence gaps are, in comparison to other areas in the field of research, a more recent topic. The current literature on the topics focuses on policy recommendations versus studies of implementation to advance program improvement (Plucker & Peters, 2016; Wells & Plucker, 2022). Second, it is challenging

to quantify expected outcomes to close excellence gaps that would be beneficial and not result in the traps that a standardized testing focus has had in trying close achievement gaps, such as failing to capture student growth, being less responsive to student interests, or teaching to the test rather than developing conceptual understanding. Measures of critical and creative thinking are not as easily quantifiable as the more discrete knowledge that most standardized proficiency tests hold up as success measures. An additional complication is the way standardization may not account for the peripheral variable talents that students may hold, such as an exceptional learning trajectory in a particular domain in comparison to peers based on varied starting points or multilingualism. Third, robust focus on expanding accountability beyond the more easy-to-quantify identification measures assumes deeper work at play which is not yet commonplace in many classrooms, such as moving beyond the basic foundations of Tier 1 access to rigor and implementing a more nuanced approach to serving the variability of advanced learners' needs.

The schools participating in this study and the district in which they were situated were only beginning to address some of the areas of focal area 3 – expanding accountability in gifted education beyond identification data. The primary area of focus in this area was to lead for equity and excellence by increasing teacher readiness to offer a continuum of services, as measured at the schools by students receiving a minimal frequency of talent development opportunities and attending to the fidelity of implementation of the full-time program option. The district was supporting professional learning in this area through staffing of an advanced academic resource teacher to build classroom teacher capacity in this gap area as well as offering professional learning sessions in multiple formats. Principals at two of the schools were also investing in additional support for learning at their school by using Title I funds to have a second advanced academic resource teacher.

Theme Two: The Need for Sustained Sensegiving to Shift Paradigms of Gifted Education

In addition to providing three key focal areas for practices that promote equity and excellence, Chapter II also describes the sparsity of research related to leadership in the field of gifted education and notes the relative absence of topics related to the needs of advanced learners in both teacher preparation and leadership development programs (Hock, 2022; Rinn et al., 2020). Further, some educator preparation programs situate gifted education counter to equity as opposed to connected in multiple ways to equity (Hock, 2022). Similar to this study, the leader participants in the studies cited in Chapter II were positive outliers in their efforts to advance equity and excellence in gifted programs. This study contributes to the literature on leadership in advanced academics in three ways. One, by discussing the ways leaders came to their current beliefs to understand what conditions support leader sensemaking on this topic. Second, by focusing on leaders at Title I schools which are positive outliers with regards to their focus on planning for and monitoring multifaceted programming which includes talent development and access to advanced programming for students. And third, it presents insights into the complexity of leadership for equity and excellence and the sensegiving required of school leaders, which is the central focus of the major theme discussed here.

Positive outlier case studies from the literature noted leaders who were knowledgeable and experienced with regards to the needs of advanced learners (Berman et al., 2012), and who were intentional in the ways they communicated with staff and families to develop a culture that supported students' needs while avoiding a tone of elitism (Lewis et al., 2007). Twelve of thirteen leaders in this study did not have gifted education topics in their teacher preparation coursework, but most sought it out after entering the profession. Eight of nine of the participating school-based leaders and one out of four of the executive leaders had taken initiative to learn more about this area by participating in some form of professional learning offered by the district – including leadership networking, one-day in-services, and/or pursuing coursework or an endorsement in advanced academics. Each school

participating in the study had at least one and sometimes multiple leaders who had pursued multiple

learning opportunities on topics in gifted education, including recent learning to increase the likelihood

of their knowledge being current. The learning or networking they sought out provided space for

collective sensemaking. This aligned with research showing that deeper mindset work lends itself to

leadership that can support reconceptualizing gifted education (Stephens, 2019).

Leaders in this study were purposeful in the ways they interacted with parents to reframe

thinking and the ways they interacted with teachers to convey high expectations about rigorous

opportunities for all students, rationales for grouping practices, and expectations for a community-

minded culture. In each of these areas, leaders demonstrated persistence for sustained sensegiving over

the course of a school year as well as reflectiveness to project how they would build on the culture they

were developing the following year. What was absent in discussions from the schools in the study in

comparison to the case study in the literature was the practice of using data to ensure growth for

students identified for gifted services. Using individual student growth data to determine whether

students' needs are being met is an example of accountability beyond identification data noted in focal

area 3, which was not prevalent in this district even at positive outlier schools.

Although there was a gap in accountability of growth for advanced academic students in the

three schools, the study did reveal additional traits of positive outlier leadership for equity and

excellence in advanced academics, including the ability and will to communicate about topics that are

ambiguous (engage with others in complex and sometimes charged sensemaking) and a continuous

improvement mindset that included willingness to take risks and adjust over time (not rebuffing

progress in the name of perfection). Undoubtedly a binary "gifted/not gifted" approach to gifted

education is easier to communicate and holds a place in the minds of many staff and families, however

misaligned with research it might be (Borland, 2012). With increased efficacy to communicate about

research-based change gained from professional learning, leaders were able to engage in supporting the

collective sensemaking of staff and families in the face of changes, such as distinguishing Tier 1 access to rigor and services on the advanced academic continuum, the role of local building norms, or shifting from a focus on labels to a focus on nuanced programming to meet student needs. Leaders engaged in periodic monitoring to inform necessary adjustments for improvement over time. For example, one leadership team continually assessed the implementation quality of Tier 1 access to rigor as an indicator of readiness to cluster group versus using a more homogenous group – until there was clearer evidence that more teachers had the necessary professional learning to be able to provide services through cluster grouping, they were not going to change models. Another reflected on a shift to cluster grouping where it was not made explicit what was required of the teachers, and realized a need to unpack what it would look like on a day-to-day basis to meet student needs with the different grouping practice in place. Engaging in a set frequency of discussion about the school's progress towards meeting multifaceted goals for a robust advanced academic program is evidence of sensemaking as a process of organizing through shared understanding, in this case supported by accountability evidence.

Summary of Themes

This study of how leaders in elementary Title I schools advance the goals of both equity and excellence in advanced academic programming surfaced two themes. The first relates to using a both/and approach to leading for equity and excellence. Leaders attended to all three focal areas noted in the literature – recognizing and correcting inequities in systems, reframing gifted education around services with multiple entry points, and expanding accountability in advanced academic programs beyond identification measures – although the first two areas had more evidence of sensemaking and sensegiving in comparison to the third at the time of the study. In the respective areas, sensegiving opportunities – and thereby collective sensemaking opportunities -- were most consistent across schools in the areas of:

- access to rigorous and culturally responsive instruction to develop latent potential and manifested abilities,

- implementing multifaceted programs and the role of local norming, and

- expectations for teacher professional learning.

The second theme notes the sustained sensegiving required of leaders in order to shift to paradigms of gifted education that are aligned with more current research in the field. This theme highlights the heavy burden on districts and school leaders to provide continuous collective sensemaking opportunities in an area that is often neglected and is resistant to change due to the scarcity of time to collectively unpack its complexity with constituents.

Together, these themes contribute to the literature by adding to the sparse study of leadership in gifted education. This study, limited to three positive outlier schools in one district, found similar characteristics in leaders' background and mindsets in comparison to past studies of positive outliers. It adds to the literature by focusing on higher poverty schools and exploring the ways leaders create environments for collective sensemaking with a variety of constituents within their local spheres of influence. Additionally, the findings in this study present evidence of the need for field building to catalyze change that could rebalance the focus in gifted education to supporting districts towards purpose and goals of advanced academics versus being stymied by politicization of gifted education as practitioners try to shift the status quo to be more aligned with research. Next, I present five recommendations for the broader field of advanced academics as well as recommendations for district and school leaders for advancing equity and excellence in elementary Title I schools.

Recommendations

The following recommendations to support leadership in Title I schools to be better equipped to lead for equity and excellence in advanced academics are organized into three categories – three recommendations for collaborative field building involving multiple stakeholder groups (e.g. national

organizations, researchers, districts), two recommendations for district level leaders, and one recommendation for school-based leaders.

Recommendations for Collaborative Field Building

Field building has emerged as a promising approach solve complex and evolving problems versus scaling individual organizations (Farnham et al., 2020; Hussein et al., 2018). In this case, collaborations between educational researchers, practitioners, and national organizations may have potential to address the historical disconnect where research findings remain difficult to enact for educational practitioners, thus limiting impacts to student learning. The first three recommendations would involve collaborations between national organizations, such as the National Association for Gifted Children, gifted education researchers, and school districts to bring coherence for research-based practices, accountability efforts for equity and excellence, and preparation for leaders and teachers to support individual districts and schools from going alone in these efforts.

Develop an Organized Framework of Aligned Program Types, Goals, and Practices. As discussed in the themes above, school leaders are left in an ambiguous environment when explaining nuanced aspects of gifted programming to teachers and families who are familiar with the gifted child paradigm, which is less aligned with best practices for equity and excellence. This ambiguity, and the struggle to move to paradigms that are more aligned to the diverse ways practitioners may adjust learning for talent development and differentiation for students with advanced learning needs, required significant energy to support collective sensemaking on the part of knowledgeable leaders in the participating schools. Given that all leaders reported having to seek learning in this area of their own initiative and not as part of their teacher or leader preparation, the knowledge held at positive outlier schools such as these cannot be assumed at all schools. Even with this knowledge, the leaders described how the heaviness of the lift resulted in them either needing to pare down expectations or expend considerably more energy than expected to enact even small changes to mindsets or practices. To

scaffold the challenge of some of the labor required in this area, parent and educator constituents would benefit from an organized framework, developed by a credible collective group versus more individualized perspectives, that distinguishes types of programs and their associated goals and practices. Such a framework would support districts in showing alignment between the goals of their program and the elements of the paradigm that are guiding their program structure and policies.

A first step in this framework would be to break down the word gifted into more descriptive topics, some of which already exist in the field (e.g. general intellectual ability, domain specific, academic, performing arts, paradigms of gifted child, talent development, differentiation). While there is research that calls out the need to align identification practices with programming that is being offered, (Peters et al., 2014), there does not yet exist a framework that clearly articulates recommended tools aligned with various types of programming, the philosophy of the program type, or the potential outcome measures that a school district might expect to use to gauge success or find areas for areas for improvement.

The gifted field continues to struggle with divergent opinions about what to do with "the g word." A November 2023 panel of diverse researchers and practitioners in the field shared ongoing perspectives on the debate. While the panel did not have consensus, there was general coalescence of a need to shift to more nuanced and better descriptions of "what we do" and in what domains regardless of whether the word gifted continues to be used (Makel et al., 2023). Of note, none of the panel members argued to dismantle gifted education and each noted multiple reasons for its necessity; however, the shortcomings of relying on such a binary approach to a multifaceted concept in the field of practice is a distraction for practitioners in updating community mindsets rather than focusing on instructional mindsets and skills to serve students' needs. A framework developed by a coalition of gifted education researchers, school districts, and gifted education organizations could support articulation and understanding of the purpose of various programmatic approaches (e.g. schoolwide

talent development, enrichment, acceleration, differentiation, domain specific differentiation or general

intellectual ability) and the expected practices associated with each (e.g. identification tools and

practices, focuses for teacher training, student outcome measures). A framework that delineates

different approaches would support districts' ability to align programs with desired goals and

communicate the why and how of what is happening to their respective school boards, staffs, and

families. Practitioners urgently need a credible support tool for collective sensemaking and decision

making to align purposes with practices.

Focus Research Efforts on Defining Excellence and High Leverage Accountability Practices. As

noted in Chapter II, definitions of equity in education have been unpacked by researchers and

practitioners over multiple years, including distinguishing equity from equality, describing types of

equity, and relevant to this study, specifically looking at equity in areas of education – in this case gifted

education (Hammond, 2020; Worrell & Dixson, 2022). It would be helpful to have a collaborative

unpacking of what is meant by "excellence." Given the role of excellence in achieving equity and the

consistent use of *academic excellence* in the mission statements of districts and schools in the U.S.

(Aragão, 2023), a natural evolution in education would be to unpack what is meant by excellence so that

it can be more than an educational buzzword. While equity and excellence are interdependent, they are

not synonymous. It would be helpful to support definitions with potential concrete examples, such as

potential student outcome measures to show the impact of focus and strategies used in schools. While

the NAGC Programming Standards (National Association for Gifted Children, n.d.) include measuring

student growth and development (standard 1) and learning progress (standard 2), there was not

evidence of these practices in any of the positive outlier schools. The current void of measures for

understanding the strength or pathway to improvement for individual schools leaves availability of

equitable and excellent learning environments for students to chance and subject to the knowledge and

focus based on individual leaders' level of commitment. Further, if the gifted research community or

district's definitions of accountability focuses in an unbalanced way on identification without ample attention to the ways different approaches to programming advance equitable and excellent student outcomes, there is no basis for benchmarking program impact, strengths, and areas for improvement.

To be clear, measuring equity and excellence impact is more complex than the standardized assessments used for measuring grade level proficiency, and there is likely not a single or simple measure to report on the health of advanced academic programs. Measures would need to account for variability of growth (e.g. removing ceilings and capturing learning trajectories), varieties of talent areas in a district's population (e.g. domain-specific strengths, multilingual abilities), the social-emotional health of gifted students (e.g. belongingness, asynchronous development), and skills that are not easily captured on multiple choice tests (e.g. critical and creative thinking).

Not having easy tools or a defined set of measures tied to program goals complicates defining accountability beyond identification data; however, that does not mean this is not an area of need. Moreover, there are currently ways districts can begin to message expectations for equity and excellence through accountability in the absence of complex student outcome data. For example, the district in this study set expectations for use of rigorous research-based curriculum as part of Tier 1 instruction to advance talent development, and leaders in the school used the data to find areas to push further or assess school readiness to take on a new grouping model. As another example, there are available tools that are not yet widely utilized, such as a classroom observation tool for differentiating instruction for advanced learners created by the Center for Gifted Education at William and Mary (VanTassel-Baska et al., 2003). A collaborative effort to expand research efforts to benchmark non-identification measures of excellence would support practitioners in identifying areas of strength or need not only in districts, but in individual schools.

Include Learning About the Needs of Advanced Learners in Teacher and Leader Preparation.
Higher education and school systems should collaborate to ensure learning about the needs of advanced

learners is part of teacher and leader preparation programs. Currently the burden of this learning is on districts, of which not all have the resources and most of which are experiencing initiative overload of topics requiring teacher professional learning. Given the complexity of understanding more current research in the field, content about advancing equity and excellence in gifted programs should be part of teacher and leader preparation programs. This is a stated but unenforced expectation in the Higher Education Opportunity Act of 2008. Additionally, some educator preparation programs take a narrow view of equity and position gifted education counter to equity initiatives rather than as a vital part of achieving equitable excellence (Hock, 2022).

Expectations for inclusive learning environments are increasing if not already in place in many districts, and as such there is a minimal need to include basic understanding of special populations – students requiring advanced academic services, ESOL services, and special education services, as well as the intersectionality of such exceptionalities – in teacher and leadership preparation. A prevalent myth related to advanced learners is that they "don't need help and will be fine on their own" (National Association for Gifted Children, n.d.). While some students may be okay by intervention of parents with social capital to be able to provide extracurricular ways to keep their student engaged, this thinking enables inequitable learning environments by ignoring the advanced learning needs of some students and ignores the gaps in what families are able to provide and the ways schools mitigate unequal opportunity of outside enrichment (Labaree, 2010; Peters, 2022). Beliefs that gifted education is elitist carries an inherent misconception which ignores the impact programs have for underserved populations (economically vulnerable, ELLs, 2e), assuming districts are using more current research-based practices for equity in identification.

Recommendations for Districts

The next two recommendations focus on ways district-level leaders can support equitable and excellence advanced academic programming in Title I schools.

Use Tools for Individual School Accountability, Sustainability, and Improvement. As discussed in the themes, accountability was the most modestly discussed focal area among school leaders. Without structures and/or tools to reflect on the advanced academic programming at a school, decisions are made based on feelings or narratives that may or may not be accurate, and there are fewer opportunities likely for collective sensemaking. The NAGC Program Standards include expectation of program reviews (standard 5) by professionals with expertise in both gifted education and program evaluation (National Association for Gifted Children, n.d.). While program reviews are beneficial for overall district health assessment, the specificity of feedback in districts with multiple schools can be too diluted to represent the variances between exemplary schools and those who are less engaged or to provide a progression pathway for school leaders to see in order to improve programming at their specific site. District central offices and principal supervisors should consider using tools which are aligned to the district's program paradigm and goals to monitor aspects of school level strengths and areas for growth. If there are sections in school improvement plans describing expectations and measures for special populations, feedback from these tools can inform the school improvement process and communicate to staff and families about areas of focus.

Schools participating in the study all included talent development goals in their school improvement processes by their own initiative. Not all schools in the district included aspects of advanced academics in their school plans. The findings from this study revealed that gifted program goals were not part of conversations between principals and their supervisors, revealing that school-based leaders' commitment to improvement in this area, like their decision to seek out professional learning about gifted education, was their personal endeavor rather than a systemic expectation. Historically, Title I schools, in comparison to non-Title I schools, have not identified as many students or had as robust of programming opportunities for gifted education, perhaps because there is not a similar level of parental push for including talent development or perhaps because there is a perception of

needing to focus on the basics before integrating deeper learning practices. Access to rigor or strong advanced academic opportunities should not depend on family income or zip code. In order to increase equitable access to opportunity, districts should consider using accountability tools to guide leadership coaching not just at positive outlier schools, but systemically. Having documented progress of school-level work will safeguard sustainable and transparent cultures of excellence.

Create Incentives to Increase Staff Stability in Title I Schools. Nationally, Title I schools experience 50 percent higher rates of teacher turnover (Carver-Thomas & Darling-Hammond, 2019), which leaders in this study noted was detrimental to cultivate a shared vision and skillset for providing rigorous Tier 1 instruction and differentiating for advanced learners. Leaders named that when there is a higher degree of turnover, they are often starting from scratch each school year in supporting teachers' understanding of why talent development is important and how to provide rigorous opportunities at doses that are frequent enough to be impactful. Incentivizing teachers to remain at Title I schools through stipends, higher pay, or additional days for planning or professional learning would honor the depth of expertise needed to support students who are economically vulnerable not just to meet grade level standards, but to engage in deeper thinking curriculum and provide services to students who are outliers in their local context. It might encourage teachers to stay at a higher needs school for multiple years which could facilitate development of deeper culture for talent development and ensure a consistently high standard of instruction. Incentivizing teaching at Title I schools has the potential to positively impact and level the playing field for students facing additional challenges due to their family's socio-economic status.

Recommendations for Schools

The last recommendation focuses on one way school-based leaders can create a structure of expertise in their school in light of the current absence of adequate teacher preparation. Additionally,

school-based leaders could also activate tools for self-assessment and school improvement such as those noted above in district recommendations.

Plan for Distributed Expertise to Increase Collective Sensemaking Opportunities. With the rise of inclusion and diversity in classrooms, teachers and leaders need a better grasp of meeting the needs of different special populations of students. Ideally, there would be ample content about advancing equity and excellence in gifted programming included in teacher and leader preparation programs as expected in the Higher Education Opportunity Act of 2008, just as there would be learning related to other special populations such as English language learners or students with special education needs. Until that becomes reality, school leaders should be cognizant of a distribution of expertise on the instructional leadership team and across grade levels or departments, whether through hiring considerations or in professional learning plans for specific leaders or teachers.

In each of the schools in the study, there were multiple leaders with knowledge in this area, bringing voice and research-backed expertise to school improvement planning, team planning meetings, and continuous improvement for multifaceted advanced academic programming. If it is not possible to hire with this expertise in mind, leaders should consider being strategic about surveying the state of distributed expertise across the school staff and identify individuals to engage in coursework or other professional learning over an expected timeframe. The role of the advanced academic resource teachers from the three schools in this study were essential to supporting building teacher capacity to improve access and advanced differentiation across the schools; however distribution of this expertise strategically throughout the school would increase the availability of collective sensemaking time to develop a school culture of equity and excellence in advanced academics.

Summary

In this chapter, I discussed two major themes based on the findings from Chapter IV and related them to the literature presented in Chapter II and the conceptual framework presented in Chapter III.

Based on the themes, I presented recommendations in three areas – for collaborative field building, for districts, and for schools – to increase the likelihood that there are equitable and high functioning advanced academic programs in schools serving larger percentages of students who are economically vulnerable. Together, these recommendations advance the harmonization of equity and excellence in research-guided advanced academic programming that maximizes opportunity and talent development for students in Title I schools.

Action Communication Products

In the next section, I include three products designed for use in communicating findings, themes, and recommendations with participating schools and the district.

1. A memo summarizing the results of the study for the district leadership and the three participating schools.

2. A presentation template for use in debriefing district or school leaders.

3. A self-assessment tool for school reflection in each of the focal areas for use by either school-based leaders or by principal supervisors in coaching for school improvement in advanced academics.

Action Communication 1: District and School-Based Leadership Briefing

Equity and Excellence Advanced Academics Considerations for Leaders in Title I Schools

Subject: Leadership around equity and excellence in advanced academic programs, based on a study conducted at three Title I elementary schools.

Problem of Practice: Reforming gifted education requires addressing challenging tensions including: balancing equity and excellence, navigating stakeholder perceptions and opinions, and addressing limited teacher preparation to meet the needs of advanced learners. The economic vulnerability of families in Title I schools creates a more urgent need to provide increased opportunity during the school day, yet nationally, higher poverty schools tend to identify and serve fewer students in gifted programs.

Context: This study focused on the leadership at three schools identified as being positive Title I school outliers for leading for equity and excellence in advanced academic programs. Many leaders at the positive outlier schools had self-selected to learn more about the needs of advanced learners and provided structures to support teacher learning to try to close the gap in teacher preparation. Leaders engaged in collective sensemaking experiences with staff and families to increase the access to rigor in Tier 1 instruction as well as implement differentiated programs for identified students.

Major Themes: The following themes evolved from analysis of the narratives of school-based administrators and teacher leaders at the three sites. In sharing these themes, I hope that they are supportive of reflecting on your work to provide defensible and equitable advanced academic programming as well as suggest possible future actions.

- **Theme One**: A both/and approach to equity and excellence guided leaders to shape an environment that cast a wide net of opportunity through talent development efforts while also attending to the differentiated learning needs of students identified for services. The areas of primary focus fell across three focal areas:
  - Recognizing and correcting inequities in systems through expectations for talent development and rigor in Tier 1 instruction.
  - Reframing gifted education in closer alignment with current research for teacher and family constituents through communications about multiple service types based on student needs and supporting the shift a local norming approach connected to differentiation.
  - Using accountability beyond identification measures to assess quality and areas for improvement in programming through support and expectations related to teacher preparation.

- **Theme Two:** There is a need for sustained sensegiving by leaders to support teachers and families in shifting gifted programming to be better aligned with more current research. Leaders primarily seek out learning to be ready to lead in this area of their own choice and are expending significant effort to maintain progress due to teacher attrition which is greater at Title I schools.

Recommendations: As a result of these findings, I propose six recommendations – three for collaborative field building to bring researchers, gifted organizations, and school districts together

to create coherence in key areas, two for districts specific to accountability and retention at Title I schools, and one for school leaders to assess and set goals for school improvement.

- ***Partner with Experts to Consider Alignment of Program Goals, Type, and Practices.*** Some practices happening in schools are based on outdated notions of gifted education or are perpetuating status quo of goals that miss opportunities. Work with experts in the field to analyze the purpose and outcomes desired in the district programming and ensure that practices are current and aligned based on intended goals.
- ***Explore Aspects of Defining Excellence.*** Explore how equity and excellence in advanced academic programs are distinct and how they are interconnected. Connect researchers, central office and schools to test aspects of determining excellence that honor the variance of student starting points and strengths that break beyond minimal proficiency tests to communicate the success of equity efforts (e.g. growth measures, critical thinking skill increases).
- ***Work with Higher Education to Embed Learning About Talent Development Research and Methods for Rigorous Instruction in Teacher and Leader Preparation.*** The Higher Education Act currently names an expectation that teacher preparation programs include content about understanding the needs of advanced learners, but this study showed that it is not being enacted. The absence of understanding talent development and advanced differentiation strategies leaves the burden on school districts to provide even foundational understanding to teachers in this area. Teacher preparations should include content to ready teachers to meet diverse learner needs, including special populations (i.e. advanced learners, multilingual learners, and students requiring special education services.)
- ***Create Incentives to Increase Staff Stability in Title I Schools.*** In the absence of teacher preparation, high turnover rates at Title I schools make it difficult for school leaders to build culture and momentum for talent development mindsets. Consider stipends or increased salary connected to working in Title I schools.
- ***Use Tools for Individual School Accountability, Sustainability, and Improvement.*** Consider using tools such as the Classroom Observation Scale for Differentiation or the NAGC Programming Standards to reflect on areas of strength and areas for growth when setting goals for continuous improvement for advanced academics. A tool with 3 focal areas derived from the literature review from this study is proposed.
- ***Ensure Professional Learning Opportunities for Staff Readiness to Develop Talent and Differentiate Instruction According to Current Research.*** The current gap in teacher preparation leaves the burden on districts and schools and districts to provide professional learning so that teachers are ready to create equitable learning environments that lead to excellent outcomes for each student. Ensure access to professional learning for all teachers to have some baseline knowledge and skill in this area.

Collectively, these recommendations have the potential to positively impact experiences and trajectories for students attending Title I schools.

Action Communication 2: Presentation Template for Leader Briefing

Leaders' Sensemaking and Sensegiving for Equity and Excellence in K-6 Title I Elementary Advanced Academic Programs

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Problem of Practice: Advancing Equity & Excellence in Title I Schools

- **Less access to talent development opportunity in higher poverty schools**
  Nearly 70% of elementary and middle schools in the U.S. have gifted programs. However, students in schools serving families who are *not* impacted by poverty are *twice as likely* to participate in gifted education programs than students in high-poverty schools (Yaluma & Tyner, 2018).

- **Scarce professional learning**
  Only 8% of states have professional learning requirements in gifted education topics for school leaders; 22% of states leave it up to LEA; 70% of states have no expectations in this area (Rinn et al., 2018).

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Core Argument & Purpose of the Study

1 Lack of Coherence in Overall Field of Gifted Education	+	2 Longstanding Inattention in Gifted Field of Practice	+	3 Institutional Barriers to Change	=	• Disconnected fields of research and practice • Restrained progress in gifted education reforms
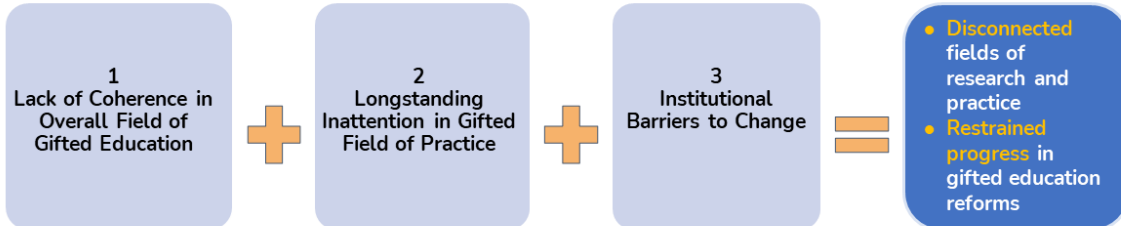
PURPOSE:
Understand what influences leaders of schools that are overcoming these barriers and how those leaders influence others to improve access to talent development in higher poverty schools

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Research Questions

Primary Research Question:

How do educational leaders advance the goals of both equity and excellence in advanced academic programs in three Title I elementary schools?

Subquestion 1
How do school leaders integrate advanced academics in the broader instructional programs of the school?

Subquestion 2
How is the sensemaking of school leaders shaped by their prior experiences and current environment?

Subquestion 3
How do leaders frame a vision for equity and excellence in advanced academics for staff and community stakeholders?

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Conceptual Framework

School Leaders' Sensemaking and Sensegiving About Equity & Excellence in Gifted Education

Gifted Education Paradigms

Gifted child

Talent development

Differentiation

Local Influences

Parent demands

District initiatives

School culture

Regulatory context

RQ 1
individual sensemaking

Leader's Sensemaking

- personal and professional experiences with gifted education
- orientations to equity and/or excellence
- beliefs and values about grouping practices and/or core purpose of public school instruction and student outcomes
- anticipation and self-efficacy to respond to stakeholders (i.e. teachers, students, parents, school board, community organizations)

Leader's Sensegiving and Cognitive Framing

Equity

Ineffectual (No Frame)

Either/Or

Language

Symbols

Expectations

Structures

Integrating Advanced Academics

Dialectical (co-exist) or Paradoxical (synergy)

Either/Or

Excellence

RQ 3
framing vision for equity and excellence

RQ 2
integrating advanced academics

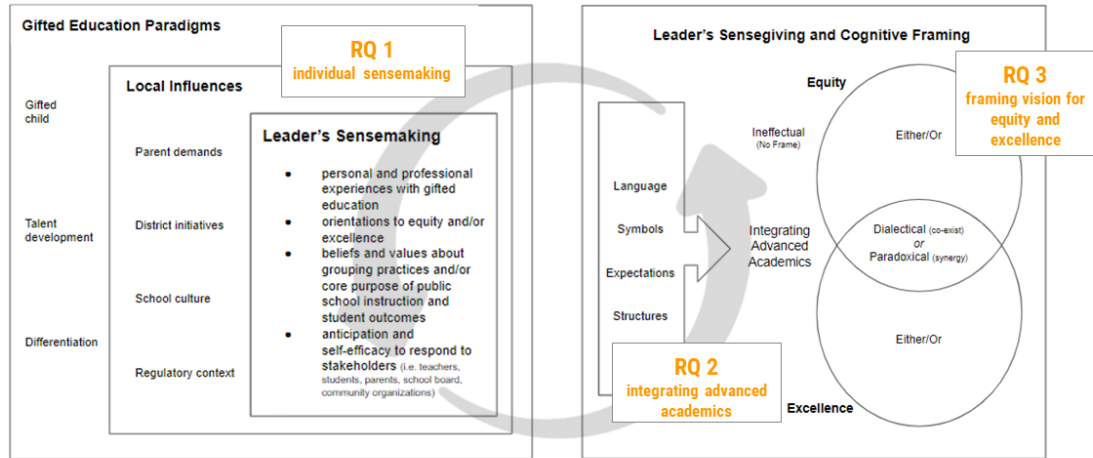**Gifted:** Colangelo et al., 2004; Dai & Chen, 2013; Peters et al., 2017

Sensemaking & Sensegiving: Eddy-Spicer, 2019; Kraft et al., 2015; Maitlis & Lawrence, 2007; Miron- Specktor & Paletz, 2020; Sandberg & Tsoukas, 2014; Sparr, 2018; Spillane et al., 2002; Vlaar et al., 2008; Weick, 2009, 2020

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Site Selection and Data

Taldev Public Schools
Large, suburban, mid-Atlantic U.S. school district

3 Title I Elementary Schools

Castellano Academy
700 students
70% ELL
70% FRM
30% mobility

Ford Academy
700 students
45% ELL
60% FRM
18% mobility

Gentry Academy
600 students
45% ELL
60% FRM
22% mobility

Interviews with 3 Leaders Per Site

Principal A
Resource Teacher A
Literacy Coach

Principal B
Resource Teacher B
Assistant Principal

Principal C
Resource Teacher C1
Resource Teacher C2

Document Analysis

School Improvement Plans

Principal/Resource Teacher Agreement form

Young Scholars reset presentation for instructional leadership team

School Improvement Plans

Principal/Resource Teacher Agreement form

Agendas for advanced academic parent group meetings

School Improvement Plans

Principal/Resource Teacher Agreement form

Parent communications about grouping plans

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Additional: interviews with 4 principal supervisors connected to the schools

Findings

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Findings for SubQuestion 1: Integration

Commonalities	Differences
- had an **instructional leadership team** which **included the gifted resource teacher** **set goals** related to advanced academics (and were **impacted by the pandemic, initiative overload, and politics**) **focused on specific teams** based on teacher buy-in - made **significant gains on the district expectation for access to rigor** to promote talent development - motivation to lead in this area **did not appear to be connected** to principal supervisors' expectations	**degree of instructional leadership team's focus** on monitoring advanced academic goals **degree of resilience** to focus in wake of pandemic impacts and initiative overload **areas of primary focus** with regards to advanced academics

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Findings for SubQuestion 2: Individual Sensemaking

Leaders' sensemaking was shaped by personal and professional background experiences

Childhood Reflections About Services	They would do cool activities, and then they would kind of **come back and rub it in all of our faces** … I remember feeling like that looks like fun.	[I got in trouble for] playing around with friends because **I was finished with work and there was nothing else for me to do**.
Leader Reflections About Why They Think Gifted Services Are Necessary	So often we have to work to just cover the curriculum, and this **gives us the opportunity for students to go further**.	I am **not fully convinced that any kind of advanced differentiation would happen** in ways that we could count on without [advanced academic] programs.

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Leaders were holding a both/and perspective.

Findings for SubQuestion 2: Individual Sensemaking

The 3 primary areas of influence:

1. experiences working with students
2. self-selected forms of professional learning
3. district-level initiatives

"It became so apparent - *a couple of students were really standing out*, and they had these academic needs that I was struggling to meet "

"*[Through] the classes I've taken in the district*, I've really come to understand that giftedness really truly is a more broad term. It's not this elite small group of children."

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Findings for SubQuestion 3: Sensegiving

Areas requiring sensegiving:

- reframing definitions of gifted
- understanding a continuum of student needs vs a binary label
- understanding equitable identification practices
- mindsets about opportunity

It's a lot harder than I ever expected it to be. I never thought advanced academics would take up so much of my time; like *just to be clear about that – I was shocked.* I sometimes get caught off guard because I don't even imagine that what I'm thinking is going to upset someone. *People have really strong beliefs around this — parents, staff* ... It's fascinating to me.

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Findings for SubQuestion 3: Sensegiving

Sensegiving <u>for staff</u>:

- direct description of vision
- use of data to show the why
- unpacking details (look fors, frequency expectations, etc.) in PLCs
- hiring conversations and building off of early adopters
- just-in-time mindset conversations
- collective monitoring of goal progress
- strategic use of the gifted resource teacher
- normalizing discomfort
- use of similes and analogies
- modeling working through complexity
- raising awareness of how language creates culture
- PLC time to norm work and identify outliers

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Findings for SubQuestion 3: Sensegiving

Sensegiving <u>for families</u>:

- use of translated materials and interpreters
- use of visuals
- creative and persistent approaches to family engagement
- building relationships and trust
- listening, paraphrasing, questioning, getting to the heart of a concern
- sensebreaking — explicitly naming old and new
- commitment to continuing difficult conversations
- responsiveness to investigate claims

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Findings for Primary Research Question

Leaders at the three schools were advancing the goals of equity and excellence in advanced academic programs by…

…framing a vision and setting expectations for multifaceted advanced academic programs

…awareness of the relationship between their individual sensemaking, their vision, and ways to support collective sensemaking

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Major Themes

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Theme 1

A Both/And Approach to Leading for Equity and Excellence

Literature Review Focal Areas		
Focal Area 1	Focal Area 2	Focal Area 3
Recognizing and Correcting Inequities in Systems (Lohman, 2005; Pfeiffer, 2012; Renzulli, 2012)	Reframing Gifted Education Around Services with Multiple Entry Points (Adelson et al., 2012; Passow, 1981; Peters et al., 2014; Peters et al., 2021; Treffinger, 1998)	Expanding Gifted Education Accountability Beyond Identification Outcomes (Frazier-Goatley, et al., 2022; Plucker & Peters, 2016)

modest / moderate / concentrated

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Theme 1

A Both/And Approach to Leading for Equity and Excellence

Most common areas requiring sensegiving:

1. continuum of services vs. label of gifted
2. role of local norming

Focal Area 2
Reframing Gifted Education Around Services with Multiple Entry Points

The categorical label of gifted does not inform the educator, parent, or administrator about what it is the student needs, or the programs in which he or she would be successful. (Peters et al., 2014, p. 30)

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Theme 2

The Need for Sustained Sensegiving to Shift Paradigms of Gifted Education

Similarities to other case studies of leadership in gifted education	Need for Sustained Sensegiving to Shift Paradigms of Gifted Education	Contributions to the literature on leadership in gifted education
1. professional learning 2. intentionality in communications to develop a culture that supported students' needs while avoiding a tone of elitism	Positive outlier leaders **provided multiple, ongoing ways for staff and families to update their conceptualizations** of advanced academics.	1. discusses how leaders came to their beliefs 2. focuses specifically on Title I schools 3. presents insights into the complexity of leadership required

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Recommendations

Recommendations for Collaborative Field Building	Recommendations for Districts	Recommendations for Schools
1. Develop an organized framework of aligned program types, goals, and associated best practices 2. Focus research efforts on defining excellence and high leverage accountability practices 3. Include learning about the needs of advanced learners in teacher and leader preparation	4. Use tools for individual school accountability, sustainability, and improvement 5. Create incentives to increase staff stability at Title I schools	6. Plan for distributed expertise to increase collective sensemaking opportunities

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Feedback & Questions

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Action Communication 3: Assessment Tool for School Leaders

School Assessment Tool: Leading for Equity & Excellence in Advanced Academic Programming

Directions: Research in advanced academics suggests three focal areas for equity and excellence in advanced academic programming. The following tool can be used by either principal supervisors to recognize areas of strength or needed growth in planning for leader professional learning, or by school-based leaders to self-assess staff and community areas of strength or needed growth areas for individual or collective sensemaking.

For each of the three areas, use the look fors to identify areas of strength with evidence of implementation. Use areas without evidence of strong implementation to select next steps and set goals for growth.

Focal Area	Look Fors	Self-Assessment
1: Recognizing and correcting inequities in systems *How: Reorienting conceptualizations of giftedness during identification and closing opportunity gaps*	Staff & community understanding of: • Use of universal screening • Use of holistic review with multiple data points to match student needs to services • Culturally-responsive identification tools • Focus on closing opportunity gaps • Latent potential vs. manifested abilities Staff engagement with: • Providing access to culturally-responsive and rigorous instructional opportunities • Allocating time and space for talent to emerge and be seen • Use of asset-based language • Developing relationships to support understanding students' interests and strengths • Systemic approaches to support retention and success for gifted students from historically underrepresented groups	Quality of Current State with Evidence of Implementation Strategies Reflections & Next Steps (e.g. goal setting for continuous improvement, professional learning needed)

2: Reframing gifted education around services with multiple entry points rather than static labels *How: Designing programs that support talent development and meeting needs for differentiating up*	• Implementing programs to meet a variety of needs through a match to appropriate differentiation strategies: - Acceleration - Depth - Complexity - Creativity • Understanding and use of local norms to adjust frequency and intensity of advanced academic strategies and curriculum in Tier 1 instruction and match outlier student needs in specific domains to services • Understanding and use of cluster grouping to ensure identified students have access to advanced curriculum and instruction and a similar academic peer group for peer-to-peer feedback for growth	Quality of Current State with Evidence of Implementation Strategies
		Reflections & Next Steps (e.g. goal setting for continuous improvement, professional learning needed)

| 3: Expanding gifted education accountability beyond identification outcomes

How: Accountability for educator preparedness and advanced outcomes | • All staff have basic understanding of the cognitive and affective needs of advanced learners
• Staff working with identified students understand and address their specific cognitive and affective learning needs
• Leaders plan for distributed deeper expertise across teams related to instruction designed to meet advanced learners' needs
• Leaders evaluate how well programming nurtures and develops talent in diverse populations
• Leaders expect professional learning for teachers assigned to teach students identified for advanced services
• Leaders assess currency of research-based professional learning and alignment to district paradigmatic approach and goals
• School uses student success measures related to growth vs solely using minimal proficiency standards | Quality of Current State with Evidence of Implementation Strategies |
| | | Reflections & Next Steps
(e.g. goal setting for continuous improvement, professional learning needed) |

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Appendix A: School-Based Leaders — Interview Questions

Thank you for agreeing to be interviewed for my study. I am a doctoral student at the University of Virginia's School of Education and Human Development. I am conducting a study about how school leaders' process information about advanced academics and support others' understanding.

The information collected will be used in my capstone project, and recommendations will be shared with other school and district leaders. This study has been approved by the Institutional Review Board at the University of Virginia and this school division.

This is a semi-structured interview, and you have the freedom to skip questions, ask for clarification, and ask questions of me at any point. I would like to record this interview so that I may accurately refer to your responses when writing my paper. I would also like to take notes during the interview if that is alright with you. These notes will help me keep track of the interview as it progresses. Do I have your permission to record this interview? Do I have your permission to take notes?

_____ Recording OK?
_____ Note-taking OK?

I want to remind you that you can withdraw your consent at any time. Do I have your consent to move forward with the interview?

All of the information you share with me today will be confidential. I will use pseudonyms for the districts, schools, and participants. You can pick your own pseudonym if you'd like. Pseudonym_____

1	How would you describe your school and its community?	• Demographics • Instructional focus • Relationships (staff, families, • Relationship between teachers and leaders • Relationship between staff and families • Perspectives about learning and students
	Notes:	
	Summary Points/Member Check:	

2	Tell me a little bit about your leadership experiences in education.	• How long would you have considered yourself to be either a formal or informal leader in elementary education?

	• What do you find most rewarding or impactful about leadership in a Title I school? • How would you describe your leadership style?
Notes:	
Summary Points/Member Check:	

3	When you hear the term 'gifted education', what does it bring to mind?	• How would you explain 'gifted education' to a relative/friend who is not an educator?" • Do you think advanced academics is a necessary part of public education — Why or why not?
	Notes:	
	Summary Points/Member Check:	

4	What is your earliest memory and impression of the existence of gifted education — either as a student or professionally?	• Were you aware of gifted education as a student? • Have you worked with gifted students in your career?

Notes:		
Summary Points/Member Check:		

5	Tell me about your professional journey with gifted education. What would you consider the key milestones?	- Did you have any formal educator training in gifted education? - What aspects of advanced academics have you spent the most time trying to understand and why? - Have there been any events or situations that stand out?
	Notes:	
	Summary Points/Member Check:	

6	What kinds of issues arise related to advanced academics in your school?	- What is your measure of whether advanced academics is a successful part of instruction in your school? - How does advanced academics fit into the broader instructional plan in your school? - Was there a time that was difficult to sort out? What did you do? Did you learn anything from that situation? - What aspect of advanced academics the easiest to lead in your school? Why do you think that might be?

Notes:

Summary Points/Member Check:

7	As a leader, are there any updates and/or changes to advanced academics you have tried to implement in your school?	• Was it a success or was it difficult? • When it came to change, how was it negotiated? What was loose and what was tight and who decided?

Notes:

Summary Points/Member Check:

8	What is one leadership action you have taken that you think has resulted in positive impacts for students in your school related to gifted education?	• What prompted your actions? • What feedback did you get that made you feel it was a positive impact? • If they give an identification example, ask about services or student outcomes, or vice versa.

Notes:

Summary Points/Member Check:	

9	How would you describe your staff (or families') perceptions of advanced academics? Is there a recent conversation you have had with staff (or others) about advanced academics?	• Has anything changed over time? If so: • What do you think is the reason for the change? • How did you respond to the change? Why?
	Notes:	
	Summary Points/Member Check:	

10	How do you see the relationship between equity and excellence?	• What is overlapping? What is distinct? • How do you see each playing out in your school?
	Notes:	

	Summary Points/Member Check:

11	Is there anything else you think is important for me to know about this topic?
	Notes:
	Summary points/Member Check:

Primary Research Question: How do educational leaders advance the goals of both equity and excellence in advanced academic programs in Title I elementary schools?

	Question or Probe from Protocol	Possible Analysis/Codes
Background Information Questions	(1) How would you describe your school and its community? (2) Tell me a little bit about your leadership experiences in education.	
Subquestion 1: How is the sensemaking of school leaders shaped by their prior experiences and current environment?	(3) When you hear the term 'gifted education', what does it bring to mind? (How would you describe to a friend who doesn't know about advanced academics? Do you think advanced academics is a necessary part of public education — why or why not?)	• paradigmatic approach • who or what is centered (student need, testing, parents, talent development, differentiation needs, academic peer group)

	(4) What is your earliest memory and impression of the existence of gifted education — either as a student or professionally? (Aware as a child? Taught advanced students as a teacher?)	• paradigmatic approach • positive or negative association • integrated or separate
	(5) Tell me about your professional journey with gifted education. What would you consider the key milestones? (Formal training? Which areas of learning? Any standout situations?)	• paradigmatic approach • key events or change over time • triggers for beliefs (ability, role of opportunity, grouping, curriculum)
Subquestion 2: How do school leaders with model programs enact equity and excellence in advanced academics within the broader instructional programming of the school?	(6) What kinds of issues arise related to advanced academics in your school? How do you decide what in advanced academics to pay attention to? (How do you determine if things are successful? How do you see advanced academics within the big picture of instruction at your school? Has there been a time that was difficult to sort out? What did you do? Did you learn anything from that situation? What is the easiest aspect of advanced academics to lead? Why might that be?	• Influences on decision making • responses to ambiguous situations that prompt thinking • ways of acting into situations • evaluation of success measures (equity, excellence, goals) • separate or seamless, constant or sporadic, integrated or extra • efficacy in different areas • reflection • ways of framing
	(7) As a leader, are there any updates and/or changes to advanced academics you have tried to implement in your school? (Any barriers?)	• how it was negotiated - what was loose, what was tight, who decided
*Subqu*estion 3: How do leaders frame a vision for equity and excellence in advanced academics for staff and community stakeholders?	(8) What is one leadership action you have taken that you think has resulted in positive impacts for students in your school related to gifted education? (What prompted? What feedback made you consider it a success?)	• triggers for actions (what or who prompted it) • feedback (from who and how) • area(s) of focus • orientation around which aspect of advanced academics
	(9) How would you describe your staff perceptions of advanced academics? (or families, or students)	• • existing tensions

	(What do they do that makes you think that? Anything changed over time? Why do you suppose? How did you react?)	- type of feedback that informs leadership (staff, family, student) - a prominent area of attention or harder to grasp
	(10) How do you see the relationship between equity and excellence? (What is overlapping? What is distinct? How do you see these playing out in your school?)	Either or, dialectical, paradoxical with examples

Appendix B: Executive Leaders Interview Questions

Thank you for agreeing to be interviewed for my study. I am a doctoral student at the University of Virginia's School of Education and Human Development. I am conducting a study about how school leaders' process information about advanced academics and support others' understanding. I'm interested in including region leaders in the study as you have a unique purview on how different schools in your area are enacting gifted education. Additionally, you have influence over the ways principals implement gifted services in their buildings that are important to understand as part of their leading for equity and excellence in gifted education.

The information collected will be used in my capstone project, and recommendations will be shared with other school and district leaders. This study has been approved by the Institutional Review Board at the University of Virginia and this school division.

This is a semi-structured interview, and you have the freedom to skip questions, ask for clarification, and ask questions of me at any point. I would like to record this interview so that I may accurately refer to your responses when writing my paper. I would also like to take notes during the interview if that is alright with you. These notes will help me keep track of the interview as it progresses. Do I have your permission to record this interview? Do I have your permission to take notes?

_____ Recording OK?
_____ Note-taking OK?

I want to remind you that you can withdraw your consent at any time. Do I have your consent to move forward with the interview?

All of the information you share with me today will be confidential. I will use pseudonyms for the districts, schools, and participants. You can pick your own pseudonym if you'd like.
Pseudonym_____

1. How would you describe the instructional focus of your region?
   o What are some bright spots and what are some challenges?

2. When you hear the term 'gifted education', what does it bring to mind?
   o How would you explain 'gifted education' to a relative/friend who is not an educator?
   o Do you think advanced academics is a necessary part of public education — Why or why not?

3. Tell me about your professional journey with gifted education. What would you consider the key milestones?
   o Did you have any formal educator training in gifted education?
   o What aspects of advanced academics have you spent the most time trying to understand and why?
   o Have there been any events or situations that stand out?

4. What kinds of issues arise related to advanced academics in your region?

- When you consult with a school leader, what are some things that you listen for or look for?
- Was there a time that was difficult to sort out? What did you do?

5. As a leader, are there any updates and/or changes to advanced academics you have tried to implement in your region?
   - Was it a success or was it difficult or both?
   - When it came to change, how was it negotiated? What was loose and what was tight and who decided?

6. How would you describe your staff (or families') perceptions of advanced academics? Is there a recent conversation you have had with staff (or others) about advanced academics?
   - Has anything changed over time? If so: What do you think is the reason for the change? How did you respond to the change? Why?

7. How do you see the relationship between equity and excellence?
   - What is overlapping? What is distinct?
   - How do you see each playing out in your school?

8. Is there anything else you think is important for me to know about the topic of leadership in advanced academics?

Appendix C: Initial Codebook

Code Category: Influence of Gifted Education Paradigms	
Code	Definition
GP-GC	Gifted Child paradigm – focus on test scores, giftedness as a static trait (Dai & Chen, 2013)
GP-TD	Talent Development paradigm – interaction of opportunity, environment, and natural abilities (Dai & Chen, 2013)
GP-D	Differentiation paradigm – meeting advanced learners needs for continuous growth – adjustments to acceleration, depth, complexity, creativity (Dai & Chen, 2013)

Code Category: Local Influences on Gifted Services	
Code	Definition
LI-PD	Parent/community demands
LI-DI	District initiatives
LI-SC	School culture
LI-R	Regulations

Code Category: Leaders' Sensemaking Topics for Equity and Excellence in Gifted Services	
Code	Definition
LS-PE	Personal and professional experiences with gifted education
LS-EE	Orientations or thoughts about equity and/or excellence
LS-BV	Beliefs or values about topics like grouping, the core purpose of public school, student outcomes
LS-SE	Anticipation and self-efficacy to respond to stakeholders when challenged

Code Category: Sensemaking and Sensegiving	
Code	Definition
SP-T	Trigger to prompt thinking or change (Weick et al., 2005)
SP-E	Enactment, acting into, noticing and bracketing (e.g. language, symbols, expectations, structures) (Weick et al., 2005)
SP-S	Select understandings or actions to generate a plausible narrative (Weick et al., 2005)
SP-R	Retention and preservation (Weick et al., 2005)
SP-I	Ongoing reflection, iterations, and refinement based on feedback (Gioia & Chittipeddi, 1991)
SG-T	Trigger to shape sense of others (e.g. uncertainty, ambiguity, conflict) (Maitlis & Lawrence, 2007)
SG-D	Decision point about whether to engage in sensegiving (e.g. perceive environment ready, have necessary expertise, have time/energy) (Maitlis & Lawrence, 2007)
SG-SB	Using sensebreaking to create a void and provide a new narrative (i.e. reframing) (Vlaar et al., 2008)
SG-F	Framing as either/or or both/and (e.g. equity/excellence or talent development/meeting unique needs) (Miron-Specktor & Paletz, 2020)

Appendix D: Revised Codebook

Code Category: Influence of Gifted Education Paradigms	
Code	Definition
GP-GC	Gifted Child paradigm – focus on test scores, giftedness as a static trait (Dai & Chen, 2013)
GP-TD	Talent Development paradigm – interaction of opportunity, environment, and natural abilities (Dai & Chen, 2013)
GP-D	Differentiation paradigm – meeting advanced learners needs for continuous growth – adjustments to acceleration, depth, complexity, creativity (Dai & Chen, 2013)

Code Category: Local Influences on Gifted Services	
Code	Definition
LI-PD	Parent/community demands
LI-DI	District initiatives
LI-SC	School culture
LI-R	Regulations

Code Category: Influences on Leaders' Sensemaking for Equity and Excellence in Gifted Services	
Code	Definition
LS-PE	Personal and professional experiences with gifted education
LS-EE	Orientations or thoughts about equity and/or excellence
LS-BV	Beliefs or values about topics like grouping, the core purpose of public school, student outcomes
LS-SE	Anticipation and self-efficacy to respond to stakeholders when challenged

Code Category: School Context	
Code	Definition
IAA	Integrating advanced academics – descriptions of the current state of advanced academic programs and instruction at the local school

Code Category: Sensemaking and Sensegiving	
Code	Definition
SP	Sensemaking processes: events that prompt thinking or change, enactment, bracketing, selection/generating plausible narrative, retention, iterations and refinement (Gioia & Chittipeddi, 1991; Weick et al., 2005)
SG	Sensegiving: prompts for sensegiving (e.g. uncertainty, ambiguity, conflict), decision points about whether to engage (e.g. ready environment, have necessary expertise, have time/energy) (Maitlis & Lawrence, 2007) use of sensebreaking to create space for new narrative (i.e. reframing) (Vlaar et al., 2008) Framing as either/or or both/and (e.g. equity/excellence or talent development/meeting unique needs) (Miron-Specktor & Paletz, 2020)

Appendix E: Prompts for Collective Sensemaking at Three Schools by Focal Area, Orientation, and Strength

Castellano Academy Leaders' Sensegiving Connected to Equity-Excellence Focal Areas

Focal Area	Situation Prompting Sensegiving by Constituent Group(s)	Leader Action/Sensegiving	Equity-Excellence Orientation with Topic	Strength of Evidence (modest, moderate, or concentrated)
Focal Area 1 Recognizing and correcting inequities in systems	Representation gaps *Constituent group: teachers*	Using data to highlight the problem and ensuring multiple data points in screening	Equity-centered (identification)	Modest
	Pushback about whether talent development should be prioritized when students are below grade level *Constituent group: teachers*	Recalibrating deficit vs. asset mindsets; naming the importance of opportunities; naming unacceptableness of holding some students back; use of cluster grouping to ensure manageable differentiation; expecting schoolwide differentiation	Equity + excellence centered (teacher readiness and mindsets)	Modest
	Efficacy to support English Language Learners *Constituent group: teachers*	Supporting understanding of language development; co-teaching to support learning about scaffolding strategies in higher level thinking	Equity + excellence-centered (teacher readiness and mindsets)	Modest
	Confusion about advanced academics *Constituent groups: families and teachers*	Use of language translation and interpretation tools; commitment to continue exploring the disconnect	Equity + excellence centered (supporting success for students in historically underrepresented groups)	Moderate

Castellano Academy Leaders' Sensegiving Connected to Equity-Excellence Focal Areas

Focal Area 2 Reframing gifted education around services with multiple entry points rather than static trait labels	Balancing multiple program goals (talent development and differentiation); Pervasiveness of the gifted child paradigm *Constituent group: teachers*	Using data to show why a focus on elements of the Young Scholars model is needed; modeling what talent development and differentiation look like; naming direct/explicit expectations	Excellence-centered (designing program implementation around differentiation)	Concentrated
	Designing for multiple programs in the school (i.e. status quo of gifted or immersion creating barriers) or for small schools with small cohort numbers *Constituent group: master schedule creators*	Using grouping considerations to integrate programming; creating opportunities for working together outside of academic time	Excellence-centered (designing program implementation around differentiation)	Moderate
	Misalignment between programs and perceptions of programs or changes in gifted education approaches *Constituent group: families and teachers*	*For both:* Sensebreaking *For families:* Parent panels and family information meetings; using visuals and explicit descriptions of similarities and differences *For teachers:* Raising awareness of how language creates culture; using similes; modeling as the lead learner in wrestling with complexity	Excellence + equity centered (communication about approach to advanced academic programs)	Moderate
	Calibrating around local norming and exceptionality in local context *Constituent group: teachers*	Grade level discussions to norm and understand outliers at each grade level within the building	Equity-centered (local norming for identification)	Modest

Castellano Academy Leaders' Sensegiving Connected to Equity-Excellence Focal Areas

	Pushback about whether some students "belong" in the gifted cluster (e.g. readiness, co-occurrence of behavior issues) *Constituent group: teachers and families*	Sharing success stories; using the MTSS process to ensure evidence-based decision making; connecting to secondary open-enrollment trajectory; asking teachers what support they need to serve students	Excellence + equity centered (communication and MTSS)	Modest
Focal Area 3 Expanding Gifted Education Accountability Beyond Identification Outcomes	PLC time that includes planning for advanced learners' needs *Constituent group: teachers*	Flexibility in PLC structures to account for diverse planning needs	Equity + excellence centered (evaluating and adjusting program implementation)	Modest
	Leading in an area where there are not plentiful models with similar contexts, including teacher efficacy and confidence *Constituent group: teachers*	Setting both aspirational and shorter-term goals; transparency with staff about challenges; expecting and adjusting to setbacks; setting expectation for earning endorsement at time of hire; setting expectation of minimal opportunity goals; providing support in PLCs for unpacking higher level resources; creating environment supportive of and holding expectations for instructional risk-taking	Equity + excellence centered (accountability for preparation and advanced opportunities)	Moderate
	Student efficacy and confidence *Constituent group: students*	Framing learning as struggle, risktaking, mistakes; centering the power and responsibility of learning with the student	Equity + excellence centered (evaluating how well programs nurture and	Modest

Castellano Academy Leaders' Sensegiving Connected to Equity-Excellence Focal Areas

		develop talent in diverse populations)	
Fidelity of implementation of the Young Scholars model *Constituent groups: instructional leadership team and teachers*	Doing a reset on components of the model for more coherence among the instructional leadership team with plans to reset more broadly with staff	Equity + excellence centered (evaluating how well programs nurture and develop talent in diverse populations)	Modest

Ford Academy Leaders' Sensegiving Connected to Equity-Excellence Focal Areas

Focal Area	Situation Prompting Sensegiving by Constituent Group(s)	Leader Action/Sensegiving	Equity-Excellence Orientation with Topic	Strength of Evidence (modest, moderate, or concentrated)
Focal Area 1 Recognizing and correcting inequities in systems	Mindset shifts about identification and what giftedness looks like *Constituent group: teachers*	Use of analogies; use of inquiry to probe for opportunities to coach, challenge assumptions, or reframe	Equity-centered (holistic screening with multiple data points and use of culturally responsive identification tools)	Moderate
	Getting started and maintaining momentum in general and when there is teacher turnover *Constituent group: teachers*	Hiring staff with aligned mindsets; signaling priority of the work through investment of Title I funds and protecting the work of the resource teacher; including the resource teacher on the instructional leadership team	Equity + excellence centered (access to rigorous and culturally responsive instruction to develop both latent potential as well as manifested abilities)	Concentrated
Focal Area 2 Reframing gifted education	Pushback about local norming *Constituent group: teachers*	Working side-by-side with teachers to reframe and unpack ambiguous areas	Equity-centered (local norming considerations)	Moderate

Ford Academy Leaders' Sensegiving Connected to Equity-Excellence Focal Areas

around services with multiple entry points rather than static trait labels	Expectations about diverse profiles of gifted students or assumptions about student behaviors *Constituent groups: families and teachers*	*For both:* Conversations about overlapping student needs *For teachers:* Critique stance on removing students from programs *For families:* Reframing through the differentiation paradigm for parents who were expecting the gifted child paradigm; starting an advanced academics parent support group	Excellence-centered (designing programs to meet a variety of needs through differentiation strategies)	Moderate
Focal Area 3 Expanding Gifted Education Accountability Beyond Identification Outcomes	Ensuring increased opportunity while also supporting differentiation practices *Constituent group: teachers*	Use of cluster grouping; expectations around professional learning; consistent, coordinated, and frequent messages from the leadership team	Excellence-centered (accountability in teacher and leader preparation to ensure a basic understanding of the cognitive and affective needs of diverse gifted learners)	Moderate
	Ensuring continuous improvement *Constituent groups: instructional leaders and teachers*	Using measures to evaluate program progress for both teachers and students	Equity + excellence centered (evaluating how well programs nurture and develop talent in diverse populations)	Modest
	Perceptions about which teachers need professional learning in advanced academic topics *Constituent group: teachers*	Conveying expectation that all teachers participate in some learning about advanced academics, not just those who are teaching identified students	Excellence-centered (accountability in teacher preparation to ensure a basic understanding of the cognitive and affective needs of diverse gifted learners	Moderate

Gentry Academy Leaders' Sensegiving Connected to Equity-Excellence Focal Areas

Focal Area	Situation Prompting Sensegiving by Constituent Group(s)	Leader Action/Sensegiving	Equity-Excellence Orientation with Topic	Strength of Evidence (modest, moderate, or concentrated)
Focal Area 1 Recognizing and correcting inequities in systems	Avoiding creation of have/have-not situations *Constituent group: teachers*	Introducing cluster grouping structure; met with general education teachers to discuss the change to delivery model and what would be required of them; sharing data about numbers of students leaving for services at another school	Equity + excellence centered (Access to rigorous and culturally responsive instruction to develop both latent potential as well as manifested abilities)	Moderate
	Resisting change/deficit mindsets *Constituent group: instructional coach and teachers*	"Working around" staff who do not buy in; leaning on district messaging around accountability expectations, unpacking changes in PLCs	Equity + excellence centered (Access to rigorous and culturally responsive instruction to develop both latent potential as well as manifested abilities)	Moderate
	Initiative overload *Constituent group: instructional leaders and teachers*	Leadership team work to make sense of connections to better support teachers; generating common understandings	Equity + excellence centered (Access to rigorous and culturally responsive instruction to develop both latent potential as well as manifested abilities)	Moderate
	Efficacy to work with English Learners *Constituent group: teachers*	Using data from work samples of opportunities with gifted strategies and curriculum; using district's 5 Essential Practices for ELLs	Equity-centered (Holistic screening with multiple data points and Accountability in closing opportunity gaps and ensuring instructional opportunities that	Moderate

Gentry Academy Leaders' Sensegiving Connected to Equity-Excellence Focal Areas

			provide space for talent to emerge and be seen)	
	Accusations of bias *Constituent group: families*	Listening; responsiveness to investigate claims; opening dialogue and building relationships	Equity-centered gap area (Communication about holistic screening)	Moderate
Focal Area 2 Reframing gifted education around services with multiple entry points rather than static trait labels	Understanding continuum of services, particularly for families in historically underrepresented *Constituent group: families*	Creative and persistent approaches to family engagement	Excellence-centered gap area (Communication about designing programs)	Concentrated
	Understanding/meeting cluster grouping expectations *Constituent group: teachers*	Reflections: Plans to be more explicit; plans to include the experienced gifted teachers in the discussion so they know how to leverage their expertise	Excellence-centered (Designing programs to meet a variety of needs through differentiation strategies)	Moderate
	Pressure to revert to older system or redirect elitist mindsets *Constituent group: families and teachers*	Dialogue (listening, questioning, trying to get to the heart of what parents are concerned about) through emails, phone calls, meetings; holding steady in values around goals for advanced programs	Excellence-centered gap area (Aligning school and parent mindsets in program design)	Concentrated
Focal Area 3 Expanding Gifted Education Accountability Beyond Identification Outcomes	Readiness to teach full-time using gifted curriculum *Constituent group: teachers*	Multiple forms of staff communication; investing Title I funds in a second resource teacher to support learning; using analogies to describe differentiation needs; normalizing discomfort	Excellence-centered (Accountability in teacher and leader preparation to ensure a basic understanding of the cognitive and affective needs of diverse gifted learners)	Moderate

Gentry Academy Leaders' Sensegiving Connected to Equity-Excellence Focal Areas

Ensuring focus on extensions as well as gaps *Constituent group: teachers*	Inclusion in school improvement plans; making resource connections, co-teaching, and gradual release of responsibility; listening for changes in teacher talk and instructional leaders' efficacy as a measure of progress; assessing whether a need to revert to pull-out model if student needs are not being met	Equity + excellence centered (Evaluating how well programs nurture and develop talent in diverse populations)	Modest