Beyond Universal Screening: Practices and Attitudes that Promote Equity in Identification for an Accelerated Program

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Abstract

Equitable identification of students for advanced education programs is an urgent problem nationwide. While there are many suggested techniques for equitably identifying students, such as universal screening, local norms, and multiple measures, some school districts are finding that these best practices do not always produce the expected results. This qualitative case study describes the journey of a school district in Washington state that at first did not see much benefit from universal screening alone. As this district refined their practices over seven years, they achieved and sustained a more than 16x increase in identification of low-income students, multilingual learners, and students with disabilities for the district's accelerated programs in grades 2-8, and a 7.6x increase in identification of Black, Indigenous, and Hispanic students. Twice-exceptional students on Section 504 Plans and students who had ever been identified as multilingual were proportionally identified district-wide; however, despite this growth, many demographic groups remained underrepresented. This case study describes the detailed practices, beliefs, and attitudes of district leaders, program administrators, principals, and teachers that led to these results, including the tremendous overall growth in the program, and the challenges that this growth surfaced. Key themes that emerged were (a) identification featured universal screening; static, group-based local norms; and OR-rules with multiple pathways; (b) services featured math acceleration and self-contained classrooms with high variability in service levels and models; (c) professional development was scarce and optional; individuals relied heavily on their personal experience; (d) equitable representation improved significantly in many ways but disproportionality remained; (e) identified students were achieving at high levels regardless of identification criteria used; (f) the change was driven top-down; team was empowered and felt a moral imperative; (g) debates about overidentification surfaced differing definitions of highly

capable; and (h) despite a broad desire to meet every student's individual needs, many questions arose on how to accomplish that goal.

Dedication

To all of the students in our public schools,

that each of their unique needs and ways of being

are fully seen and supported.

Acknowledgements

In a way, this dissertation has been in progress for well more than a decade. I am deeply grateful to Blockbridge school district's leaders for their long partnership, being receptive to advocacy, taking on this equity initiative, and staying the course - ultimately doubling down on their investment even after the initial results were disappointing. Without you and your convictions there would be no story to tell.

Reflecting back, I am struck by how many people contributed to the work reported in this study. It truly takes a village. Hundreds of parent advocates have come in and out of this story. Colleagues and good friends at the Northwest Gifted Child Association, Washington Coalition for Gifted Education, and Washington Association of Educators of the Talented and Gifted were a constant source of support and a sounding board for ideas, as was Washington State PTA and so many other organizations who came together to advocate for the needs of highly capable and twice-exceptional students. Washington state legislators played a pivotal part, as did Jody Hess and others at the Office of the Superintendent of Public Instruction. And of course the many professionals at Blockbridge whose daily work has made Blockbridge's equity efforts a reality. Thank you especially to the teachers, principals, program administrators, and district leaders at Blockbridge who directly participated in this study; I hope I honored each of your voices to reveal the truths and complexities of Blockbridge's journey.

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Finally, to the reader, I am surprised it turned out so long. I trimmed and tightened as much as I could, but it turns out there was a lot to say. Please stick with it. I hope it inspires you to take this work to the next step. Don't hesitate to reach out. I'd love to discuss your ideas for how to build on this work.

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Chapter 1: Introduction

Public school districts nationwide are grappling with ensuring equitable identification of students for their advanced academic programs and are finding this to be a difficult problem to solve. Underrepresentation is a severe and widespread concern; a robust body of research demonstrates the disproportionate representation of certain demographic groups in gifted education programs. In particular, low-income students, English learners, and students with disabilities as well as students from certain racial/ethnic groups including Black, Hispanic, and Indigenous Peoples are underrepresented in gifted programs (Peters, Gentry, et al., 2019; Plucker et al., 2013, 2018; Yaluma & Tyner, 2018). Even when controlling for achievement scores, Black students, Hispanic students, English learners, and low-income students are two and a half times less likely to be identified for gifted and talented programs (Siegle et al., 2016).

Gifted students with disabilities, also known as "twice-exceptional" or "2e" students, are often overlooked for advanced programs, in part because they may not be able to show what they know consistently on a standardized test (Bell et al., 2015; Foley Nicpon et al., 2011; Gilman et al., 2013; NAGC, 2013; Reis et al., 2014). The nature of twice exceptionality makes these students particularly challenging to identify. As Baum et al. (2017) note, the twice exceptional student's challenges can overshadow their gifts, or their gifts may overshadow their challenges, or perhaps most insidiously, their challenges and gifts can balance out, making them appear neither gifted nor needing support. This makes twice exceptional students particularly likely to be overlooked for public school gifted programs.

Although there are documented cases of overt racism against identifying Black students for gifted programs (Trotman Scott, 2021), the more pernicious problems are structural in nature, which create subtle barriers that favor well-informed families who can successfully navigate nomination and application procedures (Siegle et al., 2016). It may seem intuitive that teachers

will know their students best; however, multiple studies have demonstrated that relying on teachers to recommend students for gifted programming creates a significant barrier for students, especially for students of color (Elhoweris et al., 2005; Ford et al., 2008; Ford & Grantham, 2003; Grissom & Redding, 2016; McBee, 2006; McCoach et al., 2023; Nicholson-Crotty et al., 2016).

Rationale

Because of persistent underidentification, many students are currently being unfairly excluded from gifted programming. This is an urgent moral dilemma, because well-designed accelerated academic programming can have a strong positive impact on student growth, achievement, and self-concept for gifted students (Card & Giuliano, 2014; Lubinski et al., 2014; Lubinski & Benbow, 2021; Steenbergen-Hu et al., 2016). If some advanced students receive those school services, but others do not, this creates an ethical predicament. However, when we can predict which students are more likely to receive accelerated services based on their income, multilingual status, disability, or race, this becomes an even more urgent social justice issue (Plucker & Peters, 2016). As Coleman and Shah-Coltrane (2015) noted, “It is an individual heartbreak—but it is also a societal tragedy” (p. 71). Gentry (2019) estimated that between 39% and 52% of gifted students were missing, or never identified for gifted education, with the largest proportion of these missing students coming from Black, LatinX, Native American, or Pacific Islander backgrounds.

The most recent 2018-2019 State of the States report published by the National Association for Gifted Children confirmed that there is still no common approach for identifying students in public schools for advanced programs, or consensus on how to provide advanced services (Rinn et al., 2020). Only thirty states required schools to identify and provide gifted programs, whereas seven states required schools to identify gifted students, but did not mandate

any dedicated services (Gentry et al., 2019). About 27 states have established some criteria or methods of identification; however, even when there were guidelines, many states left it to school districts to designate their own assessments and create their own identification protocols, and that degree of local control can make services quite variable from locale to locale (Callahan et al., 2014; Rinn et al., 2020).

Cao (2017) reported that some districts used group-administered ability tests such as the Cognitive Abilities Test (CogAT) or the Naglieri Nonverbal Abilities Test (NNAT) to identify advanced students. Others relied on achievement testing such as the Measure of Academic Progress (MAP), Iowa Assessments, or Smarter Balanced Assessments (SBA). A few states, like Florida, mandated the use of individually administered intelligence assessments. However, exactly how all of these test scores were used can vary widely, and even a simple decision to require more than one qualifying score, or to average two test scores together could have a large impact on which students are selected (Lakin, 2018; McBee et al., 2014).

Problem Statement

While broad adoption remains frustratingly slow, a consensus is emerging in the field to use universal screening and local norms to improve equitable identification of historically underrepresented populations in gifted programs. The National Association of Gifted Children (NAGC, n.d.) and the Thomas B. Fordham Institute (Yaluma & Tyner, 2018) both recommended universal screening as well as local norms. The Jack Kent Cooke Foundation also found universal screening and local norms to be essential strategies (Plucker et al., 2018).

A small but growing number of empirical studies provide support for these approaches. Card and Guiliano (2016) demonstrated the power of universal screening, or conducting some sort of assessment for all students in a particular grade level, in order to reduce the reliance on teacher or parent referral and ensure that all students are considered. They reported a 174%

increase in the odds of being identified as gifted for low-income students with universal screening, alongside a 118% increase for Hispanic students and 74% increase for Black students (Card & Giuliano, 2016). Universal screening avoids relying on teacher or parent referrals, which can create a significant barrier to identification (McBee et al., 2016; Peters & Matthews, 2016).

Another essential technique is to use building-based local norms, which compares student scores against other students in their same school, rather than against national norms (Peters et al., 2021; Peters, Rambo-Hernandez, et al., 2019). A sophisticated statistical analysis of grade 3-8 students across 10 different states generated hypothetical gifted identification increases of 238% for Black students and 170% for Hispanic students using building-based local norms, but also noted that building-based norms worked best in situations where a school's enrollment was fairly homogeneous (Peters, Rambo-Hernandez, et al., 2019). Another use of local norms, called group-based local norms, compares students against others with similar demographic characteristics, such as low-income students or English learners, which is more applicable in heterogenous enrollment situations (Peters, Gentry, et al., 2019; Peters & Engerrand, 2016).

There are also other techniques that are cited in the literature, such as using multiple measures (Cao et al., 2017; McBee et al., 2014), using parent or teacher rating scales (Greathouse et al., 2015), and being mindful about how scores are combined when making decisions (Lakin, 2018; McBee et al., 2014). Some also suggested that professional development was essential for both teachers and administrators (Rinn et al., 2020).

Despite all of this guidance, some school districts are finding that implementing these best practices does not always achieve expected results in equitable identification. It appears that there are more factors and nuances that may be important. These hidden factors are not as well understood, and lead to frustration when districts implement these gold standard approaches, and

do not see the results that they were expecting. There are also relatively few empirical studies in the literature that describe the implementation of these practices in real-world situations.

What other procedural factors come into play? Are there combinations of practices that are necessary or desirable for them to work well? Are there nuances to how these practices are implemented that are important? Is it necessary to use all of these techniques for exemplary results, or is there a core set of practices that are effective? What attitudinal factors matter? How important is it for teachers to be on board and fully trained about the characteristics and needs of advanced students? Or, is equitable identification primarily an administrative task that is driven top-down? How important is professional development at different levels of the organization to support the identification process and deliver high-quality services?

As a qualitative case study, this dissertation cannot answer any of these questions definitively. However, it can provide an example of what this school district did, how they solved these challenges, and refined their practices. The implementation details matter, and the study intended to identify the details that were important in this school district's experience. This district's hard-won learnings will further build up the body of literature in this area. Districts need better guidance on the multiplicity of factors that may impact successful implementation of an equitable identification system for accelerated programs. This study intends to contribute to the body of research needed to identify those factors.

The Case

Blockbridge School District (a pseudonym) is a suburban school district in Washington state that has attempted to implement several of these equitable identification approaches and took several years to fine-tune their procedures and approach before they saw successful results. Notably, their first year of universal screening alone in 2017-18 did little to identify more underrepresented students in this school district, especially after conducting a data sweep in

2016-17 that found some students who had been previously overlooked. It was not until Blockbridge added local norms and other additional equity-focused techniques in 2018-19 that they began to see a substantial rise in equitable identification. See Table 1.1.

Table 1.1

Summary of Students in Special Populations Identified for the Highly Capable Program as Reported by Blockbridge School District, 2015-2023.

	Section 504 Plan	Special Education (IEP)	Low Income (FRL)	Multi-lingual (ML)	Total
Newly identified in 2015-16	20	<10	<10	<10	29
Newly identified in 2016-17	39	<20	<10	<20	83
Newly identified in 2017-18	24	21	<10	<10	55
Newly identified in 2018-19	129	99	99	62	389
Newly identified in 2019-20	58	73	80	181	392
Newly identified in 2020-21	63	58	68	244	433
Newly identified in 2021-22	94	75	76	153	389
Newly identified in 2022-23	95	94	117	157	463

Note. Entries where the student count was fewer than 10 were suppressed for student privacy reasons, or where counts fewer than 10 could be deduced from the total.

In 2015, Blockbridge School District had significant underrepresentation in its advanced programs for multilingual learners, low-income students, and students with disabilities (twice exceptional students). Over the next several years, Blockbridge made many changes to its identification practices, including universally screening at multiple grade levels; using static, group-based local norms for low-income students and multilingual learners; creating multiple pathways for qualification; and using OR-rules to only consider the highest score for a student in a domain area. The district reported in 2023 that it was now identifying 16 times as many students in these historically underrepresented categories as it did in 2015, prior to starting the equitable identification initiative.

What was particularly interesting about Blockbridge's data was that the number of twice-exceptional students identified for the accelerated program had also increased dramatically, starting in 2018-19, even though students with disabilities did not have a local norm applied for qualification purposes, and decisions were made entirely based on a portfolio of test scores. Exactly how twice-exceptional students were identified so successfully in this school district without the use of a local norm for this student group is a central research question.

In addition, Blockbridge saw a much larger increase in the identification of historically underrepresented categories of students than had been documented in other studies. Card & Guiliano (2016) reported a 174% increase in identification of multilingual and low-income students in the Florida school district they studied. After 11 years of an elementary talent development program, Horn reported a 565% increase in the number of Black and Hispanic high school students that were receiving gifted services (Horn, 2015). Blockbridge is reporting a 16x increase in the annual rate of identification of low-income, multilingual, and twice exceptional students, which is substantially larger than either of these results. It is worthwhile to understand what Blockbridge was doing in detail, investigate exactly which practices were in use, describe the details of how they had been applied, and perhaps uncover new factors that have yet to be reported in the research literature.

Purpose and Research Questions

The purpose of this case study was to describe the practices and attitudes used in the Blockbridge public school district to equitably identify low-income students, multilingual learners, and twice-exceptional students for an accelerated education program. The research questions for this study were:

1. What practices and procedures were used to identify low-income students, multilingual learners, and twice-exceptional students for Blockbridge's accelerated education program?
2. What factors contributed to the increase in identification of twice-exceptional students at Blockbridge?
3. What beliefs and attitudes did teachers, principals, and administrators have about the identification and services provided to students identified for accelerated education services at Blockbridge?
4. How have principals and teachers responded as more diverse students have entered accelerated classrooms at Blockbridge?
5. What challenges in identification and service delivery at Blockbridge remain?

Significance of Research

The issue of equitable identification of gifted and twice exceptional students for public school gifted programs is an urgent concern across the United States. Because this underrepresentation has been so longstanding, school districts across the nation are beginning to scale down or shutter their accelerated programs (Sorden et al., 2019), with the implied belief that this is an unsolvable problem, and the only way to mitigate the inequity is to remove the program. If our field does not conclusively solve these very real equity issues, it will be nearly impossible to maintain support for gifted programming in public schools much longer. This crisis was predicted by VanTassel-Baska (2006) and is an existential threat to our field, and needs urgent work.

This dissertation presents a case study of a public school district that has demonstrated notable success in its equitable identification efforts, particularly for multilingual learners, low-income students, and twice-exceptional students. It describes the detailed practices and

procedures as well as attitudes and beliefs that were enabling this district to achieve these results. This case study provides an example that it is possible to dramatically improve equitable identification in a public school district and reveals factors that need to be considered for the identification and service of students who are ready for accelerated learning. Hopefully this study will inspire more districts to follow suit, and will be a launching point for other researchers to continue building our knowledge base of effective practices at a detailed level.

Definition of Terms

AND-rules: A type of combination rule used when combining multiple test scores, where multiple scores are considered and all scores need to meet a minimum threshold in order to qualify.

English Learner (EL): A student whose first language is not English, and has not yet reached English proficiency. These students receive English language support at school and regular assessment until their English skills allow them to graduate out of these special services. Synonymous with Multilingual Learner (ML).

Free and Reduced Price Lunch (FRL): The US federal program that provides free or reduced price meals to low-income families who qualify. Students receiving free or reduced-price lunch is used as a proxy for low-income status in this study.

Highly Capable (HiCap): The Washington state term for gifted and talented education, which Washington state defines as both accelerated learning as well as enhanced instruction.

Local Norms: In contrast to national norms, local norms would compare students to others of similar backgrounds or experiences.

Multilingual Learner (ML): A student whose first language is not English, and has not yet reached English proficiency. These students receive English language support at school and

regular assessment until their English skills allow them to graduate out of these special services. Synonymous with English Learner (EL).

Opportunity to Learn (OTL): A measurement of differences in educational opportunities used in order to create valid comparisons among achievement test results across different countries or demographic groups.

OR-rules: A type of combination rule used when combining multiple test scores, where either one score or another score is considered, relying on the highest test score to make the decision.

Twice-Exceptional (2e): Students who are identified as gifted or highly capable, as well as having a concurrent disability identified by an Individualized Education Plan or Section 504 plan.

Universal Screening: The practice of proactively evaluating every student in a grade level for possible inclusion in highly capable programs and services.

Chapter 2: Literature Review

This section discusses the relevant research literature to this problem, including seminal works as well as a focus on primary empirical research published within the past 10-15 years. I did a wide-ranging search using many search terms for each of my main categories, as well as gathering articles listed as references in important recent research as well as recent dissertations. I paid careful attention to lists of "related studies" in various search engines such as ProQuest and ResearchGate which yielded many sources. My main criteria for research to include was that it (a) must be either recent (since 2011) or considered a seminal or foundational work, and (b) must be based on data gathered about K-12 schools in the United States. I made exceptions for recency in a few cases where more recent studies on a specific topic were not available, or where a historical perspective was needed.

This literature review will review (a) definitions of giftedness, (b) twice-exceptionality, (c) underrepresentation in gifted education, (d) gifted identification, (e) gifted education, and (f) the theoretical framework used in this study.

Definitions of Giftedness

There are many theoretical conceptions of giftedness and talent development that have been proposed over the years. The earliest work in this field in the United States began just over a century ago by Lewis Terman, whose Binet-Simon Intelligence Test was the first intelligence test (Terman, 1911). Terman's longitudinal research study on the "Genetic Studies of Genius" coined the term "gifted" and set the initial foundations for the field to be focused on Intelligence Quotient (IQ) scores as the primary indicator of advanced ability (Warne, 2019). Terman also asserted that gifted individuals were less likely to suffer physical, social, or emotional challenges, which countered the "early ripe, early rot" thinking of the time. However, while Terman's study was illuminating in many ways, it was also rife with methodological problems,

from a highly biased sample that focused almost entirely on affluent white males, to serious breaches in research protocol, where Terman wrote recommendation letters for and gave career advice to the very same subjects he was studying. His troubling conclusions were that high IQ individuals were globally superior, and that giftedness was rare in minority groups.

Since Terman, the field has broadened and deepened its understanding of the phenomenon of giftedness, recognizing that giftedness can manifest in multiple ways, and that IQ is not the only, or even the best, way to identify gifted individuals. Sternberg's (1985) triarchic theory of giftedness suggested that the three main domains of giftedness werre practical, theoretical, and creative. Gardner (2006, 2011) proposed the multiple intelligences theory, which identified eight areas of intelligence that can exist independent of one another, such as musical intelligence, logical-mathematical intelligence, and interpersonal intelligence. The three-ring conception of giftedness suggests that it is the combination of above average ability, creativity, and task commitment that defines giftedness, and that the goal of gifted education is to produce "some type of superior performance" with a focus on creatively productive individuals (J. S. Renzulli, 2016, p. 58). Gagné's (2018) Differentiating Model of Giftedness and Talent (DMGT) offers an interrelationship between natural ability, personality, environmental factors, and chance in the development of talent.

School districts and states vary in the definitions they use for defining giftedness and gifted education programs. The current federal definition reads:

> Children and youth with outstanding talent perform or show the potential for performing at remarkably high levels of accomplishment when compared with others of their age, experience, or environment. These children and youth exhibit high performance capability in intellectual, creative, and/or artistic areas, possess an unusual leadership capacity, or excel in specific academic fields. They require services or activities not

> ordinarily provided by the schools. Outstanding talents are present in children and youth from all cultural groups, across all economic strata, and in all areas of human endeavor. (U.S. Department of Education, 1993, p. 26)

The National Association of Gifted Children updated their definition in 2019 to be more inclusive:

> Students with gifts and talents perform—or have the capability to perform—at higher levels compared to others of the same age, experience, and environment in one or more domains. They require modification(s) to their educational experience(s) to learn and realize their potential. Student with gifts and talents:
>
> • Come from all racial, ethnic, and cultural populations, as well as all economic strata.
>
> • Require sufficient access to appropriate learning opportunities to realize their potential.
>
> • Can have learning and processing disorders that require specialized intervention and accommodation.
>
> • Need support and guidance to develop socially and emotionally as well as in their areas of talent.
>
> • Require varied services based on their changing needs. (NAGC, 2019a, p. 1)

The Washington state definition, where this case study is situated, reads:

> Highly capable students are students who perform or show potential for performing at significantly advanced academic levels when compared with others of their age, experiences, or environments. Outstanding abilities are seen within students' general intellectual aptitudes, specific academic abilities, and/or creative productivities within a specific domain. These students are present not only in the general populace, but are present within all protected classes. (Washington Administrative Code, 2013, para. 1)

A common factor among the national, state, and NAGC definition is that they all stressed comparison with other students with similar levels of experience or background. This notion of comparing students to other students who are similar to them provides the foundation for the idea of local norms, discussed in a later section.

Twice-Exceptionality

Twice-exceptionality as a field has been in development for more than 50 years (Baldwin et al., 2015). A National Commission on Twice Exceptional Students worked for several years to form this definition of twice-exceptional students:

> Twice-exceptional learners are students who demonstrate the potential for high achievement or creative productivity in one or more domains such as math, science, technology, the social arts, the visual, spatial, or performing arts or other areas of human productivity AND who manifest one or more disabilities as defined by federal or state eligibility criteria. These disabilities include specific learning disabilities; speech and language disorders; emotional/behavioral disorders; physical disabilities; Autism Spectrum Disorders (ASD); or other health impairments, such as Attention Deficit/Hyperactivity Disorder (ADHD). These disabilities and high abilities combine to produce a unique population of students who may fail to demonstrate either high academic performance or specific disabilities. Their gifts may mask their disabilities and their disabilities may mask their gifts. (Reis et al., 2014, p. 222)

Gierczyk and Hornby (2021) conducted a qualitative meta-analysis of 15 studies and found that teachers were largely untrained and underprepared to work with twice-exceptional students, and were inclined to concentrate on student's deficits rather than their strengths. However, twice-exceptional students do best when they focus on their strengths, talents, and interest areas, and

are simultaneously provided supports or ways to compensate for their disability areas, such as with the technique of dual differentiation (Baum et al., 2017; Gierczyk & Hornby, 2021).

Twice-exceptional students can be difficult to identify in public schools (Gilman et al., 2013; NAGC, 2013). It is important to note that twice-exceptional students are a heterogeneous group with many individual differences; twice-exceptional students may therefore be achieving at, above, or below grade level depending on their ability to compensate for their difficulties (Baum et al., 2017). They may have challenging behaviors, such as impulsivity or restlessness, or they may have a short attention span, be easily distracted, or be inflexible (Reis et al., 2014). They may also have trouble completing work, expressing ideas in writing, or reading social cues. These unexpected and confusing characteristics may make it more difficult for teachers to notice twice-exceptional students' strength areas.

A disability or neurodiversity such as ADHD, autism, dyslexia, or dysgraphia may not be identified until middle or high school, when increased expectations finally outweigh a twice-exceptional student's ability to compensate (Baum et al., 2017). Twice-exceptional girls may not be noticed because of their greater ability to mask their challenges, and their special needs as well as their talents may be unrecognized by teachers (Fugate, 2014; Rogers, 2011). Professional development in twice-exceptionality for teachers and counselors is greatly needed to help identify and provide effective counseling support for students (S. J. Renzulli & Gelbar, 2019).

Davis and Robinson (2018) coined the term "3e," or thrice exceptional, to describe twice-exceptional students who are also culturally diverse; these students experience significant challenges having their gifts recognized and supported in public schools, compounded by the intersectionality of multiple axes of difference from dominant cultural expectations. Black male twice-exceptional students have a particularly difficult time being correctly identified as gifted in schools because teachers hold stereotyped beliefs, succumb to deficit thinking, lack cultural

awareness, and misinterpret student's behavior based on dominant cultural norms (Mayes, 2016; Trotman Scott, 2016).

McCallum et al. (2013) suggested that more twice-exceptional students may be discovered by using discrepancy criteria within a response to intervention framework, but noted that this approach would still likely miss students with slow processing speed. However, in a randomly selected national sample, Maddox (2018) found that lower processing speed scores were the most reliable indicators of twice-exceptionality, and that achievement discrepancies alone were insufficient evidence. Rogers (2011) suggested that "finding twice exceptional children may be easier in a gifted self-contained classroom than in mixed ability classrooms" because their challenges are more visible in the context of more challenging classwork (p. 60).

Underrepresentation

Gallagher and Kinney (1974) pointed out the disproportional enrollment of students of different racial groups, ethnic groups, and genders in gifted education programs several generations ago. Black students, Hispanic students, and indigenous students continue to be underrepresented in advanced education programs (Gentry et al., 2019; Grissom & Redding, 2016; Ricciardi et al., 2020; Yoon & Gentry, 2009). Dozens of scholars have replicated and elaborated on this finding, adding low-income students (Grissom et al., 2019; Ricciardi et al., 2020; Yaluma & Tyner, 2018, 2020), multilingual learners (Coronado & Lewis, 2017), and twice-exceptional students (Peters, Gentry, et al., 2019) to the list.

In Texas, less than 30% of school districts have achieved equitable identification of Hispanic students, despite long-standing state accountability laws (Lamb et al., 2019). White third graders were 2.5 times more likely to be identified as gifted than students who had identical reading and math scores who were Latino, multilingual learners, or low-income (Siegle et al., 2016). This pervasive underrepresentation of certain demographics of students in advanced

educational programs is stubbornly persistent and has not changed substantially in the past decade (Yaluma & Tyner, 2020).

Gentry et al. (2019) referred to this problem as "missingness," meaning students who should have been identified for gifted education but were overlooked. They estimated that large numbers of students were missing in all racial categories, including 63-74% of Black students, 53-66% of LatinX students, 29-49% of Two or More Races students, 48-63% of American Indian/Alaskan Native students, and 59%-72% of Native Hawaiian/Pacific Islander students (pp. 4-5). Strikingly, they also asserted that substantial numbers of White students (29-42%) and Asian students (20-26%) were also missing from current gifted education programs, despite these racial groups typically being very well represented in public school gifted programs (Gentry et al., 2019, pp. 4–5). The rest of this section will investigate the many factors that have contributed to this persistent underrepresentation.

Variance Between Schools

A large part of the issue is that 45% of schools nationwide do not offer gifted programs in the first place, and that trajectory is not positive: the number of schools offering gifted programs shrank 4% between 2000 and 2015 (Gentry et al., 2019). In addition, low-income schools do not identify as many gifted students as other schools: Title 1 schools identify about half as many of their students as gifted as non-Title 1 schools (Gentry et al., 2019). Funding for school gifted programs is also a central issue with few states providing funding for gifted services coupled with large variability in funding depending on whether the school district is in a rural, suburban, or urban setting (Kettler et al., 2015; Rinn et al., 2020).

Rural Issues

Puryear and Kettler (2017) analyzed gifted funding, staffing, and services in rural school districts, separating them into three categories: on the edge or "fringe" of a nonrural area, more

distant, and even more remote. They found that location predicted funding, staffing, and available services, with the smallest resource levels in the "remote" districts, and that "fringe" districts acted more like nonrural districts in many respects (Puryear & Kettler, 2017). Azano (2020) reported that rural teachers' lack of experience and awareness of gifted students is a hurdle, but could be overcome by providing targeted professional development, challenging curriculum to use with students, and specific guidance on how to use assessments to identify gifted students.

Low-Income Students

Grissom et al. (2019) found that when comparing students with similar achievement levels within the same school, high socio-economic status students were twice as likely to be identified for gifted services as low-income students. One factor was the social capital of high socio-economic status families to be able to successfully navigate complex bureaucratic systems to get their student evaluated and identified for gifted services. Additionally, low-income students were known to score lower on verbal scores on standardized achievement assessments (Kaya et al., 2016). This could happen for a wide variety of reasons, from reduced nutrition to impoverished academic experiences to less exposure to background knowledge to lack of referrals by teachers to bias in the test instruments themselves (Cross & Dockery, 2014; Olszewski-Kubilius & Corwith, 2018; Peters, 2022).

Multilingual Learners

Gubbins et al. (2018) pointed out that English learners, also known as multilingual learners (ML), are a hard group to measure and study, because they are constantly changing—as students develop language proficiency, they graduate out of the formal English learner program, and their former English learner status may not be tracked for long term followup or research purposes. Multilingual learners who exited formal services sooner, in under 2 years, were more

likely to be identified as gifted than those who spend a longer time receiving ML services (Hamilton et al., 2020). Most ability and achievement tests relied on a baseline level of English proficiency, even when measuring non-linguistic skills such as math, which caused multilingual learners to receive lower scores (Peters & Engerrand, 2016).

Allen (2017) found that teachers were less likely to refer multilingual learners for gifted programs because the process emphasized standardized test scores, as well as concerns about language barriers. There was little communication between English learner specialist teachers and the main classroom teacher, so even if the multilingual specialist teacher saw signs of giftedness, there was minimal opportunity to collaborate with the classroom teacher. Teachers also need to be trained in the characteristics of gifted Hispanic bilingual students to notice characteristics such as cultural sensitivity, high verbal and storytelling abilities, and a collaborative nature (Esquierdo & Arreguín-Anderson, 2012).

In studying schools that had successfully identified multilingual learners for gifted programs, Gubbins et al. (2020) found that the most important factors for identification were universal screening, alternative pathways, improving communication among school personnel, and professional development for both school staff as well as parents.

Bias in Teacher Referrals

Although it may seem intuitive that teachers should be able to identify advanced students in their own classrooms, this question has been well studied, and research consistently showed that relying on teachers to identify gifted or advanced students may create even larger equity concerns. When schools required a student to be referred in order to access gifted services, classroom teachers played a gatekeeping role in referring students for those services (Donovan & Cross, 2002). Teachers were less likely to refer girls than boys with an identical achievement profile (Bianco et al., 2011). Black students were three times more likely to be identified as

gifted if they had a Black teacher than a White teacher (Nicholson-Crotty et al., 2016). Even when test scores were similar, Black students were referred to gifted programs at significantly lower rates when taught by non-Black teachers (Elhoweris et al., 2005; Ford & Grantham, 2003; Grissom & Redding, 2016). Even when students satisfied criteria for gifted qualification, studies found that students of color were less likely than White students to be identified for gifted services (Ford et al., 2008; McBee, 2006). Teachers may hold lower expectations for students of color, or be less likely to notice giftedness in these students (Elhoweris et al., 2005; Ford & Grantham, 2003). Recent research demonstrated that between 10% and 25% of a teacher rating of a student was due to potential bias and variance between teachers, not actual student differences (McCoach et al., 2023).

The reasons behind the inequity of teacher referrals are as frustrating as they are confounding. Sadly, research has shown that educators were less likely to notice giftedness in students of color and may have lower expectations for them (Elhoweris et al., 2005; Ford & Grantham, 2003). Overt racism and bias has been documented as well (Trotman Scott, 2021). Some districts have used checklists of common traits that may be observed in gifted students to assist in the identification process in order to provide structure and additional validity to teacher referrals or recommendations. However, many of these traits have been found to be based on White gifted students; gifted students of color or from minority groups may not express the same characteristics or their behaviors may be interpreted differently by the educators who were rating them.

There are some better checklists available now, such as the HOPE scale, which was specifically created to be sensitive to ethnic, racial, and income groups; however, even the HOPE scale has noted different results between the genders and between higher-income and low-income students, though within-group comparisons yielded proportional results (Peters &

Gentry, 2010). This research on rating scales has highlighted the differences in gifted student characteristics and behaviors across different racial, ethnic, income, and gender groups that teachers would need to become well-versed in, if they were to make valid referrals.

Prejudice, Deficit Thinking, and Stereotype Threat

Many other types of bias can also affect the identification of diverse learners for gifted programs, including both intentional and unintentional prejudice that may limit teacher referrals of diverse students for gifted programs (Ford, 2013). Ford et al. (2016) later added to this list of sources of bias to include microagressions, microassaults, microinsults, and microinvaliadations as additional factors that may cause diverse students to not seek out gifted programs or may create retention problems in those programs by students not feeling fully welcome and included. Wright et al. (2017) identified ignorance and indifference as central factors that led to Black and Hispanic students being systemically overlooked for gifted education, where differences were interpreted as deficits. Despite having personal and professional experience working with gifted students, Buck (2021) found that 10 female African American teachers in low-income schools demonstrated bias against low-income students and held White-focused stereotypes about gifted students.

Another important factor is stereotype threat, which is the idea that an individual from a stereotyped group may “face the threat of confirming or being judged by a negative societal stereotype—a suspicion—about their group's intellectual ability and competence” (Steele & Aronson, 1995, p. 797). Researchers have found that stereotype threat can cause diverse students to not perform their best in the classroom or on standardized assessments, which may create barriers for their entrance into gifted programs (Ford et al., 2016; Kellow & Jones, 2008).

Stereotypes about Gifted Students

Another factor that affected identification of gifted students across all demographic groups, but especially from minority groups, was persistent myths and stereotypes about what gifted students look like and how they are supposed to behave. Students who do not embody these expectations can be easily overlooked. In an extensive study of elementary teachers' beliefs about gifted students, Moon and Brighton (2008) discovered that teachers held very traditional beliefs about gifted students, such as that they were able to work independently, had a strong vocabulary, demonstrated early reading skills, and came from an enriched home environment. They also observed that teachers had a deficit mindset and felt that students were not a good fit for the gifted program if they had any observable deficits. These attitudes reflected deeply held beliefs that ran counter to the inclusion of culturally, linguistically, and economically diverse students in gifted programs. Similarly, Carman (2011) found that both pre-service and in-service teachers without formal training in gifted education were more likely to hold stereotyped views of gifted students, which would limit their ability to perceive giftedness in more diverse populations of students.

Excellence Gaps

One way to measure the real-world impact of underrepresentation in gifted programs is by looking at achievement levels of different demographic groups of students. While achievement gaps highlight minimum proficiency level differences by demographic group, the excellence gap refers to the fact that Black, Hispanic, Indigenous, and low-income students were also much less likely to be performing at top achievement levels (Plucker & Peters, 2016). There were many fewer American students performing at high achievement levels compared to our international peers, and this was especially true for historically underrepresented students (Plucker et al., 2013).

Xiang et al. (2011) analyzed high performing students and found that only about 60% of students who were in the highest performing group as third graders were still in the highest performing group as 10th graders. However, the overall number of students performing at the highest levels went up slightly by 10th grade, replaced by other students who had moved up in the rankings. While the overall proportion of diverse students achieving at the highest levels remained fairly stable over the grade levels, the total numbers were small and reflected the excellence gaps noted above.

Range of Achievement Levels

Additionally, the range of ability levels in the typical U.S. classroom was found to be surprisingly wide. Peters et al. (2017) analyzed all state student achievement data for Wisconsin, California, and Texas, and found that a shockingly large number of students were working above grade level: 20%-49% were working above grade level in reading and 14%-37% were working above grade level in math. These students were not just working one grade level ahead; consider the large number of fifth graders who were working two, three, or four grade levels ahead in reading (9%, 5%, 10%) or math (5%, 4%, 2%). A more recent study looked at the range of achievement levels in typical classrooms using an international achievement assessment and found that 14% of both fourth grade and eighth grade students scored above the advanced benchmark of the assessment (Pedersen et al., 2023). These data demonstrate that far more students are ready for accelerated learning than many people assume, and would suggest that public schools should be identifying many more students for gifted programs than the current national average of between 7.8 and 9% (Callahan et al., 2017; Yaluma & Tyner, 2018).

Gifted Identification

Even before the issue of underrepresentation came to the forefront, identifying students for gifted programs had been a complex endeavor with multiple schools of thought, and multiple competing definitions (McBee & Makel, 2019).

History

There is a long history of identifying students for gifted services. Terman was one of the first to attempt to identify gifted students via his Stanford-Binet Intelligence test, establishing IQ as the first metric for defining giftedness (Seagoe, 1975). While the IQ-focused approach to identifying gifted students persisted for decades, and continues to be used in a few states, it eventually yielded to broader definitions and identification strategies in most places. The Baldwin Identification Matrix provided a way to collate multiple data points and produce a rank ordering of students, yet even this early tool recognized potential equity issues when students may be unfairly judged because of missing data (Blackshear, 1979). The controversial Revolving Door Identification Model leveraged Renzulli's (2012) three-ring conception of giftedness to identify students not only based on achievement, but also including interest and motivation, and suggested that students could rotate in and out of gifted services as their needs changed (E. Collins, 1983). Frasier (1997) noted the importance of using multiple measures for gifted identification, and that any system that relied on a single measure increased the chance "that qualified participants will be missed" (p. A-4). Callahan (2005) expressed the importance of expanding our understanding of giftedness to include students with talents in only one area, such as reading or mathematics, or whose talents were manifested in non-traditional ways. Callahan also noted that because the achievement gap grew over time, it is imperative to identify students with signs of high potential early, continue looking for talent as we gather data over time, and serve all students who qualify without restriction or space limits.

Assessments

There are many types of assessments available to use to identify potentially gifted students, including achievement tests, ability tests, parent and teacher rating scales, and performance assessments (Cao et al., 2017). Public schools commonly used assessments for gifted identification such as the Cognitive Abilities Test (CogAT) or the Naglieri Nonverbal Abilities Test (NNAT), which both featured a nonverbal assessment that was designed to be culture-fair and language-free, however independent reviews show that neither of these tests produced proportional results in all demographic groups (Carman et al., 2020; Giessman et al., 2013; Peters & Engerrand, 2016). One study demonstrated that even the purely nonverbal NNAT significantly under-identified low-income Kindergarten students (Carman & Taylor, 2010). The NAGC position statement on assessment (2008) urged practitioners to use assessments that were responsive to the needs of diverse students and that mimic as natural a setting as possible, as well as recognizing that no assessment is perfect. Using multiple pieces of evidence was important to ensure students were not overlooked.

Universal Screening

Universal screening was widely recommended as a best practice for identifying gifted students more equitably (Ezzani et al., 2021; Gubbins et al., 2020; Hanover Research, 2021; National Working Group on Advanced Education, 2023; Peters & Engerrand, 2016; Peters & Matthews, 2016); however, it was also becoming clear that universal screening alone was not sufficient to guarantee equity (Peters, 2022). The primary benefit of universal screening was avoiding a referral process that required parents or teachers to refer a student to be evaluated; this removed a significant barrier for low-income students, multilingual learners, and twice-exceptional students to be considered. McBee et al. (2016) conducted a statistical analysis which demonstrated that including a nomination or screening stage in the process may result in “a

stunningly high false negative rate" (p. 274) where students were unfairly excluded; using more generous cutoff scores and more inclusive criteria for students to pass from the screening stage to an assessment stage was essential to avoid this pitfall. Callahan et al. (2017) found that more than half of the districts in their survey reported using some type of universal screening, most often in the lower grades (K-2).

The most cited empirical study about universal screening was Card and Giuliano (2016) which looked at the positive impact in identifying greater numbers of Black, Hispanic, and low-income students for gifted programs in the context of a public school district in Florida. This district universally screened all second grade students with the Naglieri Nonverbal Abilities Test and saw impressive results:

> With no change in the minimum standards for gifted status, the screening program led to a 174% increase in the odds of being identified as gifted among all disadvantaged students, with a 118% increase for Hispanics and a 74% increase for Blacks. (p. 13683)

After two years, that district discontinued the universal screening practice due to budget cuts, and identification rates returned to pre-universal screening levels, adding further validity to the impact of universal screening.

Local Norms

The concept of local norms was predated by the idea of "opportunity to learn" (OTL), which attempted to measure differences in educational opportunities in order to create valid comparisons among achievement test results across different countries (Carman et al., 2018; Peters & Engerrand, 2016). Peters and Engerrand explained:

> The reason that OTL and its composite factors are so important is that most tests of ability or intelligence assume some level of similarity in background experience for a given normative group. For example, intelligence tests have very narrow age-level norms

> to enable inferences that are as valid as possible regarding a person's ability. By only comparing an individual to those who have had very similar OTL (based on age), assessments are able to produce a more valid measure of underlying ability or aptitude. (2016, p. 161)

Local norms attempt to compare groups of students who have had similar OTL, in order to create more valid comparison groups (Carman et al., 2018; Peters & Engerrand, 2016). As mentioned earlier, comparing students to other students with similar backgrounds and experiences is a common feature of operational definitions of gifted students.

There are two main types of local norms in the research literature: building-based local norms, which compare students to others in their same school building, and group-based local norms, which compare students to others in the same demographic group, such as low-income students. Peters, Rambo-Hernandez, et al. (2019) demonstrated the impact of using building-based local norms to identify historically underrepresented gifted students by analyzing existing student databases, applying local norms-based statistical approaches, and comparing the resulting selected students by demographic group. They found that with a top five percent criteria in math achievement, building-based local norms created a 300% increase in African American student representation, and a 170% increase in Hispanic student representation; they reported similar results for reading as well as math (Peters, Rambo-Hernandez, et al., 2019). Hartman (2019) similarly found that building-based local norms improved identification of low-income students across rural, suburban, and urban settings.

Group-based local norms have been suggested as a way to account for varying OTL for low-income students (Carman et al., 2018; Peters & Engerrand, 2016; Peters & Gentry, 2012). Peters and Gentry (2012) demonstrated that when a group-based local norm was used for low-income students on a reading achievement measure, fully proportional representation of low-

income students was achieved. Peters and Engerrand (2016) found that group-based norms for low-income students had a strong impact on proportional representation; they also suggested that multilingual learner status or English proficiency may be feasible to consider for group-based local norms. Carman et al. (2018) came to a similar conclusion, that building-based norms or income-based group norms "would likely have the largest impact on the differences between groups identified and produce the most proportional results" (p. 204).

Most local norms described in the literature are dynamically calculated, where the top percentage of students in a group or a building are identified for services (Carman et al., 2018; Hartman, 2019; Peters & Engerrand, 2016; Peters & Gentry, 2012). However, the local norms used in the Plan B system in Florida, as described by Card and Guiliano (2016), were static, fixed cut scores based on national norms that were applied to the demographic groups of low-income students and multilingual learners.

Multiple Measures

Many researchers suggested using multiple measures to identify students for advanced services with a variety of assessment tools ranging from ability tests, achievement tests, rating scales, and performance measures (Cao et al., 2017). The National Association for Gifted Children (2019b) also recommended that districts use multiple types of assessments as part of their 2019 update to the Pre-K to Grade 12 Gifted Programming Standards. However, there was substantial nuance to how multiple measures were combined that could have large impacts on the total numbers of students identified, and their demographics (Lakin, 2018; McBee et al., 2014). Callahan et al. (2017) reported that while usage of multiple measures was commonly used by school districts, those measures were often combined via structured matrices or strict cutoff points that tempered the benefits of using multiple measures.

A practical decision that school districts faced when using multiple measures was how to combine scores, such as by using OR, AND, or MEAN rules (Lakin, 2018; Lohman, 2012). McBee et al. (2014) has demonstrated that requiring a student to have a high score on multiple different tests, which they termed AND-criteria, would increase the risk of false negatives, where gifted students are unfairly excluded. In comparison, averaging multiple scores together to use MEAN-criteria, or alternately, requiring one high score out of several possible assessments, termed OR-criteria, would be more inclusive. McBee et al. (2014) suggested the MEAN rule as the best compromise between false negatives and false positives, as well as reducing measurement error. Lohman (2012) agreed that taking the average of scores of highly correlated tests would be the most reliable approach. Lakin et al. (2018) found that "the OR rule resulted in identifying a significantly greater proportion of girls, underrepresented racial and ethnic minorities, students eligible for FRL, and students who are ELs" (p. 214). Another study showed that using the OR-rule to combine building-based local norms and national norms resulted in the most equitable identification (Peters, Rambo-Hernandez, et al., 2019). However some researchers raised concerns about the resulting heterogeneity of students selected via OR-rules and their potential fit with more academically accelerated types of gifted programming (Lakin, 2018; McBee et al., 2014).

The Washington state legislature codified the use of multiple measures for identifiying highly capable students in law, in which districts were directed to "identify through the use of multiple, objective criteria those students most highly capable and eligible to receive accelerated learning and enhanced instruction" (Revised Code of Washington, 2017a, para. 1) and that "assessment shall be based upon a review of each student's capability as shown by multiple criteria intended to reveal, from a wide variety of sources and data, each student's unique needs and capabilities" (Revised Code of Washington, 2017b, para. 2). This is an example of how a

seemingly straightforward statement about multiple measures could be interpreted multiple ways, despite the fact that the intention was clear from Johnstone and Pauley's (2009) report to the Washington state legislature which noted, "take care not to make multiple sources of evidence be multiple hurdles that students must overcome." Regardless, some Washington state school districts took this law to mean that they needed to have multiple positive indicators for each qualifying student, effectively requiring AND-rules, and thereby inadvertently reducing the number of students who might qualify for services (Lakin, 2018; McBee et al., 2014). In 2018, the Washington state legislature later added this statement to clarify their intent: "Multiple pathways for qualifications must be available and no single criterion may disqualify a student from identification" (Washington Administrative Code, 2019, para. 2). This new stipulation effectively required districts to shift away from using AND-rules, and in the case that districts had only two available data points to make a decision, this law now directed districts to employ OR-rules for those two data points.

Equity-Informed Practices

There was growing consensus on the techniques that improved identification of diverse students for gifted programs. For example, Briggs et al. (2008) highlighted three main strategies to improve identification of culturally, linguistically, and ethnically diverse students: creating alternate pathways for identification with different assessments or consideration, identifying students in preschool or early elementary school in order to provide front loading, and taking a broader view of student performance than standardized assessments. Ford (2012) further emphasized the need for better teacher training in cultural competence, an increase in teacher diversity, an increase in expectations, and the encouragement of a scholar mindset among students.

After conducting 225 interviews with teachers about gifted multilingual learners, Gubbins et al. (2018) recommended universal screening, alternative pathways with different assessment instruments (nonverbal tests, native language tests, and speed of language acquisition), stronger communication between stakeholders, and professional development to drive change. Mun et al. (2020) came to very similar conclusions.

Arizona, Colorado, and Florida have mandated gifted services for multilingual learners; strategies used to identify these students included nonverbal assessments, native language assessments, professional judgment and collecting a body of evidence beyond standardized tests (Wiggin, 2017). Of these, Colorado had the most comprehensive approach which also added universal screening and a stipulation that no single score may disqualify a student from consideration. Langley (2020) analyzed Colorado's practices in detail and also identified positive, inclusive language as an important factor in Colorado's success identifying multilingual learners for gifted programs.

Alignment to Services

An important factor to consider in the identification of students for gifted programming was to ensure that the data used for identification was aligned to the types of gifted services that were actually provided to students. Gubbins et al. (2021) posed the question, "Identification for what?" (p. 7) and suggested that alignment between identification of gifted students and program services "is a basic tenet" (p. 7). Gubbins et al. found that for their sample across two states, most services offered were reasonably well aligned with their identification criteria. However, Hamilton (2019) surveyed more than 300 school districts across three states and found that program practices and curricula largely were not aligned with gifted selection criteria, with students being selected via academic or cognitive ability, but being offered process skills rather than above grade level materials in their area(s) of demonstrated strength. If a student had been

identified with advanced mathematics ability, it would only make sense that they should actually be receiving deeper curriculum in mathematics, but that was not happening in many of the schools studied.

Space Constraints

A factor that was less often mentioned in the literature but can be a significant barrier was the reality that many gifted and accelerated programs have space constraints. These space constraints created situations where districts must make difficult decisions about which students to place in a program, when there are more students who qualify or show need than there is available space (Peters et al., 2020). An alternate approach for this fundamental problem is offered by Peters et al. (2020), which is to "bake a bigger pie, expanding their gifted programs to meet the growing need for such services" (p. 12).

Gifted Education

Purpose

There were three main points of view about the overall purpose of gifted education. The "talent development" view prioritized the goal of developing eminence, and focused on identifying and encouraging students with the greatest potential for creative productivity (Subotnik et al., 2011; Worrell et al., 2012). According to Subotnik et al., "what determines whether individuals are gifted or not is not who they are but what they do" (p. 22). Renzulli's (2012, 2016) three-ring conception of giftedness was a foundation of this lens, identifying not only above-average ability, but also task commitment and creativity as essential ingredients in the development of exceptional performance. Renzulli (2012) declared that gifted education ought to "produce the next generation of leaders, problem solvers, and persons who will make important contributions to all areas of human productivity," (p. 152). Developing psychosocial skills such as persistence, concentration, goal setting, and positive self-talk were prioritized as

they helped individuals develop latent ability into demonstrable talent (Dai & Coleman, 2005; Subotnik et al., 2011). The talent development view has grown over time to include twice-exceptional students, whose neurodiverse strengths were seen as a potential indicator for creative, unique contributions (Baum et al., 2017), as well as underrepresented students, who may have untapped human resources to be developed (Subotnik et al., 2011).

The psychological perspective, where the gifted field was originally founded, focused instead on a "whole-child" conception of giftedness, initially defined largely by IQ and later expanded to include the presence of developmental asynchrony (Silverman, 1997; Silverman & Gilman, 2020). The NAGC Whole Gifted Child Task Force (2018) suggested a focus on "the child, not the talent" and that gifted students needed to "feel understood, accepted and appreciated for who they are, not solely for what they can do at the time" (p. 12). This lens focused less on academic achievement for its own sake but rather on individual student self-actualization, overall well-being, and the socio-emotional characteristics and resultant special needs of gifted children. A relative newcomer that was aligned with this point of view is the Parieto-Frontal Integration Theory (P-FIT), supported by a growing body of neuroscience that has discovered functional, developmental, and structural differences in the high IQ brain, which would buttress the idea of a qualitatively different human experience in high IQ individuals (Choi et al., 2008; Haier, 2016; Jung & Haier, 2007; Shaw et al., 2006).

A third point of view has emerged over the past decade, partly in an attempt to respond to wide philosophical differences among these first two points of view, and instead offers an alternate lens. The advanced academics approach suggested removing the gifted label entirely, and instead, focused on whether a student is demonstrating a need for more challenging curriculum at a given point in time (Dixson, 2022; McBee et al., 2012; Peters et al., 2020). This education-focused perspective took a pragmatic approach towards providing advanced services

in public schools. Dixson et al. (2020) proposed that the goal of advanced education was to maximize the learning of each individual student, recognizing the wide range of readiness and ability levels in each classroom. This viewpoint called for more inclusive programs that would identify and serve any student who would benefit from advanced curriculum in a particular domain area, within the context of their local school (Dixson et al., 2020; McBee et al., 2012).

While there was much commonality in the fundamental research that underlay each of these points of views, these differences in perspective created tensions in the gifted field (McBee et al., 2012; Meyer & Plucker, 2022; Subotnik et al., 2011).

Service Models

There are many different ways that gifted instruction was implemented in schools, and there could be wide variation even between neighboring school districts. In the National Center for Research on Gifted Education's analysis of gifted programs in three states, they found the following service models in use: 33% of schools used a push-in service model (on average, 1.87 hours/week), 72% used a pull-out model (2.81 hours/week), 54% used cluster grouping, and 45% used homogenous grouping or self-contained classrooms (McCoach, 2021). Overall, 35% of schools offered subject acceleration and 26% offered whole grade acceleration. A different sample of 402 school districts studied by Callahan et al. (2017) found comparatively lower rates of elementary gifted programming, with 51.9% using pull-out classes, 18.4% providing cluster grouping, and only 9.5% using some form of homogeneous classroom grouping. However, Callahan et al. found that the large majority of gifted programs they studied were not leveraging best practices in curriculum, program articulation, identification, professional development, or program evaluation.

Acceleration

A wide and robust body of research supported the practice of acceleration, either in the form of grade skipping or as subject acceleration such as in math or in reading. The enormous body of research captured in the anthology titled "A Nation Empowered" comprehensively demonstrated the value of acceleration for advanced students (Assouline et al., 2015). Similarly, multiple second-order meta-analyses by Steenbergen-Hu et al. (2016) summarized 100 years of research on acceleration to find that acceleration improved students' achievement levels with statistical significance. Foley-Nicpon and Cederberg (2015) found that twice-exceptional students also benefited from acceleration in their areas of strength, and that twice-exceptional students were more likely to receive acceleration if they were first identified as gifted before their disability was diagnosed. They noted that "crucial to the successful acceleration of twice-exceptional students is the affordance of accommodations in the challenging educational environment" (p. 196). Bernstein et al. (2021) settled a longstanding concern in a longitudinal study that analyzed psychological well-being in 50 year old adults who had experienced acceleration in their youth, and determined that, on average, accelerated adults had better well-being than the national average.

Ability Grouping

Ability grouping also has a solid research base. Flexible ability grouping has been around for a long time, which can come in the form of within-class grouping or between-class grouping (Tieso, 2003). Ability grouping has been shown to improve test scores for both high- and low-performing students (C. A. Collins & Gan, 2013). Hendricks (2009) found that math achievement scores were significantly higher for elementary students grouped in high ability math classes. Steenbergen-Hu et al.'s (2016) second-order meta-analysis found that cross-grade subject grouping, such as via a "walk to math" program, and grouping gifted students in special

programs or classrooms had positive effect sizes that were statistically significant. Missett et al. (2014) suggested that teacher beliefs about their student's abilities greatly affected their usage of acceleration or grouping strategies, and that formative assessments would help the most in shifting teachers' practices. One form of ability grouping was to implement school-wide cluster grouping, where gifted students were placed together as a cluster group in one classroom per grade level, which made it more efficient for an educator to differentiate for these students' needs. Brulles et al. (2012) studied a school district that had implemented this model and found that identified gifted students showed statistically significantly higher achievement gains in mathematics when placed in a cluster group, and that nongifted students made substantial and similar learning progress whether they were placed in classroom that contained a gifted cluster group or not. This was an important study to demonstrate that cluster grouping gifted students did not harm nongifted students' achievement.

Self-Contained Classrooms

A study of highly capable programs in Washington state found that self-contained classrooms were more likely to employ curriculum compacting, acceleration, and had the greatest exposure to advanced curriculum compared to other programs that used pull-out or differentiation (Backes et al., 2021). Tempel-Milner (2018) found that a school district that implemented self-contained gifted classrooms in Title 1 schools improved the quality of curriculum and instruction throughout all classrooms in those schools, not only in the gifted classrooms. Card and Giuliano (2014) found that "a separate classroom environment is more effective for students selected on past achievement [rather than IQ scores]—particularly disadvantaged students who are often excluded from gifted and talented programs" (p. 1). A longitudinal study of Boston Public School students who attended self-contained accelerated classrooms for 4th through 6th grades demonstrated that while all students saw some positive

impacts from the program, the largest positive impact was seen for Black and Hispanic students, who were much more likely to graduate on time and attend 4-year colleges (Cohodes, 2020). The primary mechanism of action proposed was that the self-contained program and subsequent steps kept students "on track" and engaged in their education, whereas peers in the control group fell away in their engagement and achievement over time.

Curriculum

Experts agreed that rich curriculum was an essential component of successful programming for gifted students. The Parallel Curriculum suggested that lessons be planned to span the core, connections, practice, and identity parallels, and stressed making connections to big ideas, as well as having students act like disciplinarians in each field of study (Tomlinson et al., 2009). The Multiple Menu Model also emphasized helping students construct knowledge based on known disciplines and fields of knowledge as they worked like practicing professionals (J. S. Renzulli et al., 2000). Bett's Autonomous Learner Model encouraged students to become independent learners via orientation, individual development, enrichment activities, seminars, and in-depth study. The Integrated Curriculum Model focused on advanced content, higher-order thinking such as through problem-based learning, and surfacing the deeper ideas and complexities behind each topic area (VanTassel-Baska & Wood, 2010), and has shown strong effectiveness with elementary students that further improved student achievement with repeated exposure (Feng et al., 2005). Renzulli's (2012) Enrichment Triad Model focused on giving students authentic experiences and regular opportunities to discover their interests and develop them into talents, via structured enrichment programming.

Curriculum compacting is a long-standing approach for reducing the repetition in traditional curriculum for gifted students so that students can progress faster or engage in supplemental curriculum. A seminal study found that between 40% and 50% of traditional

classroom material could be removed for gifted students without impacting achievement, creating more time for either accelerated content or enrichment (Reis et al., 1993). Curriculum compacting remained a mainstay of high quality gifted education services; for instance, Gubbins et al. (2021) reported that 73% of districts differentiated instruction for gifted students by providing a faster pace or compacted curriculum, and curriculum compacting is a feature of VanTassel-Baska's (2010) Integrated Curriculum Model.

Perceptions and Attitudes About Gifted Education

The Institute for Educational Advancement conducted a national poll of 1,414 registered voters and learned that the vast majority of the public had positive attitudes towards gifted education and especially towards issues of equity (Jones & Gallagher, 2019). Specifically, 86% of voters wanted to see increased funding for gifted programs in low-income areas, 84% were concerned about underrepresentation of low-income and minority students, 82% believed that teachers need more training in working with gifted students, and over 80% expected to see accelerated learning offered to gifted students. However, beliefs among educators, rather than the public at large, were more mixed. Childers (2009) reported that while 70% of parents were positive towards gifted education, only 50% of teachers and 20% of administrators had positive attitudes towards gifted education. Despite this range, all respondents agreed that gifted students were often bored in classrooms, and that teachers needed more professional development about gifted education.

School Leadership

Haworth (2020) found that the principals of high-performing schools with exemplary gifted programs were strong leaders who advocated for their advanced programs, were motivated and inspiring, communicated high expectations for staff as well as students, and were solid instructional leaders. Strong, transformational leadership was found to be a crucial ingredient to

the success of these schools. Ezzani et al. (2021) also stressed the importance of principals and other district leaders to advocate for equitable identification in their schools, and to counter misinformed beliefs regarding the abilities of culturally and linguistically diverse students as well as explain the fundamental value of advanced services.

Professional Development

Kaya (2015) found that teachers' conceptions of giftedness can vary by individual, but were strongly affected by their professional development experiences. Previously, McCoach and Siegle (2007) had also found that teachers' attitudes towards gifted education varied tremendously, from the very positive to the very negative, and that special education teachers had a slightly more negative viewpoint. However, they also found that professional development about gifted education or teachers' awareness of their own giftedness did not impact their attitudes. High school teachers with experience working with gifted students felt that they had very little formal knowledge about gifted education, that they had very little time to differentiate instruction for their students, but despite these limitations, these teachers felt that they were advocates for gifted students and their needs (Russell, 2017). It is no surprise that teachers felt ill prepared; Callahan et al.'s (2017) survey of more than 400 school districts found that professional development offered for educators about gifted students ranged from 15 minutes to a maximum of 4 days per year and that only 53.6% of these districts required any specialty credentials for teaching gifted elementary students.

Theoretical Framework

Brookover and Lezotte's (1981) Educational Equity Theory was the theoretical framework for this study. Educational Equity Theory concerned itself with three main concepts: equity of access, equity of participation, and equity of outcomes. For a program to be truly equitable, all three areas must be successfully addressed.

Equity of access focused on “equal access to facilities and services” (p. 66) and to ensure that “barriers to access have been removed” (p. 66). For this study, I was concerned with accelerated school programs, and more specifically, to make sure that all students who would benefit from accelerated programs have access to them, especially those from historically underrepresented backgrounds, such as low-income students, multilingual learners, students with disabilities, and students of color. An important practical consideration in improving equity of access is that you do not create a situation where “majority children leave through the back door as minority children enter through the front” (p. 68). Equity of access was a central issue for this case study. This case study aimed to examine how this district improved equity of access over time, which practices were employed to improve equity of access, how that equity of access was perceived by various stakeholders, and the degree to which equity of access was achieved. However, although access was a foundational requirement for equity, on its own access was not sufficient unless the standards of participation and outcomes were also met.

Equity of participation concerned whether students actually participated in the programs that they had access to, and required that all “programs conform to the equal participation standard.” (p. 68). This was a higher standard than simply having access. For this study, I considered whether students from historically underrepresented groups successfully participated in accelerated programs, whether they chose to enroll in these programs, whether their participation was retained over time, and the attitudes of various stakeholders about students’ participation. Of central importance was that even if a student was successfully identified for an accelerated program, if they chose not to enroll in the program, equity of participation had not been achieved. In this study, equity of participation came into play in whether students from historically underrepresented groups who were identified for the accelerated program actually

enrolled in this program and whether they maintained that enrollment. This case study analyzed both the barriers and remedies in this district concerning equity of participation.

Finally, when considering equity of outcomes, "the outcomes standard does not state that all students perform the same but that the aggregate performance in the various groups is the same or nearly so" (p. 69). The goal was that educational outcomes should not be predictable based on demographics such as gender, income, or racial background. In this case study, equity of outcomes was reflected in the achievement levels of students who participated in the accelerated program. This case study considered both the reported achievement levels provided by the district, as well as the qualitative impressions of teachers, principals, program administrators, and district leaders about student achievement.

These three principles of equity of access, equity of participation, and equity of outcomes aligned directly with the goals of this study and served as a valuable lens to analyze this school district's equity efforts. The theoretical framework analysis can be found in Chapter 5.

Chapter 3: Methodology

This study used a qualitative methodology in order to best describe the detailed practices, procedures, and attitudes surrounding identification for this advanced education program. Although a quantitative study could have compared the relative increases in representation in this school district in more statistical detail, a quantitative study would not address the most instructive aspects of this case: namely, the reasons why these increases have occurred in the first place. Blockbridge school district had already reported statistics about how many more students were being identified in various demographic groups, and there was no reason to doubt their calculations. However, what had not yet been fully explored were the specific factors that led to this significant growth in diverse populations in their accelerated programs. This study described the specific practices, procedures, attitudes, and beliefs that gave rise to this growth, as well as the consequences of that growth.

Research Design

This qualitative study used a descriptive case study approach (Stake, 1995). I gathered data through interviews and focus groups as well as extensive document analysis provided by participants, from public websites, as well as Washington state metrics and reports.

Community Partner

Blockbridge School District (a pseudonym) served more than 15,000 students and was located in suburban Washington state. In order to preserve the district's anonymity, demographics and other statistics have been provided as ranges or approximations. Blockbridge included more than 25 elementary, middle, and high schools, as well as several choice programs and alternative learning environments. Blockbridge students spoke almost 100 different home languages. As of the 2022-23 school year, district-wide, enrollment included approximately 10% English language learners, more than 15% low-income students (as measured by the Free and

Reduced Lunch program), approximately 10% Section 504 Plan students, more than 10% of students with disabilities with an Individual Education Plan (IEP), and less than 5% homeless, migrant, or military. Race and ethnicity breakdowns were as follows: more than 40% White, more than 20% Asian, more than 10% Hispanic/Latino of any race(s), less than 10% Two or More Races, less than 5% Black/African American, and less than 5% American Indian/Alaskan Native or Native Hawaiian/Other Pacific Islander.

Participants

The participants in this study included district leaders, administrators, principals, and teachers who fell into two categories: those who were directly involved with the accelerated program, and those who had not been directly involved with this program. Approximately half of the participants were individuals who were directly involved in the oversight, leadership, or execution of the accelerated program and included the superintendent, director, and administration staff of the accelerated program office, principals who hosted accelerated self-contained classrooms in their schools, and teachers who taught accelerated self-contained classrooms. In order to obtain a more comprehensive perspective, district leaders, principals, and teachers who were not directly involved in the accelerated program were invited to participate as well.

Sampling

Participants were selected by a combination of purposeful and random sampling. At the district leader level, purposeful sampling was used to select individual leaders to interview who were most directly involved with the oversight, leadership, and execution of the accelerated program, as well as several other influential leaders in the school district. These individual interviews gave a comprehensive view of the how the accelerated program was developed, as well as a range of attitudes, beliefs, and perspectives at the top leadership level about this

program. Every leader who was invited agreed to participate in an interview. This was the largest group of participants (n=8), and were collectively referred to in the findings as “district leaders.”

There were also several program administrators that were invited to participate who were directly involved in the day-to-day administration of the highly capable program, and could speak to the details of how the program was conducted from their perspective. There were three (n=3) participants in this role, and were referred to in the findings as “program administrators.” The invitation letter that was used for both district leaders and administrators can be found in Appendix A.

The next group of participants included the principals of all elementary and middle schools. Because principals form the backbone of a school’s practices and equity culture (Ezzani et al., 2021; Haworth, 2020), getting a view of principal perspectives that was as complete as possible was desirable. I invited every principal and assistant principal to participate in focus groups via individual emails, but only received three responses; the initial invitation email used with principals can be found in Appendix B Because of the low response rate, in consultation with my committee and IRB, I shifted my protocol to conduct individual interviews with these participants, and resent a revised invitation, which can be found in Appendix C. No additional principals volunteered with this revised invitation. In addition, one principal dropped out prior to the interview. This was the smallest tier of participants (n=2) and was referred to in the findings as “principals.” One came from the elementary level, and one came from the middle school level. The relative lack of principal participation will be discussed further in the Limitations section.

The final group of participants included teachers, who were also invited to participate in focus groups. A primary question in this study was how the recent increase in diverse identification for the accelerated program had affected classroom practices, so participants were limited to faculty who had taught in Blockbridge the past four consecutive years, either in

accelerated classrooms or in general education classrooms, so that they could comment on how their perspectives and practices may have changed as identification practices had changed. The protocol for recruiting teachers started by inviting all teachers in grades 2-8 via email to participate in the study and fill out a brief survey to ensure they met qualification criteria and to collect some brief background information; the email invitation can be found in Appendix D. One email reminder was sent a week later. I was prepared to randomly select teachers who had volunteered to participate in focus groups, but that was not necessary.

I received 28 responses to the survey. All teachers who volunteered were invited to participate in a focus group, and 15 teachers elected to do so; all but one teacher were elementary teachers. There was one teacher who wished to participate but was unable to make any of the scheduled focus group times, who I individually interviewed. I conducted three focus groups with teachers, one that comprised teachers who were currently teaching an accelerated, self-contained classroom, another with teachers who had never taught in an accelerated, self-contained classroom, and a third with teachers who had experience in both environments. In consultation with my committee, we agreed to scope the study down to focus primarily on the elementary level due to lack of teacher participation at the middle school level. I did interview the sole middle school teacher prior to deciding to scope down the study, but did not use that interview in my coding or analysis. It is worth noting that all of the teachers who volunteered to participate in this study were very experienced, senior educators, many of whom clearly had exceptional skill; however, this may also have biased the findings.

As a gratuity, all participants who attended a focus group or participated in an interview were thanked with a gift card to a local ice cream parlor for a free ice cream cone. Interviewees were also thanked with a handwritten thank you note. A few participants declined to accept the gratuity.

Data Collection Procedures

I collected data through semi-structured interviews with district leaders, program administrators, and principals, as well as through semi-structured focus groups of teachers in this school district. All interviews and focus groups were audio recorded and transcribed verbatim so that they could be used for detailed data analysis. Most interviews were conducted in person; two interviews were conducted via Zoom with an audio-only recording. Transcription was done using both Rev and Otter, and were manually corrected at a detailed level, in order to ensure highly reliable transcripts. Interview guides were created for each tier of participants, with separate interview guides for district leaders, administrators, and principals, as well as a separate focus group interview guide for the teacher focus groups. The guide and questions for each tier were the same whether or not a participant was directly involved in the accelerated program in order to prevent any potential bias in responses due to potentially leading questions, however follow up questions varied depending on the conversation. The interview guides for district leaders, administrators, principals can be found in Appendix E, F, and G respectively. The focus group guide for teachers can be found in Appendix H.

All principal and teacher volunteers completed a brief demographic questionnaire as part of the sampling process to collect information about their recent teaching/principal positions, their background in teaching general education and/or accelerated classrooms, relevant professional development, as well as scheduling constraints, to aid in scheduling.

Supporting Documents

I also collected a variety of current and historical district documentation pertaining to the accelerated program between 2015 and 2022, including accelerated program qualification criteria, qualification pathways, accelerated program and service models, meeting minutes, and overall district demographics. These documents were offered by participants as well as public

information posted on public school district and community websites. Participants also provided district-generated statistics of students enrolled in the accelerated program broken down by racial demographic groups, including multilingual learners, low-income students, and twice-exceptional students who have an Individualized Education Plan (IEP) or Section 504 Plan, as well as available data on student achievement levels and other outcome data disaggregated by demographic group. I only used aggregate statistics and did not access any individual student data. I also included enrollment statistics, current regulations, and other documentation from the Washington state Office of the Superintendent of Public Education to include in the document review process, in order to understand the regulatory environment, statewide context, and any available state-reported data for this district.

Data Analysis

The data analysis process began with full, verbatim transcripts of all interviews and focus groups. I audio recorded all interviews and focus groups with both Otter.ai and Rev in order to ensure accurate transcription, and so that a backup recording was available in case of technology issues; thankfully all recordings were completed with good audio quality. The automatically created transcripts were carefully corrected manually to ensure accuracy and were then loaded into the MaxQDA software for coding and analysis. The resulting transcribed data was coded for key ideas and thematic analysis using an open coding methodology (Braun & Clarke, 2006). Coded groupings were grouped into nine broad themes, which each had between two and nine sub-themes. The majority of coded segments appeared in more than one theme or sub-theme.

I used the documents I had gathered to triangulate and further validate the coded themes; these documents also provided additional details of procedures and statistics. In the findings, each theme and subtheme was annotated to specify whether there was document evidence to support that theme. I also created tables and figures to capture the numeric statistical data

collected during the document review, as well as calculated representation indices from the provided data.

In this age of artificial intelligence (AI), I feel it important to note that I did not use any form of generative AI (chat-GPT or similar) at any stage of the process. I did use the transcription software Otter.ai to create initial transcriptions of interviews, however the software made many transcription errors and I carefully and painstakingly corrected those transcripts by hand. I did use text searching during the coding process to look for keywords, primarily to ensure that I hadn't overlooked a relevant segment; however, I did not use the AI segment analysis capabilities available in my coding software, MaxQDA. All of my coding and thematic analysis as well as all of the writing was done with human power.

Trustworthiness

In order to maximize the utility of this case study, it was important to ensure that it was trustworthy. That is, whether it was “plausible, credible, trustworthy, and therefore defensible” (Johnson, 1997, p. 283). To that end, I put several strategies in place to ensure trustworthiness.

Descriptive validity (Johnson, 1997) was improved through triangulation between document reviews and four different types of informants: district leaders, program administrators, principals, and teachers. Furthermore, I invited a robust total number of participants into the process to further triangulate the data, including 14 individual interviews and three focus groups which involved an additional 14 people, for a grand total of 28 participants.

Interpretive validity (Johnson, 1997) was improved through audio recording all interviews and focus groups with both Rev and Otter which ensured accurate, high-fidelity transcriptions. Transcriptions were verified and painstakingly corrected while listening to the audio recordings multiple times, which added an additional degree of precision. When reporting

transcribed verbatim comments in the findings, I deleted repetitive words and filler words such as "you know," "like," and "right," as well as used ellipses to excerpt sections in order to make comments briefer and more readable; however, I was careful that this did not change the meaning or intent of what was said.

In addition, I encouraged participants to comment on both their perceived positive and negative experiences, to ensure that the full range of opinions was revealed, and did hear a wide variety of perspectives and witnessed significant debates on several topics. I also conducted member checks for all interviews by sharing the resulting corrected transcripts via email. Two participants did offer minor corrections via the member check process, and those corrections were fully accepted.

Although there are challenges in establishing support for internal validity in qualitative research (Johnson, 1997), I endeavored to look for patterns and relationships that explained and described how certain practices addressed equity and access for underrepresented youth in the advanced education programs that were in effect for each of the seven years of available data. In some cases, my findings were able to link certain practices to the outcomes that were observed. This was accomplished by carefully tracing the practices that were in effect for each of the seven years of available data, and noting how the outcome data was affected as practices changed. As Johnson noted, given that there were seven years of history to analyze, in some cases I was able to establish that “when the causal factor occurs again, does the effect follow” (p. 288).

To address dependability and minimize researcher bias, I kept a research journal during the data collection process in order to enable a peer review. I invited my dissertation chair to review a sample of my coding and my thematic analysis in detail for peer debrief purposes. My dissertation chair provided feedback and assisted with creating thematic categories and winnowing down sub-themes into the most salient findings.

Although using volunteers, I attempted to avoid selection bias by inviting all teachers and principals to participate, with the intention of using random sampling as needed. However, because of the lower response rate of teachers and principals, there was no need to sample, and there likely was some bias in the individuals that chose to respond and follow through with scheduling an interview or focus group. My qualitative observation is that the teachers who chose to participate in focus groups were those teachers who had very strong opinions, both positive and negative, about Blockbridge's highly capable program, and used this research forum as a way to air their ideas, suggestions, and concerns. Each of the three focus groups ran substantially over time, with participants wanting to talk longer, and ultimately I had to end the group. Many of the interviews ran the full 90 minutes. A few participants explicitly commented that this was a welcome opportunity, as described by this teacher at the end of a focus group:

> We don't get to talk about this. I have never really felt very many safe spaces to do this work…I feel like I can't talk to my gen ed colleagues about it. I feel like it's difficult to talk to some of my [accelerated self-contained] colleagues about it. So I appreciated having a safe space.

The guide and questions for each tier of participant (district leader, program administrator, principal, teacher) remained the same whether they had direct involvement with the accelerated program or not, in order to prevent leading questions that might create bias in responses. However, my follow-up questions did vary depending on where the conversation led.

With respect to ecological validity, it is important for the reader to recognize that this was a high-performing suburban school district in a relatively affluent area, and that findings may be different in different communities or contexts. I used rich description, detailed observation, careful document review, and a generous quantity of verbatim comments from participants to paint a detailed picture of the district context, participants, and overall situation, so that readers

can make their own judgements of applicability to their own school or district. However, this was tempered with the need to blur some district-wide statistics to ensure that the district's anonymity was preserved. Furthermore, the statistical data that are presented are part of a qualitative case study, and although they are quite rich, readers should be cautioned about making generalizations from one case.

Limitations

In addition to the limitations inherent in qualitative studies, there were three main limitations for this case study. First, all statistical data that were reported in this case study were calculated by the Blockbridge school district themselves in their own reporting or by the state education office. I assumed that the school district and state education office had calculated their results correctly and in good faith. Data were reported as descriptive statistics only.

Second, because of my long history of involvement with this school district, it was possible that despite attempts to ensure trustworthiness, participants would not reveal their full opinions or experiences, or my personal experiences or beliefs might color my analysis of the data. I attempted to mitigate this risk of researcher bias in my research design, however it is a limitation that I am acting as a solitary researcher for this case study, and I was personally familiar with about third of the participants. I was encouraged, however, at the extremely frank conversations that nearly every participant engaged in throughout the process, and believe the data that I received represented participants' true opinions. It is possible, however, that my name associated with this study may have impacted participants' willingness to volunteer, which may have created selection bias.

Finally, the lack of principal respondents was a disappointing outcome of the sampling and recruiting process. In the end, only two principals participated, which significantly limited my analysis to primarily focus on the perspectives of the remaining participant groups: district

leaders, program administrators, and teachers. It is unclear whether principals did not participate because of lack of time, lack of interest, lack of buy-in about the district's highly capable programs, or my specific involvement with this study; likely it was a combination of factors, including ones unknown.

Ethics

In order to protect the human subjects who participated in this study, this proposal underwent review by the Bridges Graduate School Institutional Review Board (IRB) to ensure the highest level of ethics and compliance with all requirements. Because all research subjects for this study were adults, were not members of a protected class, and were not subject to any experimentation or intervention conditions, IRB review was expedited.

All participants signed an approved informed consent form and were assured that their responses would be kept confidential to the researcher and her dissertation committee. Informed consent forms for interviews and focus groups can be found in Appendix I and J. Focus group attendees made a verbal commitment to each other to keep comments confidential. All data were reported via aggregate groups, labelled either district leader, program administrator, principal, or teacher. Where context was important, I sometimes identified teachers as either general education teachers, self-contained teachers, or former self-contained teachers, but in most of the findings, teacher comments are identified simply as "teacher" to maximize anonymity. I paid careful attention to ensure that data or verbatim comments could not be traced back to an individual due to situational or contextual factors, removed all personally identifying information, and in some cases have blurred gender using the gender-neutral pronoun "their" to ensure anonymity in the final report.

Positionality

In the spirit of reflexivity, or the "critical self-reflection about his or her potential biases and predispositions" (Johnson, 1997, p. 283), I declare my detailed interests, personal history, and involvement in this topic area. I have had a sustained and deep involvement in the Blockbridge school district. I also have had personal experience as a multilingual student, as well as firsthand experience navigating public school systems as a parent to two gifted and twice exceptional students, the youngest of whom is graduating high school the same month I will graduate.

I am a longtime parent advocate in the Blockbridge school district, and my two children have attended Blockbridge schools from the early elementary years. I have advocated for equitable identification and expansion of the school district's accelerated programming since 2008. As founder and longtime president of the parent organization that had regular meetings with the school district and through developing strong relationships with several district administrators, I have had the opportunity to influence this school district's thinking and practices over the years. While I have never been in a decision-making role in this school district, I was hired to give a few short professional development sessions over the years as well as to work on one 2-month consulting project in 2016 that contributed to some of the actions that will be reported on in this dissertation.

Additionally, I am a White woman and I do not have the lived experience of being low-income or a person of color. However, I am part of an immigrant community and did feel different from the majority of my peers in my own public school K-12 experience. I spoke Lithuanian in the home before I entered school, attended the Lithuanian Saturday School in Brooklyn, NY through early adolescence, and participated actively in Lithuanian cultural events, summer camps, and folk dancing throughout my childhood and adulthood. I was a multilingual

learner in my public school kindergarten, and learned the English language quickly. I was identified for my school's gifted and talented program from kindergarten onwards, and although there were bumps along the way, overall I enjoyed access to high quality public schools in three different school districts, and did not experience overt discrimination. I did, however, experience the intersectionality of high intelligence and immigrant status, which created social challenges. I also experienced bullying.

My two children have had more complex needs and needed my active advocacy to get their needs met, both to meet their need for academic advancement, as well as supports for various disabilities. Seeing the high degree of parent awareness and advocacy needed to get them considered for the accelerated program in a generally supportive school district opened my eyes to the inequities of this system for all students, and especially those students furthest from educational justice. I had long believed that many more students in Blockbridge would qualify for accelerated services if only they were properly considered, and I am gratified to see that after more than a decade of advocacy, this hunch was proven to be correct. My role as a researcher is to faithfully report the details of how this was accomplished so that others can learn and benefit from this school district's equity journey. My curriculum vitae can be found in Appendix K.

Chapter 4: Findings

The findings for this study are divided into four main sections: (a) district profile, (b) practices and procedures, (c) equitable outcomes, and (d) beliefs and attitudes. The district profile provides key facts about this district as well as the larger context within Washington state. The practices and procedures section then describes what Blockbridge actually did, including the detailed practices and procedures that Blockbridge developed to identify students for their highly capable education program, what services were offered at various grade levels, how those services varied in different locations, and what professional development was offered. The equitable outcomes section details how many students were identified with Blockbridge's equitable identification protocols, their efforts towards growing cultural competency, as well as student achievement data. The fourth section on beliefs and attitudes switches the focus from the specifics of what Blockbridge did to the attitudes surrounding the work. This section covers the mindsets of district leaders, program administrators, principals, and teachers about the highly capable program, the driving rationales for why this equity work was undertaken and sustained, the many debates that arose as the program grew, and the challenges that remained.

Data Sources

As was described in Chapter 3: Methodology, this case study drew on both interview and focus group transcripts, as well as various types of documents that were collected for analysis. In total, 14 individuals participated in individual interviews, and another 14 individuals participated in three different focus groups, for a total of 28 participants. The documents collected fell into six categories with their abbreviations listed in parentheses: Washington state statistical data (Wa), district website (We), district-provided statistical data (Da), district-provided historical documentation (Hi), advisory team meeting minutes (Ad), and parent group meeting minutes (Pa). A frequency table is included for each theme, which lists the data sources that contributed

to each sub-theme, including a count of transcribed coded segments, the number of individual participants who contributed those coded segments, and a list of which document data sources contributed support and information for that sub-theme.

District Profile

Blockbridge School District (a pseudonym) is a suburban school district in Washington state. In order to preserve the district's anonymity, demographics and other statistics have been provided as ranges or approximations. As reported by the Washington State Superintendent of Public Instruction for the beginning of the 2022-23 school year, Blockbridge was a public school district comprising more than 15,000 students from grades K-12 (Washington State Office of the Superintendent of Public Instruction, n.d.). District enrollment included approximately 10% English language learners, more than 15% low-income students (as measured by the Free and Reduced Lunch program), approximately 10% Section 504 Plan students, more than 10% of students with disabilities with an Individual Education Plan (IEP), and less than 5% homeless, migrant, or military. Race and ethnicity breakdowns were as follows: more than 40% White, more than 20% Asian, more than 10% Hispanic/Latino of any race(s), less than 10% Two or More Races, less than 5% Black/African American, and less than 5% American Indian/Alaskan Native or Native Hawaiian/Other Pacific Islander. In 2022-23, Blockbridge was a high performing school district with four-year high school graduation rates well over 90%, a teacher workforce with an average of more than 10 years of teaching experience, and per-pupil spending approaching $20,000 per year.

Public schools in Washington state have been required to provide highly capable programs and services as part of the state's definition of basic education since 2014. Washington state law instructed districts to "identify through the use of multiple, objective criteria those students most highly capable and eligible to receive accelerated learning and enhanced

instruction" (Revised Code of Washington, 2017a, para. 1) and that "assessment shall be based upon a review of each student's capability as shown by multiple criteria intended to reveal, from a wide variety of sources and data, each student's unique needs and capabilities" (Revised Code of Washington, 2017b, para. 2).

The Washington state legislature had an increasing focus on equitable identification in the state's highly capable programs over the past decade, and made several notable additions to highly capable law in 2017 and 2018 to encourage equitable identification practices. Districts were required to "…prioritize equitable identification of low-income students" (Revised Code of Washington, 2017a, para. 1) use "local norms, where local norms shall not be used as a more restrictive criteria than national norms at the same percentile," and ensure that assessments were "given in the native language of the student, or non-verbal assessments are used" (Revised Code of Washington, 2018, paras. 3–5). Furthermore, "Subjective measures such as teacher recommendations or report card grades shall not be used to screen out a student from assessment" and "Multiple pathways for qualifications must be available and no single criterion may disqualify a student from identification" (Revised Code of Washington, 2018, paras. 2–4)

Practices and Procedures

This section primarily addresses the first two research questions, (1) What practices and procedures were used to identify low-income students, multilingual learners, and twice-exceptional students for Blockbridge's accelerated education program; and (2) What factors contributed to the increase in identification of twice exceptional students at Blockbridge. The main themes found were: (a) identification featured universal screening, static local norms, and OR-rules with multiple pathways; (b) services featured math acceleration and self-contained classrooms with high variability in service levels and models; and (c) professional development was scarce and optional; individuals relied heavily on their personal experience.

Theme A – Identification Practices

Blockbridge developed a complex identification system, gradually iterating it over many years to fine-tune their practices to achieve greater equity. The centerpiece of this system was universal screening, however many additional practices were added over the years, including creating multiple pathways for qualification, shifting towards using OR-based decision criteria in both screening and qualification, and establishing group-based local norms for low-income students and English language learners. Along the way many other procedural aspects were fine-tuned as well, such as developing extensive procedures to handle makeup testing in all of the schools, proactively seeking parent permission, evaluating private school and homeschool students, as well as universally screening every student newly enrolled in the school district between grades two and seven. The result was a robust and complex identification system that affected nearly every part of the school district and handled tremendous scale. Blockbridge ran their highly capable identification process as an annual cycle, gathering data during the late fall and winter and communicating results to families in the spring for services that would start the following school year. Students could be identified at any grade level. Each of these findings is further discussed in the following subthemes, and summarized in Table 4.1.

Removing Previous Barriers

One of the driving goals for the changes in Blockbridge's identification practices was to remove known barriers that excluded students from consideration. Prior to the 2017-18 school year, the primary way that students had been evaluated for highly capable eligibility was by families electing to bring their students on a Saturday for testing at a central district location, as described by a program administrator:

Table 4.1.

Frequency Table for Theme A – Identification Practices

Sub-Theme	Number of Participants	Coded Segments	Supporting Documents
Removing Barriers	14	34	We Hi Ad Pa
Assessments: NNAT3, Iowa, SBA, …	23	71	Wa We Hi Ad Pa
Universal Screening	15	38	We Hi Ad Pa
Math, Reading, or Both Subjects	21	43	We Hi Ad Pa
Multiple Pathways with OR-Rules	8	24	We Hi Ad Pa
NNAT3-only Grade 1 Pathway	10	13	We Pa
Static, Group-Based Local Norms	7	17	Hi Pa
Every Child Considered	13	34	We Hi Ad Pa
Complex Identification Process	9	31	We Hi Ad Pa

Note. Document categories are Washington state statistical data (Wa), district website (We), district-provided statistical data (Da), district-provided historical documentation (Hi), advisory team meeting minutes (Ad), and parent group meeting minutes (Pa).

> Before that, you had to refer and show up on a Saturday to take a test, you had to provide your own transportation, you had to be in an unfamiliar place, everything was done kind of all at one time. For the assessment part, it may have been an hour and a half, two hours at one stretch.

A teacher concurred that Saturday testing was typical:

> Having that opportunity be presented to those families with means and capacity to take the kids on a Saturday. I mean, I proctored those tests, too. So for two years, I came in on the weekends and was blown away by these gobs and gobs of families and SUVs.

Another district leader commented that the initial impetus for change was community advocates who:

> Expressed concern that it was excluding a number of students either because of transportation—I think primarily we started there—that transportation and testing, at that time, didn't provide access to programming in an equitable way.

The new identification practices sought to remove the need for Saturday testing entirely, and to instead have all testing happen during the regular school day.

A program administrator noted that a practice that "used to be used was teacher recommendation, which we know can be very flawed or inaccurate by personalities or characteristics in which an educator and a student don't see eye to eye." A student previously needed to be referred by a teacher or a parent in order to be considered for testing. In addition, there had previously been opportunities for teachers to give feedback or recommendations. A teacher further elaborated:

> I believe in the taking immense power away from classroom teachers to be able to recommend or shut down based on their perception [and] their experience with kids. That was a very important part of our new screening process that I find to be very valuable. Because we naturally and without intention, gatekept the program from kids who don't look like they belong with us. They don't look smart. That is the perception out there, right. They don't look smart because they don't get anything done in class and they struggle to process and they are a handful. We did gatekeep the program that way for years, not just here, but everywhere across the country. I feel like that was something good that we did.

Blockbridge's identification process no longer used teacher feedback or recommendations, except in rare circumstances during the appeal process.

Primary Assessments Were NNAT3, Iowa Reading/Math, SBA, and iReady

The most frequently mentioned assessments were the Naglieri Nonverbal Abilities Test, 3rd Edition (NNAT3) (frequency=43), Iowa Assessments (sometimes referred to as the Iowa Test of Basic Skills, or ITBS) (frequency=30), Smarter Balanced Assessments (SBA) (frequency=20), and iReady Assessment (frequency=14). Other assessments were mentioned primarily in documents: the Washington Kindergarten Inventory of Developing Skills (WaKIDS), which was given universally to all kindergarteners statewide; the Torrance Tests of Creativity (TTCT), specifically the Figural test battery, which was only used the first year of universal screening; the Star Assessments (STAR) which was later replaced by iReady; the Individual Reading Record (IRR) which was used until 2018-19 as a reading screener for young students; and the Cognitive Abilities Test (CogAT), which was replaced by the Naglieri Nonverbal Abilities Test (NNAT3) in 2017. A program administrator described the NNAT3:

> So we start with a screening process, what we use currently is the NNAT3, the Naglieri Nonverbal Ability Test, which is more of a cognitive test. All the tests we give are about 30 minutes long.

A principal remarked that when students were screened with the NNAT3 in her building:

> I think some of them think it's a game—because of the type of questions that show up on the screen. I find it intriguing when I actually stand behind a kid and watch them respond to it and how they think, because I don't think that way and I think this is great.

A teacher commented on how the NNAT3 was a critical aspect of Blockbridge's equity strategy:

> I have also been in the program a long time. I've seen how that assessment and qualification process has changed multiple times. I commend the district for making an effort to reach populations that are traditionally underserved by highly capable programs, and I know that using the Naglieri Nonverbal Test as the primary screener was an

> important part of reaching those populations and identifying students who are highly capable but may experience a language barrier or may experience an exposure barrier because of the financial situation in their family.

According to document evidence dated December 2017, the NNAT3 was administered on the computer to all students, however the Iowa Assessments and Torrance Tests of Creative Thinking (TTCT) were administered via paper and pencil. The following year, the TTCT was no longer used, and all other assessments also moved to a computer administration.

A district leader elaborated on the other achievement-oriented assessments that were used during the universal screening phase as well as during the assessment phase of the identification process, and how they varied by grade level:

> For grades one, two, and three we use the only other universal testing we have [which] is iReady...Once they hit grade four, we use our Smarter Balanced Assessment. Once they get into the assessment phase, we use the Iowa assessments in both reading and math for students.

A letter to all Blockbridge families sent in December 2017 stated that the Iowa assessments were "administered at one grade level above the student's current grade level." This practice of using a higher grade level of the Iowa Assessments continued throughout the study time period.

An important note was offered by a program administrator about the use of testing accommodations based on a student's IEP or 504 Plan:

> We do also allow for students that have testing accommodations, we add additional time to their test and we try and provide any additional things that are necessary based on their accommodations. If they ask for small group, we do accommodate that. If IEPs say that they need a calculator, of course there's a calculator built into the math test, and they're

> allowed to use that. I had one student recently who is allowed to use a hundreds chart so that is acceptable, of course, because that's part of the IEP.

Universal Screening with OR-rules and 85th Percentile Criteria to Move Forward

Universal screening with the NNAT3 was the centerpiece of Blockbridge's equitable identification practices, and was first used broadly in the 2017-18 school year as the first step in a two-phase identification system. During that first school year, every student in kindergarten through eighth grade was screened with the NNAT3, which comprised well more than 10,000 students. A memo titled "Highly Capable Programs—Frequently Asked Questions" included this description of the procedure:

> For the 2017-18 school year, all students in Grades K-8 will be screened in January 2018 for potential. Those students meeting or exceeding the percentile threshold on the Naglieri (85th percentile) will move on to the second phase of the eligibility process—assessment.

This program administrator described the rationale for testing every student:

> We wanted it to include every student, those that we had been missing who are in the upper grades, as well as those who were just entering school and starting their P-12 or K-12 career… We wanted to enter kids into program and we wanted to pick up those who had been missed in previous years.

The following year, in the 2018-19 school year, every student in kindergarten through fifth grade was screened. It was the third year, during the 2019-2020 school year when Blockbridge shifted to only universally screening students in kindergarten, first, and fifth grades, which became the ongoing practice. A program administrator commented on why fifth grade was chosen for universal screening:

> We screen fifth grade students because Middle School is when there are other opportunities, different school, different ways in which instruction is delivered. And so it's another good time to go ahead and test kiddos to see if we can discover any additional kids that may need additional services.

Another program administrator described the administration of the NNAT3:

> First grade and fifth grade get tested in their classroom by their classroom teacher. So students probably don't even know that they're doing it. It's just another puzzle test that they take during the school day. The teachers are given information on how to administer the test. There's not really a proctor part of it. It's just students use their district issued device, they go to this particular app, they take the test, it's very simple.

A district leader described how kindergarten students were screened with both the NNAT3 and the Washington state universal kindergarten readiness assessment called Washington Kindergarten Inventory of Developing Skills (WaKIDS):

> We screen them with two different screening tools. We use a portion of the WaKIDS assessment. I think it's about six different portions of that. We also use that in tandem with the Naglieri Nonverbal Ability Test.

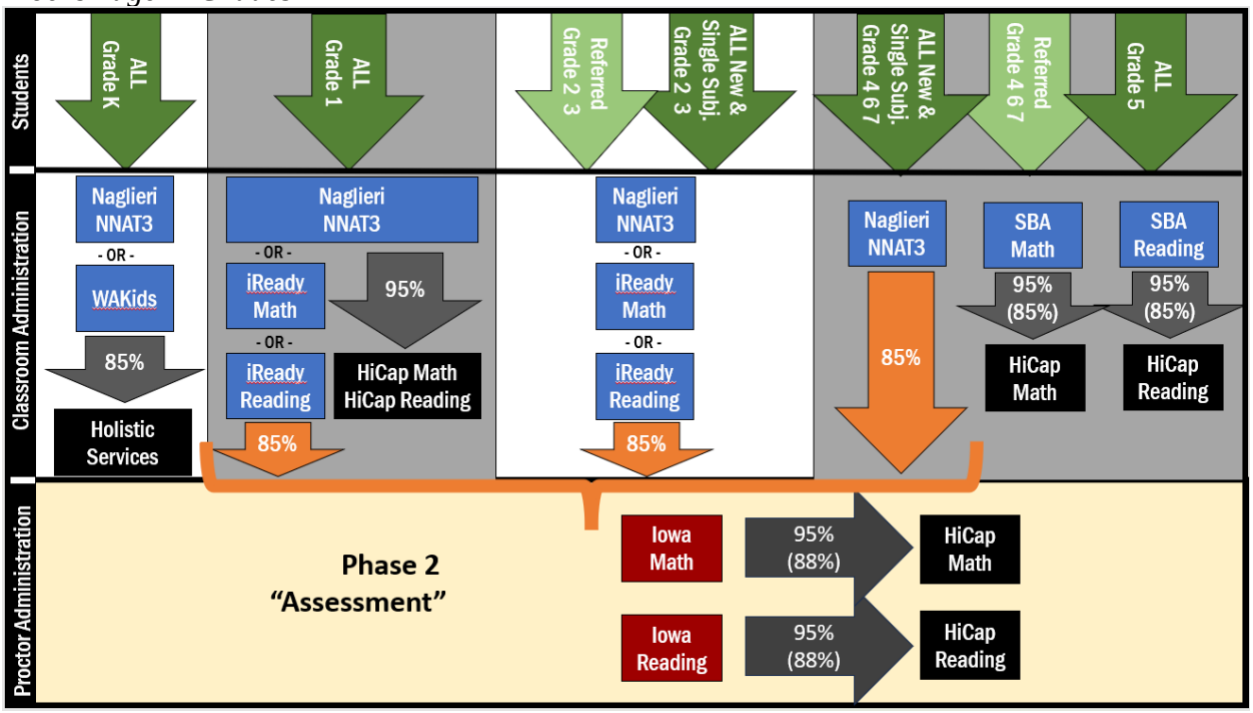
A program administrator further described which assessments were used for universal screening in other grade levels, "For first graders we use the iReady, actually first and second graders. For third through seventh grade if they have taken the SBA, we use the SBA as a screener as well." A district leader noted, "There are multiple ways to screen in at every grade."

Blockbridge used a two-phase identification system, where universal screening was the first phase and was generally administered in the classroom. The criteria to move on to the second phase was an 85th percentile score or higher on any one of the screening assessments: a nonverbal cognitive ability measure from the NNAT3 as well as either reading or math

achievement measures from either the iReady or SBA, depending on grade level. A program administrator provided details that "The NNAT3 first grade through seventh grade, when we administer that, the students that score 85th percentile or above will be eligible to move on to the second phase of testing, which is assessment." A district leader confirmed that the 85th percentile was also the screening criteria for academic achievement screeners when they said, "We use the 85th percentile in either reading or math. So they could have scored at the 85th percentile in either one of those content areas to screen them in as well." This was an implementation of OR-rules, where any individual score at the 85th percentile or higher on any one of the screening assessments, regardless of domain, would move the student on to the second phase of assessment which would further assess both domains, reading and math. See Figure 4.1 for a graphic

Figure 4.1

The Universal Screening, Assessment, and Decision Process for Highly Capable Qualification at Blockbridge in Grades K-7



Note. Decision criteria shown as nationally normed percentiles. Static, group-based local norms used for low-income students (FRL) and multilingual students (ML) are shown in parentheses.

summarizing the entire universal screening, assessment, and decision process used in Blockbridge.

The equity benefits of universal screening were frequently mentioned. A program administrator commented:

> It's all done in your school. You don't have to have transportation, you're not in an unfamiliar place. Everything has just gotten a lot more student-centric, where it's meeting them where they are, rather than making people jump through hoops. And I think that has helped a lot with the equity as well because you don't, if kids can't get somewhere on a Saturday, then they would never have taken that test. In this case they're taking it in their classroom. So we're getting kids that wouldn't have done it before.

A teacher confirmed:

> It is evident to me that the universal screening is absolutely doing some of the things that we hoped that it would do from an equity lens. We are scooping in kids who were not previously scooped in, we are providing equitable access more so than we were before.

However, not everyone appreciated that the universal screening process happened during the school day. This teacher explained:

> The damage that does in my classroom community when my kids with IEPs don't get asked for a second round or kids start noticing who didn't get pulled the second time or whose name didn't get called for that Iowa or whatever. It's very damaging. I had to take on a lot of repair work to fix that within my classroom community…The decade of SEL experience I bring to my kids, that damage is done. They know who gets picked and who doesn't…I hate that. It's such an intrusion not only my teaching time, but into my community. I really hate it.

Single-Qualified in Math or Reading, or Dual-Qualified in Both Subjects

Blockbridge qualified students for highly capable services separately in math and in reading. Many students were also qualified in both subject areas, which was known as dual qualification. This had not always been true, and had changed prior to 2015. A program administrator explained:

> In somewhat distant history, we did not single qualify, a student had to get a high score in both subjects in the same year. And if they didn't [then] they didn't get anything. If you got a high score in math one year, and then the next year, you got a low score in math, but a high score in reading. Well, you could just keep yo-yoing back and forth and never actually get qualified in anything. And I think it may have been about five years ago that that changed to if you got a high score on one subject, then you were qualified in that subject and you didn't have to take that test again. So the next year you could test in the subject you didn't have and possibly end up with then the dual qualification out of it. You didn't have to do well in both tests in the same year. And that made a big difference. It's probably about half of our kids every year that qualify in one subject not both. So all of those kids would have been out of luck before that.

Another program administrator concurred:

> I do truly appreciate that [Blockbridge] will provide a designation in one area so a student can have a highly capable designation in reading or in math. And I think that's helpful. In years past, it was all or nothing and I think that that was a disservice to many kids.

Noting the large influx of highly capable qualified students, a principal added:

> Suddenly, we had an incoming group of kids who might be identified in math, but not anything else, or English but not anything else. Or maybe they were dual and it was just like we had this influx of kids.

Another district leader gave examples of different students qualifying for different domains of service:

> We have students who qualify for different levels of service, or different types of service, I guess is the better way to say it, in our highly capable program. So we have single qualifying students. So sometimes there's a student who qualifies because their math scores indicate that they are a real mathematician, like they know stuff…We have students that are qualifying, singularly qualified through ELA or reading. And so then we have to make sure that we're providing them with supports.

While not explicitly required by Washington state law, Blockbridge offered highly capable services separately in math and reading. This was also an implementation of OR-rules, where students could qualify either in math or in reading, and would receive services specifically in the qualifying academic area(s).

First Grade Students Dual Qualified at 95th Percentile on the NNAT3

One refinement to the identification process was added in 2019-20, where first grade students could be dual qualified in both math and reading with a single 95th percentile score on the NNAT3 universal screener. A district leader explained:

> In grade one, if they score an 85 to a 94 they move on to assessment. If they score at the 95th percentile, we bring them straight into highly capable services in both subject areas, yes, just straight in for a dual qualification.

A program administrator commented:

> The NNAT3 was also added about three years ago as a single qualifying point. So that's all they have to have, if they're in first grade, is a 95 in the NNAT3 to qualify, they don't have to take the Iowa, so that was new about three to four years ago.

A different program administrator confirmed, “In the case of first graders if they happen to get above a 95% on the NNAT3 screener they don't have to take any more tests, they are in.”

A program administrator explained why this change was made:

> For those that scored 95th or above in first grade only, we grant them the highly capable designations in both reading and math without having to move on to the assessment phase. And that is a newer implementation. The reason why we did that was to identify a larger number of children that otherwise might have been missed. Typically an EL [English Learner/Multilingual] student.

Note that there was no local norm applied for this pathway. All students, including multilingual and low-income students, needed to score at the 95th percentile or higher on the NNAT3 to qualify via this pathway.

This was a controversial change with many teachers pointing out that a cognitive test does not guarantee academic readiness. A teacher commented, “We're qualifying with Naglieri and that's what's happening with first graders…If they get 95% or above on Naglieri they do not go to the Iowa always and that is a concern." Another teacher added:

> I do have some concerns about the possibility of qualifying for [accelerated self-contained] purely based on the nonverbal test. Because there are students who qualify based on the nonverbal test who do not have to show academic prowess at a level that is one grade level or sometimes more advanced than other students who are getting into [accelerated self-contained].

A different teacher recognized the value of the NNAT3 for identifying students:

> What I'm finding that is when the Naglieri came in, there were a lot more students who were qualified. I think that supported students who were, who are not really marginalized, but you know what I mean, as far as further away from that educational justice.

A program administrator pointed out that using the NNAT3 was important for identifying twice exceptional students with learning disabilities:

> I think the NNAT3 is pretty good at identifying kids regardless because it's not a reading test. So any dyslexia dysgraphia kind of things probably would be not really a factor in that particular test.

A district leader defended the practice:

> When we're identifying first grade, we're not actually identifying them as academically accomplished, we're identifying them as having academic potential, and that's where I go back to, it's not percent, they didn't get 95% on this test. They scored in the 95th percentile, which means that of all the people taking the test, they're in this top crust.

A different district leader reflected on this:

> Our youngest learners who we qualified in kind of scary way with the Naglieri Nonverbal Ability Test, which was a risk, also are performing very, very well. So they're performing at least as well as the students who took the more academic skills-based test of the Iowa. So whether that was a risky move or not, those students have performed.

Additional student performance data will be discussed in detail in Theme D.

Qualification via Multiple Pathways using OR-Rules at 95th Percentile

Blockbridge used several pathways for qualification. As described above, first graders were qualified directly with a 95th percentile score on the NNAT3. For all other pathways, one qualifying achievement score in a content domain was sufficient to qualify a student in that domain, and there were two opportunities for students in grades four and above to get a qualifying score in each achievement domain. This was an implementation of using OR-rules, where either this score or that score could qualify a student, and a student could qualify in one or

more domains, which was consistent with Washington state's law, "Multiple pathways for qualifications must be available and no single criterion may disqualify a student from identification" (Washington Administrative Code, 2019, para. 2). Notably, it was possible for students to qualify for services in both subjects during the universal screening process with sufficiently high scores; these students did not need to take the Iowa assessments in Phase 2 of the identification process which saved money as well as time. Recall the full identification decision process in Figure 4.1.

It is important to note that the first year of universal screening, 2017-18, used AND-rules as had been in common practice prior to that point; documents showed that there were five different qualification pathways available that year, but they each required students to have qualifying scores on at least two different assessments (95^{th} percentile for NNAT3, 95^{th} percentile for Iowa Math/Reading, 90^{th} percentile for TTCT), or to have slightly lower scores on two assessments (85^{th} percentile for TTCT, 90^{th} percentile for Iowa Math/Reading) combined with high scores on a third achievement measure (SBA, STAR, or Individual Reading Record). The first year of using OR-rules for qualification was in 2018-19.

Historical documents showed that Blockbridge conducted an extensive analysis in the fall of 2019 comparing the impact of potentially returning to using AND-based rules (requiring both an NNAT3 and an achievement score to qualify), versus qualifying students based on a single achievement score. They modeled four different scenarios, including the addition of local norms for multilingual and low-income students, and came to the conlusion that, "In every condition tested, the addition of the NNAT3 [negatively] changed the composition of the group. The effect was most notable in our low-income and EL [English learner] group." This analysis led to the decision to continue using the OR-rules that had been introduced the prior year, as well as to

continue using group-based local norms for low-income and multilingual students, which will be discussed in the next sub-theme.

Washington state's annual achievement test, the Smarter Balanced Assessment (SBA), was given to all students at the end of grade three and every year afterwards; if a student had qualifying SBA scores of 95th percentile or higher in a subject they were also automatically qualified in that domain and did not take any other assessments. A district leader explained, "For the Smarter Balanced Assessment, once they achieve grades four and above, we have testing results for those, and students can qualify at the 95th percentile or above."

All other students at all grade levels who moved on from universal screening and did not already have qualifying SBA scores on file were given the Iowa assessments in math and reading. A program administrator gave these details:

> Anybody else that gets an 85 or above will take the next test which is the Iowa in reading and math. Students who receive a 95 on either of those tests will be given a designation in whichever subject that they qualify in, or both if they qualify in both.

Another program administrator summarized the overall decision tree:

> So they take the Iowa assessment and then if the student has a 95% (or one of the local norms) on the Iowa then they qualify. Also if they have a 95% for an SBA test, then they can also qualify through SBA in whatever subject they have their 95 in.

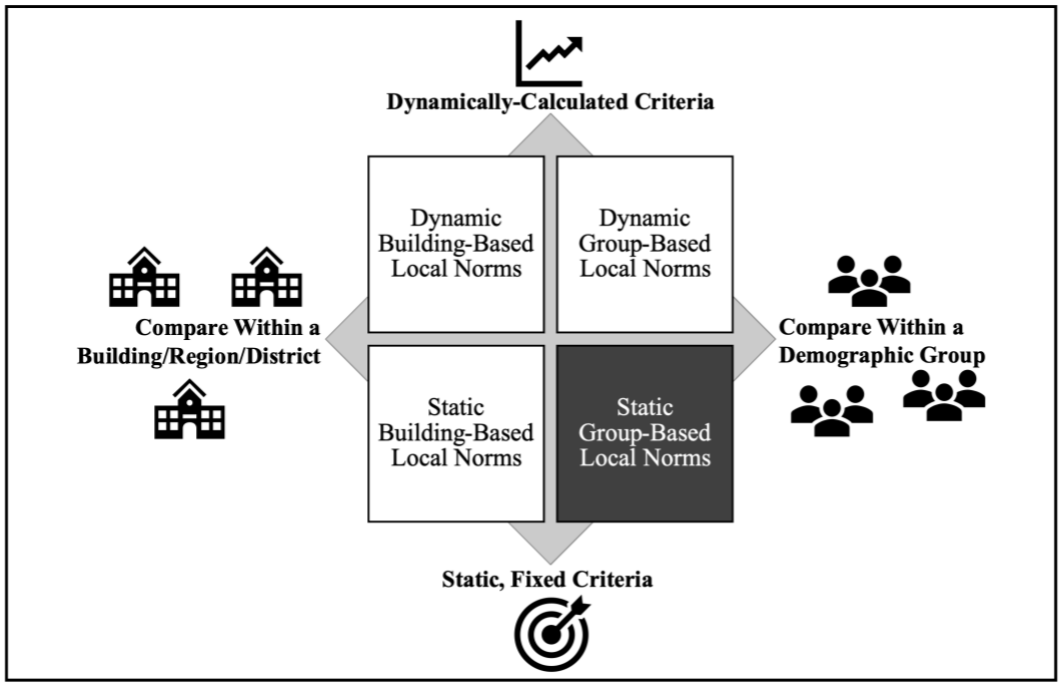
The qualifying threshold of 95th percentile was used throughout the study period, and was the historical criteria used by Blockbridge even before the equitable identification initiative began. Meeting minutes from 2018 reported the criteria used in the first year of universal screening in 2017-18 was, "95th percentile cut-off, same as previously, no lowering of standards."

Static, Group-Based Local Norms for Multilingual and Low-Income Students

Blockbridge implemented static, group-based local norms for English language learners and low-income students in 2018-19. Note that group-based local norms are calculated for a specific demographic group, as compared to building-based local norms which are calculated for all students in a particular school building, or sometimes for a geographic region or an entire school district. Furthermore, in comparison to examples in the literature that described dynamically-calculated local norms that might select the top 5% or 10% of students in any

Figure 4.2

The Four Different Types of Local Norms; Blockbridge Used Static, Group-Based Local Norms



category regardless of their actual achievement level (Peters, Rambo-Hernandez, et al., 2019), Blockbridge used a static local norm similar to that used in Florida's Plan B system as described by Card & Guiliano (2016). Blockbridge set fixed, lower criteria for active multilingual learners and low-income students on a national norm scale, which is an example of a static, group-based local norm. See Figure 4.2 for a graphic illustrating the four main types of local norms.

A district leader elaborated on the local norming process used in Blockbridge:

> We also have local norming or pseudo-local norming for our students who are at that point in time qualified for active multilingual or English learner services or if they qualify at that point in time for free/reduced lunch. So if they are low income, or multilingual, at that point in time, they can qualify at the 88th or above, they can qualify for services as well.

A program administrator clarified the specific static criteria used for both English language learners and low-income students, "We use 88% on the Iowa, 85% on the SBA." The different percentage used for the SBA was because the SBA was not able to report a result at the 88th percentile.

The main theory of action behind using local norms was to account for the achievement gap, opportunity gap, differences in Opportunity to Learn (Carman et al., 2018; Peters & Engerrand, 2016), and perceived cultural biases in the tests being used. A district leader explained the rationale behind why local norms were added to the process:

> They've been faced with some barriers, whether it's not having great access to the language that's used in school, so in our case English, or there's some financial impacts that don't give you access to early reading or early math or any type of early schooling. If you look at those two things as barriers, and those students are still achieving at percentiles, not percentages (people keep calling it percentages it's percentiles)—they're still achieving at these very high percentiles, they must have a ton of potential because they started 300 yards back on a 200 yard race, and then they are just below. If we're looking at potential, they must have a ton of potential.

A program administrator confirmed:

> We also use some local norms to bring in students who are ELL [multilingual] or low income to try to make up for the fact that maybe they didn't have preschool, maybe they're just learning the language. So they have a different threshold to get into the program.

A district leader reflected on the impact that adding local norms had on the Blockbridge's equity goals by saying, "Universal screening was huge, but universal screening with local norming was what made all the difference. It wasn't enough to just universally screen." They later continued:

> I hardly ever get challenged on it [local norms]. Especially because I have the numbers that show that it's not like we have this huge influx of kids that qualify and now that I have the academic proof that they do fine. Students who are multilingual…because our tests are not culturally responsive, this is a way for us to be as culturally responsive as we can.

The information about local norms came primarily from district leaders, program administrators, and the document record; this was not a widely discussed aspect of Blockbridge's identification system.

Ensuring that Every Single Child was Considered

Blockbridge put significant effort into catching all of the special situations to ensure that every single student was fairly considered. This manifested in multiple ways, through offering referrals alongside universal screening, including every student in the process, screening students newly enrolled in the district, offering makeup testing opportunities, providing an appeal and portfolio review process, and actively seeking parent permission to test and place students into services.

For the first two years of the universal screening process, the referral process was not used for elementary aged students, because every student in grades K-8 was universally screened in 2017-18, and every student in grades K-5 was screened the following year. Starting in 2018-19, Blockbridge re-instituted the referral process for grade levels not being universally screened, which became the ongoing practice. A program administrator explained how it worked:

> We have a form on our website. Anybody can refer the student: it can be a teacher, it can be the parent, it can be the kid...If the student is referred, then if they're not the parent, [we] will need to get permission from the parent to test them. But anybody can refer and once they're referred then they're on the radar and we ask if the parent wants to and we test them.

They continued to add that usually referrals come from, “Mostly parents. It's not that many teachers, there's a few teachers that will do it but mostly parents.” A different program administrator elaborated:

> We’ll send out a mass email to families in the district of students who are not dual qualified and that would be for grades first through seventh, that we would send out that mass communication and that would be to notify them of the referral process, that the referral window is open...We allow for anybody, a community member, a student could even refer themselves, teachers can refer, but the vast majority of referrals do come from parents.

Although the referral process was available, most students were identified through the universal screening process. For example, the number of referrals decreased 32% between 2021 and 2023.

If students were absent during universal screening, makeups were offered multiple times, as described by a program administrator:

> Blockbridge is incredibly generous in allowing makeup testing. We have proctors that are trained, paid proctors that go out to the schools to administer makeup tests…So makeup testing would be offered for students who are eligible to test and for whatever reason missed their first round of testing during the fall. And we do that again because we really want to make sure that we are providing the student every opportunity to be identified if it is something that will benefit the child.

Meeting minutes in December 2019 reported that the program administrators at that time were, "Chasing down kids who were sick or missed the test, 40-50 kids left."

If a student transferred into Blockbridge from a different school district, the program administrators would consider the student's portfolio from their prior school. A program administrator described the criteria used in this situation:

> If they have been in a HiCap program or if they have CogAT data, Iowa data, NNAT3 data, something that we are familiar with. SBA testing is fine. Other state tests are fine. Then we will take those and transfer them in as long as they meet the threshold of 95%…We have probably a dozen or more every year that transfer.

If prior test data was not available, Blockbridge extended universal screening to include all students newly enrolled in the school district between second and seventh grades. A program administrator described this process:

> If they came in before our makeups, if they were in the district before January 1, they would be considered new to [Blockbridge] and we would screen them. If they come in after that, then sometimes we'll do a summer testing as well, or if not, then we'll catch them again in the fall knowing that they are new to [Blockbridge] from the previous year. So they will be tested at some point in the first year of being in the district.

A district leader confirmed, “In any other grades 2, 3, 4, 6 and 7, they will also get universally screened when they enter [Blockbridge] and they are provided that screening with the Naglieri Nonverbal Ability Test.”

Blockbridge also began offering highly capable assessment to students who lived in the school district, but were not currently enrolled in public school. A program administrator noted, “We were not, I believe, at the beginning testing students served in homeschool or private school placements, but that was something that we also, quote unquote, fixed.”

Blockbridge also provided an appeal process for final qualification decisions; however there was no appeal process for universal screening. A program administrator explained how that worked:

> We do, by law, you need to provide an opportunity for families to appeal and that's certainly up to any family if they choose to appeal…We have a form readily available online that they complete. Sometimes they'll include additional information and then there's a team, the MST, the multidisciplinary selection team, that's what it's called, the MST that will meet and review these different applications. Sometimes there's enough reason to reevaluate, occasionally something might come up that necessitates a retest for a particular student.

A different program administrator added more details:

> Once the results are out, then parents get a letter. The letter has their scores for both the screener and the assessment tests. And then it also tells them how they would appeal...There's three or four options that are: something went wrong, like you didn't accommodate my student with their 504 or their IEP, or you have their birthdate wrong, or their name was wrong, or I don't know, other things like that. And then we also give the option of portfolio review, which is I want you to look at the data again and

> reevaluate my student based on everything else that you have. So they can write a letter …and we'll relook at all the scores for everybody that appealed. Read the letters, see what happened. In some cases, it's something did happen like we had one case where the student had a diabetic episode…where the kid didn't take their ADHD medication this morning…We've retested several kids this year for various reasons. They got a diagnosis after they took the test and now they have glasses.

The number of appeals steadily dropped over the study period. In 2021 there were 108 appeals filed; in 2023 there were only 56, a decrease of 48%.

Blockbridge also made several improvements to streamline the parent permission process and reduce any barriers it might present. Washington state law required parent/guardian permission to do any testing that was not universal, as well as required parent/guardian permission to place a student into highly capable services. A program administrator elaborated:

> We don't need permission to screen students. We do need permission to assess, so there is sometimes a problem in their getting permission to test and some students don't make it from screening to assessment because we didn't get permission, but we're pretty adamant. We've made phone calls, we talk to teachers, we talk to the schools, they talk to the parents, so we try pretty hard to get them permission to take that test.

A district leader remarked:

> I think we continue to learn but I think my biggest learning is that if you just send out emails, you are missing a large portion of our multilingual community, especially those that we are really trying to identify, so our underrepresented populations or marginalized populations who are low income or who are underrepresented multilingual populations don't read email consistently. Some do, but some don't. So to truly get those students to

> either accept services, or to accept that they screened in and give permission to take the test, warrants a phone call.

Blockbridge put significant effort into securing permission from parents. A program administrator explained:

> Sometimes the school will call the parents as well. And say I see that you're on the list of students that we should test but we see that we don't have permission from you. Do you want your student to test? That personal call from the school will sometimes do it. We made a special effort this year to call underrepresented groups and families to say your student has qualified to take this test and they have not responded, would you like them to take the test? And actually most of them said yes. In some cases, that was a call from a Spanish speaker because they didn't understand any of the other communications that we had. So when somebody calls them and speaks in their language, then they will actually respond and say, Yeah, sure. Test my kid.

A district leader commented on how they had previously believed that the phone call needed to be made by a teacher or principal that was known to the family, "I always thought it had to be someone from the school making, reaching out and I don't think that mattered. I don't know why I thought that it had to be someone really close." They continued:

> [Administrative assistant] made those phone calls and the parent may have had a follow up question, but they gave permission almost every time. And [they] didn't know any of those people. So just having someone reach out and offer for their permission to test, I would say 98% of those people gave that permission over the phone. So that was something we will want to continue in the future…We targeted a certain population because there were way too many for us to go back and phone call all of them. But we

> targeted our multilingual and our low-income families to make those personal phone calls. I think that's a huge learning.

Not every family received a personalized phone call but they did receive several reminders, as described by this program administrator:

> We send out robocalls, which are phone call, text, and email saying your student has qualified to take the next test and we'll do that several times. And that's about all we can do. If they don't respond, they don't respond.

Another important learning to maximize the number of students who received parent/guardian permission was asking for permission to be assessed and permission for placement at the same time, at the beginning of the process, as described by a program administrator:

> Things are much better now that we don't have to ask for permission to accept designations though. So that's one step that we got rid of. Used to be we would ask for permission to test and then afterwards we would ask for permission to give you a designation if you pass that test. Now we're asking once, we're asking both questions in one place. So do you give us permission to give your student a test and do you accept whatever designation that student is granted once they take that test. They do one thing and we don't have to ask a second time.

That way, even if there was no response to the request for permission to join a self-contained classroom, there was at least parent permission on file to serve the student in their neighborhood school. Based on district data from the 2021-22 school year for students in grades 1-7, of the students who had qualified for highly capable services, a total of four students never responded to a request for placement, and two students refused highly capable services. An additional three students left the district after qualifying for services. There were, however, many more students

whose parents/guardians never responded to requests for permission earlier in the process, at the screening or assessment stage.

Large-Scale, Complex Identification Process with Continual Improvement

Blockbridge's highly capable identification process was complex and handled tremendous scale. A district leader described the complexity:

> There are very few people in our district who understand the complexity of the highly capable realm. I wish more did. But truly even we, when we sit down…and talk through all of the different steps that we have, we even realize that there's a lot of complexity to what we do, and we have to remind ourselves, now, what do we do? Oh, nope, we do that first. Oh, no, we go this way. But that's because of all the multiple pathways that we will identify students and all of the multiple pathways that we screen and then we assess, and then we give every student an opportunity to qualify or to demonstrate that they may have the proficiency to accelerate their learning.

They further described the challenge of scale:

> How do you administer all of the assessments, how do you coordinate so many thousands of students, and how do you make that happen in as efficient and effective a method possible while following all the state laws and making sure that all the parents feel that their needs are being taken care of, along with staff needs, along with building needs and principals know what's going on.

A program administrator described the scope of their job:

> Look for the students who should be tested based on our policies for universal screening in various grades and universal screening of new to Blockbridge students. Find those students and work with the schools, work with the testing companies, and the proctors to

> get those students screened. And then analyze the screening data, take that screening data, put them into the next level of testing for the Iowa, work to get that scheduled and then take all the data in the end and determine who has qualified based on all of that data.

Communicating this complex system to families was a big part of the program administration's work, as described by a program administrator:

> Before we start anything at all sometime around middle of September, we send out an email, robocall, texts, the whole bit. We send it out to all families in grades one through seven who do not have a dual designation telling them that they can refer their student and this is how they should do it. After we do the initial screening, we will go and send another email to families saying you need to give us permission if you want us to assess your student if you haven't already. And we send another one to students who are single qualified saying we would like to test you in the second subject, but we need your permission. So give us that permission. And then after we've qualified the student…then we send another one saying now you've qualified so now you need to tell us if you want to be in a [self-contained highly capable] classroom or not. And all of these, I would say each one of those are sent at least twice, maybe more depending on what the numbers look like, did anybody respond or not?

The program administrators were continually improving their approaches, which was noticed by this principal, "I know that they are piloting a new math assessment, so I feel like if anything, they're improving it and fine tuning it." A district leader also commented:

> What I've come to learn is that no matter how much we communicate, it is still a complicated process. And I don't think the complexity can be taken away. In fact, we kind of add to that complexity by fine tuning our process.

That constant fine-tuning of the process was evident in much of the historical document evidence. For instance, meeting minutes of the Highly Capable Advisory Team during the 2018-19 school year mentioned, “We added the second screening data point this year. Last year we only had Naglieri; but this year we had two data points for each student.” Other meeting minutes that same year captured, “One try of a new eligibility process won’t solve everything immediately. We’ll analyze the data, make adjustments, and have the courage to move forward. Our district has come a long way in a short period of time.” A district leader reflected on the multi-layered approach that Blockbridge now uses:

> The tests have always been made in a biased way just because of who's designing the tests. So having a universal screening process, having the Naglieri being a part of the work that we do, having still the ability for families to say I'd like to have my student be considered in a different way once the initial screening is done is important. There's not just one qualifying thing that enables a student to be served with highly capable services, so it's now a multi-layered approach.

Theme B – Service Practices

Blockbridge offered a variety of highly capable services for students with different needs and at different grade levels. Kindergarten and first grade students were served in their neighborhood elementary school with “holistic services.” Dual-qualified students, who qualified in both math and reading, were typically served in accelerated self-contained classrooms in grades 2-5, which may have required moving to a different school; if so, full transportation was provided. These elementary self-contained classrooms accelerated reading by one grade level, and compacted math 2-3 grade levels, preparing students to enter high school algebra in sixth grade. Single-qualified students (and any dual-qualified students who did not wish to change schools) were served in their neighborhood elementary school via differentiation, cluster

grouping, online math classes, and/or walk-to-math, where students walked to a different level math classroom. Overall, math acceleration was a priority in service offerings, and was mentioned much more frequently than services in reading or English/Language Arts. Most

Table 4.2

Frequency Table for Theme B – Service Practices

Sub-Theme	Number of Participants	Coded Segments	Supporting Documents
Expansion and Logistical Challenges	13	41	Wa We Da Hi Ad Pa
Holistic in Kindergarten and Grade 1	8	14	We Hi Ad Pa
Accelerated Self-Contained Program	26	156	We Hi Ad Pa
Differentiation and Cluster Grouping	21	38	We Hi Ad Pa
Math Acceleration was a Priority	24	61	We Hi Ad Pa
Walk to Math and Online Math	24	39	We Pa
Backfilling into Self-Contained	12	17	Pa
Variability Across Schools/Teachers	27	103	Ad Pa

Note. Document categories are Washington state statistical data (Wa), district website (We), district-provided statistical data (Da), district-provided historical documentation (Hi), advisory team meeting minutes (Ad), and parent group meeting minutes (Pa).

notable was that Blockbridge did not employ waitlists or have space constraints for their self-contained classrooms, creating more classrooms as needed to serve all dual qualified students, which resulted in significant program expansion across many schools. Every student, whether dual or single qualified was typically provided highly capable services starting the next school year after they qualified. There was a significant amount of variability in service offerings between different buildings and even between teachers, and not all services were available in all places. Each of these findings is further discussed in the following subthemes, and summarized in Table 4.2.

Significant Program Expansion and Logistical Challenges

Blockbridge did not employ waitlists or impose space constraints; every qualified student was provided services. This caused tremendous program expansion, which was most keenly felt when additional self-contained classrooms needed to be created to accommodate more students, which happened both within schools already offering self-contained classrooms, as well as opening new self-contained classrooms in additional elementary schools. A district leader described the growth and resulting shift in priorities:

> Before, we were only qualifying 10% of our students. So that was a small slice and they're going to be okay, because they're smart. So we don't need to worry about how we're going to help them. Now guess what, 25% of our student body is highly capable because we are using universal screeners and we're identifying students who also are twice exceptional or who are also multilingual learners. So now 25% of the kids, that's a lot, that's actually still not the majority, but that's still enough. And it might be the tipping point where we're going to have to say, "You know what, we're going [to] need to reprioritize." But before the priority was, let's do something where more of our kids are going to benefit as opposed to a small slice.

A different district leader commented that "There are schools that have anywhere from 30 to 60% of their kids qualifying." However, another district leader distinguished between single-subject qualified students and dual-qualified students in accelerated classrooms:

> [People say] we have more than 50% of our school is highly capable. Well then that steamrolls and "50% of our school is in [accelerated self-contained]" is what comes out of that. Well, that's not true.

Per district documents and state enrollment reporting, overall 28% of the district enrollment in the 2022-23 school year qualified for some type of highly capable services; about 60% of

qualified highly capable students were served in elementary self-contained classrooms and 40% of qualified students were served in their neighborhood school classrooms in other ways.

Creating more self-contained accelerated classrooms as more students qualified was a significant logistical challenge, especially in the context of district wide space limitations. A district leader noted that, “Lately, we've been doing some moving students from one school to another…as we're trying to right size our schools and so certainly that has been impactful.” A different district leader elaborated:

> The problem is right now we're at a point where are we going to have to do musical chairs with programs again, and that's not fair for [accelerated self-contained] program to be the one that gets moved all the time. I am okay with three of those moves because they're back to home schools. One of the moves I'm not as okay with. However, [Elementary School] needs some relief...If we can keep them back at their home schools, how is that ever a bad thing?…But most of their home schools don't have room for them.

A third district leader described the challenges that arose with moving self-contained classrooms between schools:

> The cabinet is aware of the growing population of our students who are highly capable. We've needed to find or determine locations for [accelerated self-contained classrooms]…. So that creates all sorts of implications…Because if we have, for example, more students qualifying in a neighborhood school than in the past, it might mean then that that school can have its own [accelerated self-contained] classroom. But then you're like, but wait a minute, we've also got kids from…school A already over at this other building that are [also] school A kids. So we've now just broken up the neighborhood…it's a big mess in that regard.

A fourth district leader added:

> With more universal screening…we've grown the number of students and we've been able to serve more students either in their neighborhood school, which would be my first choice, or at least got them closer to their neighborhood school. And so that I think has been helpful from that perspective for students and for buildings and families for everybody.

The degree of logistical complexity involved in providing accelerated self-contained classrooms for all students who qualified was massive, and was a major stress point specifically at the district leadership level. A district leader commented:

> I think it's probably more [like] 75% people know that it's the right thing to do. We have to do right by our students. This is one of the ways that we are serving each and every child. And then 25% of people who are like yeah, and the next time that we have to talk about HiCap, I think I want to pluck out my eyeball because it's a tough conversation, right? It's an energy drain in that regard…it's the operation side of HiCap that that wears on people, as opposed to the reason for HiCap. People understand it, they know it, but then…the logistics are hard, because of the model that we have. I mean, if we had a model that every kid was served in their neighborhood school, it'd be different. But that's not the model.

Another district leader summed it up as, "It's the system wideness of it that makes it a challenge."

Students in Kindergarten and First Grade Received Holistic Services

Students who were identified in their kindergarten year received "holistic services" for the remainder of kindergarten and first grade. There was no specific math or reading designation at these grade levels. The holistic service was implemented by Blockbridge primarily as a watch

list, with full highly capable services waiting until second grade. A program administrator explained:

> We have holistic learners, which are for identified students that screen in kindergarten and receive that 85th percentile or above, and are identified as holistic learners. Yet as I said before, formal services do not begin until second grade.

A district leader concurred:

> We create a list of students who basically are on a watch list, and we say these students may have highly capable tendencies, and that is the sum total of what we do for kindergarten students.

A different program administrator offered, "The reason for screening kindergarten students is state law. We don't actually begin formal services until second grade."

There were very few comments about the substance of what holistic services looked like in the classroom. A teacher commented, "Kindergarteners—it is, what do they call it, that they're just watching them." A district leader offered this anecdote:

> We're holistic in first grade, which I've seen first grade teachers come up with some really amazing things for kids to do, because they haven't been told it has to be one or the other [math or reading]. And I saw them especially when we got the new science kits, I saw them doing amazing things with kids that they were kind of creating, because they had kids that were holistic and they had to share with parents when we used to have the plans. But then they were like, well, we kind of let all the kids do it.

Accelerated, Self-Contained Classrooms for Dual Qualified Students

Self-contained classrooms were available for dual-qualified students in grades 2-5. These self-contained classrooms featured accelerated curriculum, with reading accelerated a full grade

level, and math compacted and accelerated 2-3 grade levels over the course of elementary school, so that continuing students were ready to enter high school algebra as sixth graders. A district leader explained the main differences of the self-contained classrooms:

> I think the differences right now are that we accelerate services in an elementary advanced program classroom and we don't accelerate services in a gen ed classroom. The other difference would be the makeup of the classroom and that is really dependent on the building.

A self-contained classroom teacher concurred, “The intent of the [accelerated self-contained] program is to teach an academically advanced content one or two grade levels advanced and also at an accelerated pace.” A fourth grade self-contained teacher agreed, “Basically, you're just teaching sixth grade content for math, and fifth grade writing.” A program administrator detailed the specific math acceleration sequence provided in the self-contained classrooms:

> In second grade they get third grade math, and in third grade they get fourth grade math. In fourth grade, they jump to sixth grade math and then they're double jumped from there on out…so our sixth graders, a lot of the sixth graders are taking algebra.

In addition to acceleration, there was evidence of differentiation and flexible approaches being used in the accelerated self-contained classrooms. A self-contained teacher remarked, "They just show me they could do a couple and they do that instead of the textbook. So half could be doing that and not really the textbook. They just have to prove [it]." Another self-contained teacher offered this anecdote:

> These four boys started writing a story together…And it's the same story but they're writing from their own character's perspective. They asked for 10 or 15 minutes of the language arts block which turned into 20 and now more kids want to do it and I'm like, that is what they need to be doing.

A principal described observing one of their self-contained teachers in the classroom:

> I was able to watch one of my teachers teach the curriculum this week, and she was doing it one grade level above…And it was amazing because the skill, the learning objective was for them to make inferences from the text. And they were doing it throughout the lesson. It was beautiful…Those kids were, their needs were definitely met in that moment, right. I can't say that I can encourage that in another classroom, where you have students who are reading maybe two to three grade levels below.

A district leader commented on why the self-contained model was needed:

> Just the ability to differentiate if they were in a traditional classroom, I think is much more difficult. So I just think that providing the program in the self-contained model, it seems reasonable because there's less to differentiate.

A self-contained teacher summed up their thoughts by saying, “I think the [accelerated self-contained] program does an exceptional job serving our dual qualified students.”

However, there were downsides to the self-contained model, as explained by this district leader:

> I might also have to go to a different school than my neighborhood school. So there are some of the drawbacks to a self-contained room...Depending upon the school community, depending upon where my program is located, and the way in which the school has embraced the program, I might not actually be a part of the school. There are some schools that have [accelerated self-contained] programs in them where…let's say 75% of the students are being bussed in to that particular school campus because that's where the [accelerated self-contained] program is that will serve the schools that are around it.

One important note was that special education services were maintained for students in the self-contained program, as described by this program administrator:

> I actually had a parent call yesterday who was concerned about her student's IEP, and yet this child has been accepted into the self-contained class for highly capable second through fifth grade. And she was really concerned that he may lose his IEP accommodations that are written into the IEP, those services would no longer be provided if they accepted [accelerated self-contained] for him, and that is not the case, of course. IEPs, that's law, we're going to go ahead and follow that. It's interesting that not everybody understands that, that they think it's an either or.

The self-contained classroom model was perceived to be the dominant service model for highly capable services in Blockbridge, and was mentioned during interviews and focus groups in various ways resulting in 156 coded segments with this concept; the only other keyword that was mentioned this frequently across the entire dataset was “math.” Many interview and focus group participants closely associated the accelerated self-contained classrooms with the highly capable program, and often did not mention any other forms of highly capable services available at Blockbridge. This focus on highly capable services as essentially synonymous with the self-contained classroom model was pervasive. A teacher recounted their experience in a community forum:

> I sat with parents on a forum when we did our whole district wide mission vision values…and sat with parents who had no idea the four types of programs that were available in our school district. They only knew about one. They knew about [accelerated self-contained] program. They didn't know about any of the others. They knew about [accelerated self-contained] program.

Differentiation and Cluster Grouping Available, But Inconsistently Implemented

Students who qualified for highly capable services in only one subject area, math or reading, or who elected not to enter a self-contained classroom, were served in their neighborhood elementary school via differentiation. This option was clearly described on the district website, mentioning using formative assessments, presenting lessons with greater depth or breadth, as well as providing "small-group differentiated instruction." A program administrator gave these details:

> In-class services, which would be teacher differentiation within the general ed classroom for either single qualified students, or occasionally dual qualified students that choose to stay in the gen ed classroom…that tends to be largely teacher dependent.

Some schools went further and cluster-grouped highly qualified students into the same classroom, as described by this teacher:

> If a child is HiCap…in our classroom, so in our school, we cluster and there's been teachers who've said yes, yes, yes. And we've gone through training to support the differentiation in the HiCap. But it's up to us to do that work.

Another teacher described the practice in their school:

> We cluster, so when kids are identified solely in math, they are going to be in my room. And then kids who are solely in reading, tend to be in the other teacher's…there you're going to see that acceleration in that reading piece as well. That's what we've been doing at our school.

Although all elementary schools technically offered differentiation for highly capable students, implementation varied in many ways across sites and by teacher. As this teacher noted:

> At some schools, they receive, in some classrooms they receive incredible differentiated instruction at their advanced level, whereas in other classrooms, even at the same school

> or across the district get arguably no highly capable education. And that is problematic in my opinion, because not all children are getting the same opportunity.

A self-contained teacher also expressed concern about differentiation services, “It worries me that there is not a consistent approach to those single qualifiers across the district.” This district leader described the practices of a third grade teacher:

> [She] was phenomenal, the one that the parents were like, we have to have her because she was okay with knowing fourth grade standards because she had taught sixth and fifth and third so she knew fourth. She pulled her kids in small groups already, she had conditions in her room that would fit your MTSS Tier 1 everybody, you will get small group and it will be what you need. She was very targeted in her teaching points. So then her kids were accustomed, you pull up in your small group, you rotate, you play games.

A district leader told about a different school, “Teachers are taking different pockets of kids so they can work with a small intentional group, which is really good for the kids.”

The degree of difference in instructional approaches that surfaced in one focus group of teachers generated a mildly heated argument, where one teacher told about an innovative differentiation strategy they had developed, and a colleague challenged, “So you've crafted an enrichment to meet the needs of your single qualified highly capable students.” Other focus group participants chimed in with, “Yes, yes,” “Fascinating,” and “Which is not typical.” The original speaker continued:

> Well, it's also not your brief. You're a gen ed teacher. That's not your job. And I love you for doing it, but at the same time, I'm pissed that it's not happening in three other buildings that are near you. Because those families in those three other buildings deserve the same, but those educators also deserve their nights off at home and sleeping with their family and relaxing that you're not getting.

The implication was that it was not the job of a general education teacher to provide this degree of differentiation for highly capable students, despite the fact that it was the district's stated service plan for these students.

Many participants echoed that it was very challenging to provide differentiation and much of the time it simply did not happen. This teacher described the challenges:

> We're all really good at defining what differentiation is, but how do we actually do it? And that's where we start to scratch our head. What does it actually look like? How do I actually find time to do it? How do I prepare for it? And does it really take more time?

A district leader admitted that providing differentiation in the neighborhood schools was still a work in progress, saying, “Whether it's students that have singly qualified or students…who are dually qualified [and] have chosen to stay in the neighborhood school. I think we've got work to do there.” A second district leader said:

> I think that it's often easier and it probably doesn't sound great to say, but I think it's often easier for a teacher to modify their curriculum lower than it is to modify it higher. In other words, If I'm a fourth grade teacher, it's going to be easier for me to do a second grade math lesson. But I might not understand the sixth grade math lesson.

A principal mentioned, “Even with the MTSS [multi tier systems of support] rollout, even with me intentionally placing intervention blocks during the school day, I don’t think my gen ed classroom teachers know how to use it...It is hard.” A teacher remarked, “We all know what do we do when they’re struggling, but what do we do when they’re ahead?” Another district leader summed up their experience, saying there was not, “Enough understanding or as much understanding probably as it could have to really effectively differentiate when they had single qualifiers in their classroom.” They continued, “I feel like that's the area where we struggled the most.”

Math Acceleration was a Priority

Of all the topics surrounding curriculum and instruction for highly capable students, math was by far the most discussed. There were 148 coded segments that mentioned the keyword "math" in some context; alongside self-contained classrooms (frequency=149), these were the most frequent concepts mentioned in the entire dataset. In comparison, even the combination of the five keywords "reading," "ELA," "literacy," "writing," and "English" only yielded 102 coded segments. Blockbridge provided math acceleration in multiple ways, but the end goal was for students to leave elementary school prepared to take high school algebra in sixth grade. There was no stated acceleration goal for reading. A district leader explained:

> I have always been a little more stringent with the math than I have the reading because you got to stay on track with that math or kids get really, really behind…it is the most important to our community. And I can be pretty honest with that. That's the one that people care about the most. I do occasionally get asked about what are we doing for reading, but it's much less important to the large body of the community. And kids often can make so many gains in reading by reading on their own.

This teacher concurred that some of the focus on math acceleration came from the parent community:

> The big push that families advocated for, all they wanted was for their kid to get early access to algebra. That was it. They just wanted their kids to early place in algebra. That was [what] my principal said, [it] doesn't matter what happens during COVID. You have to get these kids ready for algebra.

A different district leader explained their thinking:

> We have parents who have master's degrees or doctor degrees or an engineer, we have this because of the job market around here. We have these parents that their kids are

> being exposed to math much earlier and in much more intense ways than maybe you would see if we just did a clean cross section of the entire US. I do remember being in conversations with students or parents where they're like, we're here on a work visa. If we were back in our home country, my child would be here in math, and I can't afford for my child, if we end up going back, to go there and be in remedial math, and so we need them to have the math. So I think that's forced some of it.

Another district leader also supported their reasoning for supporting advanced math in the context of an international community:

> Number one, I don't think it's advanced to be in algebra in eighth grade. I think that in many countries around the world, that's just a given…But there's so many kids ready in sixth grade. There's nothing magical about algebra in and of itself. That trajectory…gets you into algebra/trig by eighth grade. And for many students, that's not unreasonable.

Several district leaders commented on the impact that math has on future college choices, as voiced by this district leader:

> Algebra is important for kids by the time they hit eighth grade...as far as college wise, it puts them on a different track. I know we've spent a lot of time talking about math because it's essential for kids to be on the right path towards college.

Another district leader concurred:

> Math is so critical, because of the access it creates…algebra in particular, has been used as a barrier as a reason you can't access other things. And I think because of our work around highly capable services, a place that it plays [out] is that we've begun to see that when we raise the standard for students around math, they rise up to that standard and they can be successful, so I think that's one place that I put higher emphasis around the math access.

Highly capable math students are registered for accelerated math in middle school automatically, as this district leader described:

> We can get them pre-algebra in fourth and fifth grade, so students getting highly capable services for math now walk into algebra without a question. We've just said, if you've done this, you're in algebra, which if you're taking algebra in sixth grade, then you just kind of carry out the sequence and this becomes pretty high-level math when you get up to the high school…if you start looking out and they're in calculus. The amount of math that our kids are taking is pretty phenomenal.

All middle schools in the district offered in-person Algebra, Geometry, and Algebra 2/Trigonometry courses to support advanced math students.

However, single-qualified math students did not always have access to accelerated math depending on their elementary school. This was especially true before fourth grade, when the online accelerated math program became available in all schools, which will be discussed further in the next subtheme. This district leader explained:

> One of the things that was critical to me as I think about highly capable students getting highly capable services is math becomes a pretty big issue and particularly in elementary and students not being given access to math, or it's spotty access to math. We can do it at this school, students might get their advanced math, at another school they may not.

Another district leader surfaced challenges in properly identifying math-only students, as well as providing math-only highly capable services:

> I don't know if we really well served all our math-only qualifiers because of second language, I think, not all kids were able to get into both the math and the reading and writing, the math and literacy. Then sometimes because of maybe dyslexia, dysgraphia, or a second language, were perhaps processing…where there were challenges at the time

> of assessment. I think we had some math-only students who then maybe didn't receive services in a way that they could have if they had been in the [self-contained] program itself, but I think we continue to work on that.

Not all highly capable math students elected to take algebra in sixth grade. This district administrator described the thought process when a student entered highly capable services in the sixth grade:

> So if a student qualifies…to begin in sixth grade, and they've been taking fifth grade math as a fifth grader, we're not going to just throw them into algebra. Because again, individual student—are we really going to skip a kid three grades ahead? Even if they're very motivated, we want to make sure that we're recognizing their needs and we don't have gaps. So ideally, a student in that situation will be placed in basically a seventh and eighth grade math class in sixth grade, sort of a pre-algebra, making them more prepared for algebra the following year, which is still two years ahead. And a kiddo that's testing at that level probably would benefit from that.

Although continuing highly capable math students were automatically placed in algebra in sixth grade, parents could opt the student out, and have them repeat the pre-algebra curriculum in sixth grade instead. As a program administrator explained, “Parents ultimately have the right to say no, algebra doesn't seem like the right placement.”

Staffing to support accelerated math was also mentioned as a concern. A district leader commented:

> I need to make sure whoever is teaching fifth grade, do they know the math? Can they teach that math? And that those are some challenging pieces. Or did they just get thrust into fifth grade and not realizing that's pre-algebra, and do you have the skills to teach pre-algebra?

The Blockbridge district website also detailed summer math offerings that would allow any student to accelerate their math pathway even further, even if they hadn't qualified for highly capable status in math; summer math courses were available for fifth grade math through Algebra 2/Trigonometry and offered a full year of math credit for successful summer completion. District leaders and program administrators expressed pride in the breadth of math acceleration available throughout the district. As this district leader summarized, "I think we've done a decent job with the math. We've figured out how to accelerate their math experience so that they're getting advanced level math."

Walk to Math or Online Math Offered District-Wide for Fourth and Fifth Grade

One way that accelerated math was offered outside the self-contained classrooms was via a district-wide accelerated math program for fourth and fifth grade students which started in the 2020-21 school year; during most of this school year of the pandemic, Blockbridge had been conducting remote school which made creating a new online math offering more logistically straightforward. The online program offered a replacement math course for math-qualified highly capable students in every elementary school in those grade levels, so they could access accelerated math prior to the middle school transition. This created a path to algebra in sixth grade for math-qualified students who began accelerated math programming by the beginning of fifth grade in any school. This program administrator described how it worked:

> In fourth and fifth grade, students that are identified in math are offered a variety of options…one of the options that's provided is online HiCap math with Blockbridge teachers. They meet regularly with those teachers. It's quite self-directed, and yet, it seems to be a successful program overall for those kids.

Even with the online math program with district-hired math teachers, there were differences across buildings, as another program administrator explained:

> They have actual [Blockbridge] teachers that meet with them multiple times a week but it's all online from some location in their school that the school has figured out. Sometimes they put them in a foyer or they will put them in a separate classroom or the cafeteria, or something like that for those classes.

This teacher confirmed, “At some of those schools, they have the FTE [full time equivalent staffing] to hire a person to be in a room with them to help them if they need it. And at some schools they don't.”

If a fourth or fifth grade math-qualified student was at a school that offered accelerated self-contained classrooms, and there was space in that classroom, sometimes the school had the student walk to the self-contained classroom during math instead of doing the online math program. This program administrator explained:

> There's also walk-to-math so if you have [accelerated self-contained] at the site. Some of those math identified kids in fourth and fifth grade will be able to walk-to-math in the [accelerated self-contained] classroom.

A small number of schools also offered walk-to-math for their younger grade elementary students. This district leader explained how it happened at one elementary school:

> They usually have enough single qualified math students only that they have one of their gen ed teachers teach math for those HiCap students, and they then have to agree that math is going to be done at this time every day. And so those kids will go to that classroom for math.

A principal explained how walk to math happened at their school, “We have our handful of second graders who qualified in math and they're being served by one of the teachers, they do a

walk-to-math." However, many other schools did not provide this service for younger single-qualified math students. As this teacher explained, 'We don't do walk to math, only fifth grade does that."

Although the online math and walk-to-math programs provided an accelerated pathway in all schools for every math-qualified fourth and fifth grader, teachers recognized its limitations. As this self-contained teacher explained:

> It is a different experience to do a walk-to-math than to be with your math teacher all day long so that that person can catch you during independent work time and say, Hey, I noticed you missed this. Let's work on that again. It's a very different experience to be doing your advanced math remotely. Maybe with a person in the classroom who can support you and maybe not.

Some teachers did not like the idea of live instruction being replaced with an online program. As this teacher shared, "I tried out the [online program] with my qualified math kids last year. Hated it. Hated it. I will just say, it did not work out well, just because I didn't have access to their content." Another teacher sarcastically quipped, "…since they replaced me with the [online program]…like anecdotal John Henry, I'm getting replaced by a machine but the machine is not as good as me—until I die."

Arranging a walk-to-math system also required aligning schedules, and constrained teacher flexibility in planning their students' day. A self-contained teacher noted that in some cases it was, "Easy logistically to schedule a walk to, and in other grade levels it doesn't work." Another self-contained teacher recounted how they proposed starting a walk-to math program at their school:

> There was very strong pushback from the general education teachers. Not all of them. It only took one. That they were not willing to work with others in that flexible manner. And that's all it took to shut it down.

Single-Qualified Students Backfilled into Accelerated, Self-Contained Classrooms

In order to balance class sizes, as well as to provide math acceleration to more students, some math-only qualified students were automatically enrolled into self-contained classrooms. Normally only dual-qualified students had access to the accelerated self-contained classrooms. This district leader explained how those decisions happened:

> All good intentions, all good decisions made at that point in time. Some of it has had some very interesting fallout. Unintended consequences, some good, some not so good. When we have a number of HiCap students, which makes you create a split [split grade classroom]. Splits are often hard for teachers and a lot of teachers don't want to teach a split because you have to teach two different levels of curriculum. And that can be tough. So for many schools, who had a large number of growing HiCap population, they decided instead of teaching a split, I'd like to pull in or essentially backfill with our highly capable math students, because then they'll for sure get the acceleration they need. But the decision had to be made that if we're going to backfill, we have to continue to do that all the way through because once you backfill in one grade and start to accelerate the students, they have to be accelerated all the way through… I would say maybe four or five schools across the district have done that. They've pulled them in. I don't know that it was a bad thing. But you have to see that if it had some unintended consequences, there are ways to get out of it. But I would do it slowly, just like you slowly went into it. Slowly move out of it.

A program administrator confirmed, "Where there's actually enough space they could put them in the self-contained classroom full time, and sometimes they do. But that is case by case, school by school, grade by grade." A teacher commented, “When a student is single qualified for mathematics, in some schools, those kids will get pushed. It's a numbers game. It's not necessarily about what's great for the student.”

This self-contained teacher mentioned that sometimes reading-only single qualified students were backfilled into self-contained classrooms as well:

> We all know we have to balance class numbers that that sometimes you get that single qualifier placed in because of space. What was interesting for me that first year is we had, or the second year, we had some single qualified readers brought in and they were getting the accelerated math curriculum. So guess what happens then, they are now on our trajectory…it's interesting once they're on the train and it's going.

Another teacher confirmed a different instance, “A single qualifier in reading…put in because of numbers in the fourth grade [accelerated self-contained]. She qualifies just in reading. But she also has to do the sixth grade math.”

Although backfilling initially seemed like a pragmatic solution to balance class sizes, and that students would rise to the challenge, there were issues that arose as the practice grew. This teacher described:

> I will say our school site has elected, or not elected has been told, to include single qualifiers in the [accelerated self-contained] classroom. Again, coming back to that. My first year doing that I had one. One single qualifier is not a big deal. This year, I have seven, it's 1/3 of my class who are single qualifiers.

Another self-contained teacher described the impact on teaching practices in the self-contained classroom:

> At our particular school this year, our administrator made the unilateral decision to put all of our single qualified math students fully, fully included in an [accelerated self-contained] classroom. And that has also impacted my ability to teach at the same depth and pacing as I'm used to in the [accelerated self-contained] classroom for those [accelerated self-contained] students who need that pacing in order to stay engaged. And it has been detrimental for the social emotional well-being of those single qualified kids who feel like they are two years behind, in some cases, the other kids in their class in language arts, especially when the basal textbook that we are using for everyone to read is at the fourth grade level and they are reading at the second grade level.

An additional challenge that arose was that parents were not always notified that their single-qualified student was being placed in an accelerated self-contained classroom. A self-contained teacher commented:

> Our principal did not notify those parents that their single qualified children would be placed in an [accelerated self-contained] classroom. They did not know until they showed up at meet the teacher that they were going to be in an [accelerated self-contained] classroom. Our [accelerated self-contained] families are asked whether they want to be in that situation or not. And our single qualified families were not notified or asked if that was what they wanted for their child. Just putting that out there. It was poorly done.

A district leader confirmed:

> The problem that they did is they didn't always let parents know what they were doing. So occasionally, the parents thought, Oh, well, now my kid is [accelerated self-contained]. Well then why did they have to be retested? Because your kid was never really [accelerated self-contained] and they need to be retested in the content area they weren't currently, that they didn't earn their designation in. Usually that's reading,

> because often these are multilingual students who hadn't qualified in reading yet. So that was a problem, or is a problem still.

Large Variability in Program Delivery Between Schools and Teachers

Throughout these subthemes there was a meta-theme of program variability. In general, Blockbridge did not use a different core curriculum for their highly capable students. If the student was offered acceleration, for instance in a self-contained classroom, via walk-to-math, or online accelerated math, they used the same curriculum as was used in general education classrooms, just at that higher grade level. However, some years there were some additional supplemental curriculum resources available for teachers to use with highly capable students in addition to the core curriculum, but these resources came and went. According to a November 2017 memo, for that school year these resources included TenMarks Math, Words Their Way, and an online toolbox of extension materials that had been gathered by a Teacher on Special Assignment (TOSA). In 2019, Minecraft for Education was piloted in some schools. A district leader described some of the adjunct curriculum that was being used in some highly capable classrooms in 2022, in addition to the core curriculum:

> In terms of services in ELA we have a new curriculum [district-wide], that's a tier one curriculum. I think it quote provides opportunities for extension, but I think we're always going to need our book clubs. We're always going to need our things like Junior Great Books so that we teach them shared inquiry.

A principal asked whether the highly capable curriculum ought to be different, “Maybe just blow it up, give them a different curriculum that's just geared for these kids that can handle it, you know?” A program administrator also described a desire for more targeted curriculum for the highly capable program:

> I think maybe a slight revamp of some curriculum would be good...HiCap shouldn't necessarily have the exact same curriculum as everybody else. I think maybe having something more specific would be good to have. We've not really looked at that curriculum side of things. We've been mostly looking at the identification side. I feel like we're kind of getting the identification pretty well down to where maybe then you know, we can look at the next things, that might be where to go.

In addition, different schools and different teachers provided different levels of service for highly capable students, and not all services were available in all places, or were implemented with equal fidelity. This was true even within the accelerated self-contained classroom model, as described by one district leader:

> We've got to really interrogate the models that we're using. And we think we have a singular model for [accelerated self-contained]. We were just having this conversation and [colleague] was saying, Okay, here's the [accelerated self-contained] model, right? We've got students in this self-contained space…And this is what's happening at [School A]. And this is what's happening in [School B]. This is happening at [School C], and this is what's happening at [School D], and this is what's happening at [School E], and even within that they're not the same.

A different leader added, "There are just different models that has happened around the district." Several respondents recognized that some degree of variation was to be expected, and was seen as positive, as voiced by a district leader:

> I mean, every school has its own unique characteristics, and every school has its own unique people. And although I believe we're making sure that all of our [accelerated self-contained] classrooms are being provided with the materials that they need, teachers will do what teachers will do, and that means that sometimes they will make choices about

> how they're approaching the learning and the content, and all of that, so that then, it might look very different and variable from school to school.

One program administrator concurred, “I think HiCap or not, between this classroom and the one across the hall, it's going to be a totally different experience. And I think that's mostly dependent on the teacher.” Another program administrator noted that “Each teacher is going to have their own special things that they do. And that's the way it's going to be in every classroom.”

This variability in service delivery caused tension, however. One teacher commented on the sense of unfairness, “What happens when [my] region doesn't do that? Why are my families now wondering why they aren't in your region? And how come that model is not being worked on here?” A teacher also expressed frustration:

> I feel like in this district in general, like nobody knows what the others are doing, at all. I have a daughter at a different school that I work at and went to their meeting for what their [accelerated self-contained] class is. Does every school do that? Because that's not the information I get from my kids that leave my school to go to [accelerated self-contained].

A district leader raised this issue as well, “I think everybody's kind of doing their own thing. It's so siloed right now, we're not all on the same page.”

Another district leader pointed out that there were schools that resisted implementing the highly capable service models at times:

> I think people initially were on board just because that's the direction we were headed, but I think then teachers at times at some schools wanted to try to figure out how to, you know, sprinkle kids into different classes and not have [accelerated self-contained] classrooms as much and I think there was a need to constantly be vigilant about that.

A teacher also commented that not all schools took the screening process seriously:

> Darker and weirder is that we do have some potential sabotaging of our screeners and processes. I have heard from other educators how dismissive some have been about, well just do it because we do the Naglieri in the classroom. Here's the test window, just go do it. Not giving an authentic screening experience to their students. Not casting aspersions, but the idea that don't play it up, it's not a big deal. Like those are words that have actually been said by an administrator, it's not a big deal. All students are doing it. Just have them take the puzzle test and you can go back to teaching, it's only 30 minutes. Just very, very blasé… My building has been, nope, just like SBA, just like any other screener we're going to stick to presenting it with fidelity under the terms and understanding that we need this to be equitable, and equitable means all students, they have the same access to a device they have the same access to a quiet calm space. So when that was shared with me, I asked: Is that how SBA is treated? Oh, no. SBA is sacrosanct.

A program administrator also mentioned:

> I don't know what kind of messaging students were given when educators had to deliver that test when we universally screened everybody. And in some cases, I did hear some of the messaging educators were giving. It's not what I would have hoped. And so we ended up writing a script for educators to use to help our students understand that we wanted them to do their best and to take their time…it's that implementation curve where…adults needed to get their heads wrapped around what they were doing and why, if they hadn't been convinced of the why.

A principal mentioned that they sometimes steered families away from the highly capable program even when a student qualified:

> Will they be able to manage the stress level and the expectations and the homework…I think we need to prepare some of these parents because we know some kids have

> qualified for the highly capable program in first grade and we looked at the names and we know their struggles and so we just diplomatically stated, you know, really consider like your options, know that you're not forced to be part of this program.

This district leader summed it up this way:

> Elementary schools, or schools in general, have different student populations, different teaching, staff, capabilities and all that to say you can never have everything be exactly the same. But you can have potentially a common structure that you communicate. What the untold story behind all of that, that parents don't necessarily, the community doesn't necessarily pick up on, is that there's still a high degree of variation from classroom to classroom and building to building, even with the common structure we tried to put in place.

Theme C – Professional Development

Where the other themes typically had a range of opinions represented, this theme was surprisingly uniform across almost every respondent. Participants agreed that Blockbridge offered very little professional development specific to the needs of highly capable students. A reflection of this was the much lower raw number of comments coded into this theme compared to other themes. As a result of the lack of professional development, teachers felt unprepared to teach highly capable students, especially when they had additional special needs. There was a strong desire for more professional development in this area. The biggest request from all types of participants was for teachers to receive more professional development. There were also clusters of requests for professional development for principals and other administrators, as well as professional development that focused on the social-emotional needs and characteristics of these students. What training was offered at Blockbridge was entire optional, and due to funding and labor contract constraints was not mandated for any faculty or staff to attend. Several

participants described their efforts to seek out learning opportunities and information on their own. A few bright spots were mentioned in terms of opportunities for teachers to learn from each other, and this was seen as a promising avenue for future learning. However, in the end, many of the respondents leaned heavily on their own personal experiences, both positive and negative, to inform their understanding of the needs of the highly capable student population. These

Table 4.3

Frequency Table for Theme C – Professional Development

Sub-Theme	Number of Participants	Coded Segments	Supporting Documents
Lack of Professional Development	18	46	Ad Pa
Teachers Felt Unprepared	17	26	Pa
Teachers & Administrators Need PD	22	56	Ad Pa
PD Offered Was Optional	20	32	Ad Pa
Many Relied on Personal Experience	21	41	<none>

Note. Document categories are Washington state statistical data (Wa), district website (We), district-provided statistical data (Da), district-provided historical documentation (Hi), advisory team meeting minutes (Ad), and parent group meeting minutes (Pa).

subthemes are described in more detail below, and summarized in Table 4.3.

Very Little Professional Development was Offered

During my interviews and focus groups, when I asked whether a participant had received any professional development at Blockbridge about highly capable students, over and over I heard the simple response, “no.” A principal elaborated a bit more, “As a teacher, none. As an administrator, I would say none.” One reason cited for the lack of recent professional development was the pandemic, as voiced by a district leader:

> Well, over the last four years…there has been this pandemic which has interrupted much of the work…Professional development in general stopped last year…. And that was true

> for all PD. So in this current year, we've done a little bit more, but it's all optional for the most part. That's a long way to answer your question—over the last few years, no, we haven't provided quality professional development'

A program administrator confirmed the pandemic's impact and expressed hope for the future, "With a pandemic, there was a lack of PD and ideally we will be able to have more PD opportunities to share information."

However, the pandemic did not explain the lack of professional development prior to 2020. One challenge was the program's rapid growth, as described by one district leader:

> The problem is we grew so fast that we have so many new teachers that [we] don't know the skill of all of the teachers in every spot and [we] have not been able to get in front of them or provide professional development.

The larger factor, however, appeared to be a lack of overall priority, as described by another district leader:

> Unfortunately, HiCap keeps getting pushed down the list. And that's why we're in the mess we're in because it's never been able to be up here [gesturing with hand raised]. And I think maybe now they're realizing, oh we pushed it down the list too many times...It should have been allowed to be up here because it's created now a huge stink.

Another district leader admitted, "We, unfortunately, have not invested as much resources into teacher professional development." Another district leader clarified, "When I say there's been nothing with professional development, there's been nothing system wide, to help every teacher understand the characteristics, the ways to support, the strategies for supporting our highly capable students." A fifth district leader gave a historical perspective:

> You know, it's probably an area we could have done a lot better with early on…frankly, there wasn't much special or there wasn't much professional development for highly

> capable program teachers, period. So I think that was a step that we could have made more robust.

One district leader was an outlier and seemed confused by the question, wondering why professional development for highly capable was needed at all, “I'm not aware of it. Why would you need a training on that? I'm just curious, why would that be a training?”

Teachers Felt Unprepared to Teach Highly Capable Students

Teachers were put in the position of teaching highly capable students, even in accelerated self-contained classrooms, typically without any training. This district leader recounted, “The teachers at [School] were still asking for training. They were wondering…why they were being asked to work with [highly capable] kids.” Washington state had no requirement for highly capable professional development for any educator, principal, or administrator, which was evident in Blockbridge’s practices. A teacher noted, “They're not specially qualified to be an [accelerated self-contained] teacher. They just got given that class.” One self-contained teacher described their own experience: “I was thrown into [accelerated self-contained] and never had any except for the conference. No one's ever said boo about it.” Another teacher summarized, “They are not qualified per se in what we need them to be qualified in, nor have they had the professional development to be able to support that need.”

This lack of preparedness caused serious issues at times, particularly in the context of the district’s accelerated math programming, as described by a teacher:

> I mean I think it's ridiculous. So the teachers teaching [accelerated self-contained] on my 4th grade team, one of them can’t do the math herself. Nothing against her. But taught kindergarten and is now…basically it was the only spot that was open so she took it.

Another teacher described a different situation that was striking similar:

> One of our other 4th grade team members was on maternity leave the first half of the year, and it was literally somebody that got hired the day before school started, who had just finished student teaching, and again, nothing against her, sweet, but did student teaching in 2nd grade, and didn't know what she was doing teaching 6th and 7th grade math.

One district leader offered their analysis of the situation:

> It's now starting to unnerve individuals because I believe there's a fear of not knowing how to support the kids. Especially the students who are still in general education classrooms, but who are singularly qualified for maybe mathematics or for reading or ELA….Trying to presume positive intent, teachers are afraid that they don't know how to meet the needs of kids…They're afraid because they don't know how to support the kids, from highly capable all the way through to the student with special education needs through the student who is multilingual, whichever way they're sliced and diced and configured into the classroom in front of the teacher.

They later continued, in the context of discussing twice exceptional students in the classroom:

> There's a fear of me admitting, if I'm the teacher of that student or group of students, then that makes me look like I don't know what I'm doing. And you told me that I'm supposed to be teaching the gifted kids. But I don't know how.

A teacher commented that they did not feel qualified to teach these students, "[It] does not make me qualified to reach learners who should, if accurately identified as talented and gifted…have a higher preponderance of twice exceptionality than any other population." A third district leader added additional context:

> I also want to be respectful and mindful that these are hardworking, compassionate, caring teachers, right? These aren't teachers that just want an easier job. These are

> teachers that don't know how to do it. And so I think what we end up doing is we end up putting boxes around our jobs, right? And the box that we put around our job looks like things that I want to do, versus things that I don’t want to do. And I think most often the box is actually things that I know I can do and I feel confident and comfortable and make me proud—and things that I don't know how to do. And so we oftentimes hear teachers say, This is what I want to do, and really what they're meaning to say is I don't know how to do this other stuff you're asking me to do and so I've got to shrink the box.

Needed More Professional Development for Teachers and Administrators

There was strong consensus across all types of participants that teachers needed more professional development. This district leader felt the need keenly:

> How do you have teachers feel supported? A lot of it is PD. I mean, every time we have a conversation it's we need more professional development. Oh, we need more professional development. We need more professional development. And so we've got a list of 10 things we need to professionally develop teachers so that they have more tools in their toolbox.

A program administrator agreed:

> I think it would be great if teachers could get some PD, I think that will be a great next step. Since we haven't had PD for several years. I think they all need to kind of get that refresher or see it for the first time if they've never seen it before.

There was a desire to ensure that all educators received training, as voiced by a district leader:

> When we look at professional learning, it means that my role and the connection that I have to highly capable programs is how do we make sure that all of our educators

> actually understand what it means when we say that a student is highly capable? What does it mean for the child, the youth? What does it mean for the teacher who is going to be in front of them on a daily basis?

Another district leader commented, “I think it needs to be system wide and I would require it of everybody if I could.”

Several participants described the types of professional development they wish would be available for teachers. For example, this district leader suggested:

> If I didn't have any limits, we would have people who would be able to go into classrooms and model the practices that support highly capable students in any particular content area, and I would want that person to be recorded so that we could have an example of here's this strategy…and the person behind the camera would say, so what was that strategy that you used? And the teacher would say, well, here's what I did, and here's why it worked…I would want some sort of library of videos like that to use…We're going to watch this video, we're going to talk about it in our small groups.

Another teacher offered, “The professional development piece would involve also shattering the belief that there is a one size fits all approach to this program model and instructional model.”

There was also a need for professional development for administrators. This district leader gave the big picture:

> Everyone needs professional development, ongoing professional development: administrators, principals, but I think it's the administrators in general need instructional leadership training. We as a system…haven't looked through the lens of instructional leadership here at Blockbridge for a while. There is a need for that type of training. And that goes to looking at the needs of various populations of students including HiCap, not just for HiCap.

Another district leader confirmed that they did not receive any formal preparation for highly capable, “My principal credential didn't talk about how to support highly capable students any more than it talked about how we were supposed to support students in special education.”

An important reason to train principals was so that they could in turn support the educators in their schools, as described by this district leader, “I also need principals to understand how to provide support for the teachers that are in classrooms and in highly capable classrooms as well.” Another district leader emphasized that principals needed a different type of training than teachers:

> I would train principals. So they understood. Their training would look different than teacher’s trainings. And sometimes you just throw principals in teacher’s training. That's not fair to principals. I would have training specifically for principals as they're observing in classrooms and coaching in their classrooms.

A self-contained teacher also noted, “I've seen a couple of administrators who are housing the [accelerated self-contained] who need professional development on highly capable.” One program administrator summarized it this way:

> My wish is that we would provide more professional development, that there would be, that leadership within the district would come to recognize and embrace the idea that these kids exist and that they are special needs and that as a community we would not applaud them their intelligence but recognize it as a part of who they are.

A topic that was called out as needing particular attention for professional development was characteristics of highly capable students and how that dovetailed with social-emotional learning. This program administrator explained:

> I think that we need to offer more PD regarding social emotional awareness to teachers and other staff at schools, not just the teachers, especially at those schools that have a

> large number of students that are designated as highly capable or identified as highly capable, because they do tend to be a little different.

A principal described the importance of belonging for highly capable students:

> I feel like the professional development might have to be along the lines of…Is that kid feeling accepted in their class? Do they feel like they belong?... Yeah, I feel like a lot of [it is] on the SEL component.

A program administrator summed it up this way:

> I worry that teachers that are new to teaching highly capable students may not be prepared to deal with the quirkiness of these kids. I feel that if there was some PD, there was more PD, if the knowledge about who these kids are and how they're different was available, it would be easier for them coming into a classroom…I kind of feel it's a little baptism by fire. I'm guessing that if you are a teacher that is new to these kids, it's not going to take you very long to realize that they are different. That they aren't just kids that are extra smart, that there's more to it.

Professional Development was Optional

What professional development had been offered over this time period was optional. Blockbridge could not require teachers to attend professional development because of a combination of financial limitations and the bargained contract with the teacher's union. As this district leader described:

> I always offer HiCap 101 at the beginning of the year but it's not required because I can't require anything unless I can pay for it. I can't pay for it. So in terms of true professional development that everybody's required, since I've gotten to this district, none.

Another district leader confirmed, “We don't get funds to do professional development for our highly capable students.” This program administrator elaborated:

> I'm pretty sure that for the last two or three years since the pandemic professional development has not been allowed to be required. I don't believe there's been any for HiCap because the union wouldn't allow it. Before that, I'm pretty sure that it was not required. But it was offered and encouraged. But any teacher could say no.

Another program administrator concurred:

> At the district level, we got very little professional development time. And there are all those early release [days], but then our educators often get choice in how they spend that time and it's almost impossible to have them required to take training.

There were some reports of isolated training events having been offered, as described by another district leader:

> I think there's been some, there's been some attempts. We've done some kind of one offs, whether it's principals bringing some people in or we've had optional professional development that's run out of our [highly capable department] over the years where they've brought in people or whether it's been from [University] or whether it's been outside people to come in and meet with but not a ton.

A teacher remarked:

> Even when I've had HiCap students in my class and I've asked for it, no. We have to just figure out how to do it. The teachers that are teaching HiCap it's optional if they want to go to any of the classes to learn about teaching HiCap.

Another teacher agreed, “They may have offered but it wasn't like a mandatory training or anything.”

Some teachers independently sought out opportunities to learn about highly capable students. This happened in various ways, as described by this program administrator, “My training is all self-taught…I have read many articles and gone to many conferences…I've read a lot of stuff and I've heard a lot of people speak and I've read some books.” This district leader also mentioned, “I've done some study on my own, reading on my own on differences, needs, I've been to somebody when we have brought in people here to do some trainings.” Another district leader offered, “Books, modules, lectures, conferences—and then just the opportunity to work side by side with I think some of the folks who understood that work just really deeply.” Several teachers mentioned attending an optional district-sponsored professional development session. One teacher said, “I've gone to WAETAG [Washington state gifted conference] for five years.”

In document evidence, there was a district-sponsored Highly Capable Advisory Team that met nine times between February 2018 and January 2019. The team involved volunteers from several groups: about 10 teacher/counselor representatives, about 6 administrator/principal representatives, and about 5 parent representatives, with some shifting of membership during that time period. These meetings included opportunities for reading and discussing articles concerning the needs of gifted children, as well as served as a community forum for reviewing and guiding Blockbridge’s highly capable program. This provided a measure of professional development for the individuals who volunteered for this committee.

There was also a parent group that met with the district leader that oversaw the highly capable program every 1-2 months, described in detail in online meeting minutes starting in 2016. Parent members of the council were elected yearly to represent various schools that offered accelerated self-contained classrooms, as well as regional representatives for every other school in the district. Based on meeting minutes, there were a handful of district leaders,

principals, program administrators, and teachers who intermittently participated in group meetings. A program administrator found the council meetings to be valuable professional development:

> I also think, though, a lot of my learning came from our parent group. And like I was given books or articles or just becoming familiar with the tools we were using and the why behind it. Or having conversations with people I think, for me, I'm a real verbal processor. So the amount of times that I had to put in writing or talk on the phone or put in an email about the why behind this…and it sort of solidifies your learning and your stance on this.

Some of the most appreciated learning opportunities where when teachers supported each other. Participants visibly brightened when they recounted opportunities to learn from each other in small groups or in mentoring situations. A principal told about, “A teacher there that's been doing [accelerated self-contained] for years and she gives really great information and she just asks a lot of questions, which I love.” This district leader described some intentional efforts to connect teachers together:

> In most of our buildings, but not in all our buildings, they'll have some internal mentoring that goes on within the building. Oh, you're new to the third grade [accelerated self-contained] team. Here's the other two teachers, here's the other teacher. It becomes harder when they're the only teacher in the building that teaches third grade [accelerated self-contained], but if they've got a partner, then they'll get together and share curriculum.

Another teacher concurred, “That strategy sharing happens within buildings, and in smaller guidance teams, those kind of things happen, but again, it's the most powerful part."

For one year, in 2017, there was a Teacher on Special Assignment (TOSA) assigned to support the highly capable program. Two participants commented very positively on that experience, as voiced by this district leader:

> What I really appreciated about when we did have a HiCap TOSA was I felt like what [they were] talking about with differentiation and teaching up, it was for everybody. We learned how to use those individualized plans and when we offered it, we started doing pre-assessments and post-assessments and so it became not just about the highly capable learner but about best practices across the board.

A principal mentioned being able to reach out to experts in the highly capable department for support, “I reach out to [colleague] a lot and [they’ve] been great, a great resource for me. [They have] shared a lot of information.”

Many teachers wished that there were more opportunities to leverage existing expertise within the district. This program administrator would have liked to audit best practices from teachers in Blockbridge to share with others:

> We needed to be doing I think, an audit of what was being done for students of highly capable status in our general education classrooms, as well as our unique programming situation, because I'm sure there are educators out there who were serving students well, who we just didn't know about their practices or even some of their materials or resources they had probably found over the years that they were using for their kids. And had we been able to do honestly an instructional audit of how we serve our highly capable kids, we probably could have surfaced some things that could have been shared as more like a district resource for students, even for all students. So I guess that would have been my dream world.

Another teacher wished that differentiation was implemented for professional development as well:

> Can we as trainers do the things we want our teachers to do in the classroom? Can we recognize that there are some people in our class in our professional development classroom that are not beginners? I think we've done that with a few things where if you feel you're this, self select here, whatever. But can we recognize that some people actually are experts in that content as well?

Another teacher suggested that emotional safety was essential:

> We have to make it easy so that people may have that safe space to share ideas…because we trust each other and be like okay. So if that's the case, I see that gift instead of thinking, oh my gosh…and we build from our strengths and strengths-based. I mean, it's everything we say for the kids, SEL. Let's do all that stuff for the adults.

Another teacher echoed the idea of sharing information between colleagues as a valuable part of professional development, "If we're actually allowed to then talk to each other, like we want to do with our kids." A district leader shared about a teacher who was able to do this:

> She just found a way to make it really feel personalized and like what they needed and then she was also a phenomenal communicator with families so that, you know, all the tech and all that stuff…Now take her and put her in a room with other teachers that are trying to figure out how to do it and they're sharing ideas, well then they grew each other.

Another district leader mentioned a group of eleven individuals who attended a major gifted conference together in 2018:

> [We] sent folks to Edufest early on in our work, and I think that's where a lot of teachers then got to meet other teachers that were actually doing this work. And were like, okay, well, then this isn't that unusual. I think that was an important piece.

An outgrowth of that conference was the development of the HiCap Cadre, as described in the Highly Capable Advisory Team's meeting minutes:

> The HiCap Cadre has so far recruited 19 teacher members from almost every elementary and middle school…The purpose for forming this group is to provide opportunities for teachers to engage in on-going professional development, both for themselves and to design opportunities for their colleagues.

The HiCap Cadre was active during parts of 2018 and 2019. Most of the examples offered of these types of collaboration opportunities were from more distant memory, and were not in current practice. This district leader reflected, "As we've grown, because we haven't provided professional development, we've lost that intimacy of the teachers who taught it and really understood it and could visit about it and supported each other."

Most Participants Relied on Personal Experience

Because of the lack of consistent professional development offered by Blockbridge, most participants relied heavily on their own personal experiences, which often included experiences with their own children. There were not any questions in the interview or focus group guides that probed for participants to share their personal experiences with gifted education, yet these came up in nearly all of the sessions, often with a strong emotional component. One district leader described the Blockbridge highly capable identification process for their child, "I only experienced it from a parent angle with my own kid and what the teacher's thoughts were about what you should do. And then my daughter's response to that, in terms of testing." Another district leader offered:

> I have two kids of my own. My oldest is a HiCap kid. My youngest is not. I would be hard pressed to say that my oldest kid is more HiCap than my youngest kid, right? She's

> every bit as smart, she's every bit as precocious, every bit a pain...One did well on tests. One didn't…So that also weighs into that thinking. So no, I don't think we're capturing too many HiCap kids.

This self-contained teacher described her child's experience:

> Until my child qualified as a fourth grader, he had not had positive school experiences. So from the parent perspective of a student who struggled…because he never found his people...that feeds into my philosophy as an educator now as well. I don't think I can turn that off for me, because I've experienced it. As a teacher, my opinion, my belief, my philosophy is that our students, our truly qualified students who are evidently excelling in our programming and truly needed this, needed it. They have different needs.

Another self-contained teacher shared an equally powerful personal story:

> When my daughter started in second grade [accelerated self-contained], the first week of school she came home and she said mom, math was awesome today and I said Sweetie, what made it awesome? Was it your new teacher and the way she taught it? And I love that teacher too. But she said no, she said: it was new...It was the first time that she was taught something that she did not already know...Granted, the next week of school, she came home and said she hated math. Because it was hard for the first time in her life. And that is a story that I tell every year at curriculum night because I know that there are parents sitting in my classroom who have had that same experience and that is the purpose of this program to me...[She] struggled with math, hated math a long, long time, longer than most [accelerated self-contained] students, but she was fortunate that she had really wonderful supportive teachers who could help her be successful and work through that challenge. In college now, she says to me, Mom, I know it's going to be hard, but I'm

> getting better at doing hard. And that shows you the social emotional growth that she made because she experienced that productive struggle at a young age.

A third teacher told a similar story:

> I'll never forget the day that my son came home…so excited to tell me about his day. And he's talking about his day and talking about his day. And I could not for the life of me figure out what the excitement was coming from. And so finally, I said so tell me what was the best part of your day? He goes: I got something wrong! I will never forget that day. That was this year…he's a middle schooler now, and two years ago, he would have crumbled under that. So that is something he definitely got from this program.

However, different individuals made other choices for their own children, as told by this teacher, "I thought when my kids were younger…I could get them tested for highly capable, but they're fine. They're fine. And so we didn't." Another teacher had a similar story, "My child just qualified in math, she's a first grader and I'm an educator. I'm like, she's fine. She needs to be with regular classroom peers. But that's my opinion." This principal was frustrated having to navigate a difficult process with their own child in a different state:

> My son was, every single year his teacher said oh you need to be in gifted, he needs to be in the gifted program. That's what we call it. And I'm like, Yeah, that's what the last teacher said. I'm not going to keep putting him through this. Because my daughter was in it and he'd see that. They're only two years apart, only to have his little heart broken because he just missed it every time.

Others questioned whether their child really was needing services when they qualified, as this teacher recounted:

> My daughter asks questions, she's authentically curious, and I know stuff so I support her and engage her. Is that truly giftedness or is she…fortunate to have someone who knows

> a lot about everything?…Did I create giftedness or was she innately abled, more capable of grasping, gaining? Or did she just have a very, very strong foundation that I developed? Was she gifted? Or did I create a product that had that access? It would be hard to debate.

This same teacher also shared about their own personal history that had impacted their beliefs:

> I also skipped a grade. We have this historical experience of both mom and dad were in little gifted programs. We had to wear the special shirts and people called us questies and whatever else and we felt weird and awkward.

Several individuals identified themselves as having been identified gifted as children. This district leader lamented, "I was a kiddo who missed qualifying by one point. So didn't go to the school across the way."

Personal experiences in prior employment also influenced participant's thinking. One district leader told about a magnet high school in another state where they worked early in their career:

> I had the opportunity to go to a 30 year reunion for the [Advanced Magnet High School] program. The first graduating class of that program that at the time, there was a significant population of African American students—60% of that graduating class were African American. It's not like that now, unfortunately.

A principal experienced disproportionality issues in gifted programs firsthand in another state:

> My daughter was in the gifted program…they were excluded in their own little program. It was housed in the former black high school in that area...It was just like so freakishly obvious, because we have this one building with all of these majority white students, maybe one student of color, maybe a couple of Asian students of color, but

> overwhelmingly white students who had all their classes together in a separate building that was surrounded by 98% pretty much Black students.

A teacher told about a family member's experience in a rural town in Washington:

> My sister was teaching in [town] and they had a walk-to model. And the kids spent so much time testing and it always gave them their score back as soon as they took it. And they were always failing it. So all they saw was failed, failed. And they did the walk-to model which tended to have many walk off because they didn't want to be at school anyway, so every time they were supposed to get up and go down the hallway and out that portable, they just kept going. It wasn't really working. And I remember my sister saying if I could just keep my kids, I would differentiate, I would see what they need.

Several participants told about a particular student that really left an impression, such as for this district leader:

> In my internship I sat in a meeting…about a kiddo who was multiplying in kindergarten, and the parents were like, Can we come up with a plan because he came into kindergarten multiplying, he's doing math et cetera, et cetera...I still know this kid, he's at [High School], still he's a friend with my son right now, so I have him in mind when I think about, that is an important component of what need is about.

Another leader mentioned:

> I'll never forget her—[Student]—who would come to me on a regular basis with like sheets of paper…[Student] one day brought me a stack of papers with one times one, and then all of the ones facts, and all of the twos facts and she went all the way through I don't even remember, she went all the way through something times 20. Right, because that was just how she was wired.

While many of these experiences were positive, others were not. This self-contained teacher shared this personal history:

> My four friends that dropped out of high school. Three were definitely gifted and not challenged, and one was in special ed but they didn't finish high school, and then they lost their whole spark and that can happen already like in fifth, sixth or even earlier.

Perhaps the most powerful story of all was when a district leader shared a realization they had when they first saw cohorts of highly capable students in classrooms together:

> The first year, that first group [of] students, it was a really small group of students, I saw what a need that I was not aware of that wasn't being served…[I] saw when they were all together versus maybe one here and one there, I realized what a blind spot I'd had around those students. So in terms of highly capable services, from a whole child perspective, a social emotional belonging perspective, there's a need that until we really started thinking about, the system wasn't meeting and I was not aware of and it's not something I'd really ever thought about…Seeing that group of kids together really opened my eyes to there's a need that we're not meeting.

Equitable Outcomes

This second main section describes the outcomes of Blockbridge's equity initiatives that were covered in the previous section. There are two main themes in this section: (d) equitable representation improved in many ways but disproportionality remained and (e) identified students were achieving at high levels regardless of criteria used. In order to report on the specific outcomes and timeline of events, this section drew particularly heavily from documents and statistical data gathered from Blockbridge as well as state records.

Theme D – Equitable Identification

This theme summarizes the outcomes of Blockbridge's equitable identification initiatives, including how many students were identified in various demographic groups. I synthesized statistical outcome data from the documents I gathered from Blockbridge, the timeline of when different identification protocols were implemented, as well as coded segments from interviews and focus groups to identify the most salient outcomes of Blockbridge's efforts; I drew potential connections between practices and outcomes where possible. The headline is that Blockbridge was identifying 16x more students in underrepresented groups than before they began their universal screening program, specifically multilingual students, low-income students, and students with disabilities. However, the first year of universal screening at Blockbridge showed almost no increase in these groups. It was not until local norms and OR-criteria were added that significant increases happened, and those increased rates of identification have now been sustained at similar levels for four years with some continued growth, demonstrating that this was not a catch-up effect. The largest increase in equitable identification was for students with disabilities and students who had ever been identified as multilingual, who were identified proportionally district-wide. Other underrepresented groups had also grown but not by as much, and remained disproportional; for example, identification of underrepresented racial groups grew by 7.6x compared to prior to universal screening, however representation indices remained under .5 and often lower. Although Asian continued to be the highest represented demographic group, Asian representation actually decreased during this time period. The biggest finding was the tremendous growth of the entire highly capable program—many more qualified students were found overall, from identifying about 7% of students to identifying 28% of students, resulting in

4x overall program growth. These subthemes are described in more detail below, and are summarized in Table 4.4.

Table 4.4

Frequency Table for Theme D – Equitable Identification

Sub-Theme	Number of Participants	Coded Segments	Supporting Documents
16x More Underrepresented Students	10	15	Wa Da Hi Ad Pa
First Grade Proportional ML & 504	12	16	Da Hi
Ever ML & 504 Now Proportional	16	32	Da Ad Pa
Tremendous Program Growth	19	65	Wa Da Hi Ad Pa
Underrepresentation Remained	12	33	Wa Da Hi Ad Pa
Asian Representation Index Decreased	16	29	Wa Da Hi

Note. Document categories are Washington state statistical data (Wa), district website (We), district-provided statistical data (Da), district-provided historical documentation (Hi), advisory team meeting minutes (Ad), and parent group meeting minutes (Pa).

Identified 16x More Students in Underrepresented Groups

Several people commented on how the demographics of highly capable students had changed during the equitable identification initiative. This district leader reflected, “When you looked at the demographics of our students that were in the highly capable program before universal screening, and after, it really is a different student makeup.” A teacher also noted, “Definitely I have seen more multilingual learners and I have seen more lower income learners coming into my highly capable classroom.”

However, most participants I spoke with were completely unaware of Blockbridge's progress towards equitable identification, even at the leadership level. When told about Blockbridge's growth in historically underrepresented groups, one district leader responded, "I'm not aware of [that]. Really. To be honest with you, you said it's grown. I'm surprised by that."

Equitable identification data were shared at several points during meetings with the parent group, but there was no evidence that it was shared broadly to faculty or staff.

The groups that Blockbridge tracked most carefully were historically underrepresented non-racial demographic groups that they called special populations; these included students with disabilities, low-income students, and multilingual students who were an active part of the English learner program. Blockbridge tabulated these data for every year from 2015-16 through 2022-23, and are seen in Table 4.5. Note that the entries in this table represent the number of newly qualified students in each category that were identified during each of these school years; they are not cumulative numbers. Also note that due to limitations in the district data tracking software, the total column at the right was not deduplicated; for instance, it is very likely that some low-income students also had disabilities or received multilingual services and would be double-counted in the totals. The students counted in this table had qualified for highly capable services either in math, or in reading, or in both subjects, and had accepted services. Table 4.5 lays out these data alongside a timeline of the major changes in identification protocol that occurred during each of these years. By analyzing this timeline, many interesting themes became visible.

The first row for the 2015-16 school year represented the baseline case, where Blockbridge used a referral-based process and tested all referred students on Saturdays using the Cognitive Abilities Test (CogAT) and the Iowa Assessmentsin Math and Reading. Students required several qualifying scores at the 95th percentile to be identified as highly capable; Blockbridge used AND-rules in their criteria at this time.

The second row shows the 2016-17 school year when, in additional to the regular referral and Saturday testing process, Blockbridge made an additional effort to re-evaluate student data that had been gathered in the previous years of referrals and Saturday testing. This district data

Table 4.5

Summary of Students in Special Populations Identified for the Highly Capable Program as Reported by Blockbridge School District, 2015-2023

			[Local Norms]		
	Section 504 Plan	**Special Education (IEP)**	**Low Income (FRL)**	**Multi-lingual (ML)**	**Total**
Newly identified in 2015-16 *(referrals, Saturday testing, AND-criteria)*	20	<10	<10	<10	29
Newly identified in 2016-17 *(referrals, Saturday testing, district data review, AND-criteria)*	39	<20	<10	<20	83
Newly identified in 2017-18 *(universal screening K-8; all testing during school day, AND-criteria)*	24	21	<10	<10	55
Newly identified in 2018-19 *(universal screening K-5, local norms for FRL & ML, OR-criteria)*	129[a]	99[a]	99	62	389
Newly identified in 2019-20 *(universal screening K, 1, 5; local norms for FRL & ML; OR-criteria; 1st grade NNAT3-only)*	58	73	80	181[b]	392
Newly identified in 2020-21 *(same protocol, due to pandemic some testing conducted online & ML status self-reported)*	63	58	68	244[c]	433
Newly identified in 2021-22 *(same as 2019-20 protocol, no pandemic changes)*	94	75	76	153	389
Newly identified in 2022-23 *(same protocol)*	95	94	117	157	463

Note. Entries where the student count was fewer than 10 were suppressed for student privacy reasons, or where counts fewer than 10 could be deduced from the total.

[a] Local norms were only applied for FRL and ML, not for 504 Plan or IEP students.

[b] This large increase in ML identification was driven by the 1st grade NNAT3-only pathway.

[c] Due to the pandemic, ML status was self-reported rather than determined by district assessment; this count likely is an overestimate.

review identified 2.9x more historically underrepresented students than the year prior. Conducting a data review is a form of universal screening and was Blockbridge's first attempt to prioritize equitable identification. This did result in a meaningful uptick in students identified in these special populations, and likely represented a catch-up effect of referred students who had been overlooked over several of the previous years' qualification cycles. The specific criteria that were used for this data review process was no longer known and not found in the document record; it may have included using professional judgment with underrepresented groups but there would not be formal use of local norms for several years yet. Note that data for students who had never been referred for highly capable consideration in the past were not reviewed as part of this data review process.

The third row marks Blockbridge's first year of broad universal screening, where every student in kindergarten through grade eight was universally screened with the Naglieri Nonverbal Abilities Test (NNAT3) and the Torrance Tests of Creative Thinking (TTCT) in 2017-18. Students who scored at the 85th percentile on either test moved on to take the Iowa Assessments in math and reading. Notably, there was hardly any change in identification of special populations that year despite the fact that well more than 10,000 students district-wide were tested and considered for the first time. In fact, the raw number of students in special populations decreased compared to the prior year's data review process, though it was an increase from the baseline in 2015-16. Consistent with their prior practice, Blockbridge used AND-rules to qualify students in 2017-18, however they added multiple pathways to qualify. There were five pathways which each required at least two qualifying scores: 95th percentile NNAT3, 95th percentile Iowa, or 90th percentile TTCT; or a combination of three scores at slightly lower thresholds) to earn a highly capable designation in that content domain area.

Universal screening alone, even at extremely large scale, even with multiple pathways to qualify, did not meaningfully improve equitable identification at Blockbridge.

The fourth row, 2018-19, marks the first year of notable progress in Blockbridge's equitable identification efforts, where identified special population students grew substantially in every category, representing an overall 7.1x increase from the prior year, and a 13.4x increase from the 2015-16 baseline prior to any universal screening. This was particularly interesting because Blockbridge universally screened somewhat fewer students this year; only students in grades K-5 were given the NNAT3 instead of all students in grades K-8 the year prior. Blockbridge also discontinued using the TTCT as part of their screening protocol, as well as moved to fully online computer-based testing this year.

There were two main protocol changes that year. First, Blockbridge introduced static, group-based local norms for low-income students and active multilingual students; these students were qualified with an 88th percentile threshold (85th percentile on SBA) on national norms instead of the 95th percentile national norms used for all other students. The second major protocol change was that Blockbridge stopped using AND-rules and began using OR-rules at both the screening and qualification stage for all students. Blockbridge also added additional screening pathways for a student to screen in to be considered for a full assessment, using iReady Math and iReady Reading data for grades 1-3 that were already being collected by the district for classroom use, and Smarter Balanced Assessment (SBA) annual test data for students fourth grade and older. A minimum score at the 85th percentile on any one of those achievement-based screeners or at the 85th percentile on the NNAT3 would move a student into the assessment phase, which was an implementation of OR-rules for screening. At the qualification stage, Blockbridge moved from requiring students to score highly on both the NNAT3 and the Iowa, using AND-rules, to now requiring only a single qualifying score (95th percentile baseline, 88th

or 85th percentile for local norms groups) on an achievement test (Iowa Assessments or SBA) to qualify for services in either math, or reading, or both. Consult Figure 4.1 in Theme A to recall the details of the identification process used at Blockbridge, much of which was established this year.

These major changes in protocol were clearly visible in the data. Adding local norms for low-income and multilingual students predictably increased identification in those groups; growing from less than 10 each to 99 and 62 respectively. However, identification of students with disabilities grew substantially that year as well. Even though there were no local norms implemented for those groups, 5.4x more students with Section 504 Plans were identified compared to the prior year, as well as 4.7x more students with Individualized Education Plans (IEPs). The stepwise rollout of changes in the identification protocol at Blockbridge gave me an unusual opportunity to notice that the apparent cause(s) of the increase of identification of twice exceptional students at Blockbridge. There were three changes this year that could have affected identification of students with disabilities: moving to fully online testing (the Iowa was given on paper the prior year), considering SBA achievement data for older students when it was available, and moving to OR-rules for both screening and qualification.

The following year, 2019-20, added two more significant changes. Note that although the pandemic began in March 2020, Blockbridge had already finished conducting their highly capable universal screening and assessment process for the year by that point, so pandemic school closures did not affect the identification procedure. The first change in protocol that year was that Blockbridge only universally screened kindergarten, grade 1, and grade 5 that year instead of all students in grades K-5; however, in addition to those grade levels, they also universally screened all grade 2, 3, 4, 6, and 7 students who were newly enrolled in the district as well as all single-subject qualified students who had not yet qualified for highly capable services

in the other subject. Blockbridge saw a reduction in the identification rates of three out of four groups of special populations students that year: students with Section 504 Plans by 23.3%, students on IEPs by 26.3%, and low-income students by 19.2%. The reason for the drop in those categories is unclear. It could perhaps be explained by the fact that Blockbridge screened many fewer students, or perhaps that there had been a catch-up effect in 2018-19 where previously overlooked students had been finally identified using the new protocols.

The second major change that year was creating a single ability-only pathway where first grade students could qualify with a single 95th percentile score on national norms on the NNAT3 for both math and reading qualification. This pathway was only available for first grade students. Again, because of the fortuitous timing of changes, we can see that this protocol change produced a further increase in identification of multilingual students, growing that individual category by 2.9x compared to the prior year, which is particularly noteworthy given the reduction in the other three special populations categories. It is possible that this change also mitigated the decrease in the other special populations categories.

For school year 2020-21, Blockbridge kept the screening and qualification protocol the same, however the environmental context changed. This was the pandemic school year, and Blockbridge had been operating remotely for the first two-thirds of the school year, which required some of the assessments to be conducted online. When given online, testing was accomplished over Zoom with live proctors monitoring student progress. Additionally, also due to the pandemic, Blockbridge allowed families to self-report their multilingual status that year, rather than assessing students for their English proficiency, which likely resulted in an overcount of multilingual students during the highly capable identification process; hence, I consider this data point an outlier. However, generally, the other results remained similar to the prior two years and began forming a more stable trend.

School years 2021-22 and 2022-23 provided the best examples of typical school years where Blockbridge had maintained the same screening and qualification protocol for two years in a row without pandemic impacts. All testing returned to their standard protocols and was conducted in person during school hours. Those years demonstrated continued growth in the rate of identification of twice exceptional students and low-income students, and approximately the same rate of identification of active multilingual students, as compared with the prior three years (excluding the outlier data point of multilingual students identified in 2020-21).

In total, comparing the 2022-23 school year to the baseline case in 2015-16 prior to any universal screening, the rate of annual identification of special populations students grew by a full 16x overall. It is important to note that one of the reasons why the degree of increase was so large was because Blockbridge was identifying so few students in special populations prior to 2016-17. Another mitigating factor was the lack of deduplicated totals in the district data software, which likely overstated the totals, so these statistics should be considered approximate.

Proportional Identification for First Grade Multilingual and Section 504

Blockbridge closely tracked the rate of first grade identification which served as the primary entry point into accelerated programming that started at the beginning of second grade. The first grade protocol demonstrated the most proportional identification results, with a representation index slightly above 1 for both active multilingual and Section 504 Plan students, as shown in Table 4.6. A representation index of 1 would exactly mirror the total population; a representation index above .8 is considered equitable (Gentry et al., 2019), and is a similar measure to the Equity Allowance Index (Ford & King, 2014). However, low-income students and special education students were still substantially underrepresented at this grade level.

Table 4.6

Representation Index for Special Populations in Blockbridge, First Grade (2021-22)

	% of District Enrollment (b)	% of HiCap Enrollment (a)	Representation Index (a/b)
Low-Income (FRL)	12.2%	3.8%	.31
Multilingual (ML)	24.5%	26.0%	1.06
Section 504 Plan	4.3%	4.4%	1.02
Special Education (IEP)	10.0%	4.5%	.45

The factors that made first grade identification unique at Blockbridge were universal screening of all first grade students as well as the ability-only qualification pathway which was only available for first graders. If students scored at the 95th percentile or higher on the NNAT3, they were immediately identified for both math and reading services without any achievement requirement; note that there was no local norm applied for this pathway. First graders whose NNAT3 scores were between the 85th and 94th percentiles could also be identified via achievement testing using the Iowa assessments; for this pathway there was a local norm applied to Iowa scores for both multilingual and low-income students. These practices appear to have led to proportional identification of multilingual students as well as Section 504 Plan students in this grade level. Improving equity was the original intention of the NNAT3 first grade pathway, as described by this program administrator, “The reason why we did that was to identify a larger number of children that otherwise might have been missed. Typically an EL student.” Note that nearly a quarter of first grade students qualified for active multilingual services in Blockbridge, and this was mirrored in the highly capable identification at this grade level; the district-wide rate of multilingual students at all grade levels was much lower. Younger students were more likely to be receiving active multilingual English learner services at Blockbridge.

The larger proportion of multilingual and twice exceptional students identified in this way at first grade did create some challenges, which will be discussed further in Theme G. For example, this district leader described a teacher's experience:

> I have students that qualified through the Naglieri and who are in front of me in my class, they are highly capable but they can't read what I'm giving them because their reading level maybe isn't quite up there because they're a language learner and they don't have command of the written language quite yet to the level of what the curriculum materials are.

Another district leader pointed out that they had had a few cases where students were moved back to general education from a self-contained placement:

> When we had a child who hadn't learned their letter-sound association (and that was not tested at all by the Naglieri) some of the students were given a year back in the regular ed classroom. Because to move them from first grade where they had not yet mastered that letter-sound association and couldn't sound out words into third grade curriculum—reading was too big of a jump if they could not read yet.

They later pointed out:

> Did we uncover some kids who truly needed some reading intervention services? Did we uncover something that may have been a learning disability where they actually got some support, and they were able to catch up? So those were some of the questions that we wonder about, or can we still work on that and refine that process? Because that would be actually phenomenal. If we could really uncover dyslexia or something earlier, so it really didn't become dyslexia, it actually became something we could support super early, and then prevent. Wouldn't that be exciting? I mean, that gives you kind of chills and makes

you think, wow, we could really save a lot of parents and families and students a lot of angst.

Ever Multilingual and Section 504 Groups Proportionally Identified District-Wide

Although increasing the number of new students identified every year in a special populations category would be important for achieving eventual proportional representation, it would take many years of equitable identification of successive grade levels of students to see the impact of that greater level of identification across the entire district population of students. At this time, Blockbridge had achieved fully proportional identification district-wide in two groups: twice exceptional students with Section 504 Plans, and students who had ever had a formal multilingual designation.

Because active multilingual students are an ever-changing population with multilingual students ideally receiving a few years of English learner services and then graduating out of multilingual status (Gubbins et al., 2018), tracking the identification rate of only the active multilingual students would not tell the full picture. It was important to also consider students who had ever been identified as multilingual to get a true picture of proportionality in the multilingual population. When Blockbridge considered the students who had ever been identified as multilingual in addition to the active multilingual population, the representation indices changed dramatically and indicated that this group was now being identified proportionally, as shown in Table 4.7. The representation index for active multilingual students was .31, however for students who had ever been identified as multilingual, the representation index was .93, showing proportional identification outcomes. It appears that the NNAT3-only pathway for first graders was an important contributor to identifying multilingual students proportionally, as was

discussed in the prior subtheme; multilingual students also had a local norm applied for achievement scores.

Table 4.7

Representation Index for Active Multilingual versus Ever Multilingual in Blockbridge (2021-22)

	% of District Enrollment (b)	% of HiCap Enrollment (a)	Representation Index (a/b)
Active Multilingual	10.3%	3.2%	.31
Ever Multilingual	19.9%	18.6%	.93

119.94

Investigating the factors that led to the increase in identification of twice exceptional students was a primary research question in this descriptive case study. As described in the previous sub-themes, the fact that Blockbridge made changes to their identification protocol year after year gave me a unique opportunity to identify potentially causal factors. The most important factor for the increase in identification of twice exceptional students appears to have been the implementation of OR-rules in both the screening and qualification criteria which included the added consideration of SBA scores for older students; these were the only major changes in the protocol the year that identification of twice exceptional students with Section 504 Plans grew by 5.4x. Moving away from paper-based testing to online administration of the Iowa also happened that year and may also possibly have had some positive impact for twice exceptional students; although this is less likely, it would be worthy of formal investigation to be sure. As shown in Table 4.8, the representation index for this group was 1.05 in 2021-22, which showed a slightly higher representation of Section 504 Plan students in highly capable programs than there were in the overall district enrollment. The other three special populations groups had a representation index of .32, .31, and .35, demonstrating continued underrepresentation.

Table 4.8

Representation Index for Special Populations in Blockbridge (2021-22)

	% of District Enrollment (b)	% of HiCap Enrollment (a)	Representation Index (a/b)
Low-Income (FRL)	18.4%	5.9%	.32
Active Multilingual (ML)	10.3%	3.2%	.31
Ever Multilingual	19.9%	18.6%	.93
Section 504 Plan	9.7%	10.2%	1.05
Special Education (IEP)	14.7%	5.1%	.35

Some participants did notice that there were more twice exceptional students being identified. This district leader shared:

> I hear more and more stories of twice exceptional, where we're saying wow this student's got these pretty high behaviors, that's usually what it is, behavior needs in special education. Then also look at what they're doing, when they can regulate, look what they're doing in their academics.

Another district leader concurred, “We have more students who are actually in special education qualifying for HiCap than previously.”

However, the focus group of teachers who all were currently teaching in accelerated self-contained classrooms had a robust debate about whether there were more twice exceptional students being identified. One self-contained teacher asserted, “This year especially I would argue that more than 80% of my class are twice exceptional, diagnosed or not. They very much are.” Another self-contained teacher disagreed:

> In terms of the twice exceptional students with the quirks and nuances, they seem to be far, few and in between. I think really only my first year, there were a good amount of

> them…But then years afterwards, it just became students who…could do the material and sometimes struggle, but no appearance of quirks or twice exceptionality as well.

Another self-contained teacher chimed in and said, “I would say for years I've had less than I expected, and not 80% at all. A lot less than I had anticipated.” A fourth self-contained teacher added their perspective:

> I am remembering back to the first year that I was a teacher…And I am pretty sure that the number of twice exceptional kids I had in that group was about the same ratio as in the group I currently have. I think the difference is that we have greater awareness and greater assessment and greater identification of those kids in HiCap classrooms.

A fifth self-contained teacher agreed, "I definitely have more identified kids. I still have a lot more who aren't identified, but I just know…It feels like it's always been at least a quarter to a half of the kids." One of the teachers noted that, “Some of those kids, their quirks, their second exceptionality, doesn’t even come out until they are being academically challenged because they can use their intelligence to mask it.” A district leader also mentioned, “I think our really brilliant kids may be able to hide their deficits longer. And those are the ones that I think it takes more finesse and someone with a lot more experience to figure out what's going on.”

There were numerous comments throughout the interviews and focus groups that participants made about highly capable students with academic difficulties, behavior challenges, difficulty completing work, and other common twice exceptional traits, but only occasionally were these connected to the possibility of twice exceptionality. This will be discussed further in Themes G and H. However, a few participants did explicitly remark on the fact that twice exceptional students didn’t always look the way people expected highly capable students to look. For example, this teacher shared, “There have been kids who test in but then they go but they can't really read or they're not getting supports that they need if they're twice exceptional.”

This program administrator remarked that they often heard from teachers who disagreed when a student with disabilities or a history of behavior challenges was identified as highly capable:

> Oh, yes, it's because their educators usually got right back to us saying that's not possible…So there were a lot of enlightening emails or moments where we did have educators or even principals say "I wasn't expecting that, really?" And, yes, so I do think that we did help, maybe, I hope, change the mindsets of some of our educators and leaders around kids that they had seen as perhaps just simply challenges.

Tremendous Growth in the Total Number of Students Identified

One of the most notable and impactful outcomes of Blockbridge's equitable identification efforts was the tremendous growth in the number of highly capable students identified and served overall. It was expected that the program would grow, as was stated in these February 2018 Highly Capable Advisory Team meeting minutes, "Yes, the program will expand, perhaps even double the number of students served." However, in total, from the 2016-17 school year to the 2022-23 school year, the total number of students served grew much more than that, by about 4 times, from about 7% of students identified to 28% of students identified district-wide.

The overall growth curve became particularly steep after the change to OR-rules in 2019. Parent group meeting minutes in 2019 captured that "Numbers have practically doubled in the past year [to] 17.8%." Many participants commented on the unexpected growth of the program, such as this district leader:

> If we had said six years ago, we're going to do this…predict what you think will happen. I don't think we would have predicted what would have happened. And if we had predicted the number of kids, I think we would have predicted that they wouldn't have been successful. But they have been successful. I think that's the biggest aha of all.

Another district leader also commented:

> That 95th percentile with the local norming has allowed us to not only identify a more diverse population of students. It also has significantly shown that yeah, we have a lot of high performing students who are much more capable than we've ever imagined.

A teacher mentioned, “We have seen a huge increase of more [accelerated self-contained classroom] kids than gen ed kids.” A program administrator concurred:

> We have a pretty high percentage of our population that is HiCap… I would say it's at least doubled if not more in the last three years. The curve is pretty steep. We've identified quite a lot more kids.

This district leader said that growth in the HiCap program far outpaced what they would have guessed, "A lot, right? I mean, there is a lot of kids right now that are in the HiCap program that weren't before. Again, I don't honestly know that anybody knows what that means."

Notable Progress, Yet Disproportionality Remained

Despite the improved equitable identification results noted in the preceding sub-themes, many demographic categories at Blockbridge continued to demonstrate underrepresentation. Even though there had been much growth in identification of racial groups, as shown in Table 4.9, it was not enough to get to proportionality. However, it is important to note that both in raw numbers and as a proportion, many more students from underrepresented groups were identified and received highly capable services who had previously been overlooked. This growth in racial groups represented a 7.6x growth between 2015-16 and 2022-23, in the context of a 4x growth in the program overall. This growth had been noticed by some, for instance one district leader commented:

> We get almost twice as many Hispanic students, twice as many Black and

Table 4.9

Students in Racial/Ethnic Groups Identified for the Highly Capable Program as Reported by Blockbridge School District, 2015-2023.

	Black/ African American	American Indian/ Alaskan Native	Hispanic/ Latino	Two or More Races	Pacific Islander/ Native Hawaiian	Total
Newly identified in 2015-16 *(referrals, Saturday testing, AND-criteria)*	<10	<10	10	31	<10	41
Newly identified in 2016-17 *(referrals, Saturday testing, district data review, AND-criteria)*	<10	<10	27	45	<10	75
Newly identified in 2017-18 *(universal screening K-8; all testing during school day, AND-criteria)*	<10	<10	27	69	<10	104
Newly identified in 2018-19 *(universal screening K-5, local norms for FRL & ML, OR-criteria)*	19	<10	108	175	<10	304
Newly identified in 2019-20 *(universal screening K, 1, 5; local norms for FRL & ML; OR-criteria; 1st grade NNAT3-only)*	16	<10	56	110	<10	184
Newly identified in 2020-21 *(same protocol, due to pandemic some testing conducted online & ML status self-reported)*	13	<10	66	107	<10	188
Newly identified in 2021-22 *(same as 2019-20 protocol, no pandemic changes)*	18	<10	80	139	<10	244
Newly identified in 2022-23 *(same protocol)*	24	<10	118	165	<10	311

Note. Entries of student count fewer than 10 were suppressed for student privacy reasons.

> African American students that are captured in that first go round. Not nearly twice as many obviously in the second round. But you pick up five, you pick up six, you pick up 10…reach[ing] the different categories of kids who they wouldn't have had that opportunity otherwise.

However, another district leader pointed out, “But the proportions haven't changed. And whether or not families feel comfortable taking advantage of highly capable services. African American students in particular, don't want to be the only ones sitting in that classroom.” They later continued, “At another part of the district where there's a higher concentration of Latinx Hispanic population, they don't necessarily trust public ed yet.” A program administrator also commented that district demographics varied regionally:

> I think our demographic mix is pretty mixed. We have lots of kids from lots of different backgrounds in our program…Students on the [region A] side of the district look a lot different than students at the [region B] part of the district because that's just the way the makeup of the district is.

When comparing the representation indices from 2015-16, before universal screening, to those from 2021-22, after five years of universal screening, there was demonstrated progress in almost all of the racial groups, as shown in Table 4.10. In addition to White and Asian, students in the Two or More Races group were also proportionally identified at Blockbridge with a representation index of .91. Native Hawaiian/Pacific Islander representation did drop slightly; this group represented a small percentage of Blockbridge’s total enrollment. However, even the improved representation indices roughly mirrored the Washington statewide results as reported on the Washington Report Card published in 2019 by Gentry et al; representation of these racial/ethnic groups in Blockbridge’s highly capable programs had actually been substantially below the Washington state average prior to their equitable identification initiative.

Table 4.10

Representation Index for Racial/Ethnic Groups in Blockbridge, 2015-16 and 2021-22

	Blockbridge Representation Index (2015-16)	Blockbridge Representation Index (2021-22)	WA Representation Index (2019)[a]
American Indian/ Alaskan Native	.29	.61	.41
Black/ African American	.26	.40	.39
Hispanic/Latino of any race(s)	.26	.36	.39
Native Hawaiian/ Other Pacific Islander	.37	.31	.37
Two or More Races	.89	.91	n/a
White	.74	.87	n/a
Asian	2.93	1.69	n/a

[a] Washington state comparison data from (Gentry et al., 2019), Statewide Overall.

The disproportionality of race or income groups having differential participation in highly capable programming and advanced math, as well as special education and other outcomes such as school discipline, weighed heavily on many people's minds. This was universally considered a big problem, and was not yet solved, despite the district's years of work towards equity in highly capable programming, as well as in other district programs. This district leader described:

> I think that we are not meeting the needs of—and this goes beyond highly capable—I think it's our Latino Hispanic students or Black African American students, our students living in poverty. Our students getting special education services and our students getting EL services. It's those populations of students who I continually see in every sector of data we look at disproportionalities—whether it's discipline, whether it's access to highly

> capable, whether it's performance on iReady, or SBA or readiness or whatever you want to call it. Almost across the board in the data.

Another district leader added:

> The disproportionality we have in our data is clear…You walk into an algebra one classroom in ninth grade, algebra one at any of our high schools, 80% of them are students of color. Because they didn't get algebra in 8th grade. 70% of our student population in [Blockbridge] right now completes algebra in 8th grade. That 30%, that's just a clear indication that something's not right. And that's a K-8 issue, not a middle school issue.

A third district leader reflected on disproportionality in discipline:

> The data I worry about though, was that the data of last three years was still seeing the same disproportionality around discipline. We're still seeing more about kids of color not graduating. Those numbers have not changed. That's what concerns me more than anything, so I'm glad to see HiCap is doing so well but I look at our overall population, we're still struggling.

Another district leader pointed out the disproportionality with the Hispanic population:

> Our Hispanic population is probably the largest gap we have. But we also have disproportionality when it comes to Hispanic representation when it comes to students with special needs.

A final district leader agreed with many of these points:

> I think that we have if you look at our data on the majority of our Hispanic students, on at least half of our African American students, and at least a quarter of our what we call awkwardly, two or more races. We're not serving them well. They're not reading at

> standard, they're not doing math at standard, their discipline rates are higher. We're not serving them well.

A teacher summed it up this way:

> It appears that while we're scooping more children in who didn't previously have access…Black and Brown children, socioeconomically low children and children who are not English speakers, we're scooping more of them in but we're also scooping in more White children. So the proportionality hasn't changed. While we're attempting to be more equitable, it appears as though we may not be, because we're still scooping in an even larger group from…the general buckets.

Asian Representation Index Decreased

One fact that came up in many interviews and focus groups in both direct and indirect ways was the large representation of Asian families in Blockbridge's highly capable program. This was particularly visible in the accelerated self-contained classrooms, and in certain regions of the school district where the overall Asian population was notably higher. District-wide, Asian students represented 26% of Blockbridge's total enrollment, but were 43% of the students qualified for highly capable services. This teacher noted, "When I looked at those [accelerated self-contained] classes at [School], they're almost all South Asian kids. It's all kids with parents from Pakistan and India." Another self-contained teacher concurred, "Especially for our school's particular population, we have a very, very large Asian population which includes Chinese, Japanese, and Indian, Vietnamese." Another self-contained teacher also commented, "My program was predominantly Asian and Indian families qualified at the time."

This large proportion of Asian families was visible to administrators and district leaders as well. A program administrator mentioned, "I've learned about a lot about the Indian culture

specific to being here in the northwestern part of the United States." A district leader noted that, in comparison to other school districts, "You have a higher concentration of Asian and Indian culture and a strong desire to be in a highly capable program here."

However, looking at the data over time, the proportion of Asian students had actually dropped substantially during Blockbridge's initiatives for equitable identification. As was shown in Table 4.10, the Asian representation index had been 2.93 in 2015-16, and was now much lower at 1.69 in 2021-22. While the proportion of Asian students identified as highly capable had, in fact, reduced over that time period, it was still the demographic group with the highest representation index. There was also a perception that Asian students dominated the highly capable program more so than in the past. One district leader noted that there was a perception that, "Now all these brown kids are in a class that used to be a lovely sea of white faces." A principal offered this reminder that Asian is itself a very diverse demographic:

> There is a perception that we serve too many Asian kids but the Asian population is also so diverse that I would like to see Washington state have a better metric for Asian. What is Asian, Indian Asian? Is it Chinese? Is it Taiwanese? Is it Vietnamese? Is it Hmong? Because I really think like LatinX, do we have Hispanic, do we have Portuguese…We have so many varieties of cultural backgrounds and demographics that we do a disservice to say Asian because we have an image in our head of what Asian is and it's not accurate. And so we have many underserved Asian populations who are not in our highly capable program and then we have some that maybe are, but we do have some Asian discrimination in our district. And some of it is discriminatory. Because in HiCap, because they are overrepresented. It would be nice to see that maybe disaggregated more. We have a hard time disaggregating it because it's not disaggregated at the state level.

A district leader also pointed out a controversial event that happened when universal screening first began which may have impacted the district's subsequent treatment of Asian students in the highly capable program:

> Early on, we had the Asian sort of pushback from some of our families because [National Gifted Equity Expert] had commented about looking at our Asian students as being disproportionately part of the program, which I don't know was the best way that [they] could have characterized that…I don't know that that was helpful…we had a lot of work to do to get back and regain the trust of our Asian community.

Theme E – Equitable Services

This theme summarizes the service-related outcomes of Blockbridge's equitable identification initiatives, and focuses on the achievement of students in the program as well as Blockbridge's efforts at building cultural competence district-wide. Amidst all the growth in the identification of highly capable students and entering many more students into significantly accelerated programming, identified students were achieving at very high levels. Notably, there was no meaningful difference in achievement levels between students identified traditionally versus via local norms or the Naglieri-only pathway. Blockbridge recognized that building

Table 4.11

Frequency Table for Theme E – Equitable Services

Sub-Theme	Number of Participants	Coded Segments	Supporting Documents
Identified Students Were Achieving	10	27	Da Ad
Emerging Cultural Competency	15	51	Hi Ad Pa

Note. Document categories are Washington state statistical data (Wa), district website (We), district-provided statistical data (Da), district-provided historical documentation (Hi), advisory team meeting minutes (Ad), and parent group meeting minutes (Pa).

cultural competency was a big need; however, they did not invest heavily in this area. These subthemes are described in more detail below, and are summarized in Table 4.11.

Identified Students Were Achieving No Matter How They Were Identified

After several years of equitable identification practices, Blockbridge analyzed the achievement of students to investigate if the criteria that had been used for highly capable identification predicted students' later achievement levels. A main focus of this analysis was looking at students who had originally qualified in first grade with only NNAT3 scores and no achievement testing, as well as multilingual and low-income students who had qualified via a local norm. These students' achievement were compared with other students who had qualified via the standard achievement-based qualification criteria. The results of these analyses were shared broadly at the leadership level and were referred to by numerous district leaders and program administrators. For example, this district leader commented:

> Our youngest learners who we qualified in kind of scary way with the Naglieri Nonverbal Ability Test, which was a risk, also are performing very, very well. So they're performing at least as well as the students who took the more academic skills-based test of the Iowa. So whether that was a risky move or not, those students have performed.

Another district leader commented:

> When kids are given access to the highly capable program, by and large, and it's not each and every child, but the vast majority of those children are successful in those advanced level courses… If I look at from an academic perspective, they're doing just fine. So if we've overqualified, why are they so successful…If you look at their grades, they're doing fine in class.

Another district leader remarked, “The kids are very successful in relationship to the iReady test and that's awesome. And they're getting a great education.” Answering the question of what surprised you, a fourth district leader said, “I think our kids are capable of far more than we think. For sure.”

Figures 4.3 through 4.10 show the specific data that were analyzed and shared with district leaders. Figures 4.3 and 4.4 show the achievement levels of elementary students in grades two and three who had been identified as highly capable. This was the first cohort of students who had been identified via the NNAT3-only pathway as first graders, which had started in 2019-20. The orange/upper bars represent students who had been qualified via the ability-only pathway with only an NNAT3 score above the 95th percentile. The blue/lower bars represent students who had been qualified via an achievement score. For comparison, the district-wide average for iReady for second and third graders in 2021-22 was 62.1% in math and 64.4% in reading. A program administrator described this analysis:

> [We] compared students who were qualified with just the NNAT3 to students who are qualified with Iowa, so [we’re] just comparing HiCap to HiCap and then looking at their iReady scores, their SBA scores, things like that. And the kids who are qualified with the NNAT3 almost did better across the board than the kids who were qualified with Iowa. So that seems like a pretty good indicator that it's good enough all by itself…I think that was not necessarily expected. I didn't think we knew what that was going to be. But the fact that it was just almost across the board in every demographic, in both subjects, they were doing better.

Figures 4.5 and 4.6 show a similar analysis with SBA scores in both math and ELA. Because third grade was the first time Washington state administered the SBA end of year achievement test, SBA scores were only available for third grade and older in 2021-22, when this analysis was

Figure 4.3

Math iReady Achievement Scores of Highly Capable Students Who Had Been Identified with the NNAT3 (Orange/Top Bar) Versus Achievement Pathways (Blue/Bottom Bar)

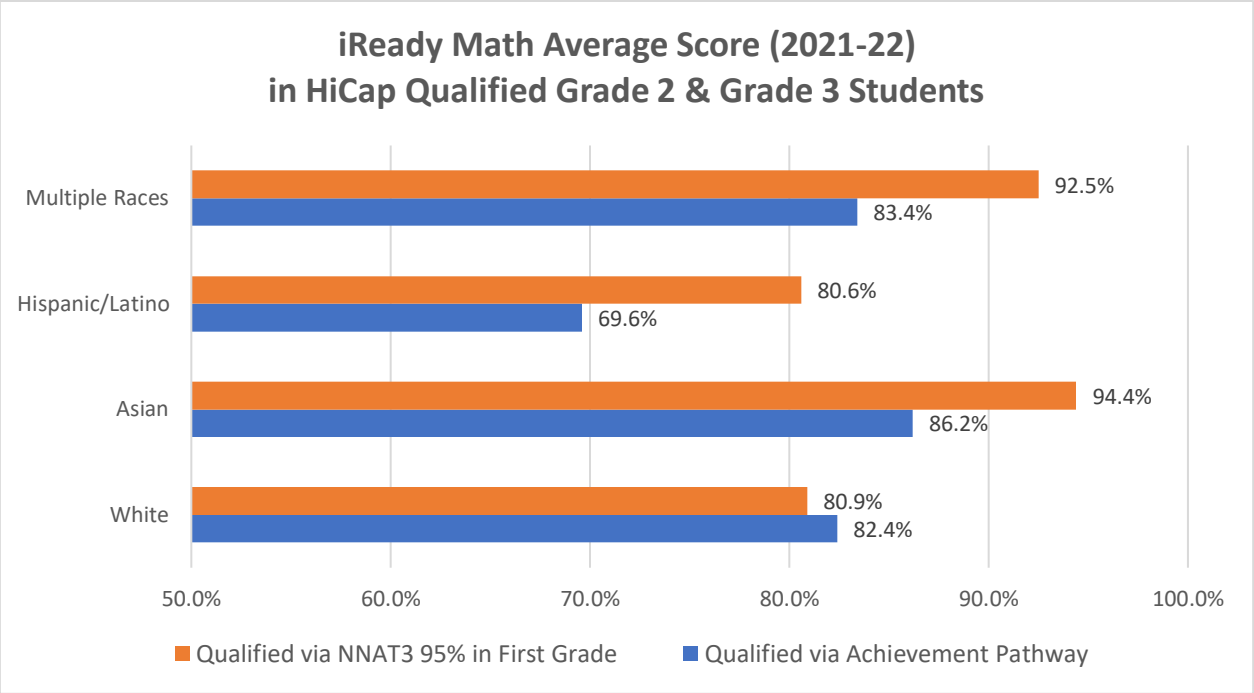


Figure 4.4

ELA iReady Achievement Scores of Highly Capable Students Who Had Been Identified with the NNAT3 (Orange/Top Bar) Versus Achievement Pathways (Blue/Bottom Bar)

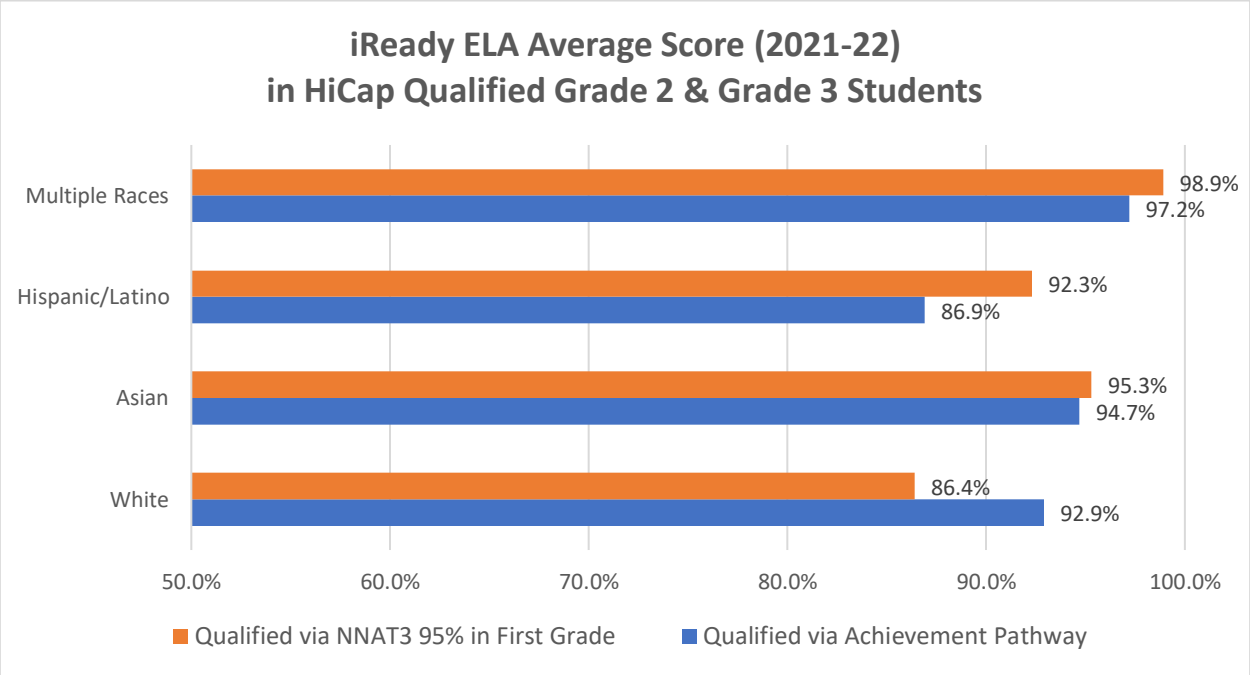


Figure 4.5

Math Smarter Balanced Assessment Scores of Highly Capable Students Who Had Been Identified with the NNAT3 (Orange/Top Bar) Versus Achievement Pathways (Blue/Bottom Bar)

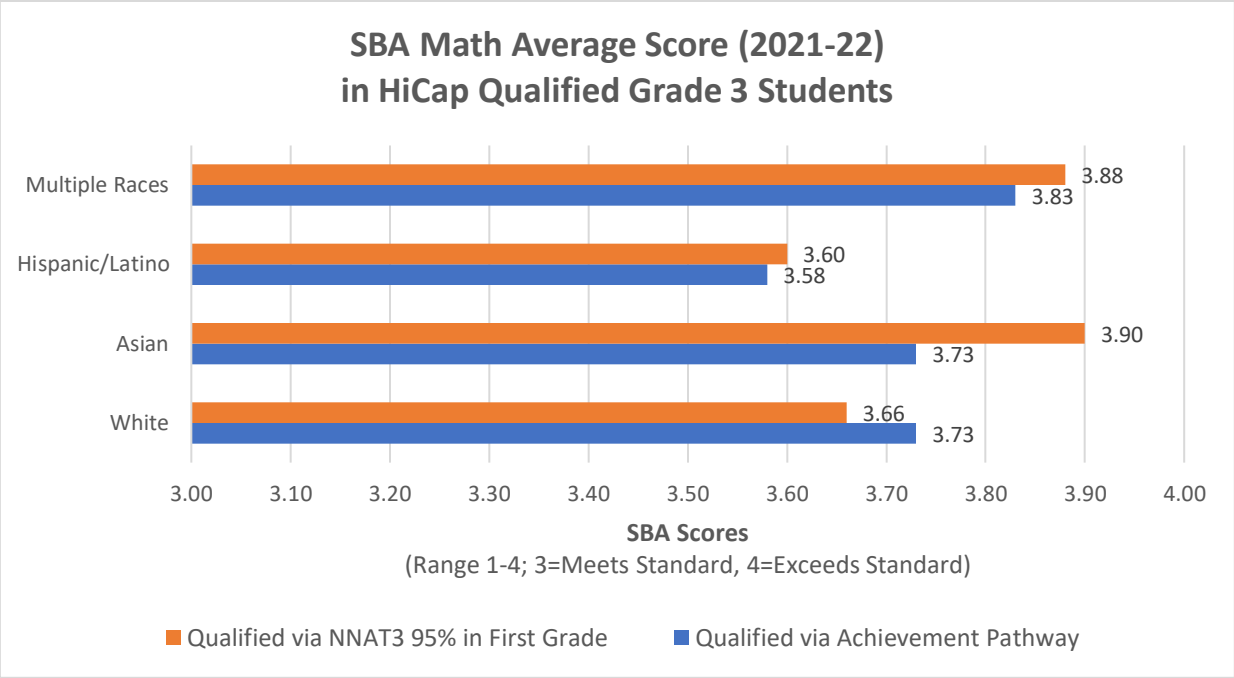


Figure 4.6

ELA Smarter Balanced Assessment Scores of Highly Capable Students Who Had Been Identified with the NNAT3 (Orange/Top Bar) Versus Achievement Pathways (Blue/Bottom Bar)

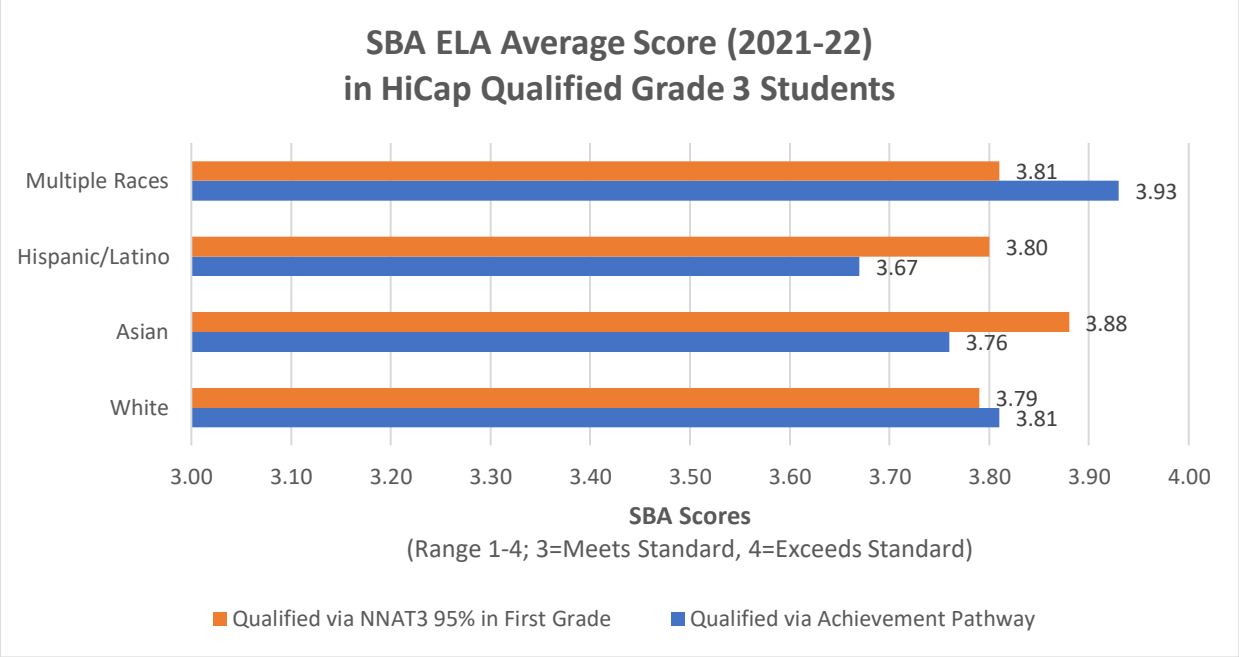


Figure 4.7

Math iReady Average Achievement Scores of Highly Capable Students, by the Iowa Score that had Originally Qualified Them for Highly Capable Services

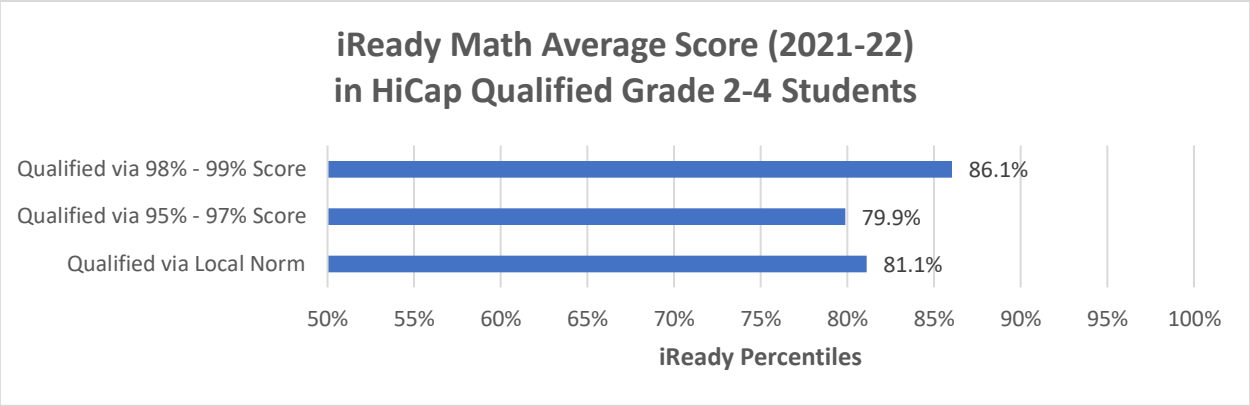


Figure 4.8

ELA iReady Average Achievement Scores of Highly Capable Students, by the Iowa Score that had Originally Qualified Them for Highly Capable Services

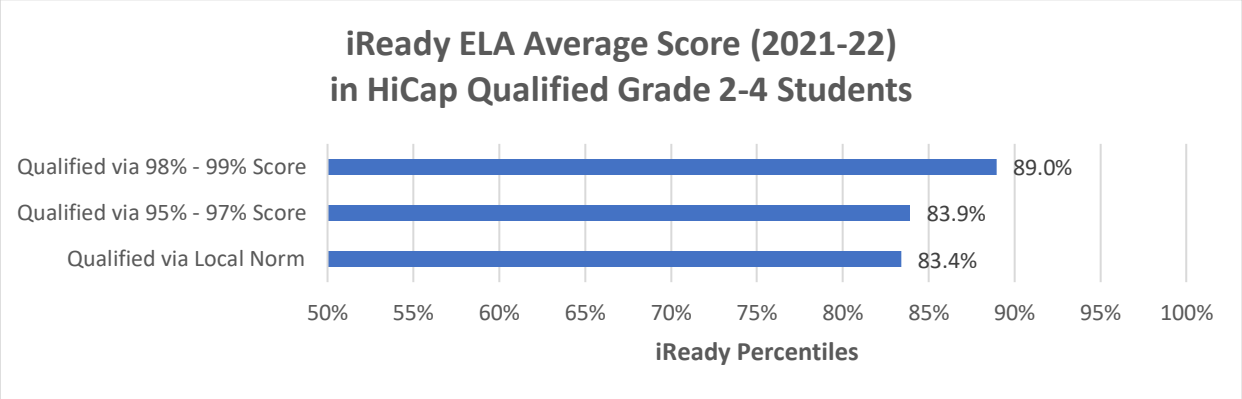


Figure 4.9

Math SBA Average Achievement Scores of Highly Capable Students, by the Iowa Score that had Originally Qualified Them for Highly Capable Services

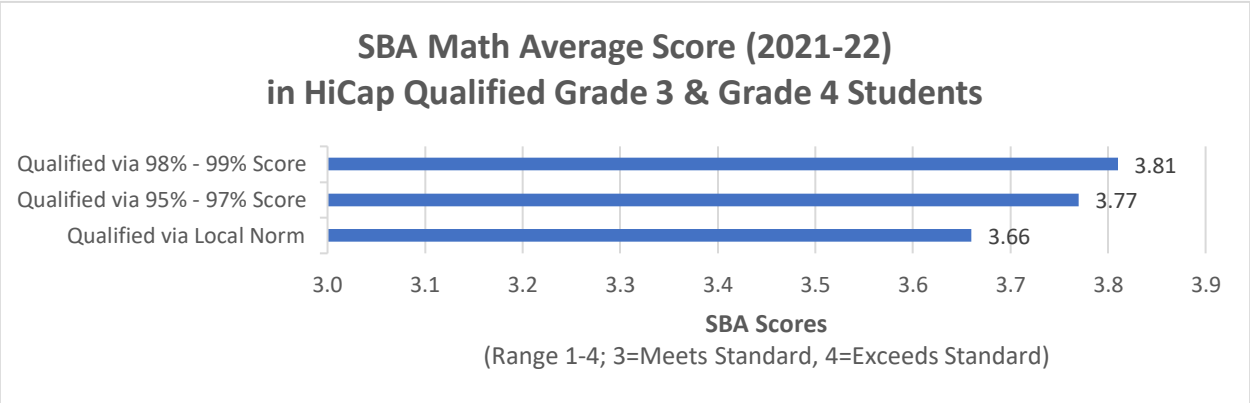
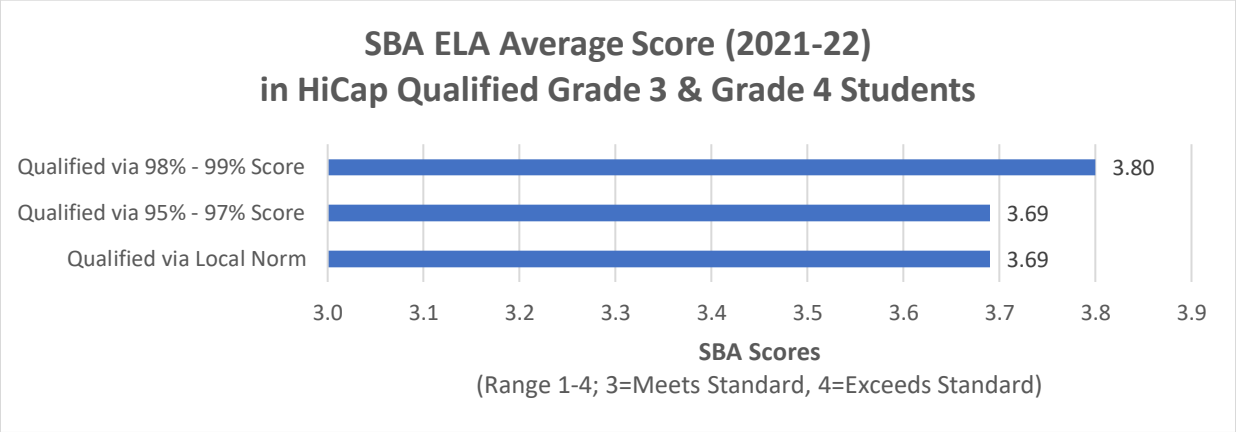


Figure 4.10

ELA SBA Average Achievement Scores of Highly Capable Students, by the Iowa Score that had Originally Qualified Them for Highly Capable Services



conducted. For both the iReady and SBA analysis, students who had originally qualified with the NNAT3-only path in first grade performed approximately equivalently or better in 13 out of 16 categories. Note that some racial/ethnic groups are not shown because there were fewer than 10 students in the analysis group; also, because the SBA analysis was only one grade level of data, sample sizes were fairly small. All of these data should be considered preliminary.

Figures 4.7 and 4.8 show the average iReady achievement scores of highly capable students in grades two through four, which was the first cohort of students who could have been identified with a local norm, which started in 2018-19. An Iowa score at the 95th percentile or higher qualified any student for highly capable services in that domain area. Students who qualified with an Iowa score between the 88-94th percentiles had qualified via a local norm, which was used only for active multilingual students and low-income students. Discussing these students who had qualified through local norms, the program administrator continued:

> People think well, they got in with a lower score, so they're not going to do as well. And they do just as well. So getting in with an 88 or an 85 does not mean that you're going to

> end up staying at 88 or 85. Once you're in the program, your scores go up, just like everybody else that got in with a 95. And I don't know that that was expected, either. I think we didn't really know. But the fact that the kids that are getting in with those lower scores are ELL kids who, once they learn the language, they're fine, right? They move on once they exit the [English learner] program faster and they do well. The low-income kids, once you've made up for the fact that maybe they didn't go to preschool or maybe they didn't have the tutor or the Kumon, or whatever it was that somebody had, then they're fine, they're good. They're in with everybody else, and they move ahead just like everybody else does…we didn't really know how it was going to turn out and it turned out like we hoped.

Figures 4.9 and 4.10 show the similar analysis for the end of year SBA scores for third and fourth graders who had had the possibility to qualify with a local norm. In general, the students who had qualified via a local norm had similar ELA achievement levels to the students who had qualified with 95th to 97th percentile achievement scores, and just slightly lower scores in math. For comparison, the district average scores for third graders taking the SBA were 3.12 for math and 3.20 for ELA in 2021-22.

A district leader clarified that classroom teachers did not know whether individual students had qualified via a local norm or an ability-only test score:

> Now the question would be, did they perform well, because our expectations were that they performed well? Because we did not tell teachers who qualified in what ways, we just gave them all their students. So by having high expectations, did they live up to those high expectations, or did they perform well because that test really did measure that they had potential and they were students who could perform well?

A different district leader pointed out that just looking at numeric achievement levels would not tell the full story:

> Are the students performing? Yes. At a higher level than we would expected them to? Yes... Just looking at the quantitative data, you could say—Yeah, we're meeting the needs of kids based on grades and that kind of thing. But there's this qualitative part, too, that we just don't know. The experiences our students are having from classroom to classroom. We can't control for a lot of the variables there.

Another leader wondered if they could track even more detailed longitudinal data:

> Now the challenge is, how do I prove that they're doing well a grade level above or how do I prove that they wouldn't have done well anyway? Well, that's asking some pretty tough questions. And then sometimes I have parents who are asking even tougher questions. Well, where do they go after school? And are they all doing well in college and are they doing well in life? Wow. You know, I haven't tracked them all…how long have we really been serving this many students and that significant amount of population? So [we're] really justifying that we do have 20 to 30 percent of our population who can handle accelerated services.

Developing Cultural Competence

There was high awareness at the leadership level that cultural competence was a necessary skillset for Blockbridge to develop. This district leader explained:

> We don't have very many Hispanic teachers. That's really hard. We don't have very many Asian teachers. We have more, we're growing that, we're looking for those, we're looking for underrepresented populations. We have more in para [paraeducator] positions now than we've had in the past, but not in certificated teaching positions yet. And those are

> things that I think we can definitely improve upon. But in terms of cultural responsive teaching, and the ethnic studies courses that we're working on, I think those are all pieces that can help add to the way we serve kids.

Another district leader pointed out:

> The whole district has gotten more diverse. At the same time, we opened up the highly capable. I think those things move together. It's hard for me to tease out highly capable, our whole district has gotten increased diversity and then through that we've been forced to become more aware of our practices and our practices that are not culturally responsible. And so we've continued to push on that with our staff, with ourselves, and try to grow in that area in our practices in those areas and think about how do we respond on that?...for me, it's hard to tease it out from highly capable itself.

Another district leader pointed out the magnitude of the shift needed:

> I mean, the American school system, as you well know, was built on an agricultural model and it was patterned after when the crops were in the ground. I mean, that's just... And it was also there to serve the white egalitarian men who wanted to be in politics.

A fourth district leader concurred that this was a massive challenge:

> Our elementary schools are predominantly white teaching corps [who] walk into classrooms every day with these implicit biases that prevent, that transfer to the students and students think less of their ability and as a result they perform at a level that doesn't prepare them for what they really are capable of. Therein lies our challenge. Nothing new. It's not a new challenge, but that's the work.

Another district leader also recognized bias and deficit thinking happening in the classroom:

> What I hear quite often is, even when kids are in those classrooms, expectations are not the same…It's your own biases with kids who don't look like the rest of the kids coming

> into the classroom, or you're going to have to work harder with that kid because the color of their skin because that's what you see originally. Rather than focus in on what they actually do bring to the classroom as far as their creativity for, as far as their intelligence around the work. It's that deficit thinking that we often talk about that, when it's a special population.

Another district leader commented, “We don't always view our Hispanic kids as highly capable and that's very interesting to me. Why is that a bias that we have as a system?” Variants of the terminology “students furthest from racial and educational justice,” including the acronym FFEJ, were used thirteen times across all of the interviews and focus groups. The term “minoritized” was used twice; “marginalized” was also used twice, all four were by different individuals. The term “underrepresented” was used two times each by two different individuals, for four mentions total.

Blockbridge had created a Director of Equity position in 2018, which later became the Department of Racial and Educational Justice. However, this office operated somewhat outside of the main leadership circle. This principal remarked:

> I find it ironic sometimes that our REJ department is also segregated in that work should be bleeding into everything we do, and they know this. This is not a comment on them at all. However, we've segregated that…just within our own thinking.

A district leader remarked that the primary work of the Racial and Educational Justice Department was in secondary schools:

> [We] work with…80% or 90% of the population of our staff in high schools and middle schools…bringing those culturally sensitive lessons into the classroom for all of our students. Now, I would hope in HiCap program that they're doing those same lessons…It is our job to make sure that they are getting those lessons that I feel are very important for

> kids to walk out of our school systems where they are around people knowing more than just their own culture. They live in more than just in Town ABC wherever they live at. That's important. So that's what we do.

A district leader pointed out that the National Gifted Equity Expert hired in 2017 had given Blockbridge equity-focused advice beyond just highly capable programs:

> [National Gifted Equity Expert] came and [they] said some really hard things and caused a reaction from people. I think we chose to focus on one of the three very hard things [they were] telling us. We decided that if we do this, then. I didn't believe the theory of action in the very beginning and I've seen the remnants of maybe where that got us and where it's helping to a degree. There are students who are getting more of their needs met but because we didn't really hone in and focus on the other three things, the other key things that I felt like [they were] really telling us…[They] talked about the district disproportionality of special education…but did we spend the same time and effort into figuring that out and training up? And then there was a lot to be said about the disparate data about our multilingual learners and the fact that there are places in our nation where kids are doing much better, but to investigate, to study, to research, to learn and then come up with a plan of action that was three-pronged, we didn't do it.

Like many other professional development efforts at Blockbridge, professional development in cultural competence was optional, as told by this district leader:

> It's optional. And that's what I mean, if they want it. We've said for the last several years these lessons should not be optional. We do a training every single month and we have modules online, they can go to them anytime they want to meet them and utilize those lessons for classrooms if they want to or for their own individual training, but it always comes back to if they want to. Which to me we will never get where we want to as long

> as we're only bringing people to the table that want to be there. You know, we need to get to the people, we need to get those folks to the table who don't really want to be there. But maybe have some willingness to change and learn…When things are optional and not mandatory, it's hard to make movement.

Although cultural competence lessons in classrooms and other student service delivery was earlier in development, there was more cultural competence demonstrated during the highly capable identification process itself. There was recognition of potential bias in the tests used for highly capable qualification. A district leader asserted, "The tools themselves have their own built-in bias." Another district leader elaborated:

> Iowa Test of Basic Skills, for example, is written in English, given in English, and has a lot of bias in it because the tests have always been made in a biased way just because of who's designing the tests.

Another district leader agreed, "Our tests are not culturally responsive." As was discussed in Theme A, local norms were employed to attempt to mitigate some of these biases for low-income students and multilingual students.

The highly capable department also put effort into making materials available in different languages, especially Spanish. Documents showed that many communications were provided bilingually even as early as 2016; in 2021, Blockbridge purchased an automatic translation tool that would support translating all messages sent via the student information system into any language. Meeting minutes in 2018 mentioned an informational meeting that "Will have Spanish interpretation headsets." Many of the identification practices detailed in Theme A demonstrated a commitment to cultural competence.

However, a teacher told a powerful story of receiving feedback from their principal about their concerns that some families were inappropriately pushing their students into highly capable programming:

> And [they] had a loving conversation with me about cultural competency that made need to take a step back about those questions as a White woman. As a White woman, I had to check myself, I never had to be in a position where it was so important for me to have an edge. Right? But for kids of color, wherever they come from, from some families, that's the only way that they get an edge in life. And so I also keep that tucked in my brain to leave a little bit of space and empathy for where parents are coming from even though I very deeply disagree with that belief system. I did find it a powerful perspective.

A district leader pointed out other cultural barriers that affected identification:

> We do have some cultural barriers. Where if there are multiple children in a family, and there might be an older student in that culture who did not qualify and the younger student did…that the younger child will not accept those services, especially if the younger child may be a female, and the older child was not. So I think that does still happen in certain cultures. And that can be really tough.

Another district leader made this comment that did not recognize the possibility that highly capable students might also have challenges to overcome:

> HiCap I've always seen as this entitled program anyway. Let's focus on the population of teachers out there that are really just doing the job of just having kids in the classroom on an everyday basis who come up with all sorts of issues, not these other issues where I feel these kids in HiCap may not have. So that's been our interest and our focus. Now how can we get those kids prepared for college? Obviously, kids in HiCap they're already on the college track...So there's not much to do there.

A program administrator gave this hopeful perspective:

> I think that exposure to a more diverse community is going to prepare students better as they enter into a global world, into a global business world. So I think that's positive. I know personally, dealing with parents, we have a lot of parents that are Indian. And that has personally been really interesting for me to deal with and talk with many of those parents, to recognize that there are cultural differences and to be just more aware, and I'm sure that is the same for our kids, that they go to somebody else's house, and it smells different. They're eating different types of foods, and I think that that's just really positive.

Beliefs and Attitudes

This fourth main section of findings will primarily answer the last three research questions: (3) What beliefs and attitudes do teachers, principals, and administrators have about the identification and services provided to students identified for accelerated education services at Blockbridge; (4) How have principals and teachers responded as more diverse students have entered accelerated classrooms at Blockbridge; and (5) What challenges in identification and service delivery at Blockbridge remain. The main themes found are (f) the change was driven top-down; team was empowered and felt a moral imperative, (g) debates about over-identification surfaced differing definitions of highly capable, and (h) despite a broad desire to meet every student's individual needs, many questions and debates arose on how best to accomplish that goal and what those needs were.

Theme F – Change Management

Restructuring the highly capable identification process to improve equitable access was a massive undertaking in change management. The main impetus for change came from the top leadership of the school district, including the superintendent, which was instigated by a few

meaningful consultation visits by a national gifted equity expert. There was district-wide support for improving equity and access and solving disproportionality, though there were differences in interpretation of how that applied to highly capable programming. The program administrators who implemented the change felt a strong moral imperative to give every student a fair opportunity to qualify; this conviction drove their work. This small staff of program administrators was empowered by the top leadership to work somewhat independently and make the changes they deemed necessary. There were intentional communication efforts to get information about the highly capable program communicated to district leaders, principals, teachers, and parents, however the messages weren't always received or fully understood. Factors that further helped sustain the change process included aligning with research best practices, aligning with Washington state law, and top leadership demonstrating significant political savvy to handle difficult situations. Amongst all of this, funding was an overall

Table 4.12.

Frequency Table for Theme F – Change Management

Sub-Theme	Number of Participants	Coded Segments	Supporting Documents
Leadership from the Top	11	34	Hi Ad Pa
Expert Consultant and Best Practices	10	20	Ad Pa
Broad Support for Equity	22	52	We Hi Ad Pa
Empowered Staff, Moral Imperative	11	51	Hi Ad Pa
Communication Wasn't Heard	22	50	We Hi Ad Pa
Political Savvy for Tough Situations	7	32	Hi Pa
Laws Were a Motivator	11	25	Wa We Hi Ad Pa
Funding was a Limitation	16	19	Da Hi Pa

Note. Document categories are Washington state statistical data (Wa), district website (We), district-provided statistical data (Da), district-provided historical documentation (Hi), advisory team meeting minutes (Ad), and parent group meeting minutes (Pa).

limitation. These subthemes are described in more detail below, and are summarized in Table 4.12.

Strong Leadership from the Top of the Organization Drove the Change

Like many change management experts have found, strong leadership at the top of the organization is essential for driving organizational change (Shah, 2023). This was evident at Blockbridge. A district leader explained how the district's strategic plan drove the move to universal screening:

> My role at the time was to ensure we had a program that had equitable access and opportunity for all students in meeting the needs of our strategic plan that we had committed to as a community…So we had to make the decision based on our strategic plan at that time to universally screen so that all students had access to entry into the program... I felt like it was a core value that this was just the right thing to do.

This program administrator elaborated:

> There was little to no diversity in here…historically, that's the only way the program's ever looked. I think then leadership…sort of decided that that was going to be the work of this program was to listen and react to that. But it wasn't popular…you know, talent is equally distributed among races, but our program did not look like that.

Another district leader gave their perspective:

> I was there at the onset of it. And I feel like some decisions were really fast. And there were some places where you just had to disrupt and move. I don't have any problem with the fact that we were like, nope we need to test all the kids, we know the test isn't perfect, we probably have to fix it, we probably will have some things to do, but at least we took that big leap.

A district leader further elaborated that moving quickly was strategically important for instigating change:

> I think people believed it was the right thing to do, but weren't always acting as if it was…You have to go far enough fast enough not to slide back to where you were before you made the changes. And I think there's a certain level of inertia or a certain level of, I don't know what, that the system has to spin out of, otherwise it gets sucked back to what it always did.

A principal asserted that, “People with power are the ones who get to determine how the conversation goes” when discussing how the superintendent was driving this change. A few comments referred to inspirational leadership being a supportive force. For example, this program administrator remarked, "And then my mentor moved to [Blockbridge] and she's like, ‘You should come to [Blockbridge].’ Of course, we follow those that we admire and that teach us and lead us and inspire.”

However just getting the initial changes started was only the first part of the challenge; it was equally important to sustain the changes through full implementation and years of refinement. This district leader described the crux of the issue:

> I think that this work requires really steady leadership. I think any meaningful work in the K-12 sphere requires a commitment to staying the course for at least a generation of kids, for at least their 12 years. And what we tend to do in education is changing around quite a bit so nothing really can be fully evaluated. So my hope would be that as a profession, we're able to not flip flop around, but actually stay the course and provide that steady leadership. You're always going to have flare ups of why is this happening and why is that happening? But just staying the course because we know it's the right thing to do I think is just really critical.

They later continued:

> We did a lot of screening in every student, we had the technology to do it, which was good. I think there were some folks that resented the class time even though it wasn't much, but just the bureaucracy of that work I think was resented by some people. But in the end, I mean, I think people understood that's just what we're going to do. I mean, you can't waver at all. And you have to have the right leadership moves that are completely aligned…if you don't have a leader that's committed to that, it goes sideways in a hurry.

There was also a significant leadership change towards the end of the duration of this study; a district leader described the impact of that organizational change:

> People begin to jockey for power and position again and that people want to test if this was the initiative of, the will of the organization, or the will of [Leader]… I've seen a number of areas, not just related to highly capable services, a number of areas where people are like, Well, can we do what we've always done? Or can we do what I think what we've always done? And where's the will of the organization?

By this time point, bringing the larger community of educators and families along had also become an important issue, as described by another district leader:

> To be responsive to the community, and try to lead, but I say this maybe too often that if you don't bring people along with you, you're not leading, you're just taking a walk. So we need to make sure we bring the community with us in whatever we do. We have not effectively done that in certain aspects of our implementation of services for highly capable students.

Expert Consultants Instigated Change and Alignment with Best Practices

In 2016, Blockbridge hired a prominent national gifted equity expert consultant to review the district's highly capable identification practices and give their recommendations. This was mentioned multiple times by various district leaders as a turning point in developing a leadership consensus, as described by this district leader:

> [National Gifted Equity Expert] pretty much said Blockbridge has a country club mentality. You know, looking at the kids that are in the programs, how they got in it, looking at our community as a whole and decided that we needed to find other ways to get more kids of color in those programs…It was a time of eye-opening I think more than anything else. I think [they] did a good job of awakening with [their] own articulate manner. [They] didn't sugarcoat it. [They] called it the way it was. And I think that surprised and embarrassed a lot of people, were you to take a good look at what [Blockbridge] truly has done to, I guess you could say, segregate certain populations from certain programs.

Another district leader also recalled that conversation:

> I remember [National Gifted Equity Expert] said you'll never close the gaps, or the disproportionalities in special education until you close the disproportionalities in the highly capable program…So we brought [them] to the district and [they] took a look, kind of toured for a day, looked at our data, did a review and really shared with us that you know, the system that we were running was a country club program, that in fact, you know, had racist aspects to it. So at that point, [they] talked about the type of screening we were doing because only certain students had access to it. So we had to make the decision based on our strategic plan at that time to universally screen so that all students had access to entry into the program.

Another district leader also pointed out:

> It's been beneficial in my own learning to see or to have, you know, actually [National Gifted Equity Expert] just name what we knew was going on. And to be able to call it out and say, “Cut it out. Don't do that.” That's been important.

Another district leader weighed in:

> I experienced what I felt like was a lot, a shift in focus to leaning into the highly capable programming and rationale why when [National Gifted Equity Expert] was here and who it meant we were leaving behind when we were focusing our time and resources there.

A final district leader summed it up, “[National Gifted Equity Expert] came and reminded us that you know, guess what, there's actually some kids that you're not paying attention to when you do that. Do better. We started to do better.”

While that expert only visited Blockbridge a few times, bringing in an expert also gave Blockbridge confidence that they were aligning their plan with research-based best practices. Meeting minutes recounted that a different expert in gifted education was hired in 2018 who also provided some consulting to the Highly Capable Advisory Team that had formed by that time, and provided similar reassurance and guidance. Universal screening was seen as a best practice, as described by this principal, “That's the quote unquote best practice for almost anything right now is the universal testing.” Another frequently cited best practice was moving to use the Naglieri Nonverbal Abilities Test (NNAT3), as described by this district leader:

> The universal screening process is essential. Because it's catching the kids that we were ignoring, because—and we're also using not just an Iowa Test of Basic skills, but we're using the Naglieri which is the nonverbal test of cognitive skills. So what that enables us to do is it enables us to identify students that were being left behind before.

A teacher confirmed that the NNAT3 was seen as best practice, “We identify with Naglieri as that's what the district decided, that's what was the standard of practice across the country.” Another district leader concurred that updating the assessments for identification was important for removing bias in the process:

> By moving forward with a system that we know is right, because we have to not use outdated, biased assessments to tell us who the students are in front of us that have a need for support for their highly capable brains.

Another program administrator felt confident about the assessments that were chosen, “I think we likely selected the most high leverage tools… The tools we used I do think were high quality tools and I don't question those at all.” A third district leader summed it all up:

> I think in the end when we look at a comparison of how were we qualifying kids now versus how were we qualifying students, we're doing a much better job. We know that we're doing the right thing. Because when we start to look at some of the research that's out there…[We] have some documents that we shared with our [Leadership Team] on qualifying students for highly capable services that reminded everyone—no, you can't just have a single qualifying test. You can't just have parents say that this child needs to be tested. You can't just have a teacher say that this child needs to be tested to qualify for highly capable services. We know that the work that we're doing is actually aligned with best practice, when you're looking at the organizations that sponsor and that promote and are related to highly capable learners. We also know that we're doing right because we're now finding the students that had been historically unqualified, disqualified, not qualified for highly capable programs.

Differing Opinions about What Equity Meant for Highly Capable

There was a strong desire for equity and access that permeated almost all of the interviews and focus groups. The segments coded into this category were those that addressed equity, inequity, and access in an explicit way; there were many more that addressed equity concerns indirectly. Equity and access were primary concerns for all of the district's offerings; this district-wide consensus provided some broad support to follow through with the changes to the highly capable program. A principal described the district's focus on equity over this time period:

> The four or five years, it's just kind of funny because I have been a part of all of that shifting. And I would say the naturally tumultuous nature of various diverse people trying to work through the journey towards equity… It goes always, it always goes back to justice and equity, and access and all of those things… We have an obligation to any of our families, whether they're newcomer families or there's a language barrier or a cognitive barrier, or any other barriers to help them understand the systems and how to take the same advantage of them for their kids.

A district leader agreed that equity was a primary focus for all programs, "When I look at my work, we're looking at equity across the board." Several participants referred to the district's focus on students "furthest from educational justice" as described by a district leader:

> I have responsibility for supporting and making sure that the work that we do toward our racial and educational justice mission of making sure that all students, especially those furthest from educational justice, are being served in the best possible way.

A year after starting universal screening, Blockbridge created a specific role focused on equity, as described by a principal, "In 2018, they had just appointed a director of equity, or I think at the time it was yeah, it was just director of equity. Now it's racial and educational justice."

Improving equity was also a concern of the parent group, which showed up repeatedly in meeting minutes. The parent group also officially adopted a “Non-Discrimination and Anti-Racism” policy in 2019.

Equity as it was applied to identifying students for highly capable programs was framed this way by one district leader:

> It's another part of our MTSS structure that we need to serve the needs of all students no matter who they are, and see it as an opportunity to pull students who are minoritized in, so you have both gamuts, and some who bothered to learn about it I think do see it as an equity issue.

Another district leader remarked, “I think the most important one is that we give every student access and we said we did before but we actually didn't.” Another district leader said, “The change to removing bias and changing the process absolutely was a need, to in some ways level the playing field even just to have access, the opportunity, right?” This focus on equity was evident from the beginning; meeting minutes from the Highly Capable Advisory Team in Spring 2018 read:

> We’ve talked a lot about equity in our meetings. One of the key goals of the new eligibility system is to offer opportunity to students who otherwise wouldn’t have had the opportunity to test and potentially qualify. We’re also looking at sub-groups who are not currently represented in the HiCap Program.

However, it wasn’t always clear exactly what equity meant in the context of highly capable services, as described by one district leader:

> There were definitely times where there were very differing opinions on senior district level leadership around what we should be doing or not doing for highly capable, whether we were just, whether we were losing sight of some of our other racial and educational

> justice work and stuff and just really focusing on one group of students so there's been that conflict. And trapped in the middle are these students that need these highly capable services and these political tensions around that. So it's been tough. I can say the same thing has been around some of our special education services. So there's other places that it's happened but highly capable has definitely been, especially as it's grown, it's been part of that.

This tension between the desire for equity in all areas of the school district's work and equity for highly capable programs was also reflected in another district leader's comments:

> Why in some places and maybe more places than I recognize there isn't as much support for, if I get down to the brass tacks of it, really recognizing the needs of…the child who's receiving highly capable services…that there's a need. That is kind of like admitting that you're racist. People aren't just going to raise their hand and say, Well, I actually think that those kids deserve less. We haven't gone to task on what do we really believe, and what are we really saying and if we really believe that this is or isn't, or should or shouldn't be, then let's speak it out and then let's recognize what we really believe, because ultimately, whatever our decisions are, we are the ones who continue to hold up the system.

Another district leader offered a similar sentiment:

> Early on, it was, "Why are you worried about those kids? Right, they're fine. They're going to be fine." It's like, well, their potential isn't being realized…There was, I think early on and maybe still in some quarters, a feeling that they're you know, why spend time or energy or money or resources on highly capable kids because we have so many other needs. So I think there was a little bit of work that had to be done around what do

> equitable access goals, opportunities, etc. look like for all kids, regardless of their academic expertise or potential or whatever.

They later continued:

> I think we don't as a country have a very clear definition of equity…Sometimes we close gaps by robbing the higher potential, right, or the higher achievement and therefore they're closed, but that's not how we want to close gaps. We want to raise everybody up, not just let some people drift so that there's no gap.

Small Staff Was Empowered and Felt a Moral Imperative

The small staff of highly capable program administrators represented less than two full time positions spread across three people; along with the director (categorized as a district leader in this study) who oversaw multiple programs, they were empowered by the superintendent to make the needed changes to implement the equitable identification initiative. While many district leaders could comment on what the highly capable department was doing and were often supportive of the work, they also indicated that the highly capable department worked somewhat independently. Throughout the interviews, different district leaders made comments such as "I think that falls on the person who's in charge of that program…I'm not directly involved in that," "It's [their] department," and "I don't focus much on the HiCap program. I leave that to [Leader] and [they] share with me what's going on, but that's not our department's focus. It really isn't."

The program administrators felt a keen sense of moral and ethical obligation to catch every student who could benefit from programming. A program administrator commented, "We really want to make sure that we are providing the student every opportunity to be identified if it is something that will benefit the child." The extensive identification process described in Theme

A demonstrated that this wasn’t just a hopeful goal; this small team of program administrators created a process that not only universally screened every student in kindergarten, first grade, and fifth grade, but also every student newly enrolled in Blockbridge, and every single-subject qualified student who had not yet qualified in the other subject. The system they operated went well beyond what the law required, including private school and homeschool students in the process, as well as providing extensive makeup testing opportunities during the regular school day. They also offered a remarkably amount of flexibility throughout this process, especially given the large scale they were managing, as described by this program administrator:

> We try really hard to be flexible. And the philosophy going in is we err towards the student, so that the student is the one who should receive the benefit of the doubt if there's concern or if there's a question. We err towards the student.

They later continued:

> We have we have deadlines, but we don't have deadlines. So you know if at the last minute the kid's parent sends a note and says I want them to take this test and you didn't actually tell us ahead of time, okay, fine, we'll test them.

This principal also echoed this moral obligation to catch every student:

> We have to, absolutely, we have an ethical and moral obligation. So that would be my recommendation, I guess. I don't think of it as a recommendation because I think it's just like that. We should. We should do that. It shouldn't be recommended. We have an obligation.

This district leader also articulated the moral obligation:

> We have a highly capable program because it meets the needs of our students. That would be the moral obligation in terms of we have a lot of different programs to meet the needs of students and they are one of the many needs along the spectrum of services that

> we provide to students because students have many different needs…We give every student an opportunity to qualify or to demonstrate that they may have the proficiency to accelerate their learning. And where we're willing to flex and be malleable and…how flexible can we be within the limitations of our public school system, but it's an obligation to provide services to students who need them.

Another district leader commented, “How well are we doing? We're doing well, we're doing the right thing… We have to do right by our students. This is one of the ways that we are serving each and every child.”

Despite this extensive identification process, the people closest to the program felt that while they had accomplished much, there was still room for improvement, and felt that some students were still being missed. This program administrator shared:

> Every once in a while we'll see a student who maybe has tested year after year, and they're testing 90 to 94th percentile consistently. And yet, maybe all the siblings have gotten the designations and it's difficult to see that, because that kid probably would benefit by receiving services. They probably just haven't they been, their needs haven't been identified. Their 2e need hasn't been identified. We can do better, we can always do better.

They later continued:

> I think we do a good job with what we have. And I think we identify a good number of kids. I think that we probably are missing some kids. But we're always looking to improve. And I feel it's important. It makes me feel good about being a part of the process here.

A district leader concurred:

> I think with a system this large I think we're doing a good job. I think there's always students that we'll miss, I think sometimes we miss them because we don't reach out enough or we can't, we don't get a family to respond or a family just is struggling so much that they have so many other things going on that are more important than that, that email to respond to or they don't know what it [is], they are the only multilingual family in that language. Or they just aren't plugged into the system enough and we don't reach them.

Communication Wasn't Always Understood

The program administrators spent a lot of effort communicating information to parents, principals, teachers, and district leaders. A program administrator described the challenge:

> How do we get the information out to parents with thousands and thousands of kids being screened, and how do we make sure it's accurate? And how do we make sure that it's information parents can understand? Because when they don't, the principals would refer them to me.

Another program administrator gave more details about their process:

> We try really hard to communicate, not in excess, some people feel we do. Some people feel we do not communicate enough. It's hard to find that balance. But when you're sending out thousands of messages, you're not going to please everybody. I think overall people are happy with the amount that we communicate…We notify the schools first, then we notify the families. We will follow up those emails with letters that will be sent via USPS mail to all families of students who have participated in the highly capable eligibility process regardless of whether they have received the designation or not.

Another program administrator also described how all communication went to schools and principals first, before anything was sent to parents:

> Everything that gets sent to families has to first get sent to schools. So the schools are always notified before any communication goes to families. They are notified of all the students who should be taking the test before we ask the students for permission. They're notified of all the students who have gotten designations before we tell the families that their students have designations. They get all of the information on how to proctor whenever they're giving the NNAT3. We are constantly in contact with them when we're setting up the schedules to give the tests at their schools and we're sending our proctors because we need to know locations and that kind of thing. We're constantly telling the schools everything all along the way. And always before the families.

Much of the information that went to families was sent via the district's information system, which a program administrator reported would send families, "email, robocall, texts, the whole bit." There were also numerous documents referring to evening information nights, other school meetings, and informational letters that were sent to families.

Communication also involved fielding a lot of questions, as described by this program administrator:

> We do our best to make sure that we're communicating accurate information in a timely manner. At times, things get incredibly busy and so it can sometimes take over a week to respond to somebody. But we do the best we can to communicate with the schools, help them understand, and then also with the families, ideally.

Most of the communication was focused on the identification process itself, and did not focus on the goals or reasons for the highly capable program. This teacher expressed frustration that families didn't always have all of the information they needed:

> Families whose child is qualified and they don't know what it means. And then they say to their gen ed teacher, "I want them to do the, I trust the school. And whatever the school says I will do." And these are typically families that are of color, and so not understanding what the scores mean, not understanding what does that mean for your child moving forward? And not understanding all of the different avenues that could be for what's best for this child at this moment. I think there's been a lack of communication in that regard as well.

This principal noted:

> We really needed better marketing…We don't do a lot of marketing of ourselves appropriately…Actually, it's better said by somebody I spoke to recently who said we do a really good job of being transparent but saying nothing.

However, unfortunately information didn't always get shared as fully within schools as it could have been, as told by this program administrator:

> When we communicate with the schools oftentimes, information will be shared with the administrative staff first, with an expectation that it will be passed down to teaching staff. I'd say for the most part that happens [but] sometimes an email may get buried in a principal's box, and so it doesn't actually get passed down.

Breakdowns in communication were evident during my interviews and focus groups, where participants would share factually incorrect information about the highly capable identification process or service offerings. For example, there were more than a few people who believed that the highly capable qualification criteria were loosened at some point during this timeline from the 98th percentile to the 95th percentile, which was provably false. In fact, raising the qualification threshold to the 98th percentile was hotly debated by district leadership at one point in 2019, but that change ultimately was not implemented. One district leader commented:

> I understand there was a communication about it, but people didn't pick up on what that meant. I think there are a higher number of individuals in the district that still think that the 98th percentile or higher, kind of our 99th percentile or higher group of kids that we're talking about when we say highly capable, but that's not what how we define that here in [Blockbridge].

Another district leader also had the same misunderstanding that the qualification threshold had changed from the 98th percentile to the 95th:

> If you think about the number of kids that we have picked up into that HiCap…net over the last two to three years as a result of expanding, I think from 98 to 95.

Many teachers commented on the perceived reduction in entrance criteria, as voiced by this teacher, "I feel like the parameters, the standards to get into [accelerated self-contained] is lowered down quite a bit." Another teacher said, "It feels like a moving target of who will qualify based on what score and I feel like that score changes." A district leader expressed their frustration with this persistent misconception, "I think the public perception is we've decreased or we've lowered our bar, which we haven't. It's really stayed the same." This will be discussed in more detail in Theme F.

Several teachers commented that the apparent shift towards acceleration in the self-contained classrooms felt like a change in program model, as described by this teacher, "It feels like we did like a bait and switch but really we did change the model or the idea of what are we doing and why? They're just like shhh, we're changing it." However, the elementary self-contained program had already existed for at least a decade or possibly longer, and had always featured subject acceleration, so in fact, the program model had not changed.

Some elementary teachers did not know that the acceleration provided by the elementary self-contained classrooms would be continued during middle school. One teacher commented,

“How does that serve a child because when they get to middle school, it all goes away anyway? Right?” When a teacher mentioned the accelerated classes that were available in all middle schools, a third teacher commented that not all students could access them, “Some of them do, but not all.” In actuality, all of Blockbridge’s middle schools had provided accelerated sections for all core academic subjects since 2018; highly capable students were automatically placed in these accelerated middle school classes in all schools.

Another teacher questioned whether IEP services were available within the highly capable program:

> It doesn't sound like there's special ed there…this doesn't sound like there are for kids who also have IEPs. I'm not, maybe, you know, I'm not sure. I feel like I heard someone say that if they had an IEP that they couldn't. Or maybe that isn't true.

One possible cause of these misconceptions may have been the apparent taboo of discussing highly capable programming openly. At the end of a focus group, this teacher shared:

> We don't get to talk about this. I have never really felt very many safe spaces to do this work. I can't talk to my gen ed. I feel like I can't talk to my gen ed colleagues about it. I feel like it's difficult to talk to some of my [accelerated self-contained] colleagues about it. So I appreciated having a safe space.

A district leader offered a solution for the misconceptions:

> Maybe the thing we have to do differently and better is to help our educators understand why we're qualifying the students the way that we are, and do so in a little bit more of a deliberate way. They get the information, they know what's happening because they see the process. They may not understand why the Naglieri is used or why we don't qualify kindergarteners yet or why the Iowa is a part of the process—they might not understand the whole reason behind the shift.

Political Savvy to Handle Difficult Situations

Although not as many participants were aware of these occurrences, there were several politically charged events that were mentioned during interviews and focus groups, a few of which participants asked to not be shared directly because they were so sensitive. Throughout these anecdotes, the common thread was that district leaders demonstrated a strong degree of political savvy to handle these difficult situations, and most resulted in positive or at least neutral outcomes. One example was the situation that arose when the National Gifted Equity Consultant's comments angered the Asian community, mentioned in the previous theme. This district leader described the fallout:

> I'm just remembering back to those days. Those were some tough conversations. It's like no, we're looking at maintaining a screening assessment. We're just not only doing it on a Saturday, or we're not only doing it for students that are nominated. It's every student has an option. So I think the constant need to explain that we're not lowering expectations, we're just increasing support. And that's a really different model.

Another district leader agreed that the highly capable program had become politicized:

> There's other places that it's happened, but highly capable has definitely been, especially as it's grown, it's been part of that. Particularly it's gotten attention and then other people want attention for their stuff. And as my stuff's not getting attention and why it's this, and there's just all sorts of political stuff.

One principal pointed out that high stakes decisions frequently became political:

> When we say that things have politics behind them. They always have politics behind them. And when you work in government, you begin to understand very quickly that that is a beast that you can't avoid. And it is how things are done. Because as lovely as

> democracy is in its beautiful abstract when it's having to be concretely applied it doesn't work always in that sense. You have to be willing to let go to get sometimes.

One area that was mentioned several times was negotiations with the teacher's union surrounding the highly capable program. This required continual discussion, as described by this district leader:

> I think as long as we stayed within the bounds of the strategic plan and said, Look, this is around an equity move to include students. And it shouldn't be predictable which students [qualify] based on universal screening. I believe the union stayed with us…So, I think the union stayed with us, as long as we could staff it, as long as we maintain resources in an adequate way for the things the union needed. It's all a give and take. So I think they knew it was the right thing to do early on, and I think were willing to stay the course as long as resources were still available for things that they had an interest in as well.

Another district leader detailed how deep these debates ran:

> In this district, things have been bargainable…. the CBA [Collective Bargaining Agreement] says you don't have to teach more than one grade level in your classroom. That goes directly…against having multiple groups of kids in your classroom at the same time and it makes it almost impossible as a classroom teacher. And you can even have two people in the [union] arguing almost right against each other at the same time. So on one hand, they'll say, We want all these kids in our classroom and the other set of hands will say, but I can't teach all these kids in my classroom. And so I don't even know that they know where they want to land.

Another district leader commented, "Our teaching force, some of our teachers believe that we are over accelerating kids and just caving into high pressure from parents. So there's this tension

with our labor partners around it." A district leader recounted how union buy-in was essential from the beginning:

> [National Gifted Equity Expert] came in and was really clear about it. [They do] this work, you know, all over the country. So it wasn't us looking at it and saying, Hmm, let's see what we can do to, you know, mess with our system. It was, you know, somebody who's a professional researcher and someone who worked in the field and has done broad district audits on this topic…at that time we brought the union with us in the conversation. You know, [Union Leader] was part of that conversation. Then it made sense, right?

Laws Were a Powerful Motivator

Washington state laws around highly capable programs were mentioned quite a few times by participants as a reason why Blockbridge had changed their highly capable identification practices. Washington state had established highly capable programs as part of basic education in 2014 and added some stipulations to prioritize equitable identification of low-income students in 2017 and 2018. However, the law requiring universal screening and testing during the school day was debated for many years in the legislature but didn't formally pass until 2023. This program administrator explained how Blockbridge aligned with state laws:

> I'm also proud of aligning with state law. The house bill that came out and the state law that has changed, so no Saturday Testing, testing in school, those kinds of things. We very much got ourselves in alignment with state law very quickly.

A district leader commented:

> It also is state law and so we do have legal requirements to provide students with services that are different for their accelerated learning needs and enrichment needs that they require. And we work really hard to make sure that we're meeting that letter of the law.

A program administrator mentioned the law several times, saying "The reason for screening kindergarten students is state law," "IEPs that's law, we're going to go ahead and follow that," and "We do by law, you need to provide an opportunity for families to appeal."

The law was also cited as an important rationale by teachers. One teacher said, "I know that one reason Blockbridge and other schools have highly capable programs is because there was highly capable legislation passed some number of years ago." When asked why Blockbridge had a highly capable program, another teacher answered, "Other than because it's state law?" A program administrator shared that the law was a primary rationale used to explain the changes to others, "We had the law, and I think I needed to tout the law quite a bit in order for people to understand why we were doing what we were doing."

References to the law showed up frequently in documents as well, especially during the 2017-18 school year when universal screening was first implemented. In a December 2017 letter to all Blockbridge families in grades K-8, the new universal screening process was described and included this rationale:

> OSPI's [Washington State Office of the Superintendent of Public Instruction] Highly Capable grant application now requires a comprehensive action plan for addressing inequity issues. Signed June 30, 2017, Engrossed House Bill (EHB) 2242 requires districts to implement practices that prioritize equitable identification of low-income students.

Blockbridge also made annual filings of the state-required iGrant report, which was required by law in Washington state, and was approved annually by the Blockbridge school board. The

Blockbrige school board also had a defined policy that covered the operation of the highly capable program to align with state law.

Meeting minutes from a Spring 2018 Highly Capable Advisory Team meeting summarized a presentation from a gifted consultant from a university in the state who had visited the group, which included detailed references to Washington state law. There were numerous other places in the meeting minutes for the Highly Capable Advisory Team that also mentioned various aspects of Washington state's highly capable law to support Blockbridge's changes in practice. Laws were also mentioned on various district communications, such as this 2018-19 Kindergarten Highly Capable Eligibility Process information sheet that read, "Those students meeting the criteria threshold on the screening tool will move on to assessment. Parents of students moving on to the assessment level will be notified. Per WA state law, parent permission is required to assess a student."

During their visit, [National Gifted Equity Expert] had pointed out that Blockbridge was vulnerable to a federal Office of Civil Rights review because of disproportionality in highly capable identification, as described by this district leader:

> I think that often we talk about equity, but the actual work of that rarely is welcomed because it generally requires change and disruption if you will, of practices that in many cases have been there quite a little while. Like, you know, they weren't just practices, they were traditions in some ways. So I think on the part of leaders, I think there was a nervousness. And then, on the other hand, you know, I think once they saw the data in ways that perhaps they hadn't previously seen the data, there was also, there really was no explanation or reason to not move forward and do something different. And in fact, you know, I think it indicted our system of what we did…If you have the data, if [National

> Gifted Equity Expert] would have done an Office of Civil Rights Review, it really left you no choice.

This principal reflected on how laws drove behavior:

> I know the laws. I always explained [that] when I had to defend things or talk to my students, you have to know the rules, because they only play by the rules, and people will use the rules to their advantage all the time. They wrote them. So if you know the rules, and you know how to navigate them, and you hold people to their own policies, that's how you get something done. You will not see change otherwise.

One district leader also reflected on the role of laws for ensuring that the right thing actually gets implemented:

> I feel like just saying the right thing to do is one thing, but you almost need to make an economic case for that. In terms of potential, either realized or not, for lawmakers and politicians across the country to really double down and ensure that this is the right thing to do and it happens everywhere.

Funding Was a Limitation

Funding came up in multiple ways as a limitation, as described by this program administrator, “Unfortunately, the state law didn’t come with any money. So you know, that’s tough.” Another program administrator said, “I think that the schools have some misconceptions about funding for HiCap, they think that somehow HiCap gets lots more money.” This district leader shared:

> Within a system this big and this large there are always things that wind up having to take more of a priority. And there are the priorities oftentimes are driven by what's legislated and where the money's coming from. The bottom line is in what we're expected to do and

> what we get state funds to do. So we have to, for example, every other year, do professional development on social emotional learning. We have to every year do professional development on racial and educational justice equitable practices. We don't get funds to do professional development for our highly capable students. Although one could say well, hey, wait a minute. Professional learning for highly capable students fits in with both of those things. But on its face, and when you look at the RCW's [laws] you have to start being very creative in how you draw that line.

A principal argued that funding limited the amount of individualization that could be offered:

> You can't really give everyone an individualized education. It's beautiful in theory, and that's what we want to do and that's what we aim to do. Without the funding and the ability to do it, we can't.

One district leader commented on how every educator felt like they needed more support:

> Everybody's got a difficult job in education right now. And we just have to learn how to support all of those various positions in a way that truly feels like support. And I don't know that we even have enough funding to do that. So it's how do you provide support without necessarily having it be funding?

A different district leader commented, “There's a financial piece to it, that has to be considered. I think there's more we could do and it's just how and what we do it and in the name of what.” A teacher pointed out that when there’s more funding, more things are possible, “My previous school district in a different state, we did have IEPs for HiCap…federal money followed it, amazing what you can do when you have money to fund people.”

One area where lack of funding for faculty was keenly felt was when greater identification of highly capable students caused schools that did not host accelerated self-contained classrooms to drop in total enrollment as their students transferred out to other schools.

This wasn't a net loss of funding for the overall district, as this program administrator explained, "They're all still kids in our district. So they're all going to have to go in some classroom somewhere." Another program administrator also commented:

> I don't know that increasing the number of kids in the program, I don't know that has made much of a difference as far as where you're going to put the kids because the kids still have to go somewhere. So whether they're in this classroom versus that classroom, it's kind of all the same. You just end up with a lot more teachers that are teaching HiCap classes rather than gen ed classes.

However, when a particular elementary school lost enrollment, they lost funding for their local faculty as well, as explained by this teacher, "When we are qualifying…18 first graders across the school that is a classroom, that is one person's full time FTE…So we lose staff almost every year." Another teacher also commented:

> When you have a school, that they don't house an [accelerated self-contained program] and so if their kids qualify and they accept a position elsewhere, in those buildings, they lose FTE, and teachers lose their job.

However, other schools who hosted accelerated self-contained classrooms benefitted from some of those enrollment shifts, as told by this principal, "No one has said a word about it because they know it keeps our numbers up, you know, enrollment numbers at a pace where we are not losing any staffing."

Budget was not a primary driver of the move to universal screening, however, this practice turned out to be a cost savings. By moving to screening students during the school day, Blockbridge reported that they saved $140,000 compared to their previous practice of Saturday testing, as reported in this information sheet:

> Prior to universal screening, [Blockbridge's] entire HiCap grant [state allocation] was used for fixed costs and assessment, largely because of the high number of proctors needed for Saturday testing. Universal screening created a cost savings for Assessment of nearly 50%.

That funding was put towards improving services and offering the online math acceleration for fourth and fifth graders who had qualified for math-only services.

Theme G – Debates about Identification

As the highly capable program grew, debates about whether Blockbridge was overidentifying students grew as well, with strong opinions on both sides of that argument, and many participants expressing frank disbelief that it was possible for this many students to qualify. Teachers pointed to underachieving students who had visible challenges with reading, writing, math, or motivation as an indication that students were being overidentified. This led to questioning the identification criteria, especially students who were being qualified with the

Table 4.13

Frequency Table for Theme G – Debates about Identification

Sub-Theme	Number of Participants	Coded Segments	Supporting Documents
Debate about Overidentification	23	48	Ad
Underachieving Students	18	32	Ad Pa
Questioning the Identification Criteria	17	26	Ad Pa
Test Prep & Parent Pressure	27	78	We Da Pa
Differing Definitions	22	51	Ad
Highly Gifted Getting Needs Met	15	26	Ad

Note. Document categories are Washington state statistical data (Wa), district website (We), district-provided statistical data (Da), district-provided historical documentation (Hi), advisory team meeting minutes (Ad), and parent group meeting minutes (Pa).

ability-only pathway in first grade and no achievement testing, as well as the fact that writing was not assessed at all, and a long list of other questions. Another massive debate was raised by teachers around test prep, tutoring, and general parental pressure to qualify for highly capable services, particularly in some cultural groups, as well as counterarguments from district leaders. Ultimately, this raised the question of how Blockbridge defined "highly capable," and whether that was the same as the definition of "gifted." A subsequent question was whether highly gifted individuals who had even more unique needs were getting their needs met in Blockbridge's current system. These subthemes are described in more detail below, and are summarized in Table 4.13.

Debate About Whether Blockbridge was Overidentifying Students

Many teachers and principals expressed the opinion that Blockbridge was identifying too many students for their highly capable program. This principal stated:

> Just as a blanket statement, I think we overidentify, and I think that is incredibly obvious in our data. I don't know what the national figures are, but I think it's something like 4-6% students, which fits within a bell curve, right. But I think we've identified maybe 28% of our students as highly capable. Which is weird, because it's like a third almost of our students.

Many teachers felt that it was just not possible for this many students to qualify. This district leader shared what they had heard from teachers, "There's some disbelief that there's that many kids that actually, quote unquote, are highly capable." This teacher said, "Two thirds of the kids qualified in one grade level, in second grade. They qualified in." Another self-contained teacher said, "I feel like one of the biggest arguments that I am hearing is of the overqualification." Another teacher said, "Right now we're more than 25% district wide, at my school it's more than

50% We need to admit we made a mistake." Another teacher added, "We have more [accelerated self-contained] students at my school than we do gen ed. If that's not a red flag, I don't know." Larger numbers of highly capable students were common at magnet schools that hosted accelerated self-contained classrooms for a region. Another teacher emphatically shared, "Right now, I'm crying to the wind and no one cares because it looks good on paper. Look how many kids we're qualifying. Well, that's more than the national average." A district leader concurred that they were hearing this feedback broadly, "A place where we're getting quite a bit of pushback is that we're overidentifying students."

However, among district leaders and program administrators, the perception of the situation was much more nuanced. A district leader admitted, "I've probably along the way been one to say well, now we're qualifying too many kids or I see that all these kids are qualifying in these places." Another district leader shared:

> There is a loud voice of teachers right now who are saying we've got to do something differently, we're overqualifying students and/or the impact of highly capable services very negatively impacted my work and my ability to work with kids. That's the loud voice. I don't know if it's the minority or majority voice, like that's something we're actively trying to figure out.

Another district leader commented that identifying more students has changed how people view potential in students, "When I look outside, I think there are some who really get it…they actually see that there's potential in kids that they didn't see potential in before."

Several district leaders framed the argument that if students were being successful, they weren't being overidentified:

> I feel like we were well on the way to an improved system. I don't know if it was perfect. I think we were still working things out. Were there kids being overidentified? I don't

> know. I don't think so. You know, I think we have to look at were kids successful who entered the program. And if they were, I don't think that we were overidentifying.

Another district leader agreed that students being successful was an important counterargument:

> A place where we're getting quite a bit of pushback is that we're overidentifying students. If we look on one end of it. I don't know if it's a reflection on the highly capable program or it's a reflection on just our instructional practices. But when kids are given access to the highly capable program, by and large, and it's not each and every child, but the vast majority of those children are successful in those advanced level courses.

A program administrator concurred:

> I understand why there can be concerns about the number of students that are identified and yet ultimately, if our goal is to serve the individual child, we need to look at the individual child. If there are 25% of the children that live in this community that have been identified and have proven to be served well to receive those opportunities, to experience challenge, to develop some grit, then I think it's okay.

A third district leader suggested that these students had always been there:

> I wonder, if by moving forward with a system that we know is right, because we have to not use outdated, biased assessments to tell us who the students are in front of us that have a need for support for their highly capable brains. That by moving forward with the new patterns of qualifying students, has that surfaced what was always there? Maybe.

Another district leader added their perspective, “I hear you're overqualifying students, which is pushback we get but then if I look at from an academic perspective, they're doing just fine. So if we've overqualified, why are they so successful?”

One reason stated for why Blockbridge may have identified so many students was because the district was situated in a highly educated area. This district leader shared:

> I think Blockbridge also had a unique student population because of the families who chose to move and live there from all over the world. So I think there was a higher percentage of students in the highly capable program, but I think that's okay to do.

Another district leader added, “I have to believe we have more parents with advanced level degrees who are bringing children to our schools than many areas in the country.”

Ultimately, the majority of the district leaders identified the primary pressure on the system not as the number of students being identified, but how they were being served. This district leader shared:

> It also has significantly shown that we have a lot of high performing students who are much more capable than we've ever imagined. It puts a strain on the system though, because we changed our identification process, but we didn't change our service delivery model to go along with it. And that has created tension within the system.

Another district leader concurred:

> I think primarily the pressure that we're feeling in the system is less a result of the number of kids and more result of the way that they're being served and what classes they're coming out of and those kinds of things.

A third district leader offered their analysis:

> Some of them think that we're just going down the wrong path by overqualifying the children, we're overqualifying them. And again, if I'm not charitable, they're racist. When I am charitable, they're afraid because they don't know how to support the kids, from highly capable all the way through to the student with special education needs through the student who is multilingual, whichever way they're sliced and diced and configured into the classroom in front of the teacher.

Teachers Raised Questions About Students Who Were Underachieving

One of the most frequently cited datapoints leading teachers to believe that students were being overidentified for the highly capable program was seeing students who did not appear to be academically ready for the accelerated classwork. This was true among self-contained classroom teachers as well as general education teachers. This self-contained teacher explained:

> Now we just have a massive influx of a lot of kids getting into it. And I've been teaching it for quite a few years now to notice that I have kids that are maybe not as gifted as I've seen in the past. There's a lot more that struggle in a lot of different areas, not as motivated.

Another self-contained teacher agreed, “This year in particular, I have way less motivated, a lot if I just compare from my own perspective, the handful that is much lower than the top in the other classes.” This general education teacher recounted:

> I've heard people, incredulous teachers saying, this kid that was in my class tested in to HiCap, and I can't believe it, you know, I just didn't, I don't think, that kid didn't strike me as HiCap and the behaviors and other challenges they have.

Another teacher offered:

> When I also taught the 4/5 [accelerated self-contained] split, it was the third year of our global screener. And I can confidently say three of my fourth grade students were in over their heads. They were not what I would identify as, or labeled and identified as TAG [talented and gifted] in any other state or highly capable. Hearts of gold and strong, strong, willing, mastery-oriented learners but not exceptional in their abilities to take on new learning, explore, examine inquiry concepts, a lot of struggle that was not productive struggle for them.

Another teacher told about a conversation they had with another teacher:

> Were they truly ever an [accelerated self-contained], or a TAG [talented and gifted] student. That educator would tell you, No, and she taught TAG for 15 years, so she's like, No, 90% of my class shouldn't be here.

Yet another teacher added, “I want to say early on when we were qualifying kids, I saw them ready. Now, today, they're not ready." A self-contained teacher summarized, “I would agree that the variance in ability has absolutely widened and I would echo that it takes longer to do everything which impacts pacing and depth and rigor.”

One area that was flagged as a particular challenge was literacy, including reading and writing. A self-contained teacher elaborated:

> We always say okay, well writing is an area that they struggle, but these kids are struggling in a lot of areas... and we think, oh blame it on the pandemic, blame it on online learning, whatever it is, but it's definitely noticeable now, where I have some kids that are really, really behind and I'm really surprised they're in [the accelerated self-contained classroom] honestly. Which is too bad. I mean they're stepping up because everybody in the class steps up and everybody does really high work. And so those kids are kind of by default, they're working harder. They're looking around and seeing other kids and they're motivated, they're getting there, but it's been a different population than the last four years, five years, for sure.

Another self-contained teacher told their experience:

> This year in particular, I had two or three students in my third grade [accelerated self-contained] class who should have been reading at the third grade level when they entered third grade [accelerated self-contained] so that they're ready for fourth grade content. And they were not yet meeting third grade standards. One of them was not even meeting second grade standards on the iReady test.

This teacher shared their concerns as students reached more sophisticated literary analysis:

> These are Z readers…They also have eidetic memories and they build huge fonts of vocabulary. But when they're in a Socratic seminar and asked to expound on meanings of the dialogue between these two characters and the tension in the tone, they sit there and go, I know what tone means, I know what tension means. And they struggle, and not only do they struggle, but their peers who moved into that placement from the gen ed setting outdistance them in achievement, in thought, and then they feel dejected because they're supposed to be the smart ones.

A district leader gave their analysis of this situation:

> The teachers of the programs are frustrated. Because they have kids that are not as strong of a reader. Right. And so that's their main concern. It has nothing to do with… are [the children] able to engage in conversation? Can they think creatively?...No it has everything to do with whether or not they can read what I put in front of them.

This principal argued that reading is not the best indicator of intelligence:

> We have this huge population of kids who are years behind in their reading, how are you going to know if a kid's gifted if they're like three years behind in their reading, but being able to read is not at least to me, an indication that you're smart [or] gifted, quote unquote. It's a really great way to access learning, but it doesn't mean that you have gifted strengths and intelligence.

Another district leader gave this context:

> The only time that we saw the struggle, and sometimes we allowed students a little bit more time in a regular classroom, was by making some of those moves really early, was when we had a child who hadn't learned their letter sound association and that was not tested at all by the Naglieri. Some of the students were given a year back in the regular ed

> classroom, because to move them from first grade where they had not yet mastered that letter-sound association and couldn't sound out words into third grade curriculum—reading was too big of a jump if they could not read yet, they could not master decoding.

There were challenges in the domain of mathematics as well. This self-contained teacher said, “I had students, I teach seventh grade math, that didn't know what perimeter and area was…and we're doing pre-algebra.” A district leader explained that students who were identified in math in the later elementary years may have skipped a lot of content:

> There are situations where the student is identified as highly capable later in the elementary years—4th or 5th grade. Some of those students then skip over some math content that they miss. So particularly if they are single qualified math students, and trying to go back and make sure they get that grade level content that were skipping over has become a concern. So there, but with anything there's always going to be challenges. But it's very important to be able to support those students in making sure they have those foundational skills before in order to be able to be more successful going forward. I think that's, in my mind the biggest concern.

Another teacher shared, “Some of the things that they would ask me, like, you don’t even understand this is a subtraction problem. This is alarming.” Another teacher added, “We do end up with classes of kids who are far behind. They don't know their basic facts. They're not able to determine whether a word problem, what operation they should use.”

A self-contained teacher explained the impact of underachieving highly capable students in their school:

> I feel like at my school in particular, there's just a good amount of primary teachers, the teachers who see these kids get accepted into [accelerated self-contained] that first grade kind of year, grow a large animosity towards the program, simply because their

> experiences with those kids cement their belief that they do not belong based upon their experiences with the kids. And I do think sometimes their experiences can very much be right. But I think also that could be missing the twice exceptional piece as well.

Another self-contained teacher echoed the need to recognized twice exceptionality in this population:

> I would say yes, as teachers…we need to embrace the fact that we're getting kids that have different challenges. And I think at times, we are given them and we can act like well, they're in [accelerated self-contained], they should be able to handle this. Come on and get on board. Let's go. And we're going to have kids that aren't making it… and that happens in a general ed room as well. We sometimes have to caution fighting the system of if we get them, that they're supposed to be easy to work with…They're going to be challenging. That's part of who they are. That's part of our clientele that we get.

A principal also pointed out that identifying based on potential will mean that some students lacked background knowledge, and needed scaffolding:

> To my understanding, you're identifying kids on their capabilities and their capacities of understanding and intelligence of what they can engage with, but not necessarily the background knowledge…So are they capable of that work? Yeah, sure, probably. But are they going to be equipped to do it with the background knowledge they need?...You still need scaffolding. That part never happened.

A teacher shared that the experience of teaching a self-contained classroom was not as different from general education as they had been expecting:

> I had a certain idea of what the experience was going to be. And when I met my students and we really started to dig into things, it felt very much more like a typical gen ed classroom with a handful of kids that I felt were much more skilled, particularly in

> mathematics, but most of the kids I felt, were just, were kids I would also work with a gen ed classroom.

However, even though a teacher may have felt that a student did not belong in an accelerated classroom, they were loath to bring it up, as told by this self-contained teacher:

> Even if I feel like a child maybe doesn't belong in the program, that to plant that seed of enmity, frankly with how it would be perceived by many parents is simply just not worth the blood and the sweat. So I don't.

Questioning the Identification Criteria

These concerns about overidentification and underachievement led many teachers to question the highly capable identification criteria. Stated simply by this district leader, "There's a lot of concern about currently overidentification of students through our current qualification process." This self-contained teacher shared:

> It feels like there may be something wrong with our qualification process. I don't think it's a throw baby out with the bathwater situation. I think a lot of the things we do with qualification are really valuable…I don't want to throw out the entire qualification process, but I think it does need to be relooked at.

This self-contained teacher asserted, "I do definitely think that a lot of students are being let in and so the parameters for when those students are let in are being questioned heavily right now by all teachers." Another self-contained teacher agreed, "In my opinion, I feel like the parameters, the standards to get into [accelerated self-contained] is lowered down quite a bit."

The first grader ability-only qualification pathway, where students could qualify for services in both math and reading with only an NNAT3 score above the 95th percentile was particularly controversial, as told by this program administrator, "Some folks believe that that

does not actually test enough. They think that well you haven't done an achievement test. So how do we know that this student is actually gifted?" A self-contained teacher shared:

> I do have some concerns about the possibility of qualifying for [accelerated self-contained] purely based on the nonverbal test. Because there are students who qualify based on the nonverbal test who do not have to show academic prowess at a level that is one grade level or sometimes more advanced than other students who are getting into [accelerated self-contained]. And that means that when they are in my classroom, it takes more time and effort and differentiation and small group specialized instruction to get those kids up to the same level as their [accelerated self-contained] peers because they are missing foundational skills in the grade level that was skipped.

Another teacher shared a similar concern with the Naglieri as the sole data point:

> There is a concern also, that there's children who use the Naglieri and they don't go into the Iowa, and they jump from Naglieri to [accelerated self-contained] and Naglieri gives us a basis of foundation that yes, there is some of that creative and curiosity and out of the box thinking but if our structure is accelerated program…it doesn't always seem right. I've seen that struggle with students who are not quite ready to be in a program. Parents see that and they say, yes, we want them in no matter what. Whereas giving them a little bit of a chance to get more of that foundational skill in place so that they are ready to be in that acceleration. That's what I'm noticing. I'm noticing that there is a disconnect there.

Another teacher asked whether identification with the NNAT3 was aligned to the services that were being delivered:

> The Naglieri itself, the level of non-neurotypical thinking we have in kids in this current generation is very different, that puzzle solving and rapid on screen processing of

> nonverbal, non-written cues. Is it still currently aligned to the way that accelerated programs and learners in those programs will succeed?

However, a program administrator countered with their experience:

> I get calls from schools, from principals saying, Tell me how the student qualified, because they're not doing well…I don't think I've ever looked up a student in that case and had them be qualified through NNAT3. It's always they got qualified through Iowa, they got a 99 on the Iowa math, I don't know why they're not doing well in math, or reading or whatever it is. So I think they have that misconception, that you didn't test them enough. Therefore, this is why they're not doing well.

On the other hand, other participants had concerns with highly capable qualification based on only an achievement test, as told by this teacher, "I don't know what has happened at other schools but I had a student who's fourth grade this year, qualify for [accelerated self-contained] based on his third grade SBA testing." This district leader also questioned this practice, "I have a problem with the ITBS [Iowa Assessments] however, and we didn't change it." This teacher agreed that ultimately identifying most students with an achievement test nulled much of the equity benefit of the NNAT3:

> I felt like it was more holistic, the Naglieri's coming…the symbolic reasoning, we're taking out that like prior knowledge, how are you solving problems, how are you looking at these pieces? And there's not like necessarily a right answer, but how do you connect to these things? We're going whoa, we're looking at people that are thinking without being told this is what you need to do. And I'm like, wow, what an interesting, unique way to capture another perspective of our children, but then we take that group and…go take this ITSB [sic, Iowa Assessment] or whatever. Take this criterion-based test at a grade level above. So we're right back to where we were before.

Others raised concerns that the current criteria did not assess writing at all, and that many identified students had challenges with writing, as described by this self-contained teacher:

> A big issue that I have is that writing is not even assessed, and I have known too many students as somebody who has taught fourth grade for many, many years would not be reaching standard for writing in fourth grade and would probably be considered for intervention.

However, a counterargument was offered by this principal who relayed an anecdote about a student with dysgraphia who failed to be identified as gifted in a different state because writing had been included in the assessment:

> It wasn't until after the fourth year of them doing this…that I learned the test they were giving, the WISC, I knew all about it, but you could remove the written portion of it and still get like a perfect score that gives you insight into does this apply for this kid? For [this student] they never removed the written portion. But he has dysgraphia.

Several teachers felt that the lack of any teacher input into the identification process was problematic. This teacher shared that prior to universal screening in Blockbridge:

> There was teacher input, that was another piece to the acceptance per se. That gave some insight to what the kids were doing within the classroom. And that seemed to be another additional bonus and support of these students who are, who have the curiosity, have the inquiry, have the out of the box thinking, have that ability and capacity to be accelerated in an [accelerated self-contained] HiCap setting.

Another teacher also felt that teacher input should be considered:

> I feel like the elimination of any personal judgment of educators who have worked with that student and see how they perform in a community classroom really sets us up to miss some kids and feel like that overqualifies another group of kids.

There were also concerns that some students were still being missed, despite the large number of students being identified. This teacher pointed out that the Naglieri doesn't always catch students whose strength area is literacy:

> They don't get identified because the Naglieri isn't getting their English language arts or their literacy abilities. It's puzzles and logic which for some of my highly literate students and exceptionally bright writers and readers, that if they have no interest in the puzzle, they don't like it. That's not where their brain goes.

Another teacher recounted that in their general education classroom they had four students with Section 504 Plans who were not identified for highly capable services but perhaps should have been, indicating that some students may have been missed: "Four 504s, every one of those 504s is a genius, not identified, nonqualified, but is a genius, they're scary twice exceptional smart."

Debates About Test Prep, Tutoring, and Parent Pressure

There were emphatic concerns from teachers that some students prepared for the NNAT3 and Iowa assessments, as described by this self-contained teacher:

> About three weeks ago, I actually asked the students in my class who are being qualified for a while how many of you actually studied for this test? And they said well, it's online. We found it. It's right there for us to look at before we even take this test. And I was like, Well, how many of you found that? 75% of the kids my class raised their hand and said yeah, we found it. We studied for it.

Another teacher reported:

> Now with the way that we're qualifying kids I have a lot of concerns. One, because really, it seems like those strip mall places are really good at training kids in how to take the test, even the Naglieri, and pass it.

Another teacher reported:

> There's a few ML [multilingual students] in highly capable because there are families who speak other languages that take their kids to those programs to make sure they get in, and I don't think that's even opinion, I think that's like documented again and again and again that that's happening. I know that my own children's friends, like they got punished if they didn't pass the test through middle school, through elementary and middle school until they finally got in, and then they got like a car for getting into AP classes or double jump or whatever, it was extreme pressure.

Test preparation was not a new phenomenon; this teacher shared:

> That teacher reported to me, my grade level colleague, that her student was taking a week off from school in order to study for the [accelerated self-contained] test and that would have been maybe 2017.

Another teacher reported, “I've had parents tell me that they've purchased, whether or not they're adequate materials or not is questionable, but I have had parents tell me that they've purchased ITBS prep tools." Another teacher agreed, “Their families identified to me that they drilled and killed their kids to achieve the Naglieri and achieve then the Iowa tests. They put them through the camps." This teacher confirmed:

> I'd be a nickel-aire if I had a nickel for every time a child in the last five years has told me they've studied so far for the HiCap test. Yes, and I'm like you don't study to be gifted or you don't study to be highly capable. So you've been preparing for this, like it was the SATs or something like that…it's an industry at that point.

Several participants reported that test preparation seemed to be more prevalent in the Asian demographic, “I feel like I see that more in families from India and China than in families from other ethnicities.” Concerns about test preparation were echoed by this district leader:

> There are people out there who are marketing test prep for a slice of the population. And I know one of them, right like this person was a parent in the school that I was a principal of in another school district. And they were absolutely unashamed of saying, I will help your child pass the test. Well, that's not actually identifying a student who's highly capable. It's identifying a student who now has a set of skills that they've been taught to pass a particular test at a certain rate. And as we know, there are now assessments that we can use that get at a high cognitive level in a different way than just whether or not I can read and take the Iowa Test of Basic Skills and pass it at 90%. But this parent was going to guarantee or money back. And that's what I think is wrong.

A frequent concern was that test preparation was linked to higher economic status, as described by this self-contained teacher:

> It's kind of evident, at least within our school that the amount of test prep and more importantly the amount of families pushing the acceleration upon these kids who may or may not be ready for it…it's shocking to know that like two thirds of my class go do some form of extracurricular tutoring academy…Kumon and aftermath and whatever…I feel like we're encountering that population more and more, which is parents that are pushing their children even possibly beyond their capabilities. And then what you brought up it's not only just more White families, but also just families who have that economic access.

Another teacher noted that the tutoring centers were located in the wealthiest regions:

> When you just drive away…just a little bit, those Mathnasiums…and all the different things, they start disappearing. It's really just in the wealthiest areas that suddenly it's we're going to buy our child's advancement.

Another teacher added:

> People have already spoken to the drill and kill. I have a different word: pay to play. When parents who can afford it can have one parent at home to help do the additional studies that would be required to qualify. I know that it's not all the students and I get it, but the families where it has been revealed to me that this is the case, I have found other issues with their performance in class regarding curiosity and collaboration and persistence. And I worry that that's because there is a social benefit for a family to have a child in [accelerated self-contained] as opposed to the opposite…I feel like I see that more in families from India and China than in families from other ethnicities.

Many teachers were worried about students experiencing high pressure from their parents to qualify for highly capable services, as told by this self-contained teacher:

> Evidently there are families who take some level of status from this and then push their children into an uncomfortable place and position. Because, so they can say my child is in [accelerated self-contained]…it feels like that's the root of the tutoring and the test prep and all of the things that people were bending over backwards to get the child into this classroom.

Another teacher was concerned about the impact that parental pressure had on students:

> Pockets of anxious unqualified kids who are in over their head, pockets of families that are driving the ship and are teaching the lessons at home and are doing their [online math] with or for their children, and then the ones who got into the program or pushed into the program because of single qualification, not dual and lack the skill set to progress. That's a challenge.

A teacher shared a conversation they had with a parent:

> She is South Asian and her kids are in [accelerated self-contained] but she was talking about her community. In the South Asian community, oh your kid's not in [accelerated

> self-contained]? So it's like this, almost not status, but what's wrong with your kid if your kid's not in [accelerated self-contained]. And you know, you could try to combat that all you want, but it's just pushing down, did your kid get into the Ivy Leagues? What are your kid's SATs? It's just pushing it down to the elementary school. It's inevitable. I mean, that's what people do.

This district leader also recognized the parental pressures on some students:

> There's so much pressure in some cultures to qualify that that pressure is just astounding. And so that's when you see a lot of prep for and conversation about and if a child doesn't qualify, then there is just this almost ostracizing or something is wrong with that child. And I think the child feels just the enormity of that. And I don't know how to contend with that. So that's, that's a really tough piece because that really enters into a realm that I'm not sure we are equipped to know what to do, honestly.

This teacher reported that parents explicitly asked how to prepare for testing:

> I'd say as both a gen ed teacher and as an [accelerated self-contained] teacher, I have been approached by parents and asked how can I get my child ready for this test to qualify for reclassification? I don't answer that question. But I have been approached every year.

This district administrator gave their perspective:

> My personal opinion is that test prep is not a great idea…Maybe give them some time to play on your iPad or on your computer. Give them an opportunity to understand what it feels like to push to click on a mouse or to push on the trackpad. I think that that's fine. But to actually prep for a specific test, I disagree with my understanding what the premise might be for such…I have had families ask me specifically what test prep should we do for our kid? I have families that will ask what level of Iowa are you going to give my

> child. Those questions concern me. If they asked me blatantly "What should we do to test prep our kids?" I will tell them no, we don't recommend any test guides.

However, among many of the district leaders, there was much less concern around test prep. One district leader shared:

> That will always happen. And then what can you do about that right? And then going to the NNAT3…going to that certainly leveled the field for a bit. I don't anticipate it did forever. I suspect people went, “Wow, didn't see that coming.” And then two to three years later, they figured out how to prep for that test as well. No doubt and that will always be the way it is, right. My kid’s off to college next year and it's a game in every single part of the system and I don't think that we can spend a lot of time worrying about that. It's going to happen and I don't even know that it's unfortunate…what's unfortunate about it is that not everybody has the same opportunities…but I don't know how you would resolve that. And I don't know how you would look at somebody and take away their right to prep their kid for an experience that they think is going to be pretty critical.

Another district leader focused on the access to test prep as the central issue:

> I don't worry about it. What I worry about is if it's disadvantaging a group because they don't know to test prep. I don't worry about the kids that are test prepping. I'm worried about the kids that may be disadvantaged because they don't have access. So I do worry about it from that end.

Another district leader commented, “Even if their parents are helping them study for the test and prepare for the test, the kid's still got to sit down and take the test.” Later they continued:

> Would you be saying the same thing if the parents were having their students sign up for [Level] A youth soccer? If that's what the kid's into or that's what the family's into—as long as the kid's not being emotionally traumatized by mom standing over them, "You

> must do your algebra." Like good on them. Good on the child. Nobody said that the child is not being successful in algebra, it's just that mom's pushing them or dad's pushing them. If that's where the kid is, and that's what their interests are, as long as they're not being harmed by it. More power to them.

This self-contained teacher echoed a similar idea, that all parents push some things more than others, and this may fall on cultural lines:

> It would be nice to be able to feel and tell people that you can't study for the test, that you are ready for it or you aren't…that perception is that you can get ready for it. I think kids are getting themselves in. That part's hard. As far as parents being really involved in stuff. I think I myself have had to step back and look at, we push our kids in different ways. And whereas some people say they're so pushy, they're making their kids do so much stuff. I can name 100 parents who have put their kids in so many sports clubs and programs and gotten them on the best teams and have them been practicing until midnight. It's a different focus of study. We have to respect that culturally.

A self-contained teacher commented:

> There are definitely parents I think who purposely take specific time in order to prep their kids for those tests. I don't know if that gives them a leg up or not. People who understand those tests probably have a better sense for that than I do.

Another district leader felt that the incidence of test prep is much smaller than people think:

> I used to think it was huge. I think it was bigger when parents saw the testing. So the year we were out in COVID when parents were there, I think it may have spiked a little bit because they were right there and it was super hard to resist. I don't know that it is as big as it has been portrayed to be…the private school kids, I think most of them have prepped because I think they will only come to us if they get services through our highly capable

> programming…Otherwise, I think it's really a small percentage of our kids who are already in our public school system that prep. I think some of them don't even know that there is a prepping process. I would say the majority do not. So although you may hear it, it's a really small percentage.

This district leader pointed out that test prep is another way for families to partner with schools:

> It doesn't concern me honestly...I think it seems sort of ironic in some ways to say that we really want students and parents to partner with us and then when they work really hard to be prepared, for whether it's an assessment or a screener or whatever, that then somehow that's a problem. So I don't know. That doesn't concern me at all, quite honestly. But I mean, even taken at the other end, SAT, ACT prep, we don't provide that equally…but some folks have access to it, some don't. But that doesn't mean that we stop testing or that colleges you know, some of have gone test optional, but not all. So I don't know, that hasn't particularly worried me.

There was some evidence of the possible impact of test prep in the statistical data. Meeting minutes in 2017-18 reported that 26% of the students universally screened with the NNAT3 scored 85th percentile or higher. This was the first year that Blockbridge had conducted universal screening, and included every single student grades K-8, which should have provided an excellent statistical representation of the full district population. Yet, seven years later the total number of students qualifying for full services at the 95th percentile—not just screening in to further assessment—was even higher at 28%. This discrepancy does raise some questions about the possible impact of test prep. However, keep in mind that the NNAT3 was not the only way a student could screen in to the assessment phase of the identification process, and there was some evidence that Blockbridge's efforts may have been attracting families who were particularly seeking out Blockbridge's highly capable services to move into the school district.

Differing Definitions Emerged of What it Meant to be Highly Capable

The growth in identification of highly capable students at Blockbridge raised questions about what it meant to be a highly capable student. Participants raised multiple different definitions of highly capable and gifted, as well as terms from other states such as talented and gifted (TAG). The main question was whether highly capable was the same concept as gifted, and what the implication of that difference would be for Blockbridge's program. This teacher stated, "I do question the definition of highly capable. I would like to see a clear definition of that because I just don't believe 28% are highly capable. It just doesn't make sense to me."

Many participants felt that Blockbridge's definition should be aligned to a traditional idea of giftedness, representing students who had extremely unique needs, as told by this self-contained teacher, "I want to say that there's just not that many in the truly gifted part of it that I'm at right now. I think there's some really hard working kids." Another teacher said:

> These children I don't believe are truly gifted. I mean, there's very, very few children, who are, in my opinion, truly gifted. They are smart, fast learners. Parents who want them to be accelerated and so on, but that doesn't make them gifted.

A third teacher shared:

> I know studies have shown that oh, yes, kids who are qualified as gifted and talented, learn best in an environment by themselves. That's great. Then let's do gifted and talented. That's not what we're doing right now.

A district leader quantified it:

> There are a higher number of individuals in the district that still think that the 98th percentile or higher, kind of, or 99th percentile or higher group of kids that we're talking about when we say highly capable.

Referring to the upper end of a bell curve, a teacher commented:

> When you're talking about students in this bucket of the rainbow, that's a lot fewer kids than the kids we're putting into [accelerated self-contained] classrooms. I'm not pulling a bigwig salary, [that] could be a lot more feasible of a delivery model.

A teacher reflected on their experience in another state, “Coming out to California, with the talented and gifted monikers and labels, also lends itself to my understanding of students that should be placed in the highly capable program or the [accelerated self-contained] program.”

Another teacher recognized a difference between advanced learning as distinct from highly capable:

> We did a good job of identifying students that had the capacity for more advanced learning and exposure to maybe above grade level work. But I don't think we've done a sufficient job in using qualifying scores, metrics or markers that clearly delineate students that can achieve a talented and gifted, or highly capable level in Washington State. I think our district struggles with that.

A teacher who had the opportunity to observe two different highly capable classrooms commented on the differences they saw, “I realized in that class, those were the highly capable kids. The other kids were the gifted kids, those kids who were like fighting over algorithms. That's a whole 'nother level.” Another teacher commented, “There is a difference…gifted and highly capable, and there is a difference between those two.”

Several understood the main definition that Blockbridge was using to be focused on being academically advanced, as told by this self-contained teacher:

> The qualifying to be advanced is different than being gifted. And I was kind of worried when I first got the job, well this isn't gifted, this is advanced and faster pace and stuff. But I found the first three years, yeah, I think they do correspond. I was afraid it was just kids that might have been pushed by family members and they're able to work faster but

> they might not be gifted where they think in a different way. But so far I feel besides this year that they were.

A district leader offered this definition:

> When I think of the highly capable student. Yes, there's this number that gets assigned to them because they take a test and it says that they have cognitive capabilities that far exceed what we consider the norm of 100 right, so there's that piece of a definition and a characteristic right. They've got this cognitive skill that enables them to think quickly that enables them to process information in a nimble way.

Another district leader put it into context of Washington state's definition of highly capable:

> I think when people think of gifted education, and gifted in the state of Washington has a different connotation in people's heads than highly capable, and I think that's why Washington State chose highly capable. But even still, people, teachers predominantly, and not all teachers, but many teachers, they see in their head a student who sits and does all their work, and is the perfect student in the classroom, raises their hand, answers all the questions, complies with all the rules. And is your A plus student.

Washington's state definition at the time was:

> Highly capable students are students who perform or show potential for performing at significantly advanced academic levels when compared with others of their age, experiences, or environments. Outstanding abilities are seen within students' general intellectual aptitudes, specific academic abilities, and/or creative productivities within a specific domain. These students are present not only in the general populace, but are present within all protected classes according to chapters 28A.640 and 28A.642 RCW (Washington Administrative Code, 2013, para. 1).

Washington law defined highly capable services this way: “For highly capable students, access to accelerated learning and enhanced instruction is access to a basic education” (Revised Code of Washington, 2017a, para. 2).

This principal discussed how teachers expected highly capable students to behave in the classroom:

> You have teachers who have always taught highly capable, and they have a vision of what that looks like in their classroom and how it's engaged and how it behaves in the classroom, you know, it's this very quiet kid who sits there and does the five levels of math ahead of the next kid.

A district leader observed:

> It does involve a shift in your potential thoughts when you think about whether you call it gifted education or highly capable education, you have to reimagine in your head what you used to think, or at least most teachers in this district used to think of, as highly capable.

Others focused on dispelling myths about highly capable students being a homogenous group, such as this district leader describing the different types of students who might be identified:

> The friends who are highly capable are multilingual, the friends who are highly capable have twice exceptional needs, the friends who are highly capable aren't just your super smart kiddo who tests well, and/or who already knows a lot.

A self-contained teacher also raised common myths, "They don't look smart. That is the perception out there, right. They don't look smart because they don't get anything done in class and they struggle to process and they are a handful." Another self-contained teacher went even further to ask whether the program was expressly intended for twice exceptional students:

> I think there's different messages being sent about the [accelerated self-contained]. Is it truly for students who just need acceleration or is it for students who are who need such acceleration and are twice exceptional?

Another district leader addressed the belief that highly capable was linked to economic status:

> They think it serves the wealthy and I think it maybe has moved from the wealthy White to the wealthy White and Asian. I think that's where some have perceived it. But it's hard when you have a district of 85% who are socio economically sound. Most people are economically okay. They shouldn't have to apologize for that either. Just because you're economically okay also doesn't mean you have kids who are all quick learners. That is another fallacy.

A few teachers raised the question of whether a highly capable student can be created with sufficient exposure to advanced content, as told by this teacher:

> I feel like at some point, we're still identifying people that have more access to stuff. They're going to the strip mall tutoring, or they're graced with the misfortune of having the parents that like, are like, Hey, let's sit down and have some family bonding time…does that make you gifted? Does that make you highly capable, or does it make you highly advanced in that space?

However, this teacher expressed incredulity that any student could be working that far ahead regardless of their exposure:

> And how do they get six grade levels ahead? You're in that same environment. They're doing the same work, are they doing more? Are they just magically more gifted and talented? Or are they getting more out of the nutrients of the instructional environment than their same age peers? Like where does this leap and bound happen?

Ultimately, there was still a lot of confusion over what Blockbridge was trying to accomplish with their highly capable program, as described by this teacher, “I think those tests in particular need to be looked at in terms of, 'What is the goal of the program and do these tests meet that goal the program?"’

There were also participants who wondered why Blockbridge wasn’t identifying students who were advanced in other ways other than math and reading. A district leader commented:

> Well, it's math and it's reading, or math and literacy. And it's a standardized test. And it's, there's other ways to be gifted, that aren't being measured in that next round. Then that's where I think we might miss some kids. So there might be students that are significantly artistically talented. They may or may not be awesome at the Naglieri because they see things, they see things in images, let's say.

A principal also raised the question of other domains of giftedness:

> That ends up excluding kids who have a lot of remarkable gifts. You can be highly capable in social skills. And that gets you nowhere. You can be highly capable in navigating dynamic social situations. That's not recognized. You can be highly capable in empathy…What do we want to identify as gifts or practices that are really you know, inherent to that person and how their brain works.

Another teacher also advocated for identifying artistic skills:

> I just think it does them a disservice because we're only testing them on one particular skill…This kid I know has an artistic, I don't want to use word genius lightly, but he sees things in a way that other kids just can't capture at his age, probably ever. And that isn't captured….I think all kids are geniuses and in particular this one little boy whose art just shows that he thinks differently…I tell him every time I see him, “You're amazing.” But

> the district isn't saying you're amazing. They're telling him you can't read. They're telling him he needs special ed because he can't read.

Another teacher referred to their own children as examples:

> I think my own children are definitely highly capable and they would have done well in the highly capable [accelerated self-contained program] and whatever. They did AP and they did running start [dual enrollment in community college] and all that. But I don't know that my own children are gifted as much as I love them. One of them is an artist, one of them is a musician, but not gifted in general academic.

A district leader summarized this concern about different domains of need:

> We have really focused on students in highly capable in math and highly capable in reading. We know that we have lots of gifted students in a lot of different areas. And we haven't figured out how to identify that and make value of that. So if I could magic wand, so this means I don't have a solution. If I can magic wand, we would figure out ways to identify the people as gifted or highly capable in other areas and grow those as well… poetry…dance…How are we growing that?

Were Highly Gifted Students Getting What They Needed

Because so many students were being identified for highly capable programming, another question that was raised by a surprising number of participants was whether highly gifted students were getting their needs met, as described by this teacher:

> My other concern is, well, if we're over qualifying kids, which in my opinion is happening, then what is it doing to the kids who should be in [accelerated self-contained]? Are they getting what they need when you have kids who are not quite ready, but qualified and so they're there also. There's that other conversation.

Several participants gave examples of highly gifted students who had unique needs, such as this example offered by a teacher:

> In my career, I've had like two students who never ever work to learn…anytime they learned something new they remembered everything they ever learned, but they were always connecting it to everything...they were both in my gen ed classroom, but they were on their own working on college level calculus and writing a novel in fourth grade that got published when they were in sixth grade, and their understanding also of just humans, so not just the academics but the social emotional…those two kids that I'm thinking of in my career, they're never going to have to work at learning because they soak up knowledge. They can't hear something and not remember it, and connect it to and think about and apply it and dive deeper on their own individually because they're self driven 100% and motivated. It's nothing I did or their parents did or anything. It's like 100% in their DNA somehow that created this. I can make sure to keep giving more opportunities and enrichment but I can't, it's going to go beyond anything I could provide.

A principal expressed concern that identifying more than the very top percentiles gives false equity:

> You'll have kids who are in this top, top, top, top percent who look all like each other. Right?…Do we identify too many? Yes. Just like I said, by the numbers, it's just too obvious. But I think it takes away rather than it giving and it gives a false equity. It's false access. It's almost like the generic brand. It's just as effective I guess, but you're still not recognizing gifts that kids have.

One district leader framed it this way:

> Who are we trying to serve and how are we trying to serve them through this program? I think we have to answer that before we decide what we do. Right? You have students that

> are in the 99th percentile, for whom I think they almost need an IEP right? They need something that is different structurally, it's different from a curriculum standpoint, that has different everything to it, right? These kids think differently and we need to let them do what it is that they do in a supportive environment and give them what they need. I suspect that that's not the same thing as the kids that are in the 96th percentile. But we can't lose whatever it is that we figured out with them or the 95th. Can't lose that.

There was surprising consensus at the district leader level that students in the highest percentiles of achievement may not be getting their needs met. It was particularly unexpected that this came up as a subtheme because there was no question in the interview guide that asked about highly gifted students. This district leader expounded:

> If we have 30% of our student population being identified as highly capable…the original thinking around highly capable was this top 1-2%. I've worked with kids that are so uniquely different in their needs in that top 1-2% kind of thinking, that yeah, what we do for the other 25, 30% that we're now identifying? Are we actually serving that group of kids within this current model that we have and I have to think that we probably aren't…What are we doing for that particular group?

Reflecting on an experience with a highly capable classroom early on, this district leader shared:

> I think back to that group of students and I wonder if they got lost in the mix a little bit. Because now…that group of students, I walk in the classroom, I don't see them, it doesn't stick out. So are they still being served? I wonder if we've lost a little bit…I do think as I said earlier, with more students qualifying for highly capable services, the population of students that have these strong social and emotional needs that relate to their highly capableness, their giftedness, that they're getting lost in the system again, like they were probably lost before we started this.

Another district leader concurred:

> So if you show me a kid in the 99th percentile, and asked me whether or not they were getting everything that they possibly could, I don't know the answer to that. I suspect probably not.I suspect we have students, just like we have students at this end of the spectrum and we have students at this end of the spectrum who could get more, who could do faster, who could be accelerated.

There was also a question about whether it was realistic for public schools to truly meet these unique students' needs, as described by this district leader:

> For those really super, highly gifted students. I think the challenges are more difficult because they may academically really be able to hit the mark and may be able to soar even further than we can challenge them. And the question is, can we do that along with their social emotional needs? Or is the gap so big that we in a public school system can't reconcile that, and so a family has to decide, do they remain and then try to make something work out of a public school system or do they have to go somewhere else? I don't know that we have the capacity to meet every single child's needs really.

A program administrator thought that on the balance, Blockbridge was doing what they could with the resources they had:

> We identify many students and I think the vast majority are served well, that are receiving services. But I think those that are at the very high end may not be receiving everything they need. Yet I don't know that there is a public school system that would be able to serve those kids, or even a private school system that can serve those kids well. I think we do a good job with what we have.

Theme H – Debates about Services

As the highly capable program grew and the impacts of that growth became more visible across the school district, many debates emerged about how Blockbridge was serving highly capable students' needs. While there was broad agreement on the goal to serve every student's individual needs, and reasonable consensus that highly capable students needed to experience challenge at school for both academic and social-emotional reasons, there were many other areas of deep debate. Some participants noted that students rose to meet higher expectations, and wondered what the implications of that meant for the highly capable program. They also noted that parent advocacy was a powerful force for advocating for highly capable students' needs. Many commented on the unique social-emotional needs of highly capable students, however not everyone recognized these needs, or those needs were viewed through a deficit-focused lens. The

Table 4.14

Frequency Table for Theme H – Debates about Services

Sub-Theme	Number of Participants	Coded Segments	Supporting Documents
Every Student's Individual Needs	22	53	Hi Ad Pa
Need to Experience Challenge	27	72	Hi Ad Pa
Parent Advocacy was Powerful	23	63	Ad Pa
Unique Social Emotional Needs	27	106	Ad Pa
2e Broadly Recognized	27	101	Hi Ad Pa
Acceleration vs. Depth	27	96	Ad Pa
Debate about Inclusion	25	119	Pa
What is Possible for Teachers to Do	28	178	Hi Ad Pa
We're Not There Yet	24	89	<none>

Note. Document categories are Washington state statistical data (Wa), district website (We), district-provided statistical data (Da), district-provided historical documentation (Hi), advisory team meeting minutes (Ad), and parent group meeting minutes (Pa).

term twice exceptional was very broadly recognized, but not deeply understood. Participants debated whether the highly capable program should offer acceleration, as it did now, or whether focusing on depth, enrichment, or creativity would be more appropriate. There was massive energy behind the idea of inclusion; of all of the debates, this was by far the loudest. Participants weighed in on what was reasonable and possible to ask teachers to do, and suggested many different approaches for new service models, but ultimately there was no consensus. These subthemes are described in more detail below, and are summarized in Table 4.14.

Agreement on the Goal to Meet Every Student's Individual Needs

There was a sincere desire on behalf of participants at all levels to meet every student's individual needs. The statements that were expressed in direct ways were coded into this subtheme, but this concept was an underlying belief throughout almost all of the interviews and focus groups. A district leader said, "I have an appreciation for and desire to make sure that each and every one of our students get what they need…So when I think about different populations of students that we serve, and their unique needs, my job is to understand that [and] adjust systems in my role, to better serve our kids." As a teacher expressed, their goal was, "Reaching all students to every level of support available to them that meets their academic, personal, social and emotional goals." Another teacher agreed, "Every program should be responsive to the learning needs of its students."

Every single district leader had something supportive to say on this topic. One district leader said, "I think highly capable students aren't a monolith, just as any student isn't a monolith, any student group…they're all kids, right? They all need us." Another district leader offered, "It's another part of our MTSS structure that we need to serve the needs of all students no matter who they are." They further elaborated:

> We have a lot of different programs to meet the needs of students and they are one of the many needs along the spectrum of services that we provide to students because students have many different needs. And students are individuals and highly capable services are one of those many needs along the spectrum of students that enter our public school system…So it's unpacking all of these exceptional students who are individuals. Every child is an individual.

Another leader put it this way, "How do we balance the needs and put the kids at the center of all the decisions…We have to do right by our students. This is one of the ways that we are serving each and every child." A different leader spoke about how they originally got into teaching, "That led me to really appreciating the impact a teacher has on students and basically that became my purpose to really improve outcomes for each and every student I had an opportunity to interact with."

However, they also recognized that this was a difficult goal to achieve, as expressed by this district leader:

> We would create a system in which every kid, every parent got what they wanted for their kid, no matter where their kid was in the system…Whether or not we can create that kind of a system I don't know.

Another district leader admitted:

> It was becoming more and more clear that we weren't meeting the needs of all of our students…we were maybe still are at a place at a time where we were teaching to the middle. We were not as knowledgeable about the learner variability…how we create a school space that gives them what they need.

Another district leader also commented on learner variability, “There's so much learner variability…we're stretching our thinking and stretching our experiences around them and trying to figure out the best place to meet them.” Another district leader offered this analysis:

> We've got to figure out how do we serve all of our kids. And if as a system, we've decided that these kids need something different then we need to create the system so that these kids can get something different, without complaining about what impact that has on these [other] kids that also need something different. And these [other] kids which also need something different, right? And so how do you fix that problem? I don't know. That's been the quest for the last 30 years.

Teachers also agreed that meeting every student’s special needs was essential. A teacher suggested that highly capable needs might best be served as a type of special education:

> I think kids who are in the range of either end of the bell curve should get IEPs and an IEP is not a negative thing. So the kids who are twice exceptional would get specifically what they need. And the kids who are, you know, 250 IQ are going to get what they need. And so it's a specialized Individualized Education Plan. Not there's something wrong with you. But let's give an individualized education plan to the kids who fall on either side of the bell curve.

The teachers felt a strong responsibility towards the students in their care, as described by this general education teacher:

> They're my kids. And so that idea of we still as educators hopefully want what is best for each kid within our classrooms, or within our school, and that they will make the growth, the leaps that they should, hopefully, someday, want on their own as well, because we put in the supports and the care.

Another general education teacher added the aspiration to, “See them all as our school's students, as our district's students…we're just going to say OK, you came to us and now we're going to wrap around you and work together.” A principal commented that their role was to create a school culture that allowed all students’ needs to be supported:

> What's going to be right for each kid…My belief is if I create an environment, a school, culture where people want to work here and they want to support kids, no matter what their needs are, then I know I've done my job. And that's what I want to do.

Reflecting on the many people across the district they had worked with, this program administrator summarized:

> One of the things that I find really wonderful is that the overwhelming number of people that work in [Blockbridge], I believe, remember to look and see the individual child. How can we identify, how can we help this child? How can we recognize who this child is?...I really do believe that overall the staff at all levels really do want what's best for the individual child.

Highly Capable Students Needed to Experience Challenge

Similar to the previous subtheme, there was good consensus (but not universal consensus) among most participants that highly capable students needed to experience challenge at school. One district leader said, “I think kids need to be challenged…provided the proper challenges and opportunities that they need to achieve.” Another district leader said that highly capable students needed, “Opportunity to expand their thinking, to move faster than their peers, to be given the challenges that they need in order to continue to cognitively stimulate them.” Another district leader said simply, “To be challenged in a way that feels challenging to them.” A teacher added, “When you are bored, you get in trouble.” Another teacher said, “I want kids to

have a chance to thrive in school, to push their thinking." A self-contained teacher asserted, "Our kids deserve to have a challenging education." A fourth district leader elaborated on the importance of challenge for developing life skills:

> I think we do that for most highly capable learners, that they really are pushed, and that they experience a challenge in their classroom, that they are able to find things that truly frustrate them. We want them to find that learning is challenging, that they might hit a wall that they don't understand something and then learn that not everything is easy and that they need to figure out ways to get around those obstacles…We are setting them up for success in real life, whatever that holds for them when they leave us. If they don't have that challenge is when I think we haven't really done a service to them. For those really super, highly gifted students. I think the challenges are more difficult because they may academically really be able to hit the mark and may be able to soar even further than we can challenge them.

A program administrator talked about how challenge led to developing grit:

> If these kids are not challenged, they don't develop grit. And it is not highly unusual for them in either high school, or in college to end up with imposter syndrome meaning that they kind of hit a wall where they recognize that, or they believe, that maybe they've just somehow flown under the radar, they've snowed everybody, maybe they really aren't as smart as they thought. So it's really important that they're addressed and they have those experiences as young as possible. So that they learn how to learn, instead of just understanding things inherently and sliding by. Sadly, there is a percentage of these children as they age that, if they are not challenged, will end up never reaching even close to their potential. So that's why it's important that these kids are served.

A self-contained teacher agreed that giving kids early access to productive struggle was essential for their long-term success:

> That's another important aspect of our program that I talk about to parents at curriculum night both from the parent perspective and the teacher perspective, that we give students that productive struggle at a young age, when they are willing to accept help and learn coping mechanisms and support so that they can learn to struggle on their own. Instead of waiting to experience that in high school or college.

Another self-contained teacher echoed that sentiment, "If they aren't challenged and then they finally are, they don't know how to deal with the challenge and they crumble…They just kind of crumble because they're not used to it."

Several participants expressed that highly capable students needed something different in order to achieve this. For example, this general education teacher said, "Students have often been recognized that their aptitude in the classroom far exceeds the capacity of the learning environment in that room." A principal described Blockbridge's highly capable program this way, "It serves a group of kids that need something different, slightly different, that probably need to be challenged and not bored in a classroom and given the opportunities to be stretched." A self-contained teacher also felt there was a need for something different:

> I don't mean to quote our HiCap bible but our students didn't need more, they needed different, right. And I have experienced that as a parent, and as a teacher. I have students who really did need this. They needed a different focus on academics, they needed to learn how to struggle.

Another district leader pointed out that with twice exceptional students it can be even more complex to figure out what a student's needs were:

> Sometimes it's oh they're just not being challenged enough, especially when they are younger. Sometimes it's not that they're not being challenged enough, it's that they've got this need, that might get special education services and then they have also an ability to achieve pretty high.

However, not all educators understood the need for challenge. This teacher recounted a time when another educator told them:

> Two quotes. "They were the easiest class I ever taught." It shouldn't be the easiest class you ever taught. "They just pick up everything, I put everything put in front of them." You should be putting different things in front of them. I just cringed. I left the building and I cringed.

Another district leader offered this analysis of why some educators may not recognize the need for challenge:

> I think our educator belief systems and what we believe about students really impacts how we treat students and sometimes sort students. And I don't know that a lot of educators have had a great deal of experience in the highly capable program themselves in their own education. I ran into a few researchers several years ago that were talking about, sometimes we replicate what we experienced and if we have a disproportionate number of educators who were not in a program that challenged them, then I think there's some schools of thought that wonder if they really understand why that's so important. Like it's not just about the grade. It's about the development of that intellect and the ability to problem solve and critically think.

Several participants commented on the phenomenon of students rising to meet higher expectations. A general education teacher told this story:

> I taught a 4/5 split, still general education. And I was piloting a fifth grade reading program...So I used it for my fourth and fifth graders. They all advanced, the fourth graders advanced farther than the fifth graders did. If you expose children more, all children learn more… Well I did need to do small groups...I did need to differentiate. I did need to put building blocks and core foundational ideas in place, but they could do it and by the end of the year, they could all read the grade level text.

A district leader also observed that, "We've begun to see that when we raise the standard for students around math, they rise up to that standard and they can be successful."

This line of thinking led to a thought experiment that a few different people floated: If you raised expectations for all students, just as you had with highly capable students, would all students meet those higher expectations? This district leader expounded:

> I also have learned just in general, if you raise expectations, most of the kids are going to rise right up to those expectations. And it makes me question when I see a school like [School], who 50% of their students have scored in this really upper percentile, and then we put them in these more advanced courses and they're doing just fine. It makes me question the students that didn't score that high, are they actually being challenged as well. And if we raise the standard, if we raised the expectations for them, would they rise too? Maybe, maybe not.

Another district leader also shared their thinking:

> I have a sneaking suspicion that if you took more students and put them in that same environment, that they would also do equally well. I don't think there's magic to that part of the formula…it raises all sorts of questions in terms of, so if that's true for the 95 [95th percentile], would it be true for the 94, would it be true for the 88? Would it be true for the 76? Right? I mean it should, if we thought about it, raise all sorts of questions in

> terms of instruction and curriculum expectations, right, those kinds of things…Maybe there is also something to be said for raising your expectations, for developing rigorous program, for finding material and instructional practices that are engaging for kids, telling kids that you're super smart, you're going to do well in this class, and putting them in the class and letting them run.

Another district leader asked, “Does it just tell us something else about the way that our education system needs to change in terms of our expectations of kids and our beliefs around what they can do and what they can achieve?”

Parent Advocacy was Powerful and Fraught

Blockbridge’s relationship with its parent community was complex. The district prided itself in partnering with parents, as described by this program administrator, talking about why Blockbridge offered so many accelerated math options:

> I think it's because the students have proven that they can and we can do it and they want it and I think parents have spoken up and have asked to make it happen. Blockbridge tries to be collaborative with the community and with the parents and with the students. What do you need and how can we address those needs?

A principal commented, “There are very active parents who are involved, who support us.” A district leader mentioned a time when parent volunteers had made enrichment groups possible in their classroom, “When I had my 2/3 combo and parents were willing to help, so we had enrichment blocks.”

Parent advocacy was also cited as a positive force for change, for instance by another program administrator, who described the advocacy of a parent-organized nonprofit group for parents of highly capable students in the Blockbridge district, “Highly capable parents on our

group that met and sort of raised some awareness and some concerns to me around how we even identify kids." They later continued, "I had parents help me understand and learn about all of the different ways that their kiddos needed to have support." That parent group consisted of elected representatives that represented parents across the school district. The group met regularly with district leaders and program administrators; an extensive website published meeting minutes for approximately ten meetings per school year since 2016, as well as other files and historical documents.

One teacher pointed out the negative impact of parent involvement in schools when highly capable students transferred out to access an accelerated self-contained classroom:

> In my experience, the families of parents of those students in programs are very vocal. They're great advocates for their community. And when my school loses that adult population as well, our whole community suffers. We can't fundraise, our PTA drops. It's not just losing students and then losing FTE, we're losing a big part of our community that we need to advocate for the kids.

Another teacher also commented on the influence of parent involvement, "The parent involvement and also the impetus on, you can do better, the stressors that come with it, like I've got to put on my A game every day, versus nobody cares."

Several pointed out that parent advocacy for students with unique needs was natural and expected, as this principal described:

> I don't blame anyone for doing that. You're a parent, you're going to do everything you can… Can I fault or have any judgment really on any parent who's doing that?…No, not at all. Because you don't realize you're doing it. You're just looking after your kid. And you should, that's your job.

A district leader also commented that because there are disparities in schools, parent advocacy was always going to be needed:

> And as long as that disparity is there, you're going to have parents who are going to try desperately to get their kids into whatever it is that's best. So it's just part of it.

Another district leader commented:

> There's going to be HiCap parents, who are very much concerned, almost as all parents are, but not really. Making sure that their kids are getting what they need. I see the same kind of drive oftentimes in special education parents that I've seen in HiCap parents. And it's not that people who aren't in either one of those camps don't have drives and concerns for their kids. But I think we are a system that's designed for the masses, right? We're not designed very well for kids that are, that don't fit inside our box that we keep talking about, the general education box, right. The big happy middle.

Some participants recognized the equity issue that not all families had the knowledge or skills to be able to advocate effectively on behalf of their students, as one principal said, "Access isn't just about let's put this in this language. It's helping parents understand the availability of resources and the availability of how to navigate systems…I don't understand why we don't have advocates for families." An educator expressed their desire to be "Champions of the underdogs." They continued, "The parents, they have this advantage. Well, we are the advantage for those kiddos who don't have other additional cheerleaders."

However, parent advocacy was also seen as a friction point. One district leader reported that, "Some of our teachers believe that we are over accelerating kids and just caving into high pressure from parents." Another district leader shared:

> We hear a lot of comments about rich, affluent, White, Asian students…this kind of common belief that the parents that are the loudest get what they want, and maybe it's an

> injustice to not hear from families who don't typically show up to [school] board meetings and things like that.

Another district leader commented:

> I think the concern that surprised me was how much the principle of scarcity played a role in parent concern. In other words, they saw universal screening at times, but I think we got past that. But I think at times, parents can see it, well if you're going to support more people accessing it, then there's somehow less chances for me as a parent for my student.

A teacher shared that parents of highly capable students had a reputation for being difficult:

> Teachers don't want those jobs because the parents have the reputation for being really, really difficult. And if that's one part of your job as an educator, if you can eliminate a hard parent. That's how I got into the district, no one wanted that 4/5 [accelerated self-contained] position, so I took it.

Another self-contained teacher offered, “I have also heard administrators say they dislike the parents in our community, because they are more challenging or they require more engagement, like their kids.” Another self-contained teacher added, “You've got the parents involved, too, and we don't have easy parents for sure. They have demands.” A district leader reflected on their time as a principal at a school that hosted accelerated classrooms, “I was not happy. I don't want a bunch of these entitled parents.”

A teacher pointed out that parents have a lot of power because, “They have a super powerful parent group.” A program administrator told about a time when, “Some parents became concerned or upset about that and had meetings.” A district leader hypothesized what would happen if major changes to the highly capable program were announced, “I don't think it's going away. I don't think that's going to happen. I think that would be a political nightmare for any

district that tried to get rid of programs like that." Another district leader expressed fear of the parent community, and whether the district was engaging with all parents equitably:

> There's definitely a fear of the parent community, significant fear and what that then means, because I mean, that ruins careers, right? That ruins reputation, that ruins all the different things that might come up, and parents have come to the table saying some really rough things in the past that have been listened to, and sometimes they haven't. But I think there's that whole parent piece that's part of this that hasn't, that I didn't really get to go into that I still am trying to understand. How much of our parents really would want it to stay this way? And why is that and how much of that matters when we're saying we need to partner with families and communities? Which families and communities should we partner with? All of them, some of them, equally or equitably?

Another district leader offered a solution:

> I also think teachers need to learn to talk about their profession as professionals. And if we were better at articulating what we know and are able to do as professionals, we would be in a better spot because we would talk to parents as professionals about what we are doing in our craft…But if a teacher can't craft that in a way to explain it to a parent who has a masters or a PhD, because those are the parents you're serving. And you have to know your audience. We teach that to kids all the time. You have to know your audience, you have to write to your audience, you have to be able to speak to your audience. But if we can't do that as teachers, then we're never going to win that argument. Or we're never going to be allowed the flexibility to be the professionals we want to be seen as, and that's where I think we are asking for this flexibility: trust us, trust us, trust us. But if we can't then articulate what it is we're doing and we want to be trusted to do.

Different Interpretations of Social-Emotional Needs

Many participants who had direct experience with highly capable students recognized that they had unique social-emotional needs. A program administrator gave this description:

> Highly capable children are kids that are quirky, they tend to have different needs. They are ones that may be perfectionistic. They may have different learning styles. They can be difficult to deal with in a regular classroom…If you follow typical teaching techniques, for instance, you must repeat and teach a concept several times over. And a gifted kid or highly capable child is more likely to start to wonder why you keep on repeating the same thing. And can actually second guess themselves, talk them out of what they already understood. It can be really problematic. That's one instance.

A district leader elaborated:

> What type of confinement that you experience in the classroom as a student when your teacher is teaching things that you knew…a long, long time ago or you think differently than the way that's being presented or provided and so then you are then stuck, right? And then there's all these other exhibits of behavior or mental health issues that come out.

Another district leader offered:

> Other characteristics of highly capable learners. I think some of them, not all, are voracious readers. They are students who can digest information in a very quick manner. At the same time, they don't always have the maturity to understand what they're reading, so a highly capable student in a second grade classroom could consume the entire set of Harry Potter novels. And by consume them, they could read them and they could understand at the surface what the novels are about, but because of the age may not have that same sophistication that once they're older, they would understand all of the dynamics going on with the characters.

Another teacher shared this anecdote about a student having a strong emotional response to making a mistake:

> One of my sixth graders this year, she would cry, 98% accurate on a two grade level above curriculum assessment…but so frustrated that she had one error...But she would be in tears, inconsolable, could not be brought back for 15-30 minutes after making a mistake.

A principal told about how a self-contained teacher supported students, "One of my teachers, she does a great job at selecting books about failing and trying again, and it's okay…It was just in line with what those kids needed at that time." Another district leader elaborated:

> I would like to think that we are doing what's right with them. That we are making sure that they are understanding that perfection is not important, that learning for learnings sake is messy...that it's okay to make mistakes, that learning isn't going to be perfect, that you don't have to create something that is always perfect. And I say that because I know that oftentimes that is something that happens for our highly capable students, that they don't want to go on until it's just right.

Another district leader commented on sensory challenges:

> We were beginning to learn about characteristics of gifted people, and what that means about how they are trying to navigate society and what's unseen and unwritten and how it might come in the form of a certain behavior. That is, I want to say maybe not marginalized, but characterized as odd or weird or whatever....There could be because of that sensory input issue or these other things that I don't think we were aware of, like we have the Doogie Howser's of the world…

Another district leader expressed the dangers of not being responsive to highly capable students' needs:

> When you're in these environments that are not conducive to who you are and what you need, it can become toxic and that toxicity translates into various forms of behavior or mental illness. There's all those pieces and so as you're developing and evolving, just like nature and nurture, if you're not nurtured in zero to two, you might show up very differently, if you've experienced a lack of nurture or trauma in a certain time period of years [it] can be impactful in different ways. So if you're in classroom environments where you're hitting these developmental milestones and markers at a very different level than your peers, then there's…a very negative, potentially a permanent negative impact.

A program administrator shared their experience talking with parents about their highly capable child's characteristics:

> Often I talk with parents who call and say this is my oldest kid and they've been identified and I just don't know if it's the right program for them. And then they maybe tell me a little bit about their child. And then I'll say, well, one thing that's good about this identification and being with other kids that are like them, is that your kid probably is perfectionistic. Oh, yes. Your kid is probably extra sensitive. Your kid is probably really intense. Your kid, you know, may have XYZ, some of the more common characteristics, and the parents are just amazed—how do you know my child?

These social-emotional differences often resulted in behavioral challenges in the classroom. This teacher described a second grade highly capable student at their school:

> Who apparently bites other kids in the classroom, and is just a real handful in terms of behavior challenges…I mean, I knew he was a little bit different, but I didn't know the extent of some of his challenges behaviorally.

Later that same teacher added, "Maybe it bores them and then they have trouble socially, emotionally, behaviorally, whatever." A highly capable teacher shared their experience:

> I can't tell you how many times I have sat at a parent teacher conference and said glowing things about a child and the parent says, "Are we talking about the same child?" Because that same child was labeled as a behavior problem in their gen ed classroom.

A program administrator also noted, “A lot of the teachers expect that well, you're a HiCap kid, you should be well behaved. And that absolutely doesn't fit with HiCap kids.”

About half of the participants, chiefly those who had direct experience with the accelerated self-contained classrooms, felt that highly capable students were best supported in self-contained classrooms, where there was a cohort of similar students with similar social-emotional needs. This program administrator explained:

> I also feel it's really positive for those kids to have a cohort…to be with other kids that are quirky that in third grade might actually just fall off their chair for no reason at all, that have a higher level vocabulary. It tends to be a safer place for them, in my opinion, to be themselves and explore who they are. Because they are with other students that are like them, that are quirky, that are perfectionistic, that maybe have high anxiety…it makes easier for them to be themselves rather than trying to mask who they are or their capabilities for fear of being ridiculed at times.

Another program administrator added:

> [In] the elementary self-contained classrooms, I think it's really great for the kids to find people that are like them. And I think that is great for their social emotional well-being to find that there are kids who like the same things they like or read the same books that they read. I think that's awesome…I think having a kid that is a HiCap kid in a regular classroom might lead to them not feeling like they fit in very well. Because they know the answers and maybe the other kids don't. I feel like it helps a lot for them to be in that cohort.

A self-contained teacher pointed out a benefit of the cohort, “When they give all this excitement about something they learned, they don't get a blank stare or anything. I think the peer part is really important.” Another self-contained teacher added:

> I have students who really did need this…They needed to learn who their people were, and how to socialize with their people and other people…A student of my own who cried every year [in a general education classroom]... He was made fun of and he never felt like he fit. He felt wrong.

A teacher shared their own daughter's experience in a self-contained classroom:

> My daughter said in her first grade gen ed class that the girls in her class just wanted to stand around and talk and she was still interested in imaginary play. She was also interested in non-gender specific play. When she joined the [accelerated self-contained] classroom, she was with other peers who were more like-minded and she had more friends.

A district leader added:

> In my experience, sometimes there's a need for a highly capable student to be given a little bit more scaffolding and structure sometimes with personal relationships…Having an opportunity to be around, in some cases, people that are a little bit more alike than different, you might have some similarities in the way they process and function and think about things.

Another district leader also recognized unique social needs, “They also have some unique needs because they're highly capable…How to navigate and support the highly capable learner who may have some social skills needs that are different from a general education peer.”

Participants also pointed out academic benefits to the highly capable peer group. One district leader shared:

> I've got my intellectual aged peers with me. I'm there with kids who have a similar cognitive skills, cognitive abilities. And so I can process information in a quick way with them. I can engage in discourse with my peers who might be thinking on kind of the same wavelength that I'm on.

Another district leader made a similar comment:

> I think for our highly capable students to experience and achieve what they're capable of, just the opportunity to be around other students who think in those ways is really important. If you've got one or two in the classroom…you just don't ever build that sense of intellectual community in the same way

Unfortunately, not all teachers recognized or understood the unique needs of highly capable students, as a district leader described:

> I think people don't understand some of the needs of some of our most gifted kids…There were needs that those kids have that are less about math or less about reading, that teachers don't understand or some of our staff don't understand, exact same thing about special education, but it's really highly capable that we don't understand what those needs are as deeply as we should.

A program administrator added:

> I think your HiCap teachers understand a lot of things better, because they live it, but if they're not a HiCap teacher, I think they don't understand very well. I think the principals don't understand very well. I think the rest of the administrators don't really understand it very well either.

A self-contained teacher shared this experience working with a principal who did not understand the need for the highly capable program:

> My first and second administrators at my former school where [accelerated self-contained] had been integrated for a long, long time were very supportive of the program and they understood the nuances of our kids and their unique needs. When my program moved to a new building, where that program was not understood by the administrators or the other teachers, I literally had an administrator sit with me in a meeting and tell me point blank, the [accelerated self-contained program] is BS. That killed me.

That teacher later added, "I think to do this job and to do it well, you have to love those kids and their quirks and the way they are." A program administrator commented:

> It's an often underestimated and under identified special needs group. And what I mean by that is that they are often disregarded, as far as their specific needs. I think it's very easy to recognize the intelligence and sometimes to address that. And yet I don't know that we, as a society, are great about recognizing some of the other quirky things that come into play, unless it's to maybe make fun of them to say, Oh, well, you know, they're an engineer. Well, they're a geek. And so we kind of dismiss people instead of recognizing those special qualities…I have learned that the lack of recognition for this demographic of students is vast.

Some descriptions of the social-emotional needs of highly capable students reflected a deficit mindset, focusing on the things the students couldn't do well as evidence that they didn't need highly capable services, or would even be harmed by it. This attitude was well-intentioned, intended to help students become more well-rounded; however, the result was a focus on challenges as problems to be fixed as opposed to recognizing them as unique characteristics common in this population of students. Very few participants commented on focusing on strengths. One teacher explicitly argued against a strength-based approach:

> They're very highly successful academically, but are they going to have places that we could have been working on. So when we look at that, do we just say hey, let's make your strength stronger? And for me that's like, as a coach for football, track, and soccer, it's okay, you're really strong this area, but I need you to be a whole player. Not just this person that can do just this one trick. We want to make sure we're supporting the other parts of you and not just saying, "Oh, you're really strong in this. And so let's just put you someplace that makes only that part strong."

Another teacher told about a highly capable student who had trouble articulating their thinking:

> As we look at student performance, we're always looking at splinter skills. So they might be strong in some things, like when I see students that are really strong in knowledge or problem solving, but no reasoning or understanding [or] communication…What I would find is they knew stuff, but gosh, when I said show, describe, explain, those are different skills than solve. Explain. Describe. They were just, "I just know."

Another teacher commented, "This child is an organizational wreck." Another teacher felt that focusing on social development was the most important goal:

> Some of those educators are doing a great job of filling in pieces of the social emotional part, which a lot of HiCap, if you're truly gifted, there's a lot of usually quirks in that social development. They're really good educators, they are really working on that and they're like, cool, here's your academics, because that's going to come to you. But what we're working on in here is how to be a human in society, because that's the hard part for you.

Another teacher felt that being around typically developing peers would be a more effective way to improve a highly capable student's social-emotional skills:

> It's not like I don't want her to push herself and see something harder, but she really just needs to be around peers who don't get it and see how that works for somebody. Because she needs to learn how not to not freak out when she doesn't get one question right and become a puddle. See how a kid who gets six or seven wrong, doesn't become a puddle and it's okay. How can we learn from each other?

Another teacher similarly felt that highly capable students, "maybe lack those social niceties and empathies because [they've] been ostracized or separated from [general education students] since second grade."

Several participants pointed to the stress of acceleration as the cause of student's emotional differences, as told by this former self-contained teacher:

> They cry, they will do a math test and they will cry like no matter how much we teach them about growth mindset and tell them that they're capable…I have a kid who for the first two months of class would not speak in front of the class without shedding tears because he was experiencing so much anxiety…I would say, probably 20 to 25% of my classes presented with me with one or more symptoms of anxiety that has called upon for the interference of a counselor at school or at home.

This program administrator summed it up:

> These kids have their own little quirks. And that's okay...How do we get people to recognize that we shouldn't belittle a child for their asynchrony...It's hard and we come in with our own preconceived notions and our own biases. I think we're getting better and I think this community is getting better I think...We have a racial and educational justice department, I think is a component of that of being able to open and stretch one's mind to recognize that there is a problem and that we can do something to address it.

Twice Exceptionality (2e) Broadly Recognized but Not Deeply Understood

Although a newer concept, the term twice exceptional had become broadly recognized at Blockbridge. Across all of my interviews and focus groups, there were only two individuals who were unfamiliar with the term. As this district leader explained:

> Now when you say a student is twice exceptional. People are like, Oh, I know exactly what that means…you mean a student that gets special education services, and is also highly capable. And I think a bunch of years ago if you said twice exceptional—what are you talking about? They had no framing for it.

A principal also commented, "You'll hear the phrases dropped very often, and not in a bad way, and I don't mean dropped like that. But, this is our jargon, 2e, twice exceptional." A teacher bantered, "I like to call them misunderstood superpowers." A program administrator explained their understanding of the term:

> Twice exceptional is going to be a kiddo that is gifted or highly capable and has some other type of issue or concern, oftentimes we think of a learning disability, it could be dyslexia or dysgraphia. It could be a visual processing issue. It could be maybe OCD or some other identified concern and sometimes not yet identified concern.

A self-contained teacher defined it this way:

> Twice exceptional means that they're highly capable or gifted…and they have something else going on. So ADHD could be their twice exceptionality, I think but I'm not sure. I think it's anything else that's going on for that kiddo. So that could be anxiety. Could be ADHD could be Autism Spectrum could be something else.

Other teachers commented on the prevalence of twice exceptionality, "If accurately identified as talented and gifted or accurately identified in Washington State as highly capable, who have a higher preponderance of twice exceptionality than any other population." A general education

teacher believed that most highly capable students were twice exceptional, “Highly capable identified students, generally who also come with a twice exceptionality or higher needs focus for behavior and social adaption in motion.” Another program administrator enumerated, “I think there's all sorts of issues, vision, hearing, dyslexia, dysgraphia, you know, all the different things.” One district leader reflected that these students have always been there:

> I will say the understanding that there's the twice exceptionality has been something newer, and yet not. There have always been and I don't want to sound dismissive or unkind, but in my experience, not all, but some kiddos who are highly capable have always been quirky. And so that quirkiness is I think sometimes where that that twice exceptionality comes in, because the student may, without necessarily having had the identification of being someone who is on the autism spectrum, actually been someone who was on the autism spectrum. The twice exceptional labeling is something that for me was kind of an aha in terms of systems learning around HiCap…That was a steep learning curve, and I don't even think I still know all of the important parts about it.

Another program administrator also commented:

> I think people are understanding that HiCap kids are everywhere and are in every program and every demographic. And I think that that wasn't necessarily super well known. I think people didn't know that you could have a HiCap kid that also had an IEP or a HiCap kid that was also in a [reading support program] or an [English learner] program. So I think people have started to learn that that you know, the programs that you're in today don't necessarily mean anything. I think we already knew that but everybody else I think is starting to get that. I think some people are starting to learn that it is more like special ed than they thought it was, where it actually is something that is necessary. Not just a nice to have.

However, several participants commented that these twice exceptional students aren't always easy to recognize, as one program administrator commented:

> I think part of the problem with highly capable kids, especially those that tend to be really high is that they mask some of their deficiencies, if we call them deficiencies, so they're able to compensate because of their high intellect. And so sometimes we don't see those issues.

A district leader commented on identifying disabilities in highly capable students:

> I think we do a better job of identifying students unless they are really, really smart. And I think some of those are the ones that don't get identified. And that those may be the trickiest of all…I think our really brilliant kids may be able to hide their deficits longer. And those are the ones that I think it takes more finesse and someone with a lot more experience to figure out what's going on.

A self-contained teacher also noted, "Some of those kids, their quirks, their second exceptionality, doesn't even come out until they are being academically challenged because they can use their intelligence to mask it."

When participants were asked to describe twice exceptional students, they tended to describe extreme cases, such as this anecdote offered by a general education teacher:

> If I'm understanding this identifier, it would say that they have exceptional needs that would require say intervention support because of a developmental discrepancy below standard in some areas at some times. And then in other areas, they're showing the giftedness and exceptionality on the other end. So I would say that the person that that descriptor was used, for me in second grade, he scored in the 99.99 percentile of any person on that academic part in all areas, but at the same time, couldn't remember to chew. Like literally could not remember to chew his lunch and would have difficulty

> communicating, interacting or even verbally responding to stimuli around him. So his adaptive social skills were not even close to what we would expect of a 7, turning 8 year old. However, his academic knowledge and his understanding of mitosis and meiosis…I was told this person is twice exceptional.

When asked if they had seen twice exceptional students in their classroom, this general education teacher responded, "Yes. And in my career of 28 years, I think I've seen two." Other teachers also felt that they hadn't seen very many students that fit their expectation of twice exceptional. A self-contained teacher answered, "I feel like I have a lot more ADD, although I only have one that is diagnosed, but I feel like the same with dysgraphia…in four years I don't think I've had anyone that is spectrummy." Another self-contained teacher added their perspective:

> I just don't feel like I have all that many twice exceptional. I do have a lot more what I believe are very intelligent, hyperactive…I have one that I can say he is definitely on the autistic spectrum. But I don't feel like there's all that many in my class. When I really look at it, though, I have an extremely chatty class. So I'm like, is that all ADHD happening there?

A program administrator described the challenges in identifying disabilities in highly capable students:

> I think we have a whole lot of kids who are 2e in our classes, and I think that it'd be great if there was some way that we could inform families of that kind of thing. Oh, well, your kid did qualify for highly capable, [but] we see that they're having trouble reading. Here's a list of things that you might want to look into…I think it'd be great if we could have some kind of a list of resources for families that everybody got, especially you know, they are identified as HiCap. So we know that they're capable of doing these various things, but the fact that they're not doing as well as they should, would lead you to

> believe that maybe there's something underlying, so here's a list, go check it out and go see what you can do. I would love to be able to do that. I don't think we do. I'm not sure what the liability on schools would be in some of those cases.

They later added that of the students that are identified as highly capable, “A lot of them eventually end up with IEPs that say that they have those disabilities."

Identifying students as twice exceptional often fell on parents to seek a disability diagnosis outside of school. This district leader described how the process typically was expected to work:

> A parent notices—My student isn't reading as I would expect them to or writing as I would expect them to or they have identified disability that we have verified with our physician. And they need this extra support. So the family is helping the school understand and then address the need of the student with a disability or the school is also seeing something that is a need. And so then, there should be this happy medium right where, yup, we've learned now that this student has highly capable skills, they definitely have the cognitive skills that require us to support their highly capable profile, and we're going to need to also match some services and support their disability in whatever way makes the most sense.

Another district leader elaborated on the parent role:

> I think we have some educators who do that well, and notice things. I would actually argue that many of our parents are the ones that when they notice that there's something that their child is struggling with... The parent community in [Blockbridge] is strong and they talk to each other. And social media has really probably improved the ability for parents to find information and connect with other parents. So I don't think there's a shortage of information out there…So I think that whole cycle or circle of looking at

> ideas, whether it starts at the school, whether it starts at the doctor's office, or it starts from the parent asking questions, someone somewhere makes a mention, and then it goes down and they start drilling in and asking questions, unless it's blatantly obvious.

This principal pointed out:

> In my experience, with students who have had that kind of access in their IEPs and things like that, it's often the result of a very caring and loving parent…pushing to have their kid get everything they need and rightfully deserve.

A district leader also commented:

> I think if a parent has a voice and advocates and knows what to ask for, their students are better served than if parents don't know, and the system shouldn't rely on the parents' ability to know who to connect with or what to say. But I still feel like that's a bit the case with twice exceptional kids.

However, there were some parents who did not want to consider a formal diagnosis of a disability or accept special education services or Section 504 Plan accommodations. This teacher described a scenario:

> Secret code people don't talk about is that if I try to put those students into a process for receiving services that might help them, it would be perceived by parents as me trying to remove their child from HiCap and that's not a boxing match I want to get into. It is not worth it. So, frankly, I will not do it. So I have some students who I worked my tail off to support in writing, and I avoid additional, frankly, other tools that I may have because I fear that the perception will be that I'm trying to get their child removed from HiCap.

Another teacher told a similar story:

> As soon as you mention it, your [accelerated self-contained] families shut down…you're like, no, this is behavior and I got a coach, I got a peer. There's a teacher he loves that

> wants to check in and check out with him every day and this will be great for him. Nope. We may as well have just called my kid gen ed and then they run you over the coals.

Another self-contained teacher observed:

> We have a very, very large Asian population which includes Chinese, Japanese, and Indian, Vietnamese. How much of them recognize that twice exceptional part and particularly within their homegrown cultures are accepting of that part? Because I think for a good amount of them, there is a quite a lot of shame if your child is identified as one of those things you've listed and I think that becomes really much, much harder to tackle as a teacher is when you recognize those things.

Another teacher pointed out, “We've run into that even with just speech.” A third chimed in with:

> And OT [occupational therapy]. Because it's an IEP. We have an OT. We had them refuse OT services. You could not read the child's printing, and the child was still young enough and grippy enough that it could be corrected. “They're only going to use computers” was the words from their family.

A principal also recounted a story of a family refusing special education services:

> I observed this unfolding in a class one time and I think the child may or may not have gotten it, but was very hesitant to complete the task and the teacher was prompting and giving different tools to support. And I think sometimes he just didn't want to participate. Yeah, and that led to a conversation, the child ended up qualifying for special ed. But the family decided they didn't want him labeled. And they were going to work with him at home. You know, so that's tough.

Providing appropriate support in the classroom for twice exceptional students was another big topic area. Teachers in the accelerated self-contained classrooms felt that they had developed strategies for working with twice exceptional students, as described by this self-

contained teacher, “Now we don't fight against it. We know how to support them.” Another self-contained teacher added:

> We kind of know how to support them, and same with dysgraphia dyslexia…I feel like it's just more known now. So we just naturally accommodate without thinking. The 2e [twice exceptionality] is not that glaring I feel like for mine, but yeah, there is that discrepancy of they can't spell the word when W-H-E-N and they spell it W-E-N and they're brilliant and they write five sentences but they yeah -- you know that huge disconnect. But we just naturally support them where they are nowadays.

Another self-contained teacher added, “It has been a large proportion of my [hicap self contained] classroom.” One self-contained teacher told this story about a student success:

> There's a couple of kids that some have some very quirky behaviors. And we just praise it. We just think it's great...the one in particular that I'm thinking about, his parents are just, this is the best year he's ever had. And this kid is just opening up and the whole class is kind of accepting it and letting it go and letting it roll…it's really fun to watch that and it's just an amazing success. Because this was a kid that was very quiet and just really didn't want to talk...This kid has just really opened up and now I feel like the floodgates open and man, we’ve got to kind of calm down because he's so excited about everything that he's doing, but he's just been such an interesting kid and he's really undiagnosed with anything. Although his parents are like, he's a little different.

Another self-contained teacher gave their analysis:

> I would argue that people…are vastly unaware of the twice exceptionality that we are working with and that's a large component of what we do. I think that there is a misconception about who is in our program, and what abilities they have or don't have, and what quirks and nuances they have or don't have. You would generally hear quite a

> few people would say, well, but you don't have to differentiate, they're all smart or they're all high right? But I am differentiating for quite a few other things that, like you say, didn't come out until they were challenged or didn't come out because they weren't socializing with anyone before.

Among district leaders and teachers outside the self-contained classrooms, there was a lot more concern expressed about the challenges of working with twice exceptional students. This district leader shared:

> I think there are some of the diagnosis especially that come from the Special Ed that are really challenging to meet and we're stretching our thinking and stretching our experiences around them and trying to figure out the best place to meet them and then as we get smarter about it, we're realizing what we're not doing well.

This general education teacher shared their frustration at not being able to access special education services for a highly capable student:

> I had a student who was highly capable in my classroom, and had dysgraphia. I went to my special ed department to say, how can we support this child? And special ed specifically said I don't know what we would do for this child. Our special ed services in general tend to look at kids who are below standard. They do not look at kids who are needing an intervention even though their cognitive ability is above standard per se.

This district leader commented:

> I think the twice exceptional kids are really I found to be a group that's left out, often around the country, there aren't fabulous models out there at the moment…You have a center if you have a reasonable size district, or do you try to do that in the classroom or at the school level.

I noted several comments from educators who pointed out student challenges that they felt strongly had been caused by over-acceleration; however, these same behaviors could also have been explained by twice exceptionality. For example, a former self-contained teacher reflected on working with a student that they felt had been accelerated in math too quickly, “You don't know how to divide. You're doing seventh grade solving with inverse operations. And you don't know how to say 38 divided by two in your head.” Another former self-contained teacher shared this anecdote about a student they felt had been accelerated too quickly and was improperly placed in an accelerated self-contained classroom:

> The one who got the early placement, but wasn't yet in a developmental place that they could achieve their levels of growth, but they were also given that next year and next year and next year. So they also are the students that generate the largest behavior problems in this program, which in and of itself, especially, I have my heart fondness for the neurodivergent, big shout out for me. And those spaces are not conducive to a student whose myopic focus is Minecraft and never writing. And never write.

A program administrator summed up the challenge for teachers:

> I think they need to learn about the difficulties that are involved in being a HiCap kid that …they're just as likely to have, maybe be more likely to have, other difficulties like the ADHD, the autism, the dyslexia, dysgraphia, the you know, all the different things. Just because they can't read in second grade doesn't mean that they don't deserve to be in the program. It just means that they need some scaffolding for their reading and then they'll take off. I think they just need to learn that HiCap kids don't necessarily have to know everything right now. And they can be asynchronous, just like every other kid can. And maybe they're really good at math now. And maybe they'll be really good at reading later, but they're not there yet, or vice versa.

Debate between Acceleration and Depth

One debate that emerged was whether Blockbridge's highly capable services should focus on acceleration, as they had been doing, or whether a focus on depth would be better. This district leader framed it this way:

> I think it's also one of those things where we need to think about what our model is, right? Is highly capable really about accelerating a kid through a grade level's worth of content? Or is it that we actually need to be leaning in on critical thinking and creativity and the curiosity that these children bring to the school with them already?

Some participants recognized that acceleration was needed to meet students' readiness levels, as this principal stated, "The purpose is really to serve these kids in a slightly different way than what's happening in the regular general ed classroom. You know, if they can read a grade level above, why not?" One teacher went farther and suggested that acceleration should be available universally, even outside the highly capable program, "Everyone should be in an accelerated program because every program should accelerate. Every program should be responsive to the learning needs of its students."

However, many participants questioned whether acceleration was the best service model for highly capable students, as told by this general education teacher:

> It just sounds like they're being pushed forward really fast. And to what end is my question like, how does that serve a child?...It doesn't sound like their focus is really on developing the creativity in your mind, but more just like move through it quickly and faster. But I may not know everything. There's maybe more to it than that.

Others felt that acceleration was causing too much stress on students, as this teacher shared, "We're putting all this pressure on our kids." This district leader described the concerns they had heard from teachers:

> One of the worries, but I don't know that it's founded, one of the worries is that we are overstressing kids. Have we created a place where if you're not in algebra by sixth grade, you're not good…And so there's a concern about the social emotional impact on some of our students, either to stay on the path that maybe not be of interest or may be too rigorous for them. Or if they're not on there, then I'm not smart.

There was also a concern that acceleration put too much emphasis on achievement. This was paired with a belief that high achievement did not lead to different life outcomes, as this general education teacher recounted:

> I graduated in the top 10% of high school, and graduated [college] I don't remember magna cum laude or summa cum laude, and it didn't get me anything. It doesn't give me a job. It doesn't get me a different pay. It doesn't get me anything. And so now with my own children, I literally am the parent who's like, C's get degrees. You can stay up all night working on this or you can half-ass it, and you're still going to get a B because that's who you are.

Another general education teacher shared that they didn't see eminent outcomes coming out of the accelerated program:

> All the kids that I know that went through the [accelerated self-contained] program…they all did graduate from high school, many of them with valedictorian and honors and everything else. And now they're pushing 30 and still work in the restaurants…I think that the idea is oh, they're going to be a lawyer. Finish Line. Yeah, they're going to cure cancer... And really of their whole class, I don't know if anybody…nobody went on and is doing something incredible.

However, the first large cohort of fifth graders to be identified via universal screening in 2018-19 were only partway through high school at the time of this study, and most were younger, so

logically, it is too soon to see long term outcomes of Blockbridge's equity efforts. One district leader felt that this was an open research question:

> How did that affect their course taking patterns as they moved through the system? Did they take AP IB? Did they go on to university or jobs that really expanded? Did their opportunities expand because of the opportunity to be in highly capable?

A former self-contained teacher also asked for the research to be collected:

> I want to know what happened to my 4/5 [accelerated self-contained] kids. Do they love math?...Do they see themselves as engineers and software engineers and mathematicians or scientists? Or can they just not wait to be done with school? And that's the piece of data that I think is really, really missing. I know they're going to do great with their grades. How do they feel about themselves? What is the role of school and education in their lives? And my biggest concern is, do you still like math? Where's that data? If you have the data to say that what we're doing is good for the human beings, okay, let's keep working on it. I've not seen it.

A few people commented on their journey with their own children applying to colleges, and how much the college application process affected K-12 education and the focus on achievement. This general education teacher told their story:

> We want our children to be at these places because these places are the spots where they bring out individuals that are going to be independent, successful and have access to this variety of things… As a parent, I want her to fulfill every dream and have every opportunity, and if I have even a possibility to do that, what would I do for my child short of robbing, stealing, cheating and lying to give her a chance to go toe to toe with the other people who are doing that same crap.

Many teachers emphasized the importance of depth for highly capable students, as this teacher described, “My understanding is that it's not really going, my understanding of what I've always learned about gifted education is not just that kids learn faster, but that they can go deeper.” This teacher emphatically stated:

> I don't philosophically agree with [accelerated self-contained], because I do think it's watering down gifted. My background is, by the way, my master's is in dual exceptionalities…I liked it when we had differentiation within the classroom and did project based. And now I morally and philosophically disagree with what we're doing.

This district leader elaborated on the need for depth and creativity:

> Strategies that they can use to encourage the creativity, the deep thinking… Our highly capable students won't thrive if we don't provide them with experiences that enable them to explore their talents, explore their interests in a lot of depth, engage in a lot of creative thought, and be allowed to extend beyond what the typical grade level curriculum warrants.

Overall, several felt that both acceleration and enrichment was needed, as articulated by this district leader:

> In my mind, there needs to be both…Absolutely we want to continue to accelerate in order for kids to be able to be provided the proper challenges and opportunities that they need to achieve. And enrichment at the same time. I don't think it's one or the other.

Vigorous Debate on Self-Contained Versus Inclusive Approaches

With the growth in the number of students identified for highly capable services, many more accelerated self-contained classrooms were created to accommodate all who qualified, as was described in Theme B, as well as some schools experiencing changes in enrollment, as was

described in Theme E. Growth also led to having more self-contained classrooms than general education classrooms in some schools, especially in magnet schools that drew students from other schools in the region. This self-contained teacher explained, “We either have classes that are equal amounts of gen ed and [accelerated self-contained], they have two to two for instance. Or even there'll be more [accelerated self-contained] classes than compared to gen ed.”

This very visible growth led to a vigorous debate between those who preferred Blockbridge’s accelerated self-contained classrooms versus others who argued for more inclusive approaches and would have preferred heterogeneous classroom models. There was tremendous energy behind this debate with strong opinions on both sides and multiple aspects to consider. This principal set the stage:

> It's been almost something that people wanted to debate, you know teachers who complain that it's developing groups of kids who are elitist. You have people that will [say] it's taking away staffing and it's not fair that they have smaller class sizes. I don't feel like that's the case, because I know the same person might complain if I place these highly capable kids in their class and they have to plan for them.

Class sizes varied widely by school. At a different school, a self-contained teacher explained that an intentional decision had been made to make accelerated self-contained classes larger:

> Our general ed classes have 16 students, and our [accelerated self-contained] classrooms with their single qualifiers have 24 or 25 students…the intent was so that students furthest from educational justice could have a smaller class size and more focused attention.

Class sizes were also affected by the fact that classes with a larger number of high needs special education students had smaller class sizes due to the contractual agreement with the teacher’s

union, as described by this district leader, “In our collective bargaining agreement, those students are weighted as worth 1.5 students for class size purposes.”

Class composition was the first major nexus of this debate. As the highly capable program grew and many more students were moved into accelerated self-contained classrooms, this concentrated higher needs students into fewer general education classrooms. This teacher explained, “We have seen a huge increase of more [accelerated self-contained] kids than gen ed kids. So it is pushing a heavier high needs load onto a couple gen ed teachers.” This shift was compounded by the fact that Blockbridge was simultaneously moving towards full inclusion of all special needs students into general education classrooms, as told by this teacher:

> This forced integration of highly impacted special education students at the same time as we have this specialized program for highly capable students in our district is creating divisiveness and vastly different teaching experiences in the classroom.

One general education teacher reported, “I had seven IEPs in my room. Twenty-two kids, seven IEPs and four 504s.” Another teacher added:

> What we see now in the gen ed classroom, even though I do have five highly capable readers in my class, I also have nine IEPs and I have two special ed programs represented in my room because all of the cream of the crop has been scraped off.

These high needs special education students were only included in general education classrooms, not accelerated self-contained classrooms. One district leader noted:

> I think there's a lot of ways that [accelerated self-contained] students could learn from students with special needs being integrated into their classroom for appropriate opportunities and appropriate times. I don't know why the notion was that they couldn't…I think the notion of integration is that they need to be close to their same ability level peers, but when there's no close ability level peers at the same age, I don't

> know why it would matter which classroom you're integrated into. That would be my argument back.

It is also important to note that there were a sizable number of special education students with IEPs who were also designated as highly capable, as was discussed in Theme D, some of whom were placed in accelerated self-contained classrooms. These twice exceptional students were very rarely acknowledged in the context of this debate.

The practice of implementing full inclusion into general education classrooms for all special education students but not for highly capable students was controversial. This teacher explained, “I think that they're basically segregating [highly capable students] out into a program and at the same time, saying, ‘We can't do that for kids with disabilities.’ That feels just inherently hypocritical to me.” One district leader elaborated:

> Once special ed became a topic of conversation, I think that's where things got more challenging, because there was some real pushback on the part of teachers about having kids with an IEP in their classroom. And then suddenly the highly capable program you know, became a bit of a target around, if you want this, you've got to do that. Which really doesn't, it wasn't based on research, per se, or any kind of best practice.

They later continued:

> We have staff saying, look, if you're moving us towards inclusion in special education, then why aren't we including highly capable kids as well? Right. And I think on the surface that makes sense, if the curriculum was fully accommodated or what do I want to call modified or committed to, but the reality is even special ed students in special education that are getting fully included aren't always having their needs met either, right? Like it’s not a panacea just to be included in a regular ed class.

A teacher told about a special education inclusion effort in another school district, and feared that Blockbridge was on the same path:

> They basically told everyone that we're doing inclusion. Oh, there won't be aides or assistants, but they'll [special education students] be included and it'll be great. So they were calling it inclusion but not providing any supports needed to make it actually meaningful and useful to them. It was awful.

A principal also commented, “I feel the same way about sped, the other extreme. Yes, we want to be inclusive, but I also think sometimes, if you don't have the right resources, these kids suffer.”

The second major nexus of this debate was around the impact of separate classrooms on school culture. One aspect of this was the idea of removing the top performers from the general education classroom community, sometimes referred to as skimming. This teacher described their experience:

> So the kids who had been moved on to [accelerated self-contained] out of those fourth grades, even our third grades here, where our higher second graders left last year as first graders. They're pretty low. It feels low. It doesn't feel like gen ed to me. It feels low…I just don't have that higher group anymore, which I have always been accustomed to having the full range.

Another teacher offered, “We are failing their peers in stealing highly adaptive, highly responsive, socially-emotionally gifted, exceptionally gifted” students out of general education classrooms. A self-contained teacher rebutted:

> General education teachers who say you're taking all my model students or my high fliers, I don't think they recognize or acknowledge that by taking those students, we are

> narrowing their instructional range. I also think they don't understand that we are alleviating what could be some behavioral challenges in their classroom.

Another self-contained teacher reported that they had heard general education teachers saying, “You're taking all of the good kids, you take all of the smart kids. We have nothing to work with now.” Their response:

> I take issue with that because of how they're feeling about their students, most importantly, but also that it feels as though the perception is that, fine, the thing that we'll let go of is providing our students what they need and deserve. Our kids deserve to have a challenging education. Our kids deserve to have their people. But the feeling as a teacher that I get when I hear those things is it's more important to me that I have some smart kids in my class, air quotes, than it is that kids get what they need.

Several district leaders also commented on this, such as this leader, “I also think that there's now a ridiculous argument being made around how the program is skimming the best off the regular classes." Another district leader shared:

> Teachers who say well, you've just taken all of the leaders out of my classroom. Rather than trying to expand the leadership of those students who are in their classroom, because we don't have slouchy students in Blockbridge in any classroom, and I think that lack of appreciation for the students who are in front of them is the thing that frustrates me the most. You have students in front of you, they all have gifts, and wherever they're at is where you start and you move them forward.

Another district leader stated “I hear things like it's taking all the role models away from the general ed setting.” When asked if they thought that was true, they responded, “No. It depends on how you define a role model. It's all being used in terms of academic.” Another district leader commented on behavior models:

> It drives me nuts when I hear, Oh, how will we have behavior models. We need behavior models for kids…I really don't think that's the role of a student to have to be a behavior model for other kids. I think they're there to learn. But I hear that often, you know, if we take all the smart kids out, then who's going to be left.

The argument in favor of inclusion was primarily centered on non-academic factors, as described by this teacher, “We're here to learn to be a whole person and we can learn so much more than just academics from each other.” Another general education teacher added:

> I feel like when we're segregating them, we're also, I just feel like we're missing friendship opportunities. And community building opportunities where we could see diverse populations also interact and say, you may have gifts, but we also can be friends and we can also have relationships and communicate, versus I can't talk to you because you're over here.

Another former self-contained teacher said, “They're not even getting the opportunity to learn through and partner with their communal peers or their neighborhood school neighbors. It's so isolating.” Another teacher argued, “I think it's important for kids to see the range of gifts that everyone has and to be able to work with all kinds of people and be around all kinds of people…If you're only always with a certain type of kid, maybe that doesn't serve you so well in the long run."

This concern around social isolation was compounded by hearing reports like this, recounted by a teacher, “We have kids on the playground [with the] whole school say I am not allowed to play with you, you're not [accelerated self-contained].” A district leader elaborated:

> The concern [is] that students themselves and families start segregating into groups where, I've heard stories from as I go and visit buildings of, families or children who are saying no, I can't play with you because you're not in the highly capable program. Or

> playdates are setup in such a way…So that is of major concern and existed to a certain degree, even when we had smaller numbers, but now it's become more and more prevalent within our system.

A self-contained teacher pointed out that this wasn't always a fair characterization:

> When there are issues like on the playground, it's frustrating to hear if an [accelerated self-contained] kid was involved with a gen ed kid, they blame that, that that's the reason. It's just they won't play with the other kids, and you know what, kids don't play with other kids anyway, let's look at what really is going on instead of blaming.

A district leader also commented on this phenomenon, and noted that these stories were often reported third-hand:

> It creates divisions on playgrounds I've been told, third hand from principals, that parents have reported there's divisions in the neighborhood: my kid is the only kid in the neighborhood that's not highly capable and the other kids won't play with them, or kids will find ways to identify differences in each other and use it against each other. So that's been a thing now.

There was also friction reported between teachers, as described by this former self-contained teacher:

> The staff made me feel like an outsider, like I had taken, reaped their classrooms of all of their leaders. The program did do that, but it wasn't me. That was one of my toughest years of teaching.

A district leader elaborated:

> It does create some divides in some staffs where there's, "We're [accelerated self-contained] teachers…and we're not" and one thinks they're better than the other. And it could be either way. I'm not an [accelerated self-contained] teacher, so I'm better than

> you are. Or I'm an [accelerated self-contained] teacher and I'm better than you. So I think it can create some schisms on some staffs.

Asked whether this tension has gotten louder more recently, they answered:

> I think that it feels the same. But also it can be just because I'm tired of hearing the same thing over and over again, but it feels like—I don't know that it's changed...There's more teachers teaching [accelerated self-contained] so that changes things a little bit, but there's still this divide and set of beliefs…I struggle to know when you hear a loud voice, [it] doesn't always mean it's the majority.

There was also a concern that separate accelerated classrooms harmed students' self-concept, and drew attention the fact that some children had qualified as highly capable, as described by this district leader:

> We have created school environments where some students feel that they are less than because if they are not in those highly capable self-contained classrooms they think that they are not as smart as those other students.

A teacher also commented on this:

> We hear a lot of kids saying oh well I'm dumb, they went to [accelerated self-contained] and I'm dumb, so I'm here…And then from the [accelerated self-contained] perspective, well we're so smart, we're in this program. So this…feels very damaging to both groups of children because it tells them that they are one thing or the other.

A principal recounted how a teacher helped students understand these differences:

> This other kid said, "Well, no, I just want to be in this class because we are smarter, that's why we are here." So it's creating this culture of elitism. And so the teacher handled it wonderfully and had a conversation with them…there are some students who are not in the [accelerated self-contained] program but qualified to be in here, and they want to be

> in the other classroom and that's okay…I have the right teacher to address conversations like that. And I know she's coaching my newer teacher to do the same, which I think is important.

A practical issue with the accelerated self-contained classrooms was that although they were available in more than half of the elementary schools in Blockbridge, they were not available in every school, meaning that some dual qualified students needed to ride a bus to access those services, as was described in Theme B. Full bus transportation was provided, but this did divide neighborhood communities, as was described by this district leader:

> There was even an injustice in that, like you've got to ride a bus to do this. Or you are with a group of people that you might maybe engage with more. But for some of you, you might have to choose your friends and your community in order to go get this thing that you need.

A reciprocal issue came up in some schools where accelerated self-contained students who had been bussed in from a different school didn't feel fully welcome in that school community, as described by a district leader, "What that can do is it can create less of a sense of that being my neighborhood school, my place of being a student."

Another issue was that students who qualified for single-subject services in either math or reading did not typically have access to the self-contained classrooms unless that individual student happened to be backfilled into a self-contained classroom. As was discussed in Theme B, differentiation for highly capable students in general education classrooms was highly variable, and depended on the skill and perspective of the classroom teacher. This led to many single-subject students receiving much less robust services than students who dual qualified for highly capable services who could access the accelerated self-contained classrooms. This lack of consistent, high-quality services for highly capable students in general education classrooms was

the heart of the argument in favor of self-contained classrooms, as self-contained classrooms provided a reliable level of service to the students they served, meeting both academic and social-emotional needs, as was discussed in Theme B. However, the lack of similarly consistent, high-quality services for single-subject qualifiers created another equity problem that favored dual-subject highly capable qualifiers over single-subject qualifiers, even if they had qualified in the same subject area.

What Is Reasonable and Possible for Teachers to Do

The essential questions behind many of the debates discussed in this theme concerned what level of service for highly capable students was possible and reasonable to ask teachers to provide. This was complicated by the various service models and classroom situations, the general demands of the teaching role, and the constraints imposed by the school district and the bargained teacher's contract. No one disagreed that teachers had an essential role in providing high quality education for all students, as articulated by this district leader:

> From my years in education, I really believe in that instructional core: the teacher, the student, and the content. And what happens in that instructional core really is all about that relationship between those three things. You have to have good curriculum, you have to have a great teacher, and you have to be able to have that relationship between the teacher, the student, and then whatever that curriculum is.

However, there was a lot of debate about which teachers had the harder job: the accelerated self-contained teachers or the general education teachers. As discussed in the previous sub-theme, the implications on teacher workload from higher needs special education students in the general education classrooms was an important factor to consider. A general education teacher described their current experience:

> The number of IEPs [meetings] I go to, the number of tracking meetings to try and get services, whether it's counseling services or therapy, the number of CPS calls I make is greatly more than my other grade level team members and the needs of my kids are much higher. And yet I have the same number of resources myself. I guess I get a little more ML [multilingual] push-in but no time to work with the ML teacher to plan and prepare. I get my kids pulled out or push-in for IEPs but not with any time to plan and prepare.

A district leader commented:

> There's a feeling by teaching staff that if you're not teaching in the highly capable program, that you're getting more complicated caseloads that you have to work with and you don't necessarily have the skill sets, the training, or the experience to work with these more concentrated complicated cases.

Compounding this, there was also a feeling that accelerated self-contained teachers were given greater latitude to adapt the curriculum, as described by one general education teacher:

> The message they hear from their administrators is, oh, you have the [accelerated self-contained] class, you just do whatever you need to do. So they get to be creative and problem solve and do PBL and aren't held to the same unfortunate lines that we are.

However, in addition to the challenges of supporting the needs of twice exceptional students described in an earlier subtheme, accelerated self-contained teachers also reported that the pressure to keep up with the pace of the compacted, accelerated math curriculum gave them less time to innovate in the classroom. This self-contained teacher described the pace:

> The double jump [in math] that we experience in fourth grade…sometimes it's impossible to go deeper than…just teaching the procedure. You don't have time if you want to keep on the pace the district wants you to keep on. As a third grade teacher I had much more

> latitude to be able to do the deep thinking, innovative things than I did once I moved to fourth grade.

Another self-contained teacher added:

> There's only really one project where I feel like I can let that curiosity and ingenuity happen every single year and I protect that with all my life. It just doesn't feel like I have that room.

Another self-contained teacher offered:

> I either have to slow down the pacing, or I have to drop the time that I have dedicated to social emotional learning, which we know to be a very important aspect of what we do in all programs.

Another self-contained teacher shared that even in the accelerated self-contained classroom, they didn't always have the time to differentiate for the highest performers in that cohort, "The magnet goes towards the lower ones naturally…I like try and challenge myself every day, am I going to challenge this dozen students. And it happens in a blue moon." A district leader agreed that accelerated self-contained teachers had unique challenges that general education teachers often didn't see:

> Unfortunately, the general ed classroom teacher doesn't understand that a teacher that's teaching a class full of students identified as highly capable, there's some uniquely different challenges that they're having to face as well. And they're not exposed to that, they don't experience that, so they're just seeing OK, the best kids, the smart kids are over here, and I have students that have all these other challenges. Trying to educate everybody about that is, we can talk about it, but unless they live it or experience it, they don't get that.

Another district leader reminded that all teachers have a difficult job:

> They just want it to be easier. And teaching is not an easy profession. And anybody who came into the profession for an easy profession, didn't come into the right profession. HiCap teachers need to be very careful not to be high and mighty and holier than thou or think that their jobs are the hardest jobs in the district because they are not any more difficult than a gen ed classroom. And when we start this comparison politics, we're never going to win. So, we have to stop comparing one job to another job. Everybody's got a difficult job in education right now.

Another district leader analyzed the big picture:

> The analogy that people eventually come to is you're pulling out your first chairs out of your orchestra. I think that's a horrible analogy. But I think that pressure that people feel is real. I worry about what that really means...Because, in essence, what it seems like we've admitted is that we've narrowed the band in terms of the students that we need to serve. So the level of differentiation just got better…But we don't typically think about it that way. And so what that makes me wonder is, when we have the class look like this, whether what we're really saying is that it's easier to ignore these kids [in] the middle.

One claim for why general education teachers wanted highly capable students in their classrooms was to act as tutors for other students. One self-contained teacher reported:

> I have also heard general education teachers say I let my HiCap kids teach other kids. While there is value in repeating what you know, because it solidifies it, that does not move you towards an increased understanding yourself or deeper understanding or the next thing that you need to learn. I think it is also sad when, and I get this because general education teachers have a wide range of learners and they need to focus on getting kids up to grade level, that the kids who can do it are often just given independent work or

> independent study without instruction or encouragement to go deeper or go further. And that to me is a travesty.

Another self-contained teacher also reported, “In a gen ed class they're often asked like, oh, you finished early. Can you help so-and-so?” However this claim was disputed, as a general education teacher stated:

> That's that whole old fallacy misnomer…you just want the HiCap kids so that they can coach other kids. The hell I do, I was like, but also, a tide raises all boats. Yes, except that I'm not asking those kids to suck up the water, I’m asking them to enjoy the ride with us.

The teachers who volunteered to participate in this study, without exception, were some of the most experienced, highly trained educators at Blockbridge. Several made a strong case for personally being able to provide the level of differentiation needed for highly capable students in the context of a heterogeneous, mixed-ability general education classroom. One teacher offered:

> That student will still learn because I will give that student access to, I have 2800 books in my classroom, and you know, roughly 900 of them are above grade level, and are going to access themes and points and texts and topics and ideas. So I'm going to target that student.

Another general eduation teacher shared:

> I'm accelerating the learning for all of my learners based on where they can go and what they can do. Because that's what dynamic teaching is. That's pedagogical choice and practice, right?

Another teacher told this anecdote:

> [We] were in partnership with families so families understand that no, I'm not pulling out another whole textbook of math, but I do have the seventh and eighth grade holt. And I

> will give your students some. But they're going to do these projects. I have five qualified in math.

A district leader described an exceptional general education teacher they had worked with:

> Like my third grade teacher… she might introduce as third graders a fourth grade concept and then see what they did and they got all excited and then she'd have them grapple with it and then the next time she'd come back and say, well, what about this and she'd give them a fifth grade concept in the same strand of fractions, let's say, and see what they could do and she would find where in the middle she needed to work with whoever. She just found a way to make it really feel personalized.

However, general education teachers also felt like they were not allowed to provide acceleration in the general education classroom. One teacher said:

> We're doing it all on our own and, and doing that because these kids deserve it...Yes it really is a need. But when [we] asked, 'Can we use third grade material?' We are told no because that's third grade. And so we are working around with third grade Common Core standards to support the students in second grade.

When another participant asked why they couldn't use third grade material, they responded, "It's so the kids don't see it twice." Another teacher endorsed, "That's exactly it." Another chimed in, "It's a teacher issue." Another clarified, "So the kids don't get that third grade workbook two times." A teacher summarized, "So it's one of those, we've always done it this way, common understanding, but it's not written anywhere." A teacher in a different focus group also commented on this constraint:

> When I was teaching HiCap students as a gen ed instructor, I was I was told that it was actually to take pressure off me. I was told that it was in my best interest to not accelerate, that that would be too much to ask…I've got four kids that I need to teach fifth

> grade stuff. Well, woe is me. I didn't see it that way. But that was what I was told. I will also note that this feeds into the problem that when these...students maybe in third grade become qualified [midyear], now we could have been accelerating them and it wouldn't be such a surprise to be taking on sixth grade content [the next year]. But, we're not allowed, we are for various excuses/reasons dissuaded from doing so.

One reason that general education teachers were discouraged from providing acceleration in the general education classroom was because the negotiated contract with the teacher's union disallowed requiring a teacher to teach more than one grade level at a time, as described by this district leader:

> The CBA [collective bargaining agreement] says you don't have to teach more than one grade level in your classroom. That goes directly against the [highly capable] law and directly against having multiple groups of kids in your classroom at the same time.

A teacher also gave their perspective:

> Our contract is negotiated that we teach one subject area. So that gets thrown in my face occasionally by parents that are like, "Well, it's because you're union"…But if you're teaching an [accelerated self-contained] class, you're still only teaching at one subject grade level.

Another district leader pointed out the dangers in not allowing general education classes to accelerate beyond grade level:

> Now, one of the things that I think we've masked is if we put students in there that could achieve more, and we say, well, we're just going to keep you on grade level, that actually just means that they're not actually getting what they need as well, that they're not being challenged, they're not being pushed. And so they're just kind of going along for the ride.

> And we don't notice it because they're getting A's and B's, things must be great, but we don't realize how much they can actually do.

Although some participants believed they could meet all highly capable students' needs in the general education classroom, many participants disagreed. One district leader observed:

> I do think there are pockets of people who really do appreciate students who can learn differently or learn faster. I think there are other people who just dismiss it. So I think it's all over the board and those pockets of excellence are what's so frustrating because then it doesn't lift everybody together.

A former self-contained teacher agreed, "I have to say it's hit and miss based on what the teacher can do." A district leader concurred, "I just am not there to see that a teacher can serve all kids in one classroom at the same time. I think that's asking people to be superheroes that we can't do." A former self-contained teacher shared that teachers in their school simply didn't differentiate:

> I have a master's in differentiation…But when I talk with even colleagues in my school, they'll say, no, I don't differentiate. They've told parents, I don't differentiate. That to me is a crime. That to me should be that they should be on a plan with their administrator to understand why (1) they're saying that and (2) what do they need to be able to do their job to meet the kids' needs.

A general education teacher remarked on how difficult it was to provide differentiation:

> The differentiation in the classroom, it was literally like being like a circus ringleader and you're like, we're over here, we're doing this. I'm going to pop over and do this. And of course, not having any support from other humans, adults to keep them guided and going.

Another general education teacher pointed out the high workload that teachers were managing:

> For most of us, honestly, we're trying not to drown, especially in our new curriculum in our constant chase at the new professional standards and keeping our jobs and everything

> else that comes, so like we want to do better. And we want to do more but balancing our life and our work…

Another teacher commented on the lack of passion for the job as it was currently defined:

> By doing it the way that we're doing this now, as teachers, where is the passion? Where is the ability to? I don't know if this is me coming out in 29 years, and coming in where this was not just a job. I've seen it more and more of just a job.

A principal remarked that the accelerated self-contained program, “Supports our teachers because then you don't have to plan for two or three different grade levels, because I did that for years and it's exhausting. You know, it's nonstop." A district leader also commented on the workforce readiness:

> Right now we have such a shift in our educator workforce. We have such retirements in large numbers, we are gaining teachers that maybe haven't taken a lot of teacher prep programs, so career switchers and teacher residents…I think it's not reasonable to expect a teacher to teach fourth grade math and sixth grade math at the same time. I think that that is difficult. I shouldn't say it's not reasonable. It's difficult and I think it requires a skill set that not all teachers have.

A general education teacher commented, “The neighborhood teachers are like I can't do another year. So then we get the newest and most inexperienced teachers coming, we're not setting up a system that's really equitable for our students.” Another teacher quipped, “I can see why there is a five year drop out.”

The worry was that moving to an inclusive model would mean that highly capable students would not get their needs met because of teacher limitations, as articulated by this general education teacher:

> Students that quite honestly if they're put in a closet could read for themselves and that's the risk. That's the fear. That's the part I think about with our students that could be going further and pushing more. If they were in the same place would they consistently get that support? So I see some of the reasoning of why it'd be beneficial, while people would like to see students moved to a space where they can get it, that's just what happens every day, versus I hope this group or this individual provides that additional enrichment and instruction which some do, and some don't.

Another general education teacher added:

> We see really easily the kids who are behind standard but we never seem to see or acknowledge the group that's always stuck at the ceiling and never getting more...Society ignores those who do well…The low always gets attention, the high is ignored.

A program administrator shared that staff don't always think that these students need the services they were getting:

> Other staff members that I interact with…have suggested that Oh, it must be hard for you to deal with those parents. They're all so pushy, and really, they just need to stop pushing their kids…We're giving too much to those kids, they don't need that much.

They later continued:

> Sometimes there's an argument to put these kids, just intersperse them with everybody else…a teacher might feel like it's easier if they have those kids in the class. Sadly, some of those teachers don't realize the extra things that come along with it that might actually make it more difficult for those kids to be in that class.

A self-contained teacher asserted that highly capable students don't get their needs met in a typical general education classroom:

> I personally believe as an educator that it is important that every student is learning new academic content every day. And I know from a parent perspective, and as a teacher, that those students are not getting that in a general education classroom.

A district leader concurred, “HiCap parents certainly have concerns about being served that way.” They later continued with this fuller analysis:

> I think that what people say when they say inclusion, for the most part, is that we are trying to create systems and structures where every student can belong in the general education classroom and get what they need in that setting. Again, it's that box and what that box has typically done: I can do this, I can't do this. Our solution over the years has been to create two different boxes. So you can do this, this is your job. And this is so complicated, we can't possibly have you do this. So we're going to create an entirely different system called Special Education…And I think there is this recognition that all of those boxes are actually impacting the kids that are stuck in them. So they want those kids to have a different experience. I think the challenge though, when you try to conflate that debate with the other one is that there are a group of highly capable students that this teacher probably isn't going to be able to serve well because of the number of different needs that a teacher has in the class. So there is a specialty…the same is true for special education. Is there a way for us to be able to bridge those gaps so that students can have all of the experiences in all of the boxes, but also get what they actually need? And that's the trick. And that's the argument, right? Is that a kid at 95% actually belongs in my box. Whereas the kid at 99% doesn't, because they don't know what to do with those, but I think I could probably serve the kid with 95. But could you? I don't know. And if you did, at what cost? So you know, I think all of those things are all mixed up and conflated, and they make for great rhetoric and quick arguments and lots of shortcuts, but I don't

> know that, I don't know we've done the actual work to figure it out. But the rhetoric sounds good.

We're Not There Yet

All of these heated debates led many of the participants to suggest that there was still work to be done, and that Blockbridge's highly capable model was not yet meeting everyone's expectations. Professional development was a clearly needed next step, as was discussed in Theme C, but that was not the only need. This district leader recognized the progress that had been made, as well as the challenges that remained:

> While I think we've done a good job, a better job, of identifying students that need advanced level academics and getting them the advanced level academics, I don't know that we've thought about the whole child picture around it and the impacts of that.

Another district leader felt that the focus moving forward needed to be on service models:

> I don't think we should change our identification process. But we definitely need to change our service delivery to address the concerns that we see—that tension that is occurring between staff as well as students and families.

Another district leader shared:

> I think there are some people who would love to just blow it all up. But the problem of blowing it all up is and as we've talked about so many times is the CBA [collective bargaining agreement with teacher's union] says you don't have to teach more than one grade level in your classroom.

A self-contained teacher described the degree of disagreement:

> It's created a situation of lines in the sand. We hear things about certain buildings. And there's more than a few of them where even administrators are saying things like I would

> do whatever I can to break this program up. Interestingly, it's not coming just from schools where they're losing kids to our program, but also schools that house this program. So that doesn't make sense in my brain.

However, most participants leaned in to looking for ways to further improve the program to solve the problems that had arisen. This teacher articulated the overall goal that many shared, "How we do this in an inclusive way? How does that look so that we don't destroy the community of our school by saying this us and them kind of thing?"

Several people resonated with the idea that no group of students should be sacrificed to improve services for another group, as described by this district leader:

> We've got to continue to iterate on how we serve students and be able to meet the needs of our highly capable students, the academic needs, the sense of belonging, and for the other students at the same time, so nobody gets lost…Not doing it in a way that we're sacrificing any group of students to better the next group of students."

Another district leader concurred, "I don't know, but something different has to happen. It has to happen relatively soon that we can be more certain than not, that it's not at the expense of any one particular kid." Another district leader felt that equity done well should create gains for everyone:

> It's almost as if individuals feel like if we have equity then I'm losing something, and really there's no loss there, there's all gains for everyone. But it's this attitude that if we put more kids in those programs then my kid is going to lose something.

One aspirational goal that came up several times was to create a system where students did not need to leave their neighborhood elementary school, as articulated by this district leader:

> I would like us to see to be able to get all students we serve in the neighborhood schools because then we don't have to have the question about, what about students that [are]

> math-only highly capable, the math instruction that they need is actually being taught there and then they can get to it. Or a student who says I've got to make the decision between staying with all my friends at [School A], or getting on a bus and going to [School B] to get my highly capable services. You don't have to make that decision because it's all happening for you in your neighborhood. So we've got to work towards that.

Another district leader added:

> We need to make sure that we're serving our kids in the neighborhood school. And then how do you do that? Again, it's logistics, really hard to figure it out. Right? Because what if you have a school that's has 30 kids versus what if you have a school where there's 60? And do you have them all clustered? Do you put them in their own standalone classroom? How do you support that? I mean, that's where the logistics of it gets really, really tricky.

Nearly all participants brought up the tensions that had emerged and most recognized that this was a complex problem to solve, as expressed by one district leader:

> It's solvable, but it's not a solvable problem within like, I can fix it by tomorrow. It's not something that I can fix by the end of the week, the end of the month, the end of the school year. It's something that is going to require a lot of support on the part of the teachers. They're going to need to be learners. And they're going to need to be provided with professional development around characteristics of a highly capable student, resources that you have at your fingertips that could help you with the students. I think it's also one of those things where we need to think about what our model is.

Another district leader also recognized the complexity:

> I think it's really important to see it as a complex problem, and then to think about how we're trying to work towards addressing it, as opposed to just saying this is a complex problem…[We need to move] beyond admiring the data and going well, we don't have the answers yet, but if we keep mucking around, maybe we'll get it. I think I'm at this table with a lot of great thinkers and divergent thinkers from myself, which is needed, so that we come up with something that moves us forward even if it's messy. I think I trust the people in the space…I don't think anything we do next is going to be clean.

A teacher articulated the core challenge:

> We have to start by changing the hearts and minds of our staff…But we don't even have all the same definition…if we really believe that Student B deserves the best education possible. And Student C deserves the best education possible...But what Student B needs is this. What Student C needs is that. And there's no way one teacher can do all of these things. What are we going to do? Let's look at our resources. Let's do that. And I think if we can work to build a collective community that wants to work together, which is honoring the gifts and the talents that each of us bring…We have to make it easy so that people may have that safe space to share ideas…and the workload can become manageable to do all those, because we trust each other…and we build from our strengths.

Another district leader said, “The whole thing is very tricky, right? Like how do we balance the needs and put the kids at the center of all the decisions?” Another district leader said, “I would say we're in the messy middle, but I don't know. That's implying that we know what's on the other side.”

Many participants thought that other service models should be considered. One teacher wondered, “I know that there [are] great models out there. But I keep asking, Where are they?

How come we're not going to visit and to understand and to be able to see a great model in action?" A district leader coincidentally answered this question, saying, "[Blockbridge] is in a unique situation. I don't know if we can go find somebody who's doing better to learn from them and apply it here. We are maybe at the cutting edge of that piece."

Numerous ideas were floated. Some argued for an IEP-based model, as described by this teacher, "It's a specialized Individualized Education Plan. Not there's something wrong with you. But let's give an individualized education plan to the kids who fall on either side of the bell curve." Others suggested a push-in or consulting model, such as this teacher's idea:

> What if we hired an [accelerated self-contained] teacher just like we do with our sped students, right, what if that's a service model that we offer on a consulting basis so that students could just stay in their community.

Another teacher built on that concept:

> In each building there is a TAG or a math lab or Accelerated educator…there is a program representative who gets to know those kids, who connects with them and then helps with their placement their next year, helps with which gen ed teacher is going to resonate with them... and then [accelerated self-contained] can start at fourth grade with them having had a launching point.

Another teacher agreed that moving the self-contained classrooms to start in a later grade level would be better, "Why couldn't we have [accelerated self-contained] later, right? Where those foundational years, they have that solid foundation that they can just run with?"

Another teacher floated an idea of "Grade band schools…to have a greater variety of places to put kids where they belong," such as K-2 schools and grade 3-5 schools. Another approach focused on more intentional mixing between self-contained students and general education students, as described by this district leader, "Kids going to specialists in a

heterogeneous [group]…Basically, they're still self-contained except for that [time] to go into [a] more heterogeneous mix of kids." One district leader suggested, "Rotation enrichment blocks," and then asked, "Should students have access to highly capable math everyday? Should it be direct instruction?" Another district leader suggested, "Let's give more opportunities to cluster." They later continued, "If the schedule is designed around need, let's say rather than contract, maybe there are things that are possible that we haven't really explored."

The approach that was discussed most often was different kinds of walk-to programs where students would walk to a neighboring classroom or to a different teacher to get accelerated curriculum. One district leader suggested, "Why can't we just decide we're going to try something and do a walk-to-learn for this particular grade level." One teacher suggested a flexible walk-to approach that pooled resources across classrooms:

> I think if we have a system where it was flexible, and we have enough professionals that had the expertise in the different areas we could easily differentiate, but it wouldn't look the same way. It wouldn't be 50 minutes of math, you have 50 minutes of this. It would be well, I need 20 minutes to give the next step to each person…mine are still working on decoding and fluency, but mine are reading Shakespeare…Oh, I love Shakespeare I can connect with those kids and give them the next thought or have a discussion…I think that's how we could integrate the whole system back together.

However, many commented on the constraints imposed by a walk-to approach, like this teacher:

> That drives the whole school schedule to put the most people available to support those grade levels that need it the most…Every six weeks they change what the groups are but they're 20 minute groups.

One teacher pointed out that a walk-to system was much easier to accomplish in math than in reading. They continued:

> With the new language arts, I don't think that we can do a walk-to because it takes up two hours of the day, one and a half to two hours of the day and there's so many pieces and you break them up throughout the day.

Some teachers had experience in other schools that used walk-to systems. One teacher told about how effective this approach was in a school district in another state, “27 out of 29 children met the state standard in grade four… They were really moving the needle…mixed population…transient population, the military base.” They relayed that the secret to this success was, “when we came together as a whole building and everybody said, these are our children that we're going to work with at every level.” Ultimately, this teacher felt that even though there was very little teacher flexibility, “I had faith in the system and the work that was happening based on the results that happened. I don't need to be autonomous…my students to do well and I love that.”

One teacher commented about how this approach required everyone to be on the same schedule which some teachers disliked, “A bunch of [teachers] quit. It hasn't all been smooth sailing and perfect. The administrators are all, I'm telling you what to do, do it…This is my decision, done.” Another teacher added:

> That frightens me, that idea, that lock step is really hard to get everybody to buy in and be on that same page. Because then you all have to trust each other. We know that educators don't trust each other.

Another risk of the walk-to approach was articulated by this district leader:

> My concern with walk to models has been in the past…the walk-to model [with] students who are struggling go to the class to get those foundational skills and unfortunately, they don't have exposure to grade level content and all they're doing is getting remedial content then they never get to grade level.

A district leader reflected on the challenges faced by a school that had implemented widespread walk-to-math, “I'm not sure anybody else is ready to go there without a whole bunch of kicking and screaming. And I think we're not there.”

Another cluster of suggestions that were floated were a fundamental overhaul of how classroom instruction worked for all students. One district leader shared:

> I'm looking at…expanding our vision of what our models are for serving highly capable students and all students actually. So yes, as it relates to highly capable students, and students that get special education services, students that we put labels on, looking at some different ways, more inclusive ways to serve those students. Training all teachers on Universal Design for Learning is a way to provide multiple access points, getting away from worksheet type instruction and into more problem based (and I'm not saying project-based, I'm saying problem-based)—more problem-based type learning where it allows more access to and then more enrichment from instruction.

A former self-contained teacher suggested:

> If teachers were trusted as creative types, and were not encouraged to deliver curriculum from a script and instead were afforded the creativity and license to do creative things, like set up project-based learning, truly in our classrooms, that's how we reach all learners. Kids who had all kinds of creative needs to be stretched as well as roping [in] our kids who often get the most rote instruction, who also deserve access to creative things and projects.

Another teacher described a model that had worked well in a prior school district:

> We were doing an expeditionary learning model…some kids were super bright, and some of them were definitely twice exceptional. But they could go so deep into topics over the course of a year and just become, they could take it in the direction that they wanted and

> the teachers would support them in that…I think project-based learning is really a great way to address the needs of high learners, deep learners…I'd like to see that explored more fully in the district as a way to reach and inspire not just highly capable but all children. I think it's so adaptable to all different kinds of kids.

Others came back to proposing a heterogeneous model where teachers provided differentiation. One district leader asked, “I hear some people saying like, what's wrong with all the kids being together and me making sure that everyone has what they need? And maybe that's possible, right?” They continued:

> I think it depends on how we do it, though. Like it comes with a lot of training and but then it has to come with an intentional focus on groups and what they need and how we create a school space that gives them what they need, not just you're in charge of this group of kids and therefore you need to make sure what they need.

Asked if it was possible for teachers to differentiate to the degree that would be needed for highly capable students, a general education teacher answered, “Yes, but it's breaking down the system.” Several participants, both teachers and district leaders, felt that a defined program would never meet individual students’ needs, because students’ needs were so individual and would not fit neatly into programmatic boxes, as described by this general education teacher:

> And as long as we still have this program or that program, we're not meeting student need. We're not teaching, we're not doing what's needed. We're doing what fits in a box. We have to break down the boxes and…however we differentiate, across the whatever, everybody's learning and everybody's getting what they need, but it's giving you the service you need, not the program.

Some participants argued for a large scale change to all of education. One teacher quipped, “The world has changed, teaching hasn't." A district leader painted this picture:

> We have to stop doing school the way we've always done school. We have to stop pigeonholing kids in the way we've always pigeonholed them before. And I think we have to wholesale change the way we do business. Because a lot of the things that are needed for at least in my personal opinion, for the support of a highly capable student are things that would benefit every student. So if we could just recreate public education as a whole, that would be the best next step. To stop thinking that we have to have grades and age bands that we progress the children through, because that's the way that we've always done it…Wouldn't it be amazing if we had everyone understand the needs that there are of learners and here's the profile of this kind of learner. Here's the profile of this kind of learner. Here's the profile of this kind of learner and we have to put that all together in our toolkit as teachers and we have to think about what the state standards are because, yep, they're there for a reason…what if we had the ability to be creative around that? We weren't so locked into, I have to teach my thing. I have to teach this class.

When asked if this was possible for our workforce to accomplish, they responded:

> The current people sitting in the chairs right now? I think maybe 10% of them could. There's 20% who need to just retire and then there's the rest of them who are going to need to have a little bit of a reckoning and then they would be able to move along…Some of them aren't even paying attention to the conversation, which is a problem in and of itself. And then there's the group that are like, I'm out, I'm done. Good. You needed to go anyway, because you're already the problem.

One district leader felt that no matter what decision was made, it was important to come to a district-wide model that was implemented consistently in all schools:

> If you…put it on the teaching staff to make a decision on it, it takes that highly charged, political piece and puts it on the school and the teachers…It really potentially creates a

> situation where parents will be shopping for schools where if [School] were to be able to figure out a way to fully implement a heterogeneous model, and that's what people want, but if another school that can't and they maintain this self-contained model, and parents are going to say, Okay, I don't like that model. I want this model. So, there is an interest to still try to have a common model district wide to avoid some of that.

Another district leader pointed out the scheduling and contractual challenges inherent in making any of these changes:

> There [are] a lot of different things and techniques that I think could be done, but it's a scheduling issue. And we have to think about scheduling and teachers need to be flexible with that...There's collective bargaining language that sometimes gets in the way, for good reason, depending on how many kids can be in a library at the same time and how many kids can a PE teacher see...Because once you sit down and put it on paper, there are a lot of things that can get in the way and some of our schools are enormous…the bigger they get sometimes the more difficult that becomes.

Ultimately, there was no clear consensus on what the next step forward should be.

Summary of Findings

Blockbridge offered a rich case study of a public school district that put forth significant effort towards equitable identification in the context of a primarily acceleration-based highly capable program for students starting in second grade. Blockbridge implemented many of the best practices that are recommended in the research literature: universal screening, local norms, and multiple pathways, and found important equity benefits in using OR-based combination rules. Strong leadership support, supportive laws, and a sense of moral imperative to find every student drove the administrative team to successfully implement a substantial change of practice, and sustain that effort to continually improve toward their goal of equity. Although Blockbridge

achieved remarkable success in growing their identification rate of twice exceptional students, low-income students, and multilingual students by 16x, and growing their identification rate of historically underrepresented racial/ethnic groups by 7.6x, they did not achieve full proportionality in all areas. They did, however, achieve full proportionality with students who had ever been identified as multilingual, as well as students who had a Section 504 Plan; White, Asian, and Two or More Races students were also equitably represented. In the process, the overall program grew by 4x, identifying 28% of the district's total enrollment for services in either math or reading or both subjects. All of these identified students were performing well in the highly capable program, surprising many that such a large proportion of students could be successful in accelerated coursework that featured high school algebra in sixth grade for math-qualified students.

The tremendous growth of the highly capable program created tensions along many axes, however. From debates about overidentification and test preparation to questioning the definition of highly capable and the self-contained service model, the fact that the program became so big and so visible attracted the attention of the entire school district. Deep differences in opinion combined with the fact that most faculty had never received any training about the needs of highly capable students or the goals of the program created a tremendous amount of conflict, particularly around the philosophy of inclusion. Participants proposed alternate service models and debated what was reasonable for teachers to be able to provide for highly capable students, all while agreeing that every student deserved to have their individual needs met, and to experience challenge at school. But ultimately, there was no consensus on what model would work better or what Blockbridge's next steps would be.

Chapter 5: Discussion

On the surface, Blockbridge was an inspirational case study of a school district that went the extra mile to ensure equitable identification and services for highly capable students. Although not the first in real life, Blockbridge provided one of the first documented case studies in the research literature of a real-world implementation of many of the consensus recommendations for equitable identification. They did experience remarkable success in some areas that should surely be attempted to be replicated by others to validate that these equity techniques do work and work even better when combined together. However, Blockbridge's experience also raised many issues—some familiar and some new—offering a cautionary tale of what can happen when you grow a program quickly without thinking through the bigger picture, and rich lessons for others who might consider similar initiatives. Some of Blockbridge's results were predictable, but others were surprising and a couple even provide a counterpoint to current consensus in the research literature. As with all good research, there are many areas that suggest the need for further study.

In this discussion I will first analyze Blockbridge's equity efforts against the theoretical model offered by Brookover and Lezotte (1981). Then I will discuss each main theme of the findings to synthesize themes across areas, identify potential lessons to learn from, and note areas for further research, for the benefit of other school districts and researchers who may wish to replicate or learn from Blockbridge's experience. I will finish with some recommendations for Blockbridge themselves to consider for the future.

Theoretical Framework: How Equitable is Blockbridge?

Brookover and Lezotte's (1981) Educational Equity Theory was the theoretical framework for this study. Educational Equity Theory is composed of three concepts: equity of access, equity of participation, and equity of outcomes. This section will analyze Blockbridge's

efforts against this rubric to answer the question, "How equitable is Blockbridge?" Overall, Blockbridge expended significant effort to improve equity on all three axes and did make noteworthy progress, but ultimately did not fully meet Brookover and Lezotte's equity standards.

Equity of Access

Brookover and Lezotte's (1981) equity of access standard focused on “equal access to facilities and services” (p. 66) and to ensure that “barriers to access have been removed” (p. 66). The primary goal for the equity of access standard is to make sure that the doors are fully open with no barriers so that all students have equal access. In Blockbridge's case, there were two aspects that each needed to be analyzed in terms of equity of access: access to the identification process as well as access to the highly capable services themselves. Blockbridge's equity of access to the identification process was excellent, however there were notable concerns about equity of access to services.

Blockbridge did a remarkable job removing barriers in the highly capable identification process. Beyond implementing universal screening in three different grade levels (i.e. K, 1st, and 5th grades), Blockbridge also went to great lengths to remove additional barriers in the process, with a strong moral conviction to give every student a fair evaluation. They conducted all testing during the school day in the student's home school, and universal screening typically happened in the student's regular classroom. If a student was absent when the screening happened, Blockbridge sent proctors to schools to catch those students who were missed, often several times. Blockbridge did not exclude students who some might have said had no chance of being identified, including special education students and multilingual students—and found students who qualified in both categories. They offered an appeal process, a referral process for grade levels not being universally screened, as well as a portfolio review process. They chose the

Naglieri Nonverbal Abilities Test (NNAT3) as the first step in the process; its pictorial nature made it accessible to nearly any student regardless of background.

Looking at equity of access in the identification process, it is hard to identify areas that Blockbridge hadn't considered or could have improved on in any meaningful way. They did an outstanding job at removing barriers. One of the potential concerns that Brookover and Lezotte (1981) raised was a situation where “majority children leave through the back door as minority children enter through the front” (p. 68). There was no evidence of this concern at all; in fact, the program continued to be highly sought after even after significant growth in diverse access and participation.

However, looking at equity of access in Blockbridge's service models raised some concerns. The main issue was that students who dual qualified in both math and reading received more reliable, high-quality services in the accelerated self-contained classrooms, whereas students who only single-qualified in one subject area did not typically have access to those dedicated classrooms. Services for single-qualified students were much more variable, and depended greatly both on the school and the teacher assignment. Neighborhood school services for single-qualified students were primarily differentiation-based in second and third grade, with an online math component added for fourth and fifth grades. Walk-to-math was offered in a few schools but not in others, occasionally as early as second grade, but often not until the later elementary grades. For students whose only service option was differentiation, there was a further inequity in that some teachers were willing and able to provide that differentiation, and others were not; the luck of which teacher was assigned largely determined the quality of services. Reading services for single-subject qualified students were exclusively differentiation-based, whereas the self-contained classrooms accelerated the reading curriculum by a full grade level, but were generally only available for dual-qualified students.

The lack of equivalent accelerated services for single-subject qualified students created significant equity of access issues. Consider the case where a second grade student had qualified only in math with a 99th percentile score and received differentiation in math (but no acceleration) in their neighborhood classroom, compared with a student who qualified in both math and reading at the 95th percentile and was placed in a self-contained classroom that accelerated math by a full grade level. The student who had an objectively greater need for math acceleration actually received lesser services. If this had been due to the student or family's choice to not enter an accelerated program, that would be less of a concern. The fact that an equivalent level of acceleration was not even possible in cases like these is the real equity of access problem; the barrier existed before the student could even get to the door.

Equity of Participation

Brookover and Lezotte's (1981) equity of participation standard asked whether students actually participated in the programs that they had access to, and required that all "programs conform to the equal participation standard" (p. 68). While Blockbridge's equity of participation was notably better than many other documented cases in the research literature, it would not fully meet the equity of participation standard at this time. To fully analyze equity of participation, both the enrollment statistics of various demographic groups identified for highly capable services as well as the degree to which students accepted services when they were offered needed to be considered.

Blockbridge did achieve equity of participation with several demographic groups. Students with disabilities with Section 504 Plans were proportionally represented in the highly capable program at all grade levels district-wide, with a representation index of 1.05. Students who had ever been part of the multilingual English learner program were also proportionally represented district-wide, with a representation index of .93. White students had a representation

index of .87, Two or More Races were slightly more represented at .91, and Asian students were well represented at an index of 1.69 which was a significant decrease from their previous representation index of 2.93 prior to universal screening. Overall, Ever Multilingual, Section 504, and Two or More Races groups represented remarkable equity of participation that was rarely documented in other studies. However, other groups remained underrepresented, including low-income students and special education students with an Individualized Education Plan, as well as Hispanic, Black, and Indigenous students, who had representation indices ranging from .31 to .61. While these indices demonstrate growth from Blockbridge's prior practice, the equity of participation standard does not concern growth, only whether the standard is fully met for all groups. In fairness, I found no example in the research literature of fully proportional representation in gifted programs in any district or state (e. g. Gentry et al., 2019; Peters, 2022).

The second component of the equity of participation standard was whether students who qualified for highly capable services actually enrolled in those services. This is an area where Blockbridge did outstanding work to proactively seek out parent permission to place students into services, and simplify the permission process in general to ensure this did not create a barrier to access to services for students, while still following the law. In order to achieve this, Blockbridge called non-responder families, sometimes with a Spanish language speaker if needed, with a specific focus on families in historically underrepresented groups. The data they reported showed that out of more than a thousand students who qualified in 2021-22, only four students never received parent permission to place them into services; an additional two students explicitly declined to participate in highly capable services. These are very low numbers and demonstrate a strong commitment to the equity of participation standard. However, because of the proportionality issues, the overall equity of participation standard was not met.

Equity of Outcomes

Finally, when considering Brookover and Lezotte's (1981) equity of outcomes, "the outcomes standard does not state that all students perform the same but that the aggregate performance in the various groups is the same or nearly so" (p. 69). At Blockbridge, the analysis of equity of outcomes focused on the achievement levels of students who participated in the accelerated program. Although we do not have full achievement data for all students at Blockbridge, Blockbridge was able to share a snapshot of achievement data for the students in the highly capable program and disaggregated that data based on how students had qualified for services. This provided a proxy for seeing whether diverse students who were more likely to qualify with alternative criteria had meaningfully different achievement levels. Although the data shared were limited and in some cases had small sample sizes, the preliminary data showed very similar achievement for students who had qualified via traditional achievement-based criteria versus students who had qualified via local norms or ability-only criteria. I did not attempt to conduct a formal statistical analysis on the Blockbridge data; however, this would be a very worthwhile project for future study, especially when more longitudinal data becomes available.

In addition, I did not have full achievement data for students who were not in the highly capable program, which would have been needed in order to fully analyze the equity of outcomes standard. Another relevant question is whether single-subject qualified students who were placed in general education classrooms with differentiation had equivalent achievement to students who were placed in the accelerated classrooms. Because students who were identified in a single-subject area were often excluded from accelerated classrooms and were less likely to receive accelerated curriculum, it is likely that we might see achievement differences between these groups. There were also issues raised by teachers that students placed in highly capable services appeared to be underachieving, however it was not clear whether those students fell in particular

demographic groups; some data point to the likelihood that some of those students were twice exceptional and would have benefitted from greater accommodations and supports, but this would need to be studied in more detail to be able to claim this with any confidence. In summary, while there were some positive indications for equity of outcomes, there was not enough data to demonstrate meeting the equity of outcomes standard.

Practices and Procedures

This discussion will follow the same headings as in Chapter 4. I will first discuss the specific practices and procedures the Blockbridge implemented, and highlight lessons learned, new insights, and opportunities for further study.

Identification Practices

Blockbridge implemented many of the practices for equitable identification that have achieved significant consensus in the literature (Card & Giuliano, 2016; Lakin, 2016, 2018; L. E. Lee et al., 2020; Lohman, 2012; McBee et al., 2014, 2016; NAGC, 2008; Peters & Engerrand, 2016; Peters & Gentry, 2012). They universally screened all students not just once, but in three grade levels: kindergarten, first grade, and fifth grade. They used group-based, static local norms for low-income students and multilingual students. They had multiple pathways for identification, giving students multiple opportunities to demonstrate their need and readiness for accelerated learning and enhanced instruction. There were also foundational practices and nuances that were likely important and were an integral part of Blockbridge's protocols. Blockbridge learned many lessons that may be instructive for others to consider and build upon; their experience offers a compelling template that would be worth replication and study in other districts.

Foundational Practices

It would be easy to overlook some of the foundational practices that Blockbridge used. However, some of these may have been important contributors to their success. The first foundational practice was conducting all testing during the school day. By moving away from Saturday testing and administering all tests at the student's home school, Blockbridge eliminated any barriers that might have prevented some students from accessing the assessment process itself. In addition, the practices of assessing students during the regular school day, assessing all students as a matter of course, and often conducting assessments in the student's home classroom for universal screening also likely reduced anxiety for students, and may also have reduced any stereotype threat that might have been a factor during the Saturday offsite testing sessions. This aligns well with NAGC's guidance to make the assessment environment as natural as possible (NAGC, 2008).

Another foundational practice that Blockbridge used was being able to refer and assess a student in any grade level, in addition to their universal screening protocol. Consequently, there were no limitations on when a student could enter the program. This removed any artificial barriers that could impose space limitations or program limitations, and allowed students to be served at any point in their K-12 career that their need for advanced programming arose. However it should be noted that after qualifying a student, Blockbridge waited until the start of the next school year to begin highly capable services in almost all cases. Ideally, there would not be a delay between identification and the start of services, however this is challenging to implement logistically in the middle of a school year.

Another foundational practice that would be easy to overlook, but had significant student impact, was identifying students separately for math services and reading services. Blockbridge's practice of identifying students based on individual domains of academic readiness aligned to the

advanced academics conception of giftedness (Dixson, 2022; Dixson et al., 2020; Peters et al., 2020), as opposed to the psychological conception of giftedness that would identify students primarily based on intelligence measures (Silverman & Gilman, 2020) or the talent development conception of giftedness that would include motivation or task commitment in the criteria (J. Renzulli, 2021). One benefit of Blockbridge's approach was that it ensured that students had access to accelerated learning and enhanced instruction in their area of strength even if they were not identified highly capable in all areas. Importantly, students could add a new domain of service in the future as skills developed.

A fourth foundational factor that was a key enabler for Blockbridge's identification system was the fact that they used online assessments at every step of the process. An online test infrastructure provided an ease of administration that made it possible to conduct thousands of tests every year across dozens of schools; keep track of student data for all of those assessments; get results back quickly; and manage all of the complex logistics of Blockbridge's process. The first year Blockbridge had attempted universal screening they were still conducting Iowa assessments and also the newly added Torrance Tests of Creative Thinking (TTCT) via paper and pencil—handling all of that paper was one of the first speedbumps they ran into leading them to move to a fully online assessment the following year.

Although online assessments were essential from a logistical point of view, they also had important benefits for students. Bubble answer sheets were prone to student error or confusion, which introduced a potential of measurement error. There were also more potential barriers for twice exceptional students in a pencil-and-paper format. Online testing provided a level of built-in accommodations and made it more likely for a student with dysgraphia, dyslexia, vision difficulties, or other challenges to be able to successfully demonstrate what they knew, even in the absence of a formal diagnosis. It is possible that the move to online testing was an underlying

factor that also increased the identification of twice exceptional students, and possibly all students. This would be a valuable topic for future study.

All Means All

Blockbridge also innovated on top of this foundation. Notably, they expended significant effort to ensure that every student was given an opportunity to demonstrate their readiness for highly capable services. The lengths to which they went were remarkable, and went beyond state requirements. To be as inclusive as possible, Blockbridge actively sought to screen all students, and did not make assumptions about those who had been historically underserved, such as special education students.

They sent proctors out to schools multiple times to provide makeups for students who were absent during screening or assessment. They proactively screened every student new to the district even outside of the universally screened grade levels. In addition to the state-mandated appeal process, Blockbridge offered a portfolio review option so that a student could be re-evaluated holistically with additional data. They went out of their way to secure parent permission for testing and placement, including making phone calls in Spanish as needed. They realized that asking families to give permission for testing and placement separately created two potential barriers, and combined them into a single request to attain permission for both at the same time, while still honoring state law. On top of all of this, they continued to offer a referral process to include any student that a teacher, parent, or community member felt needed another opportunity to be evaluated. Their commitment to including every student at every step in the process and proactively removing barriers was striking. As Lakin (2016) pointed out, ensuring that students do not fall through the cracks throughout the process is an essential ingredient in an equitable system.

Notably Absent

There were several commonly-used identification practices that were notably missing from Blockbridge's identification system. There was no opportunity for teachers to provide feedback into the process, other than referring a student outside of the universal screening process or rare requests for more information from a teacher during the appeal process; there was no teacher rating scale or any other opportunity for teachers to provide general input. Although some teachers felt that they had valuable input to provide, the research literature is clear that teacher recommendations can create opportunities for bias that discriminates against students of color (Grissom & Redding, 2016; Nicholson-Crotty et al., 2016) as well as girls (Bianco et al., 2011). A recent study showed that between 10-25% of the variance in teacher input was based on differences between teachers, not the students (McCoach et al., 2023). Washington state also discourages districts from using subjective data and expressly disallows districts from using any type of subjective data to disqualify a student. Parents in Blockbridge did not typically have an opportunity to provide input either. The one exception was if a family filed an appeal and had submitted a letter as a part of the appeal process.

Another common practice that Blockbridge moved away from was the use of a creativity measure. They used the figural version of the Torrance Tests of Creative Thinking (TTCT) in 2017-18 with their first round of universal screening, administering it to every single student district-wide in kindergarten through eighth grade. In addition to the difficulties in scoring and managing a paper-based instrument with so many students, ultimately very few students were identified with the TTCT who would not have been identified via other criteria, even when reducing the TTCT qualification threshold to the 90th percentile. Blockbridge conducted a program analysis in 2017-18, and the final report concluded, "We have not seen enough evidence to support the view that the TTCT is an effective measure of all types of creativity," and

discontinued use of a creativity measure in their identification process. The research literature is definitely mixed on whether it is even possible to measure creativity in general, and whether the TTCT itself is a valid measure (e.g. Baer, 2011).

Blockbridge also did not attempt to measure any type of motivation, task commitment, interest, or other non-academic skills as are sometimes used to qualify students for talent development programs. It is particularly interesting that Blockbridge was able to create an identification system that identified many students with notably improved equity by only utilizing objective, quantitative test scores and without the routine use of any subjective data; the only exception being during the appeal process.

Keeping the Screening Criteria Broad

One important early decision was to set the universal screening criteria in Blockbridge's two-phase identification system at the 85th percentile, which resulted in screening in approximately three times as many students as they ultimately intended to identify. Furthermore, Blockbridge began using OR-rules during the screening stage in 2018-19, allowing any one of three different data points to screen a student in to the assessment phase, which substantially widened the funnel. Blockbridge's identification threshold remained at the 95th percentile for the entire study period. Having sufficiently broad screening criteria allowed Blockbridge to avoid most of the inherent problems with two-phase systems that do not allow for sufficient flexibility to accommodate standard error of measurement as well as variability in student performance when the first phase criteria is too stringent, which would unfairly exclude students from the assessment phase who might have otherwise qualified (Lohman, 2012). As McBee et al. (2016) concluded, having too restrictive criteria in the screening stage could result in “a stunningly high false negative rate” (p. 274). Blockbridge wisely avoided this pitfall.

AND-Rules Versus OR-Rules

One of the most important lessons Blockbridge learned was the power of combination rules. Blockbridge had originally used AND-rules, requiring students to have a qualifying score on both the NNAT3 and an achievement test in order to qualify for highly capable services in a domain area, specifically either math or reading. This was likely the main reason that their first year of universal screening had such disappointing results. Despite universally screening every single student in grades K-8 and providing multiple pathways to qualify (five pathways which each required at least two qualifying scores: 95th percentile Naglieri, 95th percentile Iowa, or 90th percentile TTCT; or a combination of three scores at slightly lower thresholds), they identified few additional students; especially not within their identified target special populations demographics. The use of AND-rules was likely their biggest barrier as this problem has been well established in the statistical modeling work by McBee et al. (2014) and Lohman (2012).

In their subsequent years of universal screening, Blockbridge moved to using OR-rules for screening as well as assessment. They allowed any one data point at the 85th percentile at the screening stage to move a student into the second phase of assessment: screening data points included the NNAT3, iReady math, and iReady reading achievement scores. This generous criteria at phase one continued to protect against unfairly excluding students by maintaining a wide funnel of students who moved on to full assessment. Additionally, Blockbridge moved to using OR-rules at the assessment phase, allowing a single Iowa score at the 95th percentile or higher to qualify a student in that domain; students in older grade levels had multiple opportunities for students to achieve a qualifying score once SBA scores were available as well. As Peters and Gentry (2012) pointed out, students could have a bad test day for any number of reasons, and relying on a single test score for identification was bound to result in false negatives that underidentified students. OR-rules offered a different approach at mitigating that concern,

allowing the qualification decision to be made based on the highest available test score without any impact from a possibly spurious low test score that would be problematic if AND-rules or the MEAN-rule were used. OR-rules had the effect of giving a student multiple chances to demonstrate their need for accelerated services.

Using OR-rules had two massive impacts, one that should have been predicted (at least in part), and one that was a surprise. Multiple authors had demonstrated that using OR-rules would dramatically increase the number of students who would ultimately qualify purely through the magic of statistical analysis (e.g. Lohman, 2012; McBee et al., 2014; Peters, Rambo-Hernandez, et al., 2019). While these analyses in the research literature were done as hypothetical mathematical models based on real data, Blockbridge saw the full impact of the OR-rule with tremendous numbers of students qualifying for highly capable services. As a result of this shift, Blockbridge predicted the program might double in size;Lohman's model predicted moving from AND-rules to OR-rules could as much as triple the number of students identified. In fact, Blockbridge found that their highly capable program enrollment ultimately quadrupled.

However, the biggest surprise for Blockbridge was how impactful OR-rules were for identifying twice exceptional students. The same year that local norms were introduced for low-income students and multilingual students, Blockbridge also introduced OR-rules. All of the special populations grew substantially that year; however, local norms were not applied for twice-exceptional students. The only change that possibly explained the sharp growth in identification of twice-exceptional students that year was the introduction of OR-rules to identify students with a single qualifying score on one of possibly several different assessments. In fact, twice-exceptional students with Section 504 Plans at Blockbridge were a historically underrepresented demographic group that achieved and maintained full proportionality after several years of Blockbridge's new identification system.

This potential impact of OR-rules on identifying twice exceptional students has not been previously articulated in the quantitative research literature on combination rules. One study found that using OR-rules to combine national norms with building-based local norms created the most equitable identification results overall, but their analysis focused on racial groups (Peters, Rambo-Hernandez, et al., 2019). Lakin et al. (2018) found that "the OR rule resulted in identifying a significantly greater proportion of girls, underrepresented racial and ethnic minorities, students eligible for FRL [free and reduced lunch], and students who are Els [English learners]" (p. 214); however, the authors made no mention of twice-exceptional students or students with disabilities. Similarly, no mention of twice-exceptional students or student with disabilities was made by McBee et al. (2014, 2016) or Lohman (2012) in their similar quantitative analyses. However, many scholars in twice exceptionality have pointed out the need to use flexible approaches to identify twice-exceptional students, consider multiple data points, and ensure that twice-exceptional students are not excluded because of the nature of their disability which would all clearly support the use of OR-rules for this population (Baum et al., 2017; Bell et al., 2015; Gilman et al., 2013; Maddocks, 2020).

In retrospect, the fact that the OR-rule likely led to an increase in identification of twice exceptional students makes logical sense. The nature of these students' disabilities makes their performance on assessments highly variable. Either because of endogenous factors within the student, exogenous factors in the environment, or the match between a particular assessment and an individual student's unique profile of disabilities, there are many reasons why a twice exceptional student might score high on some assessments, but low on others. Allowing a student to qualify based on their highest demonstrated strength and not requiring them to prove their abilities across multiple assessments would significantly reduce barriers for twice exceptional

students to have their readiness for accelerated learning and enhanced instruction actually noticed.

It is important to note that twice exceptional students in general were still somewhat underrepresented at Blockbridge, because students with IEPs in the special education program were still underrepresented in the highly capable program. This was partly because, in practice, it was difficult for a highly capable student with disabilities to qualify for an IEP. It was generally easier for a highly capable student with disabilities to qualify for a Section 504 Plan. This was somewhat mirrored in the data, in that the representation index for highly capable students with Section 504 Plans was 1.05, demonstrating that these students were well represented. However, that was not enough to overcome the .35 representation index for students with IEPs. Overall, twice exceptional students at Blockbridge were still underrepresented. To accurately measure the representation of twice exceptional students, combining the number of students with IEPs and students with Section 504 Plans would probably offer the most reliable metric, with Section 504 Plans likely being substantially well represented when twice-exceptional students are fully proportionally represented overall. Overall, it would be a valuable area for future research to validate the impact of OR-rules on the identification of twice-exceptional students for highly capable programs.

Another benefit of using OR-rules was that it allowed the identification process to remain as lean and efficient as possible, while also including as many students as possible who showed an indication that they would benefit from advanced instruction. In comparison, if a district were to use AND-rules or MEAN-rules, they would need to administer the full battery of assessments to a large number of students. With the OR-rule, as soon as a student achieved a qualifying score on an assessment, they no longer needed to be given any other assessments, which saved time and money and addressed any potential concerns about over-assessing students. This practice

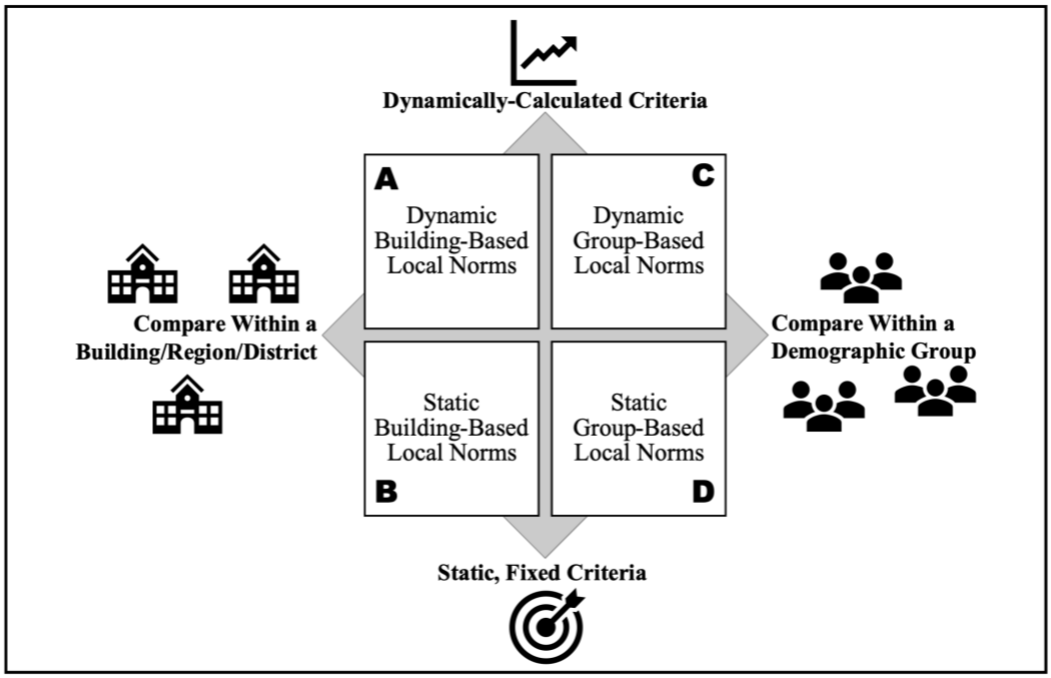
minimized testing and maximized the chance that any student who could demonstrate their readiness for accelerated instruction on any of the instruments used would be identified.

Static, Group-Based Local Norms

Another area where Blockbridge innovated was in their application of local norms. In Chapter 4, I proposed a new, more precise terminology to distinguish Blockbridge's use of local norms from that described in much of the research literature, as first shown in Figure 4.2, and again in Figure 5.1. The concept of local norms is about comparing students to other students who are similar to them, especially those who might have more similar OTL (opportunity to learn) (Carman et al., 2018; Peters et al., 2021; Peters & Engerrand, 2016); this idea also appears in the Washington state definition of highly capable students, as well as in national definitions. However, there are different ways to implement local norms that can yield very different results. I suggest that there are four primary types of local norms that fall on two axes: (1) comparing

Figure 5.1

Four types of local norms

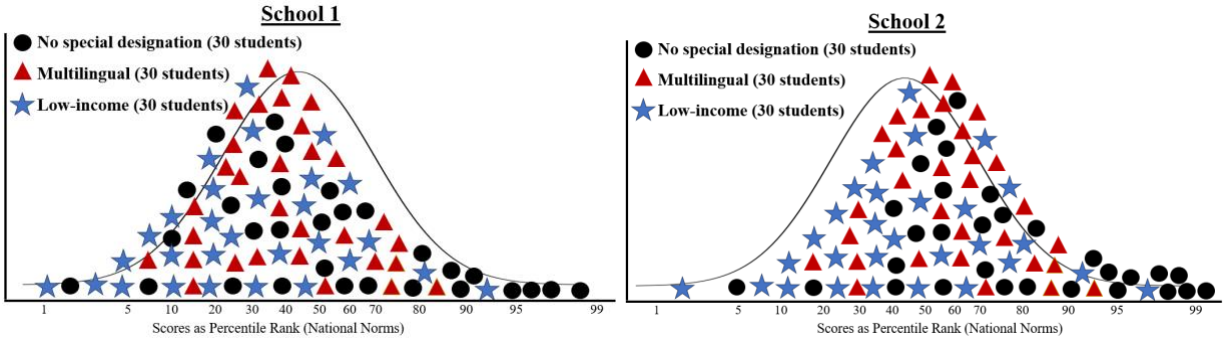


students within a building (or district/region) versus comparing students within a demographic group, and (2) using dynamic criteria versus static criteria.

Let's consider an example of local norms intended to select the top 10% of students based on a particular assessment, using each of the four different types of local norms shown in Figure 5.1. To illustrate, let's consider two hypothetical schools, School 1 and School 2, as shown in Figure 5.2. To simplify the example, both schools have exactly 90 students, with 30 students in each of three demographic groups. School 2 has somewhat above average achievement, whereas School 1 has somewhat below average achievement, but both share the common pattern of low-income students and multilingual students scoring somewhat lower than other students on standardized tests. I'll demonstrate how each type of local norms plays out differently in each school, and how those results can vary even further across these two school contexts.

Figure 5.2

Illustration of test score distributions in two different hypothetical schools

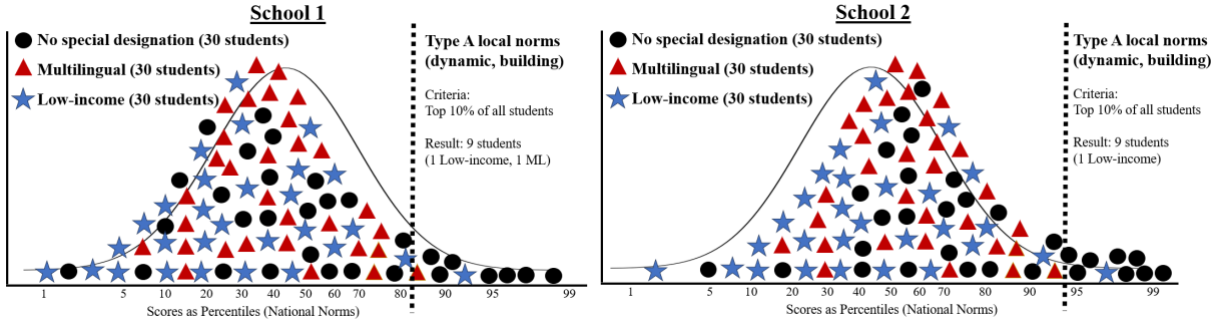


The most common interpretation of local norms in the current research literature is to use dynamic, building-based local norms, Type A in Figure 5.1. In our example, perhaps the top performing 10% of students in each school building would be identified for advanced programming. This would yield a fixed, predictable number of students who qualified, exactly 10% of that school's enrollment; however, the range of actual scores among the selected students would be unknown and could represent a wide range of ability levels, or a very narrow one. In

our hypothetical schools shown in Figure 5.3, if Type A local norms were used to select the top 10% of students in each school, the 9 students with the highest scores would be selected in each school since there are 90 students total in each school. In School 1, the qualification threshold would fall around 83rd percentile on national norms, and only one low-income and one multilingual student would be selected. In School 2, the threshold would fall around the 94th percentile, and only one low-income student would be selected. If instead of a heterogeneous enrollment, all students in the school were from the same demographic group, you could imagine a very different outcome, and this is when Type A norms work exceptionally well. Type A, dynamic, building-based norms are most effective for improving equitable identification in schools with a very homogeneous enrollment; the more diverse the school, the less well Type A local norms will work for improving identification of traditionally underrepresented groups.

Figure 5.3

Type A local norms (dynamic, building-based) applied to two different hypothetical schools

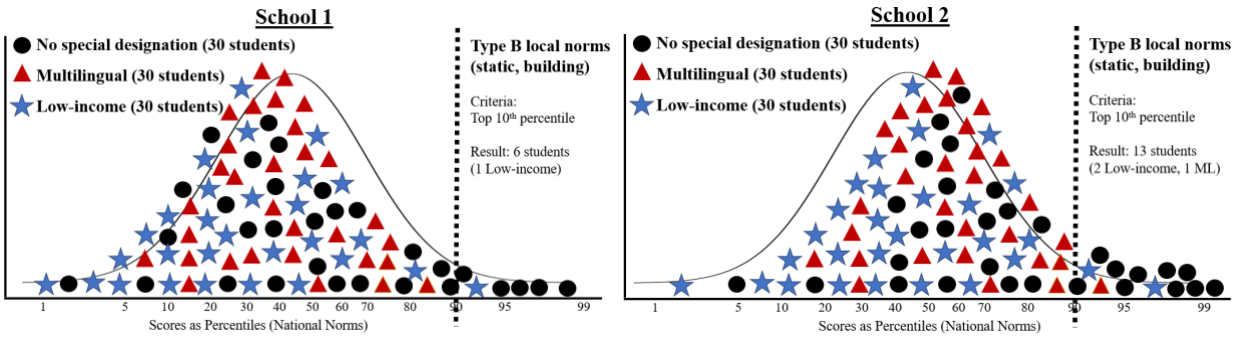


However, if static, building-based local norms were used instead, Type B in Figure 5.1, we would pick a specific, static criteria that students needed to meet in order to qualify. For our illustration, perhaps all of the students in each school who scored in the top 10th percentile on national norms would be selected. In this case, the number of students selected would be unpredictable, but we would know that all of the selected students had ability scores in the top 10th percentile of whatever was being tested. Possibly a large number of students might qualify

in a high performing school, or conversely a small number of students might qualify, or in a low performing school—possibly none. Applying Type B norms to our example in Figure 5.4, in School 1, a total of six students would be selected, one of whom is low-income. In School 2, a total of thirteen students would be selected, with two low-income students and one multilingual student.

Figure 5.4

Type B local norms (static, building-based) applied to two different hypothetical schools



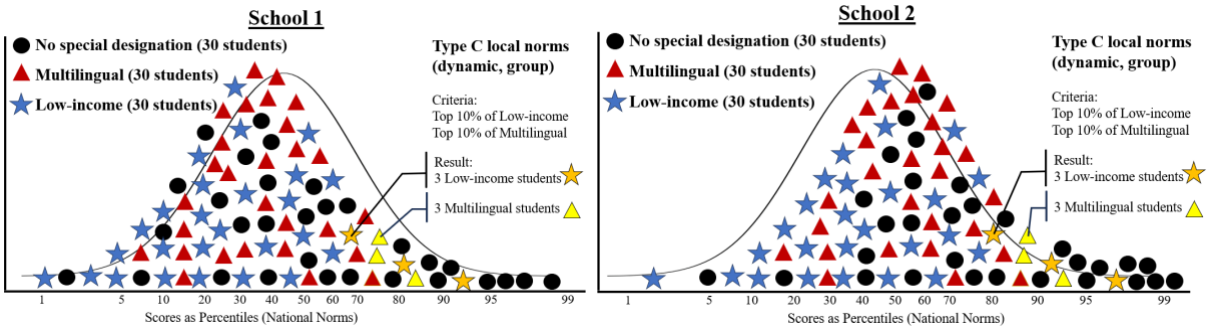
Switching to using group-based local norms, Types C and D in Figure 5.1, would mean comparing students against other students within the same demographic group, instead of comparing students against all others in their school. The chosen demographic group might be low-income students, multilingual students, students with disabilities, or another group; however, it is important to note that group-based local norms should not be used with racial groups which could be a violation of federal or state laws (Peters & Engerrand, 2016).

Type C local norms, as shown in Figure 5.1, are dynamic, group-based local norms, which would select the top ten percent of multilingual students who performed the highest on that test instrument. Again, this approach would select a fixed number of students, exactly 10% of the students in that demographic group. Although they would represent the highest performers in their demographic group, their actual performance levels on the assessment could vary widely. In our hypothetical example in Figure 5.5, we would select exactly three of the highest

performing multilingual students (10% of 30 is three students) shown as yellow triangles; in the case of School 1, their performances ranged from 75-85th percentile, but in School 2 the range was 88-94th percentile. Note that in both schools, there was another student whose score was almost identical to a selected student who would not have qualified with this approach. Although there will always be uncertainties about students who fall below any cut score, when the score chosen is dynamically calculated and dependent on the other students in the cohort, this makes a dynamic local norm feel arbitrary and harder to defend. Following our approach, if we used Type C local norms to instead select low-income students, we would select three of the highest performing low-income students, shown as orange stars in Figure 5.5; note that one of those selected low-income students would have scored substantially lower than other multilingual students who were not selected.

Figure 5.5

Type C local norms (dynamic, group-based) applied to two different hypothetical schools

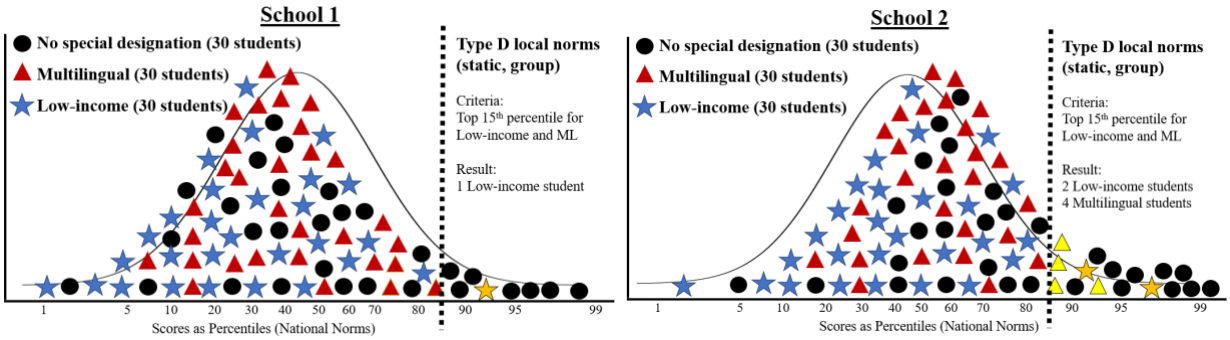


Type D local norms, as shown in Figure 5.1, are static, group-based local norms, which would select all students in a group who met a specific, static criteria; in our illustration, we would select multilingual students who scored at a particular percentile on the assessment based on national norms. With this local norming approach, perhaps many multilingual students might qualify as a result of this static, fixed criterion, or possibly fewer multilingual students might qualify, but we would know that all students who qualified scored above a minimum level of

performance on that standardized assessment. Typically Type D local norms would be used to mitigate differences in opportunity to learn (OTL) for a targeted demographic group, and might set a slightly lower threshold to compensate for OTL and any bias in the test itself. For example, in our hypothetical schools, we might be unsatisfied with the results of Type A, B, or C local norms for identifying multilingual or low-income students, and use a Type D local norm for that demographic group instead, choosing a top 15th percentile criterion instead of the top 10th percentile to account for OTL differences in the targeted demographic groups. In School 1, shown in Figure 5.6, this would result in selecting one low-income student; however, in School 2, this would result in selecting two low-income students and four multilingual students. This example further demonstrates that the static criteria chosen perhaps should be different in the different schools, to be responsive to their local population.

Figure 5.6

Type D local norms (static, group-based) applied to two different hypothetical schools



This hypothetical illustration, shown in Figures 5.2 through 5.6, demonstrates that each of these four types of local norms can result in very different groups of students selected, depending on the distribution of student scores in a school, the number of total students, and the specific criteria chosen.

Blockbridge's identification protocol used Type D static, group-based local norms and applied a fixed, 88th percentile qualification criterion based on national norms (85th percentile on

SBA) for all students who were low-income (as measured by the federal free and reduced lunch program) or who had active multilingual status (those receiving English learner services). Blockbridge's protocol was modeled partly after the Plan B system used in Florida, as was described by Card and Guiliano (2016), which also used a specific, static criterion for all low-income students and English language learners scoring 116 on a standard IQ scale, as compared with Florida's standard qualification threshold of 130. However, unlike Florida, Blockbridge used group administered ability and achievement testing rather than individual intelligence testing as the main qualifying data, which was a notable difference.

This landmark study by Card and Guiliano (2016) is best known for demonstrating the positive impact of universal screening on equitable identification in a school district in Florida. Without changing qualification criteria, conducting universal screening of all second grade students in that district increased identification of low-income and multilingual students by 174%, Hispanic students by 118%, and Black students by 74%. However, it is important to recognize that the Florida school district they studied already had Type D static, group-based local norms in place as part of Florida's Plan B system. Their study is particularly illuminating because it isolated the impact of universal screening from the impact of local norms alone; simply considering more students and removing the barrier of the referral process made a meaningful improvement in equitable identification without adjusting criteria or norms.

In comparison, Blockbridge started with universal screening and no local norms in 2017-18, and found that universal screening alone without changing the qualification criteria, norms, or combination rules had very little impact in improving equitable identification. It was only after introducing Type D static, group-based local norms and OR-rules that Blockbridge saw a dramatic increase in the number of historically underrepresented students who qualified for services. Because Blockbridge used static local norms, and not dynamic local norms, there was

no guarantee how many students their approach would qualify—it could easily have been many fewer students, since there was a fixed performance threshold that students needed to reach.

After analyzing the literature and this case study, my hypothesis is that implementing universal screening alone may not be an effective equity strategy if the qualification criteria themselves remain biased against certain groups. For instance, it is unreasonable to expect a multilingual learner who is learning English as a second language to score as high on a verbal or reading assessment as a native English speaker, no matter how fast of a learner they may be. English proficiency affects mathematics as well—the reading load in math curricula and assessments is significant (Bell et al., 2015; Peters & Engerrand, 2016). Similarly, it is unreasonable to expect a low-income student who may not have had access to preschool or other extracurricular opportunities to have as well-developed academic skills as their more affluent peers, a factor that is sometimes called the opportunity gap or differences in OTL. Requiring twice exceptional students to score high on multiple different instruments may be similarly unreasonable, as was discussed in the previous section. In addition, known biases and cultural loading on tests also need to be considered.

Using any of the four types of local norms could be a strategy to mitigate these imperfections in the assessments as well as impacts of OTL differences. However, it is important to be very thoughtful in choosing which type of local norms to use based on the situation and identified goals. Any of these local norms approaches could be useful in different scenarios. These different variants deserve further study to determine which specific situations, criteria, and types of local norms would create optimal results.

My analysis is that building-based norms would be most appropriate for highly homogeneous schools where all students have very similar backgrounds and access to opportunities and would serve as a valid comparison group for each other. In contrast, group-

based norms would be more appropriate to target underrepresented groups in the context of a more heterogeneous school where there are larger differences between students' backgrounds and access to opportunities, and a strategy to mitigate different OTL between groups was needed.

On the other axis, dynamic local norms would be most appropriate when selecting students for a fixed-space program, where only a certain number of seats are available; however, it should be noted that space-limited programs introduce inherent inequities when qualified students are turned away because of space limitations (Peters et al., 2020). In addition, using dynamic local norms could actually introduce new inequities. Consider the case of a high-performing school where dynamic local norms were used to select students above the standard error of measurement of the test, for instance, where there may not be a statistically valid difference between the 99th and 98th percentiles. Districts could attempt to use dynamic local norms to select the very highest performing students for an advanced program, but inadvertently exclude many other students who would also benefit equally from that program if they are not paying attention to statistic validity. Note that Washington state law specifically disallows this potential inequity by requiring that "local norms may not be used as a more restrictive criteria than national norms at the same percentile" (Revised Code of Washington, 2018, para. 3).

Dynamic local norms can introduce other equity dangers as well. For instance, it would certainly be possible to create dynamic, group-based local norms that would de facto identify a proportional number of students in each of the targeted demographic groups, and on paper it would appear that this strategy worked well to create proportionality. However these students could have an extremely wide range of ability levels, which would create challenges if they were being placed in an accelerated academic program, especially if the students were in older grade levels where a degree of foundational academic skill was needed to be successful. Yes, it is possible to create proportionality on paper with dynamic, group-based local norms, but it may be

a false equity and ultimately be damaging to students if they would not actually benefit from the services provided.

In contrast, static local norms would be most appropriate when there is flexibility to serve as many students as qualify, and the main need is to establish a minimum level of achievement or performance to ensure that selected students have enough foundational readiness to benefit from a particular intervention. Static local norms can be used to adjust criteria for differences in OTL balanced with program expectations, and can better match students with a particular academic program while still being as inclusive and equitable as possible. Static norms would also introduce less competition and be more inherently fair, where every student who meets the threshold would be identified; whether an individual student was identified would not change based on the number of other students in the comparison group or those other students' performance levels. Using static norms was especially important with an accelerated academic program like Blockbridge's that required a minimum level of academic readiness past the early elementary grades, and was an important part of aligning their services with identification.

Districts need much more guidance on how to implement local norms and which type(s) will be effective in their specific situations. In particular, assuming that dynamic, building-based local norms should be the default choice would be inappropriate in most schools where there is a range of student backgrounds, and any meaningful difference in achievement levels exists between demographic groups, especially at the top end of the distribution. The schools where dynamic, building-based local norms work the best are those where all students are from the same demographic group. The more diverse the building, the less effective that dynamic, building-based norms would be for improving equitable identification, especially if some demographic groups have higher achievement than others. Similarly, the local norms calculations offered by test manufacturers are dynamic norms, not static ones, which can obscure

students' actual achievement levels, which is important information for decision making. Remember that the ultimate goal is matching students with needed services, not reaching an arbitrary level of proportional representation.

From choosing the correct type of local norms for their specific situation and program goals, to setting appropriate criteria, to integrating local norms with universal screening, and choosing the best combination rules, there is a lot of nuance that districts need to manage which can dramatically impact outcomes. Continuing to unpack these interrelated factors and establish more detailed best practices for equitable identification would be an extremely valuable area for future research.

Service Practices

Blockbridge's service model was somewhat unique compared to many examples in the research literature. They didn't impose space constraints, and dramatically expanded services as more students qualified. They aligned their identification to services, identifying students specifically in math and reading and providing services in those specific domain areas. Blockbridge provided significant acceleration, especially in math, starting early in elementary school and preparing elementary students to take high school algebra as sixth graders. This represented three years of compacting and acceleration in math. Furthermore, Blockbridge provided that significant level of acceleration to a large number of students.

However, Blockbridge had a significant equity issue in that services were not equally high quality throughout the district, and dual-qualified students who had access to self-contained classrooms generally had a higher quality experience than single-qualified students who relied on teachers to differentiate, or who had variable access to online math and walk-to-math. Blockbridge also did not use a specific accelerated or advanced curriculum for their highly

capable students, which caused additional strain on teachers to compact, enrich, and accelerate curriculum as needed.

Operational Excellence to Manage the Logistics of Expansion

Perhaps the largest lesson to learn from Blockbridge is that well-executed equitable identification protocols will find many more highly capable students than expected, which will be discussed in more detail in later sections. However, the implications of this growth are equally important to ponder. The follow-on lesson is to recognize that it will require a high degree of operational excellence to manage the logistics of program expansion, and this needs to be planned for. Blockbridge's commitment to providing services for all students who qualified was admirable; however, this was a massive effort to implement, especially as the program continued to grow. Blockbridge was lucky to have extremely competent program administrators and district leaders who could manage this complexity, as well as a flexible enough district infrastructure to be able to handle the waves of expansion which touched every school and affected everything from enrollment to staffing to transportation. As one district leader pointed out, “It's the system wideness of it that makes it a challenge.” Using service models that didn't require students to move between schools would have reduced the logistical impact significantly.

Disabilities in Twice Exceptional Students Became More Visible

Blockbridge program administrators noticed a pattern that some students were first identified as highly capable, placed in accelerated programming, and then were later diagnosed with a disability as challenges surfaced. This typically required parent intervention to seek out diagnosis. Blockbridge's experience aligned with Rogers (2011) who suggested that “finding twice exceptional children may be easier in a gifted self-contained classroom than in mixed ability classrooms” (p. 60). This makes logical sense because twice exceptional students'

challenges may become more visible in the context of genuinely challenging classwork, which was likely what was happening in Blockbridge's accelerated self-contained classrooms. This would be particularly true for twice-exceptional students whose giftedness masks their challenges (Baum et al., 2017). Foley-Nicpon and Cederberg (2015) also noted that twice-exceptional students were more likely to receive academic acceleration if they were identified as gifted first, before their disability was recognized. Twice exceptional students can go unrecognized for either their high ability or their special needs in public schools because their ability to compensate allows them to perform within grade expectations, even though it may be far below their potential (Gilman et al., 2013).

For twice-exceptional students whose challenges overshadow their gifts, Blockbridge also did an admirable job in ensuring that all students who had already been identified with an IEP or Section 504 Plan were fully screened for possible inclusion in the accelerated program. These students can often be left out under the false assumption that a special education student couldn't possible qualify for accelerated services. Overall, Blockbridge's model may provide a good template to follow. First, use a highly capable identification process that minimizes barriers for any potential disabilities, diagnosed or undiagnosed, and ensure that every single student, including special education students, is screened to ensure that no student is missed. Then, place students in rigorous programming and be alert for any indications of disabilities to emerge, and be ready to follow up with support and formal diagnosis.

Sadly, Blockbridge's teachers were not well informed about the likelihood that accelerated academics was likely to surface previously unrecognized disabilities in some of their students. I found that even the teachers in the accelerated self-contained classrooms were more likely to attribute student's challenges as due to a lack of motivation, poor behavior, or that the student was improperly placed or accelerated too quickly, rather than recognizing the possibility

of twice exceptionality. This is an important area for professional development to help teachers better understand and support twice exceptional students (Bianco & Leech, 2010).

Aligning Identification to Services

One of Blockbridge's strength areas was how well they aligned identification to the services delivered (Gubbins et al., 2021). Both identification as well as services were based on achievement in either math or reading, and the services they delivered closely matched the areas students had qualified in. Unlike other school districts that identified students with measures of academic achievement but provided services in leadership, critical thinking, or enrichment (Hamilton, 2019), Blockbridge offered significantly accelerated academics in both math and reading for students who qualified in those specific subject areas.

Self-Contained Classrooms Versus Other Service Models

Blockbridge's self-contained classrooms provided reliable accelerated services for dual qualified students. They offered an uncommon degree of math acceleration, accelerating one grade level in math in second and third grade, and compacting to two grade levels ahead in fourth and fifth grade, to prepare students to enter high school algebra as sixth graders; Blockbridge was also actively moving towards having all general education students prepared to take algebra in eighth grade, but had not fully made this transition at the time of this study. The highly capable reading curriculum was a grade level ahead as well in the self-contained classrooms. Blockbridge's experience validated Gubbins et al. (2021) who reported that nearly three quarters of school districts studied provided instruction for gifted students at a faster pace or with compacted curriculum. Blockbridge's use of acceleration as the foundational program modality for their highly capable students is very well supported by research. Acceleration is one of the most deeply studied modalities of gifted education, consistently showing large effect sizes

and benefits for students, academically as well as socially and emotionally (e.g., Assouline et al., 2015; Bernstein et al., 2021; Foley-Nicpon & Cederberg, 2015; Lubinski et al., 2014; Lubinski & Benbow, 2006, 2021; Steenbergen-Hu et al., 2016).

However, although Blockbridge offered a continuum of highly capable services for both dual-qualified and single-subject qualified students in all schools, the quality of Blockbridge's services varied greatly outside of the self-contained classrooms, and in many cases the differentiated services that were promised on paper did not actually exist in real life. Walk-to-math to a self-contained classroom was offered, but only if the student attended a school that had self-contained classrooms, and only if there was enough space in the class to add another student. Walk-to-math to a higher grade level classroom was available sporadically in a few schools and at some grade levels but not others. Online math was offered consistently for any fourth or fifth grade student who qualified in math, but in some schools those students sat in a hallway, and in other schools, students had a classroom and maybe even an assigned teacher to support them; however, this model at least provided a consistent level of access to accelerated math in all schools. Some teachers put significant effort and expertise into differentiating for their highly capable students, while others felt that it was too much work, not their job, or they simply didn't have enough support in curriculum, professional development, or time to implement a meaningful degree of differentiation. Services in reading were completely dependent on teacher differentiation, making access to highly capable reading services particularly spotty. While some students enjoyed high quality services outside the accelerated, self-contained classrooms, many experienced a patchwork that ultimately did not deliver what the district promised. This variability in services outside the self-contained program created a significant equity problem between students who had access to accelerated self-contained classrooms and those who did not.

An obvious remedy to this problem would be to place single-subject students in self-contained classrooms in order to ensure they had the equitable access to acceleration that they needed. Blockbridge indeed tried this approach, which they termed “backfilling,” but this did not always go well. Aside from continuing to balloon the number of students in self-contained classrooms which had system-wide repercussions, teachers reported that backfilling caused problems in the classroom when students weren't ready for acceleration in the other subject area. It is unclear how many of those student cases were rooted in newly surfaced twice exceptionality, or perhaps in a student needing some temporary scaffolding to catch up with the accelerated curriculum, or whether it truly was not the correct placement for a student. It is also unclear how many backfilled students succeeded in the self-contained placement without issues versus those about whom teachers raised concerns—were they a majority or a minority of backfilled students? This would need to be studied in more detail to better understand these complex dynamics.

Curriculum

The lack of any dedicated curriculum designed for gifted or advanced students was a weakness of Blockbridge's highly capable program. There is a great deal of research supporting the effectiveness of deeper, more complex curriculum for advanced learners that allow students to further develop their areas of strength, often via a student-driven approach (Betts, 2004; Callahan et al., 2015; Feng et al., 2005; J. S. Renzulli, 2012; J. S. Renzulli et al., 2000; Tomlinson et al., 2009; VanTassel-Baska & Wood, 2010). Twice-exceptional students also particularly benefit from a student-led, strength-based approach (Baum et al., 2017; Gierczyk & Hornby, 2021). It is remarkable that Blockbridge's highly capable students had achieved the academic success that they had with their pure acceleration approach using the same curriculum

as in their general education program, just at a higher grade level. Incorporating a targeted curriculum designed for highly capable students paired with academic acceleration could potentially further improve the student experience and achievement at Blockbridge, as well as address teacher concerns about the difficulties of maintaining a fast pace while using traditional curriculum materials that may use more repetition than advanced students needed. A more targeted curriculum would be more efficient and reduce the need for teachers to compact and enrich standard curriculum on the fly.

Professional Development

Blockbridge offers a cautionary tale of what could happen when you make a large, relatively fast change, but do not follow through with professional development to explain why changes in identification were made, how highly capable services would be delivered, how teachers should be providing those services, and why highly capable services were important in the first place. While there were strong efforts at communicating programmatic information about scheduling testing, organizing logistics with schools, getting permission from parents, and other procedural details, there was little evidence of broad communication about the strategic importance of the expansion of the highly capable program other than in the first year when universal screening was initially announced.

Instead, my findings were full of instances of deep disagreement, misunderstanding of the goals of the program, ignorance of the legitimate needs of highly capable students, incorrect information being circulated, and even different definitions of highly capable students. Although a rigorous national poll showed strong support for gifted education, acceleration, and inclusion of underrepresented students among the voting public (Jones & Gallagher, 2019), Childers (2009) reported that only 50% of teachers and 20% of administrators had positive attitudes towards gifted education, so this general skepticism among faculty could have been predicted.

However, the degree of debate at Blockbridge was extreme and ran largely unchecked by facts or leadership guidance. When several key leadership positions changed in the summer of 2022, this only intensified the debate, as the perception was that the prior leadership had been the drivers of the highly capable equity initiative. My interviews, however, revealed a strong, continued consensus on the need for robust highly capable services among every single continuing district leader I interviewed. However, they did not appear to communicate that consensus to the rest of the organization, especially to principals and teachers.

Although others have also reported a general lack of professional development concerning gifted education in public schools (Callahan et al., 2017), Blockbridge's minimal attention to professional development was particularly surprising given their deep investment in equitable identification and growth of the program. In the absence of any broadly mandated professional development or leadership communications, it was no surprise that individuals were left to make their own sense out of the dramatic growth in highly capable enrollment that was happening at Blockbridge, each relying on their own experiences. Similar to the political polarization currently happening in the United States, this reliance on personal experiences with gifted or highly capable individuals or programs, both positive and negative, only served to further alienate faculty from each other, as individuals' positions became more entrenched, with no shared reference point of trusted, research-based information. Furthermore, open dialog was rare and differences between practices in different schools were large. As a district leader reported, “I think everybody's kind of doing their own thing. It's so siloed right now, we're not all on the same page.”

Equitable Outcomes

In this next section, I will discuss the equitable outcomes that Blockbridge was able to achieve, the degree to which those outcomes were notable, and what lessons could be applied in other similar situations.

Equitable Identification

Blockbridge's highly capable program quadrupled in size between 2015 and 2022, identifying far more students in all demographic groups than they expected. Blockbridge did not achieve full proportionality in all demographic categories; however, they did make dramatically more progress toward equitable identification than any other published study I have found. Although this was not a quantitative study, and the way that Blockbridge tracked their numbers probably led to some inaccuracies that should cause us to consider their descriptive statistics as approximate, the numbers they reported are exceptional. In the context of overall program growth of 4x, they reported 16x growth of special populations and 7.4x growth in the identification rate of historically underrepresented racial/ethnic groups between 2015 and 2023. This section will highlight the lessons that can be learned from Blockbridge's experience, as well as areas for further research.

Enormous Program Growth Overall

The biggest lesson to learn from Blockbridge's efforts is that sustained, thorough attention to equitable identification may identify far more advanced students than most would predict. Enrollment in Blockbridge's highly capable programs quadrupled between 2015 and 2022. This unprecedented growth demonstrated a noteworthy confluence of four different lines of research in the literature.

First, Blockbridge implemented not just one equitable identification technique, but several, and fine-tuned their combination approach over seven years to maximize their results and demonstrate a steady state pattern. Most of the research literature on universal screening, local norms, multiple measures, and combination rules looked at one technique at a time or performed hypothetical statistical analyses on real data (Card & Giuliano, 2016; Hartman, 2019; Lakin, 2016, 2018; McBee et al., 2014; Morgan, 2020; Peters, Rambo-Hernandez, et al., 2019; Peters & Engerrand, 2016; Peters & Gentry, 2012). While each of these studies demonstrated impacts on equitable identification, there were few studies that showed what happened when you combined techniques together. Blockbridge filled this gap in the research by offering a real-world case study of what ensued when multiple equitable identification techniques were combined and demonstrated that it is possible to yield substantially larger results than what appeared in the current literature with a combined approach.

The second line of research to consider is Gentry et al.'s (2019) work on missingness in gifted education programs nationwide. Their statistical analysis found that large numbers of students were missing in all racial/ethnic categories nationwide, including up to 74% of Black students, 66% of Hispanic students, 49% of Two or More Races students, 63% of American Indian/Alaskan Native students, and 72% of Native Hawaiian/Pacific Islander students being missing. They also found that up to 42% of White students and 26% of Asian students were also missing and should have been identified for gifted programs. Blockbridge's experience validated the idea that students in all demographic groups had previously been under-identified, not just in historically underrepresented groups. With sustained attention to equitable identification, Blockbridge identified large numbers of students in all demographic groups for advanced services, just as Gentry et al. had predicted.

The third line of research concerned the wide range in ability levels in classrooms. Peters et al. (2017) found that up to 49% of all students in grades 3-8 classrooms in three different states were working above grade level in reading, and up to 37% of students were working above grade level in math. Furthermore, many of those students were working even farther ahead: half of those students were actually working two or more grade levels ahead in reading, and just under a third of those students were working two or more grade levels ahead in math. Similarly, Pedersen et al. (2023) found that 14% of both fourth and eighth grade students scored at the advanced level on an international math achievement assessment. Firmender et al. (2013) found that reading fluency and comprehension levels in heterogeneous grades 3-5 classrooms spanned an average 6.4 grade levels, with gifted magnet classrooms spanning an average of 9.7 grade levels, and demonstrated that the range widened over time. Additional pre-published research is showing similar preliminary results of wide ability ranges in every classroom, with many students working substantially ahead of grade level (Plucker et al., 2021).

There is a far wider range of ability levels in classrooms and many more students ready for advanced programming than many realize. Blockbridge identified students for their highly capable program primarily based on academic achievement scores and found that 28% of their students were ready for advanced services in either math or reading. Blockbridge thought that their results were unique, being an affluent suburban district that served a highly-educated international community. Teachers thought that Blockbridge was over-identifying students, and this many students could not possibly be ready for advanced curriculum. However, in light of these national studies, Blockbridge appears to be quite average, and not even at the highest end of the range of advanced achievement; other school districts could expect to see similar results.

Finally, the fourth line of research is best represented by Peters, Carter, and Plucker who have argued that an essential ingredient in improving equity in gifted education is to "bake a

bigger pie" in order to expand gifted programs to serve all students who need them, rather than continue gatekeeping a scarce resource (Peters et al., 2020, p. 12). The National Working Group of the Fordham Institute (2023) similarly concluded that schools should, "Embrace inclusion, remove barriers, and reject the scarcity mindset" (p. 14). Blockbridge has embodied that mindset shift and has demonstrated that indeed if you identify with equity, you will need to expand programs dramatically to serve those students. Blockbridge took that one step further and showed that not only did they serve many more students, but those identified students achieved at high levels, even if they had qualified via local norms or ability-only scores at a young age.

Nation-Leading Progress in Equitable Identification

I found it particularly surprising that most participants at Blockbridge, even at the leadership level, had no idea how much progress Blockbridge had made towards its equity goals, and some even claimed that equitable identification had only gotten worse. Blockbridge had not been communicating their progress toward their equity goals to their staff or faculty; this may have been because district leaders did not believe they had made any meaningful progress because full proportionality had not yet been achieved. However, from a national perspective, Blockbridge's progress on equitable identification was very unusual, with growth in equitable identification for low-income students, multilingual students, and students with disabilities an order of magnitude greater than any other published study at this time, and notably, full proportionality achieved for twice-exceptional students with Section 504 Plans, students who had ever been a multilingual English learner, and students in the Two or More Races demographic category. Looking at raw numbers of students, Blockbridge's efforts resulted in identifying and serving many more students in traditionally underserved populations, even though some

demographics were still disproportional. This is an important result and should not be discounted.

As mentioned in an earlier section, the Florida case studied by Card and Giuliano (2016) provided one of the closest analogs to Blockbridge's experience. Both districts universally screened in early elementary (Blockbridge in first grade, Florida in second grade), they both used the Naglieri Nonverbal Abilities Test as their universal screener, and they both used static, group-based local norms specifically for low-income and multilingual students. However, Blockbridge improved the rate of identification of low-income, multilingual students, and students with disabilities by 16x, whereas the Florida case reported increases of less than 3x (though they did not include students with disabilities in their analysis). Similarly, Blockbridge reported improving the rate of identification of historically underrepresented racial/ethnic groups, including Black, Hispanic, and Indigenous, by 7.4x compared to an increase of less than 3x in the Florida case. The Florida case also only experienced an overall program growth of about 2x, compared to Blockbridge's overall growth of 4x.

There were a few foundational differences between the districts. Blockbridge was a much smaller district overall, and had a much smaller proportion of Black, Hispanic, multilingual, and low-income students than the Florida case. Florida used individually administered intelligence testing for qualification, while Blockbridge used group-administered ability and achievement testing. The thresholds were meaningfully different as well. Florida mandated a 130 IQ score, or the 98th percentile, as their general qualification cutoff for gifted programming statewide; this was a much higher overall threshold than Blockbridge, which used the 95th percentile as their baseline criteria. It is unclear what impact these differences may have had, but they do represent substantially different contexts.

There were also a few differences at Blockbridge that might help explain why Blockbridge's results were so much larger. One crucial factor is that Blockbridge's initial base case of identification of special populations in 2015-16, before starting any data reviews or universal screening, was extremely low, which statistically magnified the appearance of growth. Blockbridge also was unable to report deduplicated numbers, which may have double-counted students that fell into multiple special population categories, such as low-income students who were also receiving multilingual services, or multilingual students who also had an IEP or Section 504 Plan. Another important factor at Blockbridge was that they used additional equity strategies beyond universal screening and local norms used in the Florida case, including OR-rules, multiple pathways, and extremely thorough screening procedures to ensure that every single student was fairly considered. Blockbridge also paid close attention to removing additional barriers such as minimizing the number of times they had to ask parents for permission, and ensuring that all assessment happened during the regular school day.

On the flip side, there were also a number of practices in the Florida case that probably depressed their results. As Lakin (2016) pointed out, the Florida case offered a route to provide private IQ testing to qualify a student; affluent families whose students just missed the screening cutoffs to receive publicly funded IQ testing submitted private IQ results (and ultimately were identified) at a much higher rate than underrepresented students. Lakin also noted that the Florida case required a characteristics checklist to be filled out by teachers and an achievement score review prior to formal identification, which could have introduced bias. In addition, by Florida state law, gifted identification was based on IQ, whereas Blockbridge did not use IQ measures at all, and instead used achievement measures. IQ measures are known to have bias against many historically underrepresented groups because of cultural loading. Any of these

factors may have reduced the equity impact of universal screening in the Florida case compared to Blockbridge's results.

No Magic Formula

Although Blockbridge innovated in some important ways that may prove to be a valuable pattern for others to follow, they did not discover a magic formula for equitable identification that would achieve proportionality in all demographic categories. Many studies and research reviews have come to similar conclusions, that although it is possible to substantially improve equitable identification, it is not yet possible to identify with full proportionality in all categories (Hodges et al., 2018; Peters & Engerrand, 2016). Some have proposed that societal issues such as lack of housing, nutrition, security, and similar foundational human needs that are often an issue for low-income students, as well as others, may mean that fully proportional identification for gifted education programs may never happen (Peters, 2022). As Callahan (2005) noted, because the achievement gap grows over time, it is essential to identify students with signs of high potential in early elementary, continue looking for talent as more data is gathered, and serve all students who would benefit without imposing space limits. Blockbridge was implementing all of these recommendations, including using the NNAT3-only qualification pathway for first graders that did not require any demonstration of crystallized achievement for these young students which would be more resistant to opportunity and achievement gap impacts (albeit still imperfect).

Blockbridge's experience also validated existing research that showed that nonverbal ability tests such as the NNAT3 and CogAT nonverbal test batteries generated meaningfully different identification rates in different demographic groups, showing that nonverbal tests were not bias-free and were not sufficient on their own for achieving equity (Carman et al., 2018;

Carman & Taylor, 2010; H. Lee et al., 2021; Peters & Engerrand, 2016). One possibility for future experimentation at Blockbridge could be expansion of the first grade NNAT3-only qualification pathway to include a static, group-based local norm for demographic groups known to have statistically lower performance on this instrument, to attempt to mitigate differences in OTL.

Equitable Services

Blockbridge's achievement data was extremely interesting and worthy of much deeper investigation. See Figures 4.3 through 4.6 to recall the academic achievement levels of students who qualified for services via the first grade NNAT3-only pathway, compared to students who qualified via the traditional achievement testing pathway. See Figures 4.7 through 4.10 to recall the achievement levels of students who qualified via a local norm compared to students who qualified via the standard 95th percentile threshold. In general, students who had qualified with alternate criteria had similar academic achievement scores compared to students who had qualified with standard achievement criteria. Surprisingly, in well more than half of the cases analyzed, students who had qualified via the first grade NNAT3-only pathway had visibly higher achievement.

This was not a quantitative case study. The sample sizes in these data were relatively small, and of course I cannot judge statistical significance or effect sizes from this glimpse of aggregate student achievement data; hence, these data necessarily need to be considered preliminary. However, I can infer one important takeaway. These alternate qualification pathways were not identifying students who were meaningfully struggling in the curriculum, despite the many concerns raised by teachers in the findings about student underachievement, student stress, perceived student mismatch with services, backfilling single-subject students into self-contained classrooms, overidentification, and the like. On average, students identified via

alternate pathways were just as successful in the highly capable curriculum as other identified students, which included a substantial amount of acceleration in math in most cases. The achievement problems that these teachers seemed to be predicting were not visible in this snapshot of preliminary data.

Many authors of papers about equitable identification, local norms, and combination rules have expressed concern that students identified via these alternate pathways may not be ready for accelerated curriculum (e.g., Lakin, 2018; McBee et al., 2014; Peters et al., 2021; Peters, Gentry, et al., 2019; Peters & Engerrand, 2016). Blockbridge's example should help calm these fears and remind us that students often rise to high expectations when given the opportunity. It is important to note that the practice of using static local norms gave Blockbridge more confidence that the students who were being identified by alternate pathways had a minimum achievement level that demonstrated readiness for the acceleration they were offering. Another way to say this is that static, group-based local norms were being used as tool to adjust for differences in opportunity to learn (OTL) for different demographic groups (Carman et al., 2018); in contrast, dynamic local norms, even if they had still been group-based, would have arbitrarily identified a proportional number of students in every category regardless of their actual readiness levels, which would have been more likely to result in an improper match between students and services. The lesson is that static local norms may be a better approach when identifying students for an academic acceleration program.

The Blockbridge data also would provide a counterexample to current claims in the literature that it is not possible to accurately identify students for academic acceleration based on nonverbal ability measures (Lohman, 2012; Peters & Engerrand, 2016; Peters & Matthews, 2016). Blockbridge's practice of identifying first graders for math and reading acceleration purely based on a nonverbal ability measure did not appear to inhibit later achievement, and this

snapshot of data suggested that high nonverbal ability scores might even be associated with higher achievement than students who had been identified via achievement scores. Again, further rigorous, quantitative study of these data with statistical validity would be worthwhile, especially in a couple years after more longitudinal data becomes available for larger cohorts of students.

Beliefs and Attitudes

This section of the discussion will focus on Blockbridge's beliefs and attitudes, analyzing where those beliefs were coming from, what questions they raised, and what lessons can be learned from Blockbridge's experiences.

Change Management

One of the most fascinating lessons to learn from the Blockbridge case study is that this massive strategic change to focus on equitable identification and subsequent expansion of the highly capable program was driven almost entirely top-down by leadership. Although they quibbled about some details, the eight district leaders I spoke with were unanimous in support of the fundamental tenets of the program, which indicated that there had been work at the leadership level to develop buy-in. Many district leaders commented on how impactful the visit was from the National Gifted Equity Consultant many years ago, as well as their confidence that Blockbridge was using best practices as they recognized that this was a complex and multifaceted issue that would take many years to tackle. Blockbridge's experience aligned with research demonstrating the importance of strong leadership to establish exemplary gifted programs and build systems responsive to the needs of historically underrepresented students (Ezzani et al., 2021; Haworth, 2020).

However, there was little professional development or other efforts to develop buy-in on this strategy across the larger organization of principals and teachers who would actually need to deliver the promised services, and this lack of alignment showed, as has been discussed in

previous sections. As Childers (2009) reported, only 50% of teachers and 20% of administrators in their sample had positive attitudes towards gifted education, which roughly mirrors what I heard at Blockbridge. While I did not talk to any principals who were negative towards the program, I invited all principals in the district to participate, and only three volunteered, and one of those ultimately dropped out prior to the interview. I also heard reports, during interviews and focus groups, of principals being hostile to the program, and in some cases even attempting to subvert it.

There may have been a hope among district leaders that if enough positive progress had happened and had become obvious to staff, that this would have acted as a real-world proof point that would have raised visibility and changed attitudes to become more positive towards advanced education over time. Blockbridge's focus on expanding the highly capable program certainly got broad visibility across the district, however, this did not appear to change attitudes. Just doing the work was not sufficient to change beliefs and mindsets at Blockbridge.

The lesson here is straightforward but profound. It is not necessary to invest in professional development or developing large scale buy-in to instigate even a significant change in prioritizing advanced education and equitable identification. Strong top-down leadership works, and perhaps is the only essential ingredient. However, to sustain the change, deliver high quality services with consistency, and avoid the deep disagreements that are currently plaguing Blockbridge, it is important to bring the entire workforce along in parallel so that everyone understands not only the what, but also the why behind the change, and to celebrate the wins along the way to help make positive progress visible to all.

Debates about Identification

The tremendous growth of the highly capable program at Blockbridge surfaced large disagreements, particularly between teachers, most of whom had not had any direct or sustained

professional development on these topics. There were many debates, from which students should be identified and how many students should be identified to why some identified students did not appear to be performing in the classroom.

Foundational Debates

The debates about identification as well as services at Blockbridge were centered on issues at the very foundation of the highly capable program; in my findings, the source of these debates was largely the teacher workforce, both teachers working in accelerated classrooms and not. These were not nuanced conversations about refining points of practice. They were the topics you'd cover in the first dozen slides of any professional development course, laying out the fundamentals of the field and Blockbridge's policy choices in how they were administering their program. What is the state definition of highly capable? How does Blockbridge identify highly capable students? What practices is Blockbridge using to improve equitable identification? How many twice-exceptional students, multilingual students, and low-income students are in the highly capable program and how has that changed over time? What characteristics and traits are common in highly capable students? Why do highly capable students need special services? What services does Blockbridge provide?

Answering these questions authoritatively in a broad, mandatory way would have gone a long way to resolving many of the issues and debates raised in the findings. If that foundation had already been in place, the teachers perhaps would have been debating more sophisticated questions by this point in Blockbridge's journey, such as those listed in Figure 5.7. Many of these questions are indeed open research questions, and there is not a clearly established best practice. The large progress towards equitable identification and scale of accelerated service delivery at Blockbridge would make it an ideal sandbox to innovate on these thorny issues, but

sadly the organization was not there yet. Although there were a few isolated instances of a teacher raising one of these issues in a more nuanced way, it was easy to see in the focus group setting that others did not resonate or fully understand what was being proposed, and the group conversation would move onto something else. A few individuals were ready to have these conversations, but the larger organization was not. District leaders and program administrators, especially those directly in charge of the program, showed substantially more readiness and were even working on a few of these questions, but even they were mostly mired in responding to the day-to-day concerns from their workforce which limited their progress. Sadly, there were not enough principals in my sample to comment intelligently on their perspectives.

Figure 5.7

Questions for Blockbridge's Next Steps

- How best do we scaffold a student who is newly identified for acceleration and may not have had prior academic exposure in some areas?
- How do we grow our cultural competency to serve students from different cultural, ethnic, and racial backgrounds?
- What social-emotional needs do highly capable students have—which parts are common to all students, and which are unique to highly capable students?
- How exactly should we provide highly capable services to twice exceptional students?
- What are the best practices and tools for different twice exceptional profiles?
- How should we modify our approaches depending on the unique profile of disability and talent area for each individual?
- When should we provide accommodations to enable twice exceptional students to access high level concepts, and when should we focus on remediation of low-level skills?
- Do we shift to a fully strength-based approach, or is there still benefit in attempting to fill gaps in a student's abilities?
- How does the intersectionality of not just one but multiple simultaneous categories of difference, such as race/ethnicity, disability status, multilingualism, low-income, etc. affect students?
- How could we help all of our students feel belonging in our classrooms?
- How do we mitigate the impacts of stereotype threat?
- How do we accurately measure growth in highly capable students when they are working beyond what is tested on the annual state exam?
- How do we balance the need to challenge every student, but not create a pressure cooker environment?

The lesson to draw from Blockbridge's experience here is to not under-value the need for simple, comprehensive professional development in the basic fundamentals of the program, and to ensure that this communication reaches and engages everyone in the organization. It is not enough to only train the teachers directly responsible for these students—the rest of the organization also needs to understand what is happening, why it is happening, and how everyone's work contributes to the needs of the larger student population.

Disentangling Causes of Perceived Underachievement

Many participants, especially teachers, expressed concerns that Blockbridge was overqualifying students for the highly capable program. Their argument was two-fold. First, purely based on numbers, they argued it was not possible for this many students to qualify. However, as discussed in previous sections, there is high-quality national research evidence that demonstrated that most other school districts, like Blockbridge, have a quarter or more of their students showing readiness for academic acceleration in either math or reading (Pedersen et al., 2023; Peters et al., 2017). Because of this, it would be hard to make the argument that Blockbridge was overidentifying based on pure numbers alone.

The second main argument was that some students seemed ill-suited for the accelerated services that were being provided. Teachers reported that some students did not know math fundamentals, couldn't read, exhibited undue stress and anxiety, appeared unmotivated, didn’t complete assignments, or had behavior challenges. They also witnessed some students who appeared to be pushed into highly capable services by eager parents who engaged in extensive test prep. Many teachers concluded that this indicated that these students were improperly identified, and that acceleration was not an appropriate or beneficial program placement for these students and might even be harmful.

It is certainly possible that the lack of professional development for teachers may have impacted students' cumulative learning experience over the years. However, there are also at least five different possible student-level explanations for the apparent underachievement that the teachers reported in students, and likely these factors were all tangled up with each other and were all at play to some degree.

First, surely some of the students who were identified through Blockbridge's equitable identification strategies, especially those who qualified in the first grade NNAT3-only pathway based on nonverbal thinking skills, may have had the potential but not yet had enough academic exposure to have developed commensurate advanced achievement. These students would naturally need more scaffolding to catch up to their more traditionally accelerated peers. Some of them may have been multilingual and needed time and support to continue building their English literacy skills. Because the students identified on a pure potential measure were young, starting accelerated self-contained services in second grade, Blockbridge's theory of action was that there was plenty of time for students to catch up. However, teachers were not coached or prepared to expect some students to need this level of support and may have misunderstood students' needs as a lack of ability. This impact would be most pronounced in low-income students and active multilingual students who had not yet exited the English learner program. Many multilingual students were identified in first grade where these challenges would be likely to arise and may have accounted for some of this perceived underachievement.

Second, it is possible that some of these historically underrepresented students were experiencing dissonance due to their differences in cultural background, race/ethnicity, home language, or other factors. Being placed in an accelerated environment may have felt somewhat like a culture-shock, depending on what environment they were coming from. They may have also been the sole student in that accelerated classroom with their background. This may have

been further complicated by the fact that these students were experiencing the intersectionality of their cultural backgrounds, race/ethnicity, and any other characteristics alongside their highly capable status, which may not always be positively regarded in their home community. For instance, Black students may be accused of "acting White" by their cultural community if they are perceived as engaging too seriously in academics. Blockbridge's teachers were not trained or prepared to be attuned to these possible issues that could have caused students to disengage, or to exhibit different styles of behavior and values than teachers expected that could easily have been misinterpreted.

Third, given the timeframe of this study, there may have been pandemic effects at play. Highly capable students were not immune to the pandemic's impact, and also experienced learning loss, as did all students. Blockbridge ran a distance learning program much longer than most districts nationwide, closing buildings for almost an entire calendar year, and opened cautiously with a much reduced in-person schedule. This could have depressed achievement across the board and may have been felt more keenly by students who may not have had as much academic support at home. One international study found that longer pandemic school closures impacted high-achieving students more than lower-achieving or average students (Jakubowski et al., 2024).

Fourth, many of these students that were not performing up to teacher's expectations were possibly twice exceptional, where a learning disability, processing difference, or neurodivergence was creating challenges that triggered the behaviors that the teachers had reported. As Rogers (2011) noted, it is only when academic material gets difficult enough that some twice-exceptional challenges even become visible. While Blockbridge teachers were aware of the concept of twice exceptionality, their understanding seemed to be limited to extreme cases, particular diagnoses, or individual situations that they had personal experience with. This is not

unexpected; most teachers have never been trained in twice exceptionality and this was also true at Blockbridge.

A twice-exceptional student can be very intelligent and have notable strengths in some areas, and also have a concurrent disability that can cause a wide variety of challenges from mild to severe (Gilman et al., 2013; Maddocks, 2018). There are many different twice-exceptional diagnoses, ranging from dyslexia and dysgraphia (Boris, 2022; Vlachos, 2020) to ADHD and autism (Cain et al., 2019; Foley-Nicpon et al., 2012) to auditory and vision processing disorders (De Bonte et al., 2024; Silverman, 2024). These diagnoses often reflect different types of neurodivergence, or different brain patterns which will each have their own profile of strengths and weaknesses; twice-exceptional students often will have multiple conditions or neurodivergences at play, even if they are not all formally diagnosed in a school setting. This can create significant heterogeneity in individual academic profiles, as well as intervention, accommodation, and support needs. However, in general, Maddocks (2018) found that twice-exceptional students have relative challenges in working memory, processing speed, and auditory processing, while having superior fluid reasoning and verbal skills. Maddocks cautioned that many twice-exceptional students will have particular difficulty with timed tasks. However, twice-exceptional students benefit greatly from acceleration, and need appropriate accommodations and a strength-based approach to successfully access accelerated learning (Foley-Nicpon & Cederberg, 2015).

Blockbridge's data showed a substantial increase in twice-exceptional students being identified for highly capable services over this time period, with a representation index of 1.05 for students on Section 504 Plans in 2021-22, showing that they were fully proportionally represented in the highly capable program district-wide. This statistic would suggest that a large percentage of the student issues that teachers were reporting may have been due to the greater

incidence of twice-exceptional students in the accelerated self-contained classrooms. Teachers were not aware of this statistic and had not been trained to expect the likelihood of more of their students needing disability supports and possibly even initial referral and evaluation. They also were not trained in the best practices of supporting twice-exceptional students.

Based on the reports of the program administrators, some of these students were diagnosed with a disability after entering highly capable services and the diagnosis process was typically initiated by parents, not teachers. Because of this, teachers may not have always been aware of a student's disabilities at the time if the student had not yet gone through the formal process. Because students with IEPs were still underrepresented at Blockbridge overall, twice-exceptional students continued to be underrepresented as a whole. Hence, it was also likely that some twice-exceptional students continued to be undiagnosed, without any formal disability in the IEP or Section 504 system, because the parent was unaware, unable, or unwilling to seek a diagnosis, or because the student was able to compensate well enough to get by at school, with difficulties perhaps more apparent in some classes or contexts than others.

Finally, the fifth factor at play was the fact that some families engaged in test prep to help their student meet qualification criteria, as well as subsequent tutoring to help their student keep up with the accelerated content. There was ample evidence that some students were engaging in test prep, sometimes going to extreme lengths, and this was reported by participants to be closely associated with the Asian community, though not exclusively so. While it is possible that some students who prepared would have qualified anyway, it is likely that some students may have qualified who would not have scored high enough had they not been prepped. This may be one reason why the Asian population continued to have a higher representation index in the highly capable program than any other demographic group at Blockbridge; however, high Asian representation is a common pattern nationwide, not just in this district. It is also possible that

Blockbridge had a uniquely large population of highly educated Asian families who were living in the area on work visas, and may truly have represented an unusually high-achieving international population. Likely both factors were at play. Even so, test prep can only make so much difference, as one district leader reminded, "Even if their parents are helping them study for the test and prepare for the test, the kid's still got to sit down and take the test."

Sadly, we do not have enough data to fully disentangle these factors. There's also evidence that none of these factors were as large as teachers worried they might be, based on the strong achievement data shared by Blockbridge which compared students who were identified via alternate pathways with students who were identified based on high achievement, and demonstrated that both groups had similarly high levels of achievement on end of year exams.

Playing devil's advocate, however, it is possible that achievement levels actually were affected by some of these factors, and that overall achievement may have been depressed in both groups, but for different reasons. It is possible that students who had prepped and might not otherwise have qualified had somewhat lower achievement test scores than other highly capable students. Similarly, it is possible that lack of prior academic exposure, teachers' ability to support students, student intersectionality, and/or twice-exceptional impacts may have reduced the achievement levels of students identified based on alternate pathways. In this case, the impacts may have cancelled each other out, so to speak, to still leave roughly equal achievement levels for both groups. This would be worthy of further study. However, overall achievement was still high and so whatever impacts that there may have been would not have been large.

One of the most important lessons that we might consider from Blockbridge's experience is that choosing which data points to use for identification may not just be about choosing culturally-fair and fundamentally equitable instruments, recognizing that even the fairest tests available today are imperfect and will still need the careful use of local norms to mitigate

differences in OTL. Rather, the more important question may be which tests are the most resistant (or the most vulnerable) to test prep, which cannot be easily mitigated with local norms. This is an understudied area that could be greatly improved by empirical research to determine which tests are most impacted by test preparation and to what degree. Measuring the overall validity, norms, and equity characteristics of a test is an important first step to validating an instrument, but in the real world, that initial validity measurement may not remain accurate if the test is easily coached, especially if some demographic groups are much more likely to engage in test prep than others. If the goal was preventing the impact of test prep, perhaps new types of test instruments would be developed? With the widespread use of computers to administer tests, there are many more technical possibilities than have been possible to contemplate in the past.

In addition, test publishers could take additional steps to preserve test validity; test publishers are likely currently complicit in not changing test questions frequently enough to mitigate the impact of test preparation. For example, the Iowa Assessments Math test by Riverside Publishing has not changed their questions for Level 8 in all my years of proctoring that test, and many of the items are math vocabulary questions that would be very easy to coach and are directly measuring access to formal academic content, not mathematical reasoning ability. For this reason, typical achievement tests are not ideal; an achievement test that focused less on specific academic knowledge and more on academic reasoning would be more appropriate for highly capable identification purposes. It may be that a new type of test instrument is needed that better bridges the gap between achievement and ability testing.

The other lesson to learn here has been mentioned several times already. These teachers needed much more support and professional development to be able to realistically support the students who were now being identified for accelerated services. These students may have had multiple intersecting exceptionalities, from differences in prior academic preparation to cultural

differences and disability areas to over-eager parents who were pushing a student too hard. Teachers needed a lot more training and resources to be able to disambiguate these situations for an individual student, identify the root causes, and provide the right supports. These are legitimately difficult nuances even for expert clinicians to tease apart, so it is no wonder that from a teacher perspective, these behavioral, social, and achievement concerns could look very similar if you didn't know what you were looking at and didn't know what to expect.

Debates about Services

There were also many debates about services, including whether Blockbridge's service models were the best ones and what role teachers played in implementing them.

Moving from Stereotypes and Deficit Thinking to a Strength-Based Paradigm

There was a tendency for teachers to fall into patterns of stereotyped thinking, where teachers assumed that highly capable students shouldn't have any weaknesses. As one district leader said, "Many teachers…see in their head a student who sits and does all their work, and is the perfect student in the classroom, raises their hand, answers all the questions, complies with all the rules, and is your A plus student." When teachers encountered highly capable students who did have visible challenges—whether that surfaced as behavior concerns, lack of work completion, or trouble with some academic tasks—they had a hard time reconciling how that student could possibly be highly capable. These stereotyped beliefs about gifted students were very visible in the debates about the definition of a highly capable student, in concerns about overidentification, and in wanting to limit the program only to students who met this limited stereotype. Stereotyped thinking about gifted students has also been observed in many other research studies, where teachers' beliefs about what gifted students are supposed to look like inhibited their ability to recognize and include students with disabilities as well as culturally,

linguistically, and economically diverse students (Buck, 2021; Carman, 2011; Gierczyk & Hornby, 2021; Moon & Brighton, 2008; Wright et al., 2017).

These stereotypes were fueled by deficit thinking, where students were defined primarily by their challenges rather than their strengths, and that the presence of a deficit largely negated the importance or perception of any strengths. Deficit thinking was evident in many aspects of the findings, such as teachers' comments about highly capable students with behavior concerns, academic challenges, or social differences; beliefs that highly capable students who had challenge areas didn't belong in the program; and disbelief that this many students could be ready for acceleration. In the research literature, deficit thinking was often associated with historically marginalized racial and ethnic groups, where assumptions and stereotypes about these groups clouded teachers' ability to see students' strengths, especially when there were cultural differences at play (Davis & Robinson, 2018; Mayes, 2016; Trotman Scott, 2016; Wright et al., 2017).

However, deficit thinking was also happening much more broadly at Blockbridge, not just for highly capable students from minoritized backgrounds, but also those with visible differences, such as students with disabilities and neurodiverse students. The deficit thinking could even be seen for general education students. Some of the most concerning remarks were about general education students or special education students who teachers felt were less desirable to have in a classroom, believed were not as good role models, or required more work from a teacher; these implicit beliefs suggested that teachers were underestimating student potential across the student spectrum, not just for highly capable and twice-exceptional students.

Teachers felt that their core job as educators was to remedy any weaknesses so that students met grade level standards. Addressing these student weaknesses was seen as the priority, rather than spending their time and energy building up students' individual talent areas.

In contrast, strength-based and neurodiversity-affirming perspectives would acknowledge that all students have both strengths and weaknesses, and that by focusing on student strengths and providing accommodations and supports for any challenge areas we can maximize students' potential and recognize the value that each student brings to the classroom (Baum et al., 2017). Ultimately, strengths are what will drive students' future success in adult life; people choose careers that maximize their strengths and minimize their weaknesses. A shift to a strength-based, neurodiversity-affirming approach would be a major attitudinal shift for Blockbridge's educators and would better enable teachers to recognize some students' readiness for acceleration alongside other areas that may simultaneously need accommodation or supports. That dichotomy between strengths and weaknesses is currently causing a lot of dissonance for Blockbridge's teachers. Teachers believe that their job is to fix the weaknesses, however beyond a certain level of foundational proficiency, spending all your energy remediating deficits that are never going to be strength areas is probably not a productive use of the student's time.

Furthermore, for neurodiverse students or students with some types of learning disabilities, these perceived weaknesses would be better understood as differences; they are inherent characteristics of a different neurotype and do not need fixing. Attempting to mold all students into conforming with neurotypical behaviors asks neurodiverse students to mask or camouflage their non-typical behaviors; in other words, to pretend to be neurotypical. For example, every time we ask all students to sit still with their hands in their lap, a neurodivergent student is being asked to camouflage and suppress their natural need to move. Long term, this can become problematic for autistic individuals; camouflaging autistic traits is associated with anxiety and depression as adults (Beck et al., 2020; Hull et al., 2021).The essence of a neurodiversity-affirming approach is to recognize that neurodiverse students need to be accepted and supported for who they are, which includes recognizing neurodivergent social behaviors,

need for movement, and communication patterns as equally valid ways of being. This alone would be a massive shift in school culture.

What if teachers believed that their fundamental purpose in schools was to help students identify, develop, and refine their personal strengths and interests? Rather than trying to standardize all students to have no perceived weaknesses or differences, arguably an impossible goal, what if the goal of education was actually not to remove weaknesses, but to maximize strengths? For the student with visual arts strength and interest, we might encourage them to create posters, infographics, and diagrams instead of writing essays, which might ultimately lead to a later career in communications, media, sciences, or the arts. For the student with oral strength who loves to talk and debate, we might encourage them to give presentations, record podcasts, or make videos talking about their ideas, which might lead to a career in performance, media, politics, or law. For the student with mathematic strength and interest, we might encourage them to create mathematical models to explore scientific ideas or ancient civilizations. For the student with a knack for three-dimensional thinking, they might build physical models for topics in science, math, and social studies, which could lead towards a career in engineering, architecture, or the sciences. There are many more examples that could be added.

This doesn't mean that every aspect of education needs to conform to a student's personal strengths—foundational skills matter, and common core standards are still important. Making accommodations and assistive technology freely available would also make those foundational skills much more readily achievable for many more students. However, when there are opportunities where a given learning objective could be accomplished many different ways, giving students more choice, agency, and flexibility in how they engage could both dramatically increase student engagement as well as help refine individual student strengths for their long-term benefit. Crucially, this strength-focused and neurodiversity-affirming mindset would shift

the focus away from deficit thinking and stereotypes, and better recognize and value the individual strengths, interests, and ways of being of all of our students.

How Exactly to Serve Twice-Exceptional Students

One of the toughest issues that surfaced at Blockbridge was how twice-exceptional students should be served in the context of an acceleration-based highly capable program. Because there may be so many different diagnoses at play, twice-exceptional students are a very heterogeneous population, making this question extremely difficult to answer. This was a particularly tricky issue for teachers to wrestle with, who were not expecting to be working with more twice-exceptional students and most had little to no formal training in this area.

There are some best practices that have emerged for supporting twice-exceptional students in general. There is strong consensus on taking a strength-based approach, identifying a twice-exceptional student's strengths and focusing learning in growing those areas, as well as leveraging a student's strengths and interest areas to best tackle challenge areas, a technique known as dual differentiation (Baum et al., 2017; Gierczyk & Hornby, 2021; Josephson et al., 2018; Maddocks, 2018, 2020). This requires a great deal of flexibility from teachers, for instance to modify assignments to allow students to demonstrate their learning in different ways, such as drawing posters, making videos, or building models rather than writing an essay. These techniques work well with older students from late elementary through secondary.

However, while these heuristics are an excellent starting point, they do not directly answer the real issues that many of Blockbridge's teachers were facing in the classroom, especially for younger grade level students when developing foundational skills was an explicit part of the curriculum. This was doubly true when the nature of a student's disability directly

impacted their ability to access the advanced academics being taught, as opposed to disabilities that caused behavioral or attention concerns.

One of the most difficult questions that was surfaced in the findings was how a teacher ought to be working with a young, highly capable student with possible dyslexia who had significantly lagging reading and writing skills but whose conceptual thinking and verbal processing was operating at highly capable levels. Highly capable students with dyslexia can sometimes read adequately via sight words, but their challenges with decoding cause problems with unfamiliar vocabulary and spelling, which can particularly impair their writing (Boris, 2022). Dyslexic students can have simultaneous strengths in verbal skills, fluid reasoning, mathematics, problem solving, and creativity. However, without dyslexia intervention, these challenges with fluent reading, spelling, and writing will cause significant long-term problems in traditional academics.

Dyslexia intervention protocols are well known, involving structured literacy, phonics and phonological awareness instruction, and building up associated foundational reading and spelling skills. Furthermore, dyslexia intervention in first or second grade is twice as effective as intervention in third grade, so there really is a developmental window that matters (Lovett et al., 2017). On the flip side, accommodation strategies for dyslexia, such as audiobooks and speech to text can give a student full access to text at whatever level they are ready to comprehend; keyboarding, scribing, dictation, text to speech, spellcheck, and innovative apps like SnapType can allow dyslexic students to express their ideas even if the act of writing is challenging.

These support, accommodation, and intervention strategies are well understood in the research literature, but what is missing is how best to combine them in the context of a highly capable classroom, which types of skills should be prioritized, and how that might differ based on a student's age, development, or unique twice-exceptional profile. Is it more important to

spend time building up the foundational decoding and encoding skills of literacy, even if that takes up most of the student's time for daily ELA instruction? Or is it more important to engage that student at the high-level thinking that they are capable of participating in, assuming they are provided appropriate accommodations?

Ideally, the obvious answer is both, but the realities of school schedules mean that may not be possible in a typical school day. This leaves teachers asking, what should we actually do in the classroom tomorrow? Is there an age or developmental stage when the focus should shift from foundational literacy skills to high level thinking skills as the primary goal? Does that heuristic change in the context of a highly capable student? Or should high-level thinking always be the goal, no matter the student's age? At what point should we stop focusing on building foundational skills when a student's disabilities are causing significant trouble, and switch to accommodative strategies? How do we allocate our time and resources?

If we were to conduct professional development on this topic right now, it is not clear to me exactly what practices we would tell teachers to follow, especially for our youngest elementary students. This is an area where Blockbridge, and others, may need to experiment. It is possible that this is ultimately a parent decision, or the best practices may depend on the specific individual profile of a child. One thing is clear, however; excluding students with disabilities from highly capable services because of the nature of their disabilities would be a clear violation of the Americans with Disabilities Act. This is an area that needs urgent research and best practice development. Identifying more twice-exceptional students for accelerated programs does no good if we do not know how to properly serve their needs.

Inclusion or Belonging

There was vigorous debate about whether highly capable services could be delivered successfully in a more inclusive way. This was an emotionally charged issue with extremely strongly held opinions on both sides. General education teachers felt that removing highly capable students from the neighborhood general education classrooms harmed the student experience for both general education and highly capable students and made their teaching job harder. Accelerated self-contained teachers felt that high quality accelerated services could not be delivered successfully in the context of a heterogeneously grouped classroom, and that highly capable students benefited socially and emotionally from being in a cohort of similar students. There were merits on both sides of this argument, however there were blind spots as well. There were two primary areas of debate: social-emotional and academic.

On the social-emotional side, several participants shared personal stories of highly capable students who had previously been socially ostracized in their neighborhood school classrooms; when they moved to a self-contained classroom, they finally found social success with other highly capable students. These weren't isolated examples. Many similar stories were found in the parent group meeting minutes that described social challenges as one of the driving reasons why reluctant parents ultimately agreed to move their student to a new school to access an accelerated self-contained classroom.

Gross (2002) studied 640 gifted and typically developing students and demonstrated that social development of gifted students followed a different trajectory. Both gifted and typical students went through the same social development stages; however, gifted students went through these stages faster and hence were looking for a deeper level of friendship at an earlier age. This asynchrony between social developmental stages was most notable in the elementary

grades, where gifted students had conceptions of friendship congruent to typically developing children three to four years older; these differences led to a social mismatch with agemates:

> This study suggests that it is in the earlier, later than the later, years of primary school that placement with chronological peers is more likely to result in the gifted child experiencing loneliness or social isolation. (Gross, 2002, p. 9)

A more recent study of parents of gifted children reported, "feeling that their child was a 'misfit.' All of the participants indicated that their children were very different from other same-aged children in so many ways. Their children spoke differently, behaved differently, played differently…" (Peebles et al., 2023, p. 23).

In addition to these social differences, there is a robust quantity of research documenting differences in type and intensity of a wide range of emotional characteristics such as perfectionism, sensitivity, intensity, adaptability, conscientiousness, introversion, and perceptiveness that are associated with gifted and twice-exceptional students, as well as concerns such as underachievement, stress management, and mental health challenges (Beckmann & Minnaert, 2018; Cross & Cross, 2015; Daniels & Piechowski, 2010; De Bondt & Van Petegem, 2015; Foley-Nicpon & Assouline, 2020; Fugate, 2014; Karpinski et al., 2018; Mofield & Parker Peters, 2015; Papadopoulos, 2020; Peebles et al., 2023; Rubenstein et al., 2012; Wells & Falk, 2021). While some social-emotional needs are common in all students, the needs and characteristics of highly capable students differ from typical students in meaningful ways and require different types and levels of understanding, counseling, support, and guidance.

One of the deep desires among many general education teachers was to return to heterogeneously grouped classrooms that included the full range of students, from highly capable to high needs special education. From a social-emotional perspective, there was a strongly held belief that these heterogeneously grouped classrooms would create a more inclusive school

environment. Although this was an admiral goal, the differences in social development of highly capable students, as well as their emotional differences would create some barriers that would need to be overcome. It is unlikely that just putting students in the same classroom together would magically create the inclusion that teachers were hoping for.

Furthermore, inclusion is not the same as belonging. We want all students in school to experience not just inclusion, but belonging: to be fully part of the social life of the classroom; to be included in games and activities on the playground; to have close friends; to be accepted and valued for who they are; and to do all of these things while embracing their exceptionalities and neurodivergence. Belonging is a much higher standard. Given these differences in social-emotional characteristics and development, achieving belonging in a heterogeneous classroom for all students, including those highly capable students who are neurodivergent, have special needs, or are notably quirky, would require much more adult guidance to facilitate positive, successful interactions between diverse groups of students. This would not happen on its own without adult support; Gross (2002) found that social development for all children went through stages that were characterized by deepening friendships with children who are similar to each other. This explains the natural draw for children to gravitate towards other like children. It would require intentional coaching by teachers, paraeducators, playground aides, and other staff to nurture positive relationships between children who experience each other differently. Obviously, robust professional development would also be needed in both the developmental differences and characteristics of highly capable students (and other special populations), as well as how to successfully coach students in environments of full belonging for all students.

On the academic side there would also be challenges to creating a fully inclusive, heterogeneous environment. First, it would be necessary to build structures into the heterogeneous classroom model to faithfully and consistently deliver accelerated learning in all

classrooms. Forgoing accelerated learning in favor of any perceived other benefits of inclusive environments is not an option; Washington state law requires districts to deliver "accelerated learning and enhanced instruction" for highly capable identified students as part of every student's right to basic education. This on its own is a tall order that will be discussed in detail in later sections.

Second, the fact that some students would be receiving accelerated learning that other students are not yet ready for may itself create inclusion problems in the heterogeneous classroom. In fact, this may be the central issue underlying Blockbridge's teachers' discomfort with Blockbridge's highly capable services. Several participants noted unease when students recognized the self-contained classroom as "the smart class." Some teachers appeared to have profound discomfort acknowledging that some of their students had readiness for more advanced academic material than others. This is in contrast to the fact that special talents and advanced ability are routinely noticed and celebrated in athletics, music, and the arts in our society. This is a dichotomy our current culture really struggles with.

Blockbridge had no unified language or way for teachers to explain to students, or to their adult colleagues, why some students needed a different level of learning than others. Creating a unified, graceful, and respectful way to talk about this type of diversity openly with students, parents, and staff would be an essential ingredient to normalizing and respecting these real differences among students. Creating belonging in the classroom is also about acknowledging and accepting differences, recognizing that differences are a valuable aspect that builds the fabric of a diverse classroom community. A good start may be extending the idea of "just right books" that is often used in the context of early reading instruction, to help students find books at their developmental reading level; perhaps "just right math" and "just right learning" needs to be introduced as vernacular. No matter what program model is implemented, this is a general

problem that likely many schools nationwide struggle with when they offer accelerated programming and would benefit from further research. Open, respectful, and graceful language would help smooth the way to more individualized approaches towards education in general. We cannot meet individual student needs if we cannot openly talk about them.

Detracking Doesn't Solve Everything

The detracking movement started in the 1990s and was initially popularized by Oakes (1997) and later reinforced by Burris and Garrity (2008) and the Association for Middle Level Education (2010). Middle and high schools at that time often had three tracks: remedial, general education, and honors. The essential problem was that remedial tracks were overrepresented with students of color, low-income students, multilingual students, and students with disabilities, received less rigorous instruction, were assigned less experienced teachers, and consequently had lower levels of achievement. This was an urgent equity issue.

Many who advocate for equitable identification and access to advanced programs (e.g., Dixson et al., 2020; Meyer & Plucker, 2022; Peters, 2022) share many core beliefs with the detracking movement (e.g., Association for Middle Level Education, 2010; Burris & Garrity, 2008; Oakes et al., 1997). Both agree that students are much more capable of high-level work than many assume. Both seek to raise standards and expectations for all students. Both seek to accelerate curriculum beyond where it was. Both understand that achievement and demonstrated readiness are the key determinants of access to accelerated curriculum, not just an abstract concept of intelligence. Both recognize that students can have different domains of strength, and that most students will not have equal achievement in all areas. Both strongly advocate that students with disabilities, multilingual students, low-income students, and students from historically marginalized racial groups can have high achievement and deserve access to rich

curriculum that meets their needs. Both resist the idea of teaching to the middle; rather the goal is to keep expectations high, provide supports and accommodations when needed, and not get stuck in a cycle of remediation. Both advocate for more student choice and flexibility in assignments and classwork to both increase student engagement as well as to better support students with different learning needs.

The essential difference is that recent research, and now Blockbridge's experience, clearly demonstrated that some students, and quite a few more students than even Blockbridge had predicted, are ready for not just honors-level work, but advanced academic work that is one or more grade levels ahead of their agemates. This shouldn't be a big surprise. One of the biggest contributions of the detracking movement was demonstrating that low-achieving students were much more capable than people assumed. Now we are realizing the same is also true for high-achieving students, who are ready for much more significant acceleration than many would have expected. The detracking movement has been effective in removing remedial tracks in public schools nationwide, and there is strong consensus that this was a positive and necessary change. However, the question of how to simultaneously meet the needs of substantial numbers of students who are ready for grade-advanced academic work remains an open question.

In addition, although there have been studies that have shown detracking to be effective for raising achievement and access to advanced coursework for lower performing students while not harming results for high achievers, the results have been more mixed than advocates claimed (Rui, 2009). Contrasting studies demonstrated that ability grouping can create equally strong results for improving access and achievement of students across the achievement spectrum, including historically underrepresented groups (Card & Giuliano, 2014, 2016; Cohodes, 2020; C. A. Collins & Gan, 2013; Figlio & Page, 2000; Hendricks, 2009; Tempel-Milner, 2018). There is no consensus on which approach is more effective.

The most supportive studies for detracking posted large gains for traditionally underrepresented students alongside small gains for high-achieving students; these cases featured accelerated curriculum, strong funding, additional staff to provide during- and after-school support, and a deep, sustained commitment to professional development including classroom observations, team-teaching, and other resource-heavy practices, which might have been the real cause of the gains (Bavis, 2016; Burris et al., 2006; Rui, 2009). A few studies showed negative effects for high achievers in a heterogeneous detracked classroom environment (Rui, 2009). One detracking study acknowledged that the highest achievers still needed different math courses, "They all take the same college-prep classes at each grade level (with some exceptions for higher achieving mathematics students who may take university classes)" (Alvarez & Mehan, 2006).

One study found that the social-emotional experience of detracking created challenges for both high and low achieving students, stemming from social comparisons in the classroom (Fleischmann et al., 2021). Another study demonstrated that in the absence of effective teacher coaching, heterogeneous classrooms reinforced rather than removed perceived social differences, with particular challenges arising during group project work (Rubin, 2003). Much of the detracking literature did not present quantitative results but rather was ideological in nature, discussing the nature of the problem, the ways in which tracking reinforced segregation, tactics for achieving community buy-in, how to change teacher practices, and challenges with student perceptions (Association for Middle Level Education, 2010; Burris & Garrity, 2008; McCardle, 2020; Oakes et al., 1997; Rubin, 2003; Yonezawa & Jones, 2006). As Loveless (2022) pointed out, "the voluminous literature on tracking is better at describing problems than in solving them" (para. 19).

One of the flagship examples of the detracking movement was San Francisco's removal of algebra from all middle schools starting in 2015. Nearly a decade later it is clear that this

policy not only didn't raise underrepresented students' achievement in higher-level math classes, but it actually depressed access to high-level math for all students, as well as for historically underrepresented students; the students who retained access to higher level math needed to double up on math classes during high school or take summer courses (Elizabeth et al., 2023; Families for San Francisco, 2021; Loveless, 2022). San Francisco's approach was extremely unpopular, with public schools losing more than 10,000 students in enrollment since 2017-18 (Ed-Data, 2024), three school board members being recalled (San Francisco Department of Elections, 2022), a ballot measure where the public voted a stunning 80% in favor of offering algebra in 8th grade (San Francisco Department of Elections, 2024), and the new school board formally announcing a return of algebra to all middle schools in the 2024-25 school year (San Francisco Unified School District, 2024).

The proposed California Math Framework (CA Dept of Education, 2023) has attempted to codify San Francisco's failed policy as statewide guidance, under the strong advocacy of educational activist and Stanford University professor Jo Boaler. However, Boaler has been called out by colleagues as misrepresenting research results, citing the opposite of what a study reported, or making broad claims about the neuroscience of learning that the cited researchers dispute (Anonymous, 2024; Conrad, 2023; Pershan, 2021). There have been numerous scholars, educators, and advocates who have also written forceful rebuttals of California's Math Framework draft and the ideas contained within (Charikar et al., 2023; Codding et al., 2023; Conrad, 2023; Loveless, 2023; Powell et al., 2022).

Looking beyond the allegations of academic dishonesty that certainly raise eyebrows, the reality is that detracking is not a panacea that solves all problems for all students. For an idea that has been around for more than 30 years, if detracking was going to close the achievement gap and the excellence gap, the research would have become clearer by now. But this is a wicked

problem with no obvious answer. A simple solution, while appealing, is not a complete solution, and a one-size-fits-all approach will never meet every student's individual needs.

If our goal is to meet all students' needs, we must continue to build on approaches like Blockbridge's to provide ample access to accelerated academics for every student who could possibly benefit, and continually improve our ability to make that access maximally equitable and inclusive, recognizing that a substantial percentage of students will be ready for accelerated academics in one subject or another. At the same time, we need to ensure that grade-level education remains rigorous, relevant, enriched, and flexible because all students deserve a rich, challenging education in our public schools and all students are capable of much more than many assume. It is not a zero-sum game; both of these things can be true at the same time.

Keeping Expectations on Teachers Realistic and Sustainable

The weakest link in Blockbridge's service models was their reliance on teachers to differentiate to provide services for highly capable students outside the accelerated classrooms or walk-to-math structure. It would be easy to conclude that if only teachers had actually provided that differentiation, all would have been well. However, this was truly an unrealistic expectation for teachers to deliver on for a number of reasons. Teachers were asked to provide accelerated learning and enhanced instruction per Washington state law, but were provided no curriculum, little training, or additional time to actually implement that differentiation. Consequently, only the most experienced teachers who already had amassed the most robust personal stores of enrichment curriculum, had sought out their own training, as well as were willing to put in additional hours to plan differentiated extensions for students were able to meet this expectation. There is robust research evidence showing how challenging it is for teachers to differentiate

sufficiently for gifted students (Hertberg-Davis, 2009; Kilgore, 2018; VanTassel-Baska et al., 2020).

Furthermore, Blockbridge's collective bargaining agreement with its teacher's union put significant guard rails on what teachers could be expected to do; this was not arbitrary, the union's role was to ensure appropriate, sustainable workforce expectations to support work-life balance for teachers. Specifically, Blockbridge's negotiated teacher contract required that teachers only teach one grade level of curriculum. The implications of this seemingly innocuous stipulation were significant for highly capable students, who by definition in Washington state law were to receive accelerated learning. How were teachers supposed to deliver accelerated learning within that constraint?

The central model for highly capable services that emerged in Blockbridge made total sense within this context—the only way that students were going to have access to accelerated content is if they were grouped together in classroom-sized groupings where a teacher could be specifically assigned to provide a single grade level of curriculum. Hence, the accelerated self-contained classrooms were born in Blockbridge; the self-contained accelerated program had already been in existence for decades before this study and are common in Washington state (Backes et al., 2021). From this perspective, the walk-to-math and online math programs, added later in Blockbridge's history, functioned similarly—one teacher was assigned to an entire classroom of students to provide a single grade level of math instruction, which could be supported by the bargained contract. Perhaps one could argue that this contract limitation should be renegotiated; however, it was added for a reason, and simply asking teachers to do more is not fair, especially given the many expectations on teachers in our schools (Lin et al., 2024).

Does this mean that differentiation as a strategy in Blockbrige was doomed? Not necessarily, but teachers would have needed a lot more support to make it realistic and

sustainable. First and foremost, teachers needed a specific curriculum to use that provided the level of differentiation needed for highly capable students; asking teachers to essentially invent new curriculum as they went created a completely unsustainable workload for teachers and also guaranteed a different level of service between teachers. Using the next grade level of curriculum instead would not have been an option without renegotiating the contract and would have been even more difficult to coordinate completely different scopes and sequences. Furthermore, although many standard curriculums do provide several levels of activities to target different readiness levels in students, even the highest level often does not provide the accelerated learning and enhanced instruction that Washington state requires for its highly capable students; if these available curriculum materials had been sufficient, the offered differentiation would have worked, but clearly it did not.

In addition, Washington state required highly capable students to not just experience accelerated learning, but also to receive enhanced instruction. They needed to be receiving specific instruction that went deeper and provided more complexity to support that level of accelerated learning. Providing the same grade level curriculum but expecting highly capable students to independently take it farther, do independent projects without instruction, or produce more complex work with the same instruction was not consistent with Washington state law.

The requirement of accelerated learning and enhanced instruction was truly a formidable requirement to meet day after day and needed specific curriculum to support teachers to be able to realistically implement this obligation. Ideally, teachers would leverage curriculums that had been developed specifically for gifted students and validated by research. Identifying those curriculums and aligning them with Blockbridge's core grade level curriculum would be a significant curriculum development effort. Doing that curriculum work once and providing those

materials to all teachers would be far more efficient and produce a much more consistent experience for students across the district, however this was not done.

Obviously, teachers would also need training, not just in the needs and characteristics of highly capable and twice-exceptional students, but in differentiation strategies and practices themselves. However, even the best, most thorough professional development would not be sufficient on its own; teachers still needed to find the time to implement this differentiated curriculum. Placing highly capable students in classrooms in cluster groups of 6-10 students would make it somewhat easier for teachers to create instructional groupings to make this more feasible, as well as provide some built-in social and emotional support for those students. However, it would be essential for teachers to have additional planning time to incorporate that differentiated curriculum into their daily lesson plans.

Already this is a formidable list of expectations on top of an already difficult job, where 8 in 10 teachers say they do not have enough hours in the day to accomplish everything they are asked to do (Lin et al., 2024). Yet the most challenging requirement goes far beyond these technical issues; teachers needed to buy-in to doing this work, which often would require a change to hearts and minds. Many studies have concluded that a majority of teachers have negative opinions about gifted students and do not see the need for advanced programs (Carman, 2011; Missett et al., 2014; Moon & Brighton, 2008). Without teachers' full buy-in for the need for these services it would be extremely difficult for all teachers to be able to follow through on the substantial additional effort needed to plan and deliver differentiated curriculum consistently, provide challenging experiences for highly capable students, as well as understand these students' unique social-emotional characteristics. This is by far the hardest problem to solve and is a fundamental reason why any program model that requires every teacher to fully engage in

advanced education is likely to experience significant variability in service quality due to differences in teacher beliefs, which is itself an equity issue.

Teachers believed that inclusive classrooms would be easier to teach, under the belief that highly capable students were not that different from typical students. However, that is not a correct assumption; to actually meet highly capable students' needs socially, emotionally, and academically would be far more work for teachers in the context of a heterogeneous classroom. Self-contained classrooms simplified the job for teachers significantly by narrowing the range of academic differentiation as well as providing structures for social and emotional supports for unique student needs, making it a sustainable, realistic workload for teachers. Self-contained classrooms were not the only way that highly capable services could be delivered; but it was by far the most straightforward program model for teachers to implement with fidelity, using the next grade level's curriculum to guarantee the accelerated learning and enhanced instruction required by Washington state.

The Purpose of Highly Capable Programs

One of the central disagreements underlying many of the debates that surfaced was differing assumptions about the purpose of highly capable programs. Sadly, this is not a problem unique to Blockbridge. The larger gifted field has been wrestling with this same question for decades. There are three distinct perspectives espoused in the literature: the talent development approach, which aimed to maximize creative productivity and eminence in talented individuals (J. Renzulli, 2021; Worrell et al., 2012); the whole gifted child approach, which saw giftedness as an asynchronous developmental profile that was vulnerable and needed specialized supports for optimal development (Silverman, 1997; Whole Gifted Child Task Force, 2018); and the advanced academics approach, which sought to match students who showed academic readiness

with advanced curriculum (Dixson et al., 2020; Peters et al., 2020). Although there is plenty of foundational research that crosses these boundaries, many in the field recognize that there have been heated disagreements that fall along these lines.

Teachers at Blockbridge wrestled with the perceived difference between a gifted student and a highly capable student; many preconceived notions surfaced, and this was a source of much debate. For many teachers, they grew up in an educational system that identified a very small number of gifted students based on intellectual measures or globally high achievement who were provided services that were largely ancillary to the core academic curriculum, perhaps offered in a pullout program a few hours per week. There were obvious problems with that approach; it created huge inequities and it didn't actually serve students' demonstrated academic needs. Furthermore, the types of extension opportunities, creative problem solving, and other enrichment that were typically offered would have been equally valuable for all students to experience, not just gifted students, making these services profoundly unfair and sadly rightfully earned the allegations of elitism in gifted programs. Blockbridge's shift to identifying large numbers of students based on their readiness for accelerated academics in a specific domain area, and then providing advanced services in that specific domain area, was indeed a large shift from what many people had experienced in the past. Although it is a common-sense approach, it was not what people assumed, and therefore Blockbridge's leaders needed to communicate broadly that this was a principled decision to deviate from this historical practice. Sadly, this did not happen.

Blockbridge did communicate the process for qualifying for the highly capable designation, their commitment to equitable identification, and the service models they offered. However, they did not articulate what ultimate purpose the highly capable program was intended to serve, other than perhaps to accelerate students in math, and more generally to "provide a

challenging, integrated, and enriched curriculum" as stated in documents. But at a deeper level, many questions still remained. What were Blockbridge's goals for their highly capable students? How did that differ from the general education program? Was it maximizing academic achievement? Was it preventing discipline issues? Was it better social-emotional health for highly capable students? Was it developing grit and resilience in students? How would Blockbridge know if they were achieving their goals?

Perhaps what was lacking was a vision or mission statement that clarified Blockbridge's goals for the highly capable program. Again, with this important component left unsaid, individuals were left to make their own meaning. Some participants argued that the program was unsuccessful because it was not producing eminent adults. Others argued that it was unsuccessful because students continued to have social and emotional differences and difficulties. The achievement data was compelling to many leaders, perhaps because of an implicit assumption that the program was supposed to be driving higher levels of achievement.

My observation after listening to the district leaders and program administrators who were directly responsible for the highly capable program was that their implicit goal was two-fold. First, they believed that experiencing challenging academics was important for developing grit, growth mindset, persistence, and resilience, and that this would not happen if school was too easy for highly capable students who already knew most of the content. Second, they believed that highly capable students had social-emotional differences that needed supports and understanding, in order to ensure the psychological wellbeing of the child. These lines of thinking came up often in their interview comments, as well as in the document record, but were not stated as explicit goals of the program.

Tying it back to the research literature, although Blockbridge appeared to lead with an advanced academics approach, I would propose that Blockbridge's ultimate goal aligned better

with the whole gifted child approach, with the theory of action that providing advanced academics was essential to support a highly capable student's psychological wellbeing, including self-confidence, self-concept, and self-efficacy. The self-contained classrooms that were the core service model provided a further measure of support for student's social-emotional needs, by providing a higher likelihood for authentic social connections and a cohort of students with similar social-emotional characteristics, quirks, and intensities to better ensure an emotionally safe and supportive environment.

In my own experience as a consultant and trainer for school districts, as well as during other advocacy efforts, I have found that explaining the relationship between providing challenging academics and developing grit, growth mindset, persistence, perseverance, and study skills was a powerful and compelling way to describe the purpose of highly capable programs. While most educators were familiar with the concepts of grit and growth mindset, many had not considered that highly capable students would not develop those crucial skills if they rarely felt challenged, rarely made mistakes, and rarely needed to put forth conscious effort. We do our students no favors allowing them to coast through academic programs that are much too easy. When students eventually do experience a challenge for the very first time, perhaps in middle school, high school, or maybe not until college, students may have no prior experience, strategies, study skills, or emotional coping skills to rely on. This can become an identity crisis for some students, especially when perfectionism has become ingrained after years of "perfection" in school with little effort.

The obvious fix is ensuring that every student experiences genuine challenge at their individual zone of proximal development (Vygotsky, 1997), and that this happens from the early grades onwards. To be clear, this is not about creating a pressure cooker environment where we bury students in homework, provide yet another worksheet, or expect students to produce perfect

work. Rather, as Blockbridge's guiding principles say, we should be offering different work, not more work. The goal is simply to provide enough friction so that students begin to develop these crucial skills from a young age. This frontloaded approach will also surface any disabilities or twice-exceptionality more quickly, while students are still young and interventions are most effective. There is an important corollary to consider as well; it is also profoundly unfair for some students to struggle mightily in school and others to "coast" with minimal effort.

I believe this is a crucial argument that needs to be made much more broadly to help educators, principals, administrators, and district leaders understand the true purpose of advanced programs like Blockbridge's highly capable program. These skills of persistence, perseverance, resilience, growth mindset, and so on are not just needed in the academic world; adult life also requires individuals to persist through confusion, recover from mistakes, and not give up at the first sign of difficulty. Our society needs all citizens to exit K-12 education with these life skills. It is ironic that our most talented students may be the least likely to develop these abilities in school, despite apparent high achievement.

Following along this line of thinking, the real purpose of accelerating in math is actually not about the math. Rather, math acceleration is perhaps the most reliable way to get a highly capable student out of their comfort zone, so they have an opportunity to develop tolerance for frustration, recovering from mistakes, working through confusion, and all of the other soft skills that lead towards grit, growth mindset, persistence, perseverance, and study skills. Although the advanced math may be helpful for some students who ultimately go into STEM fields, many students really won't need the advanced math in their careers. However, the bigger purpose was never really about the math; the true purpose was to provide a sandbox for the development of these crucial life skills in highly capable students who were unlikely to experience genuine challenge on a consistent basis any other way.

Next Steps for Blockbridge

If I were to attempt to advise Blockbridge on their next steps, the first thing to acknowledge is that they are in the middle of a wicked problem that is so complex and uncharted that, by its very nature, there is no single defined solution. Even with my fresh knowledge of the breadth of research literature currently available, there are no best practices out there that cover anything close to the entirety of Blockbridge's situation. Blockbridge will need to pave this path as they go, leverage best practices when available, and sometimes will need to experiment where the literature is silent or equivocal.

Blockbridge is providing services that are meaningfully accelerated from second grade onwards, at the core of a student's educational experience, which is different than so many other gifted programs that add enrichment or creative problem-solving extensions that sit alongside on-grade level curriculum. Academic acceleration is a significant strength of Blockbridge's approach and is to be commended, and the benefits of acceleration are many and well-supported in the research literature (Bernstein et al., 2021; Foley-Nicpon & Cederberg, 2015; Lubinski & Benbow, 2006, 2021; Steenbergen-Hu et al., 2016). Furthermore, they are providing these services to a comparatively large percentage of their students, not just 5% or 10% of students, but a full 28% of students district-wide are identified for accelerated learning and enhanced instruction in at least one subject area. This is also a major strength of Blockbridge's approach, and research indicates that this number of students should be fully expected (Firmender et al., 2013; Pedersen et al., 2023; Peters et al., 2017). The same would likely happen in most districts across the country who implemented similarly extensive identification practices. However, in practice, it is unusual for a public school district to identify this many students and to simultaneously place them in significantly accelerated programming, and I do not know of any districts who have travelled this particular road before who have documented their experience in

the research literature. Blockbridge is at the bleeding edge of innovation in this area in both breadth of identification as well as depth of services.

However, despite implementing best practices, Blockbridge's equitable identification strategy is not yet fully proportional, though it has demonstrated a remarkable step forward ahead of others. Similarly, Blockbridge's service models themselves are not equitable, with dual qualified students generally receiving a higher level and quality of service than single-subject qualifiers. This is complicated by the real-world constraints of limited budgets and class sizes, making labor contract negotiations around sustainable teacher workloads a central issue. These are real problems that warrant continued work and are the focus of my recommendations.

There are several major decisions and trade-offs that Blockbridge will need to make moving forward. These should be thoughtful, proactive decisions, not decisions that were forced by painting oneself into a corner out of a desire to put an end to the debates. As one district leader put it, "There are ways to get out of it. But I would do it slowly, just like you slowly went into it."

What Not to Do

One pitfall to be aware of is the temptation to remove services in the name of equity. One way of theoretically resolving equity problems is to remove accelerated services so that all students receive the same service. However, that's not equity, that's equality; this approach doesn't respect the fact that different students have different needs, and that all students learn best at their personal zone of proximal development (Vygotsky, 1997). Furthermore, this would provide a false outcome that is the opposite of equitable, lowering the ceiling as opposed to raising the floor. Removing services in the public system might feel tempting, but the net impact is that motivated families with means will replace that potential loss with private services outside the public schools, creating even bigger equity gaps.

Similarly, raising highly capable qualification thresholds, such as from the 95th percentile to the 98th percentile, would only increase the incidence of test prep, as even families who disagree with the premise of test prep would feel the need to prepare in order to get their student access to needed services. Also, raising the general criteria would likely have a negative impact on identifying diverse students, especially racial/ethnic groups that cannot legally be targeted with group-based local norms. This is because existing test instruments are known to have culturally loaded questions, which will disproportionately impact students from diverse backgrounds. Raising criteria also makes no sense in the context of the strong academic performance that Blockbridge is seeing in their current identified population; these students are clearly benefitting from services and reducing the number of students who have access to this acceleration would be counter-productive. It would be a gross inequity to remove beneficial services from students.

Similarly, the idea that teachers know their students best and will be more effective at identifying highly capable students than objective criteria, although intuitively appealing, has been shown time and again to be subject to teacher bias against historically underrepresented groups, particularly Black and Hispanic students, girls, multilingual students, and students with disabilities (Bianco et al., 2011; Donovan & Cross, 2002; Elhoweris et al., 2005; Ford & Grantham, 2003; Grissom & Redding, 2016; McBee, 2006; McCoach et al., 2023; Nicholson-Crotty et al., 2016). Washington law also specifically disallows teacher feedback, report cards, and any other subjective data, to disqualify a student from highly capable identification (Revised Code of Washington, 2018). Although Blockbridge certainly could incorporate more teacher feedback into their process, it would need to be very carefully done to ensure that it did not inadvertently create equity concerns. In addition, teacher time is extremely valuable; it is not

clear to me that the tradeoff of asking teachers to spend more time providing student feedback would improve equitable outcomes, and it might even hurt.

Professional Development

The first and most essential step Blockbridge needs to take is to engage their current staff, faculty, principals, other administrators, and district leadership in professional development to level set the foundational principles for their highly capable program. Even a short, perfunctory but mandatory, one-hour online training module required of all staff to complete would go a long way towards getting everyone on the same page about what is actually happening and why, including the goals and purpose of the program, as was discussed at the end of the previous section. Authoritatively answering those foundational questions may not change the debates in every person's mind, but it would create a foundation for more productive, informed discourse moving forward.

An essential topic to cover would be: How do we talk with our students about the fact that different students are working at different academic levels? Regardless of what identification or service changes Blockbridge may decide to make, there will always be the issue of students working at different levels, some students working ahead, and others who need support in some areas. I would surmise that teachers feeling completely unprepared to coach this thorny issue with their students as well as with their adult colleagues is the actual root cause of many of the debates. Developing a vernacular around "just right math" and "just right learning," similar to the common use of "just right books" in early elementary reading development could be a good place to start.

Detailed training for any teachers working directly with highly capable students, and their principals, would also be essential, focusing especially on the myriad topics surrounding twice-exceptional students as well as thorough training in cultural competence to ensure that all diverse

students feel fully seen, welcome, and supported in the highly capable program. In light of this, a primary decision that Blockbridge needs to make is whether they will expect all of their teachers to develop this deep expertise in teaching highly capable students, or whether they will choose program models that focus building that expertise in a smaller group of teachers where they can more easily and efficiently target ongoing professional learning.

Identification Improvements

On the topic of identification, there are a few opportunities for incremental improvements. Chief among them would be finding a different suite of test instruments instead of the NNAT3 and Iowa Assessments that are less vulnerable to test prep. Closing that loophole in the current identification system would go a long way to winning back teachers' faith in the system, as well as address a legitimate problem that has emerged. It is not clear exactly how big of a problem this is, but it is enough of a concern from the workforce to warrant serious investigation.

A perfect assessment does not yet exist, however, even just periodically changing up the assessments to a new battery would disrupt the test prep industry. While parents do certainly have the right to prepare their students as they see fit, no one wins when students are coached into services that are substantially more accelerated than the student is ready for. There are other analogs for both the NNAT3 and the Iowa Assessments that could be used; the Iowa Math assessment used in first grade is particularly vulnerable to test prep in my estimation. There is also a new Naglieri General Abilities Test that offers purely pictorial, language-free test batteries in math reasoning, nonverbal reasoning, and verbal reasoning skills that would be particularly appealing to try in Blockbridge's context; because it is so new, test prep materials are not yet available. Another strategy for mitigating the impact of private test prep is doing test prep activities in universally screened grade levels in the classroom a day or two before administering

the screening, in order to shrink the access gap between students who prepared outside of school and those who did not. This would be similar to the test preparation that happens prior to end of year state testing to help students feel confident and comfortable with the test formats and style of questions.

Other incremental improvements in the identification system could focus on low-income students, which is the only special populations group that has not substantially improved in representation at Blockbridge; low-income students are also explicitly cited as a priority in Washington state law. One approach could be to add local norms to the first grade NNAT3-only pathway, targeting low-income students with a static, group-based local norm so that they might dual-qualify at the 88th percentile on the NNAT3; this is the only decision point that does not leverage local norms in Blockbridge's identification system. This could go a long way towards identifying low-income students more fairly, to account for differences in opportunity to learn (OTL) and possible biases in the test itself.

Additionally, Blockbridge might consider extending the first grade NNAT3 ability-only pathway to also use that pathway for second graders qualifying for third grade services. Given the success identifying first graders this way, the argument could be made that second graders are also still quite young and have plenty of time to catch up in academics if the raw ability is there. Alternately, Blockbridge might consider using a very high kindergarten NNAT3 score as an identifier alongside the first grade NNAT3 score. Either way, there is a strong argument to be made for catching high-potential students when they are young; identifying and serving early is our best way of combatting the opportunity gap and preventing achievement and excellence gaps from forming (Callahan, 2005). Having only a single opportunity for a student to qualify based on potential, not crystallized achievement, is bound to overlook some students who simply had a bad day (Peters & Gentry, 2012). No single test instrument or test event can ever be perfect; like

using OR-rules, creating redundancy in the identification system would raise the odds that every student would be properly seen for their needs and strengths.

Service Model Improvements

On the topic of services, Blockbridge has some big decisions to make. Although their accelerated self-contained classrooms provided high quality services, they were not accessible to all students who showed need for acceleration, especially those who only qualified in one subject area. This was a big equity problem. The separate classroom model also had created significant unease among staff on many axes. I think Blockbridge has two realistic paths forward. Blockbridge can either keep the self-contained model but implement changes to address problems that have come up, or they can move to a neighborhood school-based model that leverages strategies like walk-to-math, walk-to-reading, pre-planned differentiation, flexible ability grouping, and intervention blocks. This second approach would require a much broader commitment to professional development and developing dedicated curriculum to implement this model with consistency and fidelity, as it would involve more educators and could not fully rely on grade accelerated curriculum as the self-contained classes do now. One unique factor in Blockbridge's situation is that because they have identified so many students, more program model solutions are possible to contemplate because there is now a critical mass of qualified students in every school.

Improving the Self-Contained Model

The self-contained model could be improved in several ways to address the perceived cultural divides that have emerged. First, self-contained classes should be fully included in the life of the larger school, to ensure all students feel fully welcome in the school community, even if it is not their neighborhood school, and to encourage students to develop relationships across

academic programs. Schools can create opportunities for students to have meaningful interactions across classrooms, whether through Friday afternoon board game days, creating cross-grade mentorship groups, or other innovative ways to facilitate interaction between kids across the larger school community. These need to be intentional, structured opportunities, not just turning kids out onto the playground together, which probably is already happening and is clearly not enough. Communicating the desire for an integrated school community as an explicit goal would also go a long way towards helping parents and families recognize the role they may play in inadvertently creating these social divisions.

Elementary schools could also use specialist blocks to create opportunities for students to intentionally mix across classrooms. For instance, during specialist time, students from all fourth-grade classrooms might be mixed into new specialist groupings as some walk to music, others walk to library, and others go to the gym for physical education; each group would then rotate to different specialists the following day. Additionally, this approach could provide a structure to create flexible ability-based groupings for specialist classes, creating new opportunities for students who are ready for accelerated learning in music and athletics to have their needs met as well. These strength areas would cut across students identified for academic acceleration and would provide an additional level of support for highly capable students with strengths in different domains outside of math and reading. This approach would also address teachers' concerns that Blockbridge was only programming for academic strengths, when students clearly can have strengths in many other areas that are also part of public education.

Moving students between schools was a big problem at Blockbridge that had many consequences. To address this, Blockbridge should ideally create self-contained accelerated classrooms in every school, with multiage split-grade classrooms as needed for smaller schools. This would ensure that appropriate services were available in every elementary school so that

students did not need to bus to a neighboring school, removing the transportation need and a significant amount of logistical coordination. It also would reduce the current challenges of certain large magnet schools having more self-contained classrooms than general education classrooms, as many of those self-contained classrooms would be dispersed to other schools.

The biggest problem with the self-contained model itself was that it was not available for single-subject students. Blockbridge had tried placing single-subject qualifiers in accelerated self-contained classes full time, a practice they termed backfilling, but teachers found that caused problems when students appeared to not be ready for that degree of acceleration in the non-qualifying subject. As discussed earlier, it is also possible that with more teacher training and intentional scaffolding, this problem may not be as big as it may appear; backfilling may not need to be abandoned, but rather, better supported.

However, if backfilling is not a viable option, a more elegant and robust model might be to enable walk-to-math and walk-to-reading for single-subject qualified students to walk to an accelerated classroom in that school to be able to access the appropriate domain of accelerated services they need. Note that walking to a self-contained classroom is more preferred than having the student walk to a higher grade level classroom, which would create more difficult constraints on the school's master schedule and is not as ideal of a social and academic environment for the student. In addition, because of the degree of math acceleration offered at Blockbridge, there would be no higher grade level math classroom available for fourth or fifth graders, who would need sixth and seventh grade math curriculum; only an accelerated self-contained classroom could support those math levels.

These approaches for improving the self-contained model and providing access for single-subject students would remove the need for Blockbridge's fourth and fifth grade online math program. Although it is certainly better than nothing, it is hard to argue that online math is

equivalent to a live teacher in a physical classroom with other students. Self-contained classrooms paired with walk-to-math options in every school would also provide high quality services for every math qualified student at every grade level, ensuring a consistent level of service that is not currently guaranteed at Blockbridge, especially for younger grade level students.

Overall, the self-contained model is the most efficient model that guarantees high quality services with minimum additional cost, and with some effort, could be more intentionally folded into the larger school community. This program model limits the number of teachers that would need in-depth training about highly capable and twice-exceptional students to only those teaching the accelerated classrooms, as well as specialist teachers. Additionally, because the accelerated classrooms can use the district's regular grade level curriculum from the next grade level, there is no need for a curriculum overhaul, though incorporating more gifted-specific curriculum would still be a helpful adjunct. The self-contained model is the most cost-effective approach at providing reliably high-quality accelerated services that meet Washington state law.

Changing to a Mixed-Ability Classroom Model

A more radical change could also be considered that would be possible, but a lot more work to implement. Blockbridge could contemplate phasing out the self-contained classrooms in favor of building accelerated services into the practices of most or possibly every single elementary school classroom. Students would be assigned to a neighborhood general education classroom in cluster groupings of 6-10 other highly capable students with similar acceleration needs to both better support teachers' ability to differentiate, as well as provide a social group for highly capable students who have unique social development needs. The rest of the classroom

would have a mix of students. Because Blockbridge has identified so many students district-wide, there should be sufficient numbers in every school to make cluster groups possible.

Accelerated services in math would be provided via walk-to-math, where all students in a grade level walk to the appropriate level math class during math time, with one of the third grade teachers, for instance, teaching an accelerated math class instead of a grade level math class during that time. This levelled math class would ensure that all math qualified students, whether single-subject or dual-subject qualified, received fully accelerated math curriculum.

A similar system could be used to provide walk-to reading, walk-to-science, and walk-to-social-studies as well, though there will be a limit to the logistical feasibility of multiple walk-to systems imposed by the school's master schedule. Whatever subject areas could not be served via walk-to programs would need a significant amount of curriculum development and professional development support to enable the home classroom teacher to provide differentiated curriculum for highly capable students; this would be the most difficult aspect of this approach to ensure consistency in level and quality of services across schools and teachers.

Even very recent research consistently finds that sufficient differentiation for gifted students is very hard to accomplish in practice (Hertberg-Davis, 2009; Kilgore, 2018; VanTassel-Baska et al., 2020). Creating pre-planned, differentiated lessons for every aspect of the grade level curriculum would be essential to make this approach viable for teachers to implement. This differentiation would be delivered in the context of the heterogeneous classroom via in-class ability grouping. Schools could possibly also leverage intervention blocks to deliver complete lessons for flexible ability groups of highly capable students to offer additional differentiation alongside the grade-level curriculum.

All teachers would also need significant training and support in meeting the needs of these diverse students in their classrooms, since they would have an even wider range of

learners, from inclusion of high needs special education students to highly capable students that will have different needs and will all need differentiation on multiple axes. Smaller class sizes or additional staff support would help the most, but are realistically the least possible in Washington state's current budget environment.

What would be feasible would be pairing high-quality, mandatory professional development for all teachers taking on classrooms with a cluster group of highly capable students, and providing specific, structured highly capable curriculums for teachers to use with their highly capable cluster groups to ensure that differentiation happened consistently and robustly. These curriculum pieces would need to be carefully constructed to match and extend the current grade level curriculum so that we are not asking teachers to teach a completely separate lesson; however, it needs to go beyond the extension lessons in the current boxed curriculum in order to provide genuine challenge for these significantly advanced students. Ideally it would leverage researched curriculum for gifted students that adds significant depth and complexity. This curriculum development work should happen district-wide and be provided to teachers; as discussed earlier, it would be completely infeasible to ask teachers to differentiate lessons on their own to this degree.

This model has several structural benefits. Like the suggested improvements to the self-contained model, it would remove the need for the current online math program for fourth and fifth graders and would provide accelerated services for all qualified students in all grade levels, including single-subject qualifiers. It would guarantee a consistent level of service district-wide for all students, especially with walk-to-math and any other subjects that could be provided via a walk-to system. The biggest challenge with this model is ensuring consistent high-quality services for all academic areas not served via a walk-to system. The large amount of curriculum development and broad professional development work to enable that would be expensive and

time consuming. Getting workforce buy-in for the significant amount of both advance preparation and daily work would also be essential and would be a substantial challenge, as discussed in previous sections.

Comparing Approaches

Both of these approaches would solve the biggest pain point in the current system, which is students needing to move between schools in order to access some levels of service. Both models would now have every student attending their neighborhood school, simplifying transportation and encouraging a more stable school community, without kids transferring in and out every year. They would also both remove the need for the online math system.

While both of these approaches would address several important problems that have emerged, neither will avoid some central concerns raised by teachers in my findings. Unless widespread backfilling into accelerated classrooms is implemented, both of the primary approaches I suggested would require a walk-to system to greater or lesser degree, which would require a serious alignment of the school's master schedule, as well as the buy-in of every teacher in the building. The walk-to aspect would impact many fewer students in the self-contained model, whereas in the school-based model every single student, including general education and special education students, would participate in the walk-to process, which would feel quite different for many elementary families and staff who expect a single-room classroom experience in elementary. As teachers pointed out in my focus groups, the nature of walk-to programming means that teachers must align their daily schedules precisely, which significantly limits teacher flexibility in how they use their time throughout the elementary school day. This would be a huge change in practice for elementary teachers and would need significant workforce buy-in to implement and sustain.

It is not clear to me that either improving the self-contained model or changing to the mixed-ability classroom approach would significantly improve the cultural divisions that I heard about so loudly in the findings, however. In fact, the heterogeneous model may exacerbate this problem, with students visibly moving between grade-level and accelerated classrooms every day. This may draw even more attention to the academic differences between students, not less. Students will figure out very quickly which math classroom is the accelerated one, whether they are assigned to it or not, and this will be a constant daily reminder. As discussed earlier, inclusion is not the same as belonging, and just because students are in the same classroom does not mean that all social problems will magically disappear. Preparing teachers, students, and parents to gracefully discuss the academic differences between students and to support many different types of social engagement will still be crucial no matter which approach is used, as was discussed earlier.

Both approaches would benefit greatly from curriculum that is specifically designed for gifted or advanced students. For the neighborhood school approach, this is an absolute necessity and will require substantial curriculum development to find and create curriculum extensions that align with the grade level curriculum, but also provide substantial challenge and acceleration for identified highly capable students. Just using the extension materials in a standard boxed curriculum will not go nearly far enough for these students' needs. For the self-contained approach, a curriculum revision is not strictly required; because it uses the next grade level curriculum as a base, it is already providing a provably accelerated approach which would satisfy WA state law. However, students would still benefit from additional complexity and depth in supplementary advanced curriculum materials where possible. There are also probably efficiencies in finding ways to compact math to ease the pacing burden on accelerated math

teachers in particular, but a massive curriculum effort would not be strictly needed with the self-contained approach.

HiCap Needs to Be on the School's Master Schedule

Whichever path Blockbridge chooses, the heuristic that I would offer is that highly capable services need to be a formal part of a school's master schedule. There needs to be either a dedicated block of time, or a dedicated staff member, or both, allocated on a daily or near-daily basis. This necessarily creates the time and resource allocation to ensure that services are delivered faithfully and consistently through the school year, not just a best effort when time allows, which is destined to fall short of Washington state's requirement of accelerated learning and enhanced instruction within basic education. This also ensures that we are not placing unrealistic expectations on teachers that ultimately create an unsustainable work environment, or teachers being blamed when services do not meet expectations.

Blockbridge and many other school districts have demonstrated that differentiation at the discretion of a classroom teacher is not a reliable or equitable strategy; although the most experienced, passionate, and talented teachers can deliver remarkable levels of differentiation, this is an unreasonable expectation for the majority of our teaching workforce who are already stretched way too thin. Teachers are balancing large class sizes and a growing nation-wide incidence of student support needs of all sorts, ranging from disabilities to mental health issues to students experiencing homelessness or poverty (Lin et al., 2024). Providing more training in differentiation does not change the fundamental calculus that teachers are already working incredibly hard, are already feeling like they cannot accomplish everything being asked of them, and there are only 24 hours in the day. Asking teachers to step up and work harder is a doomed strategy that will exacerbate inconsistent levels of services and will only accelerate teacher

shortages in the long run. Whatever path is chosen needs to carefully consider realistic teacher capacity for viable implementation, and provide meaningful day-to-day classroom curriculum and support for teachers.

Conclusion

I sincerely hope that Blockbridge continues to innovate on the substantial foundation that they have developed, for the good of Blockbridge and Washington state as well as the broader nation and the global research community who will be eagerly interested to watch Blockbridge's progress and continued learnings. The work they have done is truly groundbreaking in so many respects—in breadth of identification as well as depth of services—and while there are certainly growing pains, inconsistencies, and places to further improve, their robust accelerated academic services have already immeasurably impacted many thousands of students over the years, especially students who would not otherwise have had access to that degree of accelerated learning and enhanced instruction had it not been offered in the public school. The impact that advanced education can have on individuals, families, and communities is immense; this is the real purpose of ensuring that every student is able to reach their highest personal achievement towards self-actualization. Kudos to Blockbridge and let us move forward to continue innovating for the benefit of all of our students.

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Appendix A: District Leader and Administrators Invite Letter

<individually sent to administrator/district leader interview targets>

I am a graduate student working on my Ed.D. degree and am recruiting district leaders and administrators to participate in a research study about [Blockbridge]'s highly capable program. I would like to interview you to get your perspective on this topic. I anticipate the interview will take 60-90 minutes.

Interviews will be audio recorded for transcription purposes. Participation in this study is completely voluntary.

The goal of the study is to capture a comprehensive snapshot of [Blockbridge]'s highly capable (HiCap) program at this moment in time, including how the HiCap program impacts the greater school community. It is vitally important for this case study to capture not only the positives but also the challenges. I hope to hear a wide variety of perspectives.

[Blockbridge] will be given a pseudonym in the final dissertation report and will be described only as a suburban school district in Washington state, and specific schools will not be named. Your contributions will be held strictly confidential and comments will not be traceable back to any individual in the final report. All participants will sign an informed consent form approved by my university's Institutional Research Board. This study has been approved by [Blockbridge]'s district leadership.

Participants will receive a [Local Ice Cream Parlor] gift card to thank them for their participation.

If you would like to participate, please respond to this email and I will come to your office at your convenience to conduct the interview.

Thank you!
Austina De Bonte, Doctoral Candidate
Bridges Graduate School of Cognitive Diversity in Education

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Appendix B: Principal Invite Letter (Initial)

<sent to all elementary and middle school principals and assistant principals>

I am a graduate student working on my Ed.D. degree and am recruiting principals to participate in a research study about [Blockbridge]'s highly capable program. I am forming several focus groups of principals:

- Principals/assistant principals of elementary schools that host [ACCELERATED SELF-CONTAINED] classrooms
- Principals/assistant principals of elementary schools that do not host [ACCELERATED SELF-CONTAINED] classrooms
- Middle school principals/assistant principals

Focus groups will meet in person for 90 minutes after school in January or February at a central district location. Focus groups will be audio recorded for transcription purposes. Participation in this study is completely voluntary.

The goal of the study is to capture a comprehensive case study of [Blockbridge]'s highly capable program at this moment in time, including how the program impacts the greater school community, and how that has changed over the past 4 years. It is vitally important for this study to record not only the positives but also the challenges. The study hopes to hear a wide variety of perspectives.

[Blockbridge] will be given a pseudonym in the final dissertation report and will be described only as a suburban school district in Washington state. Your contributions will be held strictly confidential and comments will not be traceable back to any individual in the final report. **Data in any reporting will be attributed only by general role (e.g. administrator, middle school principal, elementary principal in an accelerated program school) and will not identify individuals, individual titles, or school names.**

All participants will sign an informed consent form approved by my university's Institutional Research Board. This study has been approved by [Blockbridge]'s district leadership.

Participants will receive a [Local Ice Cream Parlor] gift card for a free cone to thank them for their participation.

If you would like to participate in this study, please fill out the form below.

<link to google form>

Thank you!
Austina De Bonte, Doctoral Candidate
Bridges Graduate School of Cognitive Diversity in Education

Appendix C: Principal Invite Letter (Revised to Encourage More Participation)

<re-sent to all elementary and middle school principals and assistant principals>

Based on participant feedback from a few principals, I have gotten approval from my university's Institutional Review Board (IRB) to change my study to use confidential **one-on-one interviews** rather than focus groups.

I hope this will enable more people to participate at a time and place that works for you. I can come to your office at your convenience to conduct a 60-90 minute interview. **You are invited to participate regardless of whether you have ever worked with highly capable students.**

If you would like to participate in this study, please fill out the form below.

<link to google form>

See below for more details.

—

I am a graduate student working on my Ed.D. degree and am recruiting principals to participate in a research study about [Blockbridge]'s highly capable program. I am interested in interviewing principals in each of these categories:

- Principals/APs of elementary schools that host [ACCELERATED SELF-CONTAINED] classrooms
- Principals/APs of elementary schools that **do not host [ACCELERATED SELF-CONTAINED] classrooms**
- Middle school principals/APs

Interviews will be audio recorded for transcription purposes. Participation in this study is completely voluntary.

The goal of the study is to capture a comprehensive case study of [Blockbridge]'s highly capable program at this moment in time, including how the program impacts the greater school community, and how that has changed over the past 4 years. It is vitally important for this study to record not only the positives but also the challenges. The study hopes to hear a wide variety of perspectives.

[Blockbridge] will be given a pseudonym in the final dissertation report and will be described only as a suburban school district in Washington state. Your contributions will be held strictly confidential and comments will not be traceable back to any individual in the final report. **Data in any reporting will be attributed only by general role (e.g. administrator, middle school principal, elementary principal in an accelerated program school) and will not identify individuals, individual titles, or school names.**

All participants will sign an informed consent form approved by my university's Institutional Research Board. This study has been approved by [Blockbridge]'s district leadership.

Participants will receive a [Local Ice Cream Parlor] gift card for a free cone to thank them for their participation.

If you would like to participate in this study, please fill out the form below.

<link to google form>

Thank you!
Austina De Bonte, Doctoral Candidate
Bridges Graduate School of Cognitive Diversity in Education

Appendix D: Teacher Invite Letter

<sent to teachers in grades 2-8 >

I am a graduate student working on my Ed.D. degree and am recruiting teachers to participate in a research study about [Blockbridge]'s highly capable program. I am forming several focus groups of teachers:

- elementary [ACCELERATED SELF-CONTAINED] classroom teachers (grades 2-5)
- elementary general education teachers (grades 2-5, with or without HiCap students in their classroom)
- middle school [MIDDLE SCHOOL ADVANCED CLASSES] teachers (grades 6-8)
- middle school general education teachers (grades 6-8)

You are invited to participate regardless of whether you have ever taught highly capable students.

Focus groups will meet in person for 90 minutes after school in March at a central district location. Focus groups will be audio recorded for transcription purposes. Participation in this study is completely voluntary.

The goal of the study is to capture a comprehensive case study of [Blockbridge]'s highly capable program at this moment in time, including how the program impacts the greater school community, and how that has changed over the past 4 years. It is vitally important for this study to record not only the positives but also the challenges. The study hopes to hear a wide variety of perspectives.

[Blockbridge] will be given a pseudonym in the final dissertation report and will be described only as a suburban school district in Washington state. **Your contributions will be held strictly confidential and comments will not be traceable back to any individual in the final report.** Data in any reporting will be attributed only by general role (e.g. middle school principal, middle school accelerated program teacher, elementary general education teacher) and will not identify individuals, individual titles, or school names.

All participants will sign an informed consent form approved by my university's Institutional Research Board. This study has been approved by [Blockbridge]'s district leadership.

Participants will receive a [Local Ice Cream Parlor] gift card for a free ice cream cone to thank them for their participation.

If you would like to participate in this study, please fill out the form below. If more people volunteer than are needed, participants will be chosen by random selection.

<link to google form>

Thank you!
Austina De Bonte, Doctoral Candidate
Bridges Graduate School of Cognitive Diversity in Education

Appendix E: Interview Guide for District Leaders

Interview Guide for District Leaders

Research Questions:
1. What practices and procedures have been used to identify low-income students, English learners, and twice-exceptional students for Blockbridge's accelerated education program?
2. What factors are contributing to the increase in identification of twice-exceptional students at Blockbridge?
3. What beliefs and attitudes do teachers, principals, and administrators have about the identification and services provided to students identified for accelerated education services at Blockbridge?
4. How have principals and teachers responded as more diverse students have entered accelerated classrooms at Blockbridge?
5. What challenges in identification and service delivery at Blockbridge remain?

The goal of this study is to capture a comprehensive snapshot of [Blockbridge]'s highly capable (HiCap) program at this moment in time, including how the HiCap program impacts the greater school community, and how it has changed over the past 5 years. It is vitally important for this case study to reveal not only the positives but also the challenges. I hope to hear a wide variety of perspectives and will be talking with a variety of administrators, principals, and teachers across the district.

[Blockbridge] will be given a pseudonym in the final dissertation report and will be described only as a suburban school district in Washington state, and specific schools will not be named. Your contributions will be held strictly confidential and comments will not be traceable back to any individual in the final report. All participants will sign an informed consent form approved by my university's Institutional Research Board to ensure their safety as a research subject. This study has been approved by [Blockbridge]'s district leadership.

Our interview will be audio recorded for transcription purposes, and you will be provided a copy of the transcript to ensure accuracy. You can pass on any question or discontinue the interview at any time.

If you have any documents that would be useful for me to include as part of this study, you can give them to me during this session or email them to me later.

Do you have any questions?

<Offer the consent form to read and sign>

Thank you for agreeing to participate. Let's get started by telling me a little about your background.

What do you believe your role is in this school district with respect to the highly capable program?

Why do we have a highly capable program? What purpose does the highly capable program serve?

What process is used to identify students for the highly capable program?

In your view, do we do a good job of identifying students for the highly capable program? Who do we miss? Are we qualifying too many kids? What would you change?

How well do the services that are currently being offered to highly capable students work? Probe on:

> Grade level differences (K-1, 2-5, 6-8, 9-12), elementary vs. middle
>
> Math-only vs. reading-only vs. dual qualified
>
> [ACCELERATED SELF-CONTAINED] vs. [MIDDLE SCHOOL ADVANCED CLASSES] vs. neighborhood school vs. alternative programs

How well does our highly capable program meet student's social and emotional needs?

How do you think about twice-exceptional students: HiCap students who also have a disability such as autism, ADHD, or dyslexia? How do these students get identified for the HiCap program, how does their disability get identified, and how do these children get served in this district?

Have schools implemented the HiCap program consistently? What differences exist across regions, buildings, or classrooms?

How have schools, principals, and teachers responded as more diverse students have entered the highly capable program?

What impacts have there been as the HiCap program has grown over the years?

Which students' needs are NOT being met in our current system? Which students' needs are being met well? What do you think we could do to serve either specific groups or all students better?

What professional development has been offered?

What kind of training have you personally had in the needs of highly capable or other special needs students? Preservice, in-service, endorsement, conferences, clock hours, mentorship, etc.

How does the HiCap program affect the workings of the overall school district?

How is the HiCap program perceived by different people across the district? Administrators, principals, teachers, parents? How has that changed over the past 5 years?

What impacts has the HiCap program had on you as a district leader?

What surprises, learnings, or challenges have come up around the HiCap program?

What do you envision for next steps for the HiCap program in the coming years?

Appendix F: Interview Guide for Program Administrators

Interview Guide for Administrators

Research Questions:
1. What practices and procedures have been used to identify low-income students, English learners, and twice-exceptional students for Blockbridge's accelerated education program?
2. What factors are contributing to the increase in identification of twice-exceptional students at Blockbridge?
3. What beliefs and attitudes do teachers, principals, and administrators have about the identification and services provided to students identified for accelerated education services at Blockbridge?
4. How have principals and teachers responded as more diverse students have entered accelerated classrooms at Blockbridge?
5. What challenges in identification and service delivery at Blockbridge remain?

The goal of this study is to capture a comprehensive snapshot of [Blockbridge]'s highly capable (HiCap) program at this moment in time, including how the HiCap program impacts the greater school community, and how it has changed over the past 4 years. It is vitally important for this case study to reveal not only the positives but also the challenges. I hope to hear a wide variety of perspectives and will be talking with a variety of administrators, principals, and teachers across the district.

[Blockbridge] will be given a pseudonym in the final dissertation report and will be described only as a suburban school district in Washington state, and specific schools will not be named. Your contributions will be held strictly confidential and comments will not be traceable back to any individual in the final report. All participants will sign an informed consent form approved by my university's Institutional Research Board. This study has been approved by [Blockbridge]'s district leadership.

Our interview will be audio recorded for transcription purposes, and you will be provided a copy of the transcript to ensure accuracy. You can pass on any question or discontinue the interview at any time.

If you have any documents that would be useful for me to include as part of this study, you can give them to me during this session or email them to me later.

Do you have any questions?

<Offer the consent form to read and sign>

Thank you for agreeing to participate. Let's get started by telling me a little about your background.

What do you believe your role is in this school district with respect to the highly capable program?

Why do we have a highly capable program? What purpose does the highly capable program serve?

Please walk me through the process being used to identify students for the highly capable program. How does it work? Probe as needed on:

- Grade level differences (K-1, 2-5, 6-8, 9-12)
- Out of district families (homeschool/private)
- New to district students
- Universal screening vs. referrals
- Assessments used
- Qualification pathways/criteria
- Local norms
- Appeals process
- Communication to parents
- Communication to schools/teachers/principals

In your view, do we do a good job of identifying students for the highly capable program? Who do we miss? Are we qualifying too many kids? What would you change?

How well do the services that are currently being offered to highly capable students work? Probe on:

- Grade level differences (K-1, 2-5, 6-8, 9-12), elementary vs. middle
- Math-only vs. reading-only vs. dual qualified
- [ACCELERATED SELF-CONTAINED] vs. [MIDDLE SCHOOL ADVANCED CLASSES] vs. neighborhood school vs. alternative programs

How well does our highly capable program meet student's social and emotional needs?

Have schools implemented the HiCap program consistently? What differences exist across regions, buildings, or classrooms?

How do you think about twice-exceptional students: HiCap students who also have a disability such as autism, ADHD, or dyslexia? How do these students get identified for the HiCap program, how does their disability get identified, and how do these children get served in this district?

How have schools, principals, and teachers responded as more diverse students have entered the highly capable program?

What impacts have there been as the HiCap program has grown?

Which students' needs are NOT being met in our current system? Which students' needs are being met well? What do you think we could do to serve either specific groups or all students better?

What professional development has been offered about serving HiCap students?

What kind of training have you personally had in the needs of highly capable or other special needs students? Preservice, in-service, endorsement, conferences, clock hours, mentorship, etc.

How does the HiCap program affect the workings of the overall school district?

How is the HiCap program perceived by different people across the district? Administrators, principals, teachers, parents? How has that changed over the past 5 years?

What impacts has the HiCap program had on you as a district leader?

What surprises, learnings, or challenges have come up around the HiCap program?

What do you envision for next steps for the HiCap program in the coming years?

Appendix G: Interview Guide for Principals

Interview Guide for Principals

Research Questions:
1. What practices and procedures have been used to identify low-income students, English learners, and twice-exceptional students for Blockbridge's accelerated education program?
2. What factors are contributing to the increase in identification of twice-exceptional students at Blockbridge?
3. What beliefs and attitudes do teachers, principals, and administrators have about the identification and services provided to students identified for accelerated education services at Blockbridge?
4. How have principals and teachers responded as more diverse students have entered accelerated classrooms at Blockbridge?
5. What challenges in identification and service delivery at Blockbridge remain?

The goal of this study is to capture a comprehensive case study of [Blockbridge]'s highly capable (HiCap) program at this moment in time, including how the HiCap program impacts the greater school community, and how it has changed over the past 4 years. It is vitally important for this case study to reveal not only the positives but also the challenges. I hope to hear a wide variety of perspectives and will be talking with a variety of administrators, principals, and teachers across the district.

[Blockbridge] will be given a pseudonym in the final dissertation report and will be described only as a suburban school district in Washington state, and specific schools will not be named. Your contributions will be held strictly confidential and comments will not be traceable back to any individual in the final report. All participants will sign an informed consent form approved by my university's Institutional Research Board. This study has been approved by [Blockbridge]'s district leadership.

This interview will be audio recorded for transcription purposes. If you have any documents that you believe would be useful for me to include as part of this study, you can give them to me during this session or email them to me later.

Do you have any questions?

<Offer the consent form to read and sign>

Thank you for agreeing to participate. Let's get started by telling me a little about your background.

In your view, do we do a good job of identifying students for the highly capable program? Which kids do we miss? Are we qualifying too many kids? What would you change?

How does the highly capable screening process affect your school? What do students say about the screening process?

Now let's talk about services. In your view, do we do a good job providing services for highly capable students? What do we offer, it is appropriate, and how well does it work for students? Probe on:

Grade level differences (K-1, 2-5, 6-8, 9-12), elementary vs. middle

Math-only vs. reading-only vs. dual qualified

[ACCELERATED SELF-CONTAINED] vs. [MIDDLE SCHOOL ADVANCED CLASSES] vs. neighborhood school vs. alternative programs

Social/emotional learning

How well does the HiCap program address the social/emotional needs of highly capable students?

Have you ever had any twice-exceptional students in your school: HiCap students who also have a disability such as autism, ADHD, or dyslexia? Talk about your experiences working with 2e students.

What impacts have there been on your school as the HiCap program has grown and more diverse students have entered the highly capable program? How has instruction or classroom composition changed?

What kind of training have you or your school had in the needs of highly capable or other special needs students? Do you feel well prepared? Preservice, in-service, endorsement, conferences, clock hours, mentorship, etc.

Why do we have a highly capable program? What purpose does the highly capable program serve?

Which students' needs are NOT being met in our current system? Which students' needs are being met well? What do you think we could do to serve either specific groups or all students better?

How is the HiCap program perceived by different people in your school? Principals, teachers, parents? How has that changed over the past 5 years?

What other impacts has the HiCap program had on you as a leader, your students, or your school that we haven't discussed yet? Any surprises, learnings, or challenges?

What would you recommend for next steps for the HiCap program in the coming years?

Appendix H: Focus Group Guide for Teachers

Focus Group Guide for Teachers

Research Questions:
1. What practices and procedures have been used to identify low-income students, English learners, and twice-exceptional students for Blockbridge's accelerated education program?
2. What factors are contributing to the increase in identification of twice-exceptional students at Blockbridge?
3. What beliefs and attitudes do teachers, principals, and administrators have about the identification and services provided to students identified for accelerated education services at Blockbridge?
4. How have principals and teachers responded as more diverse students have entered accelerated classrooms at Blockbridge?
5. What challenges in identification and service delivery at Blockbridge remain?

The goal of this study is to capture a comprehensive case study of [Blockbridge]'s highly capable (HiCap) program at this moment in time, including how the HiCap program impacts the greater school community, and how it has changed over the past 5 years. It is vitally important for this case study to reveal not only the positives but also the challenges. I hope to hear a wide variety of perspectives and will be talking with a variety of administrators, principals, and teachers across the district.

[Blockbridge] will be given a pseudonym in the final dissertation report and will be described only as a suburban school district in Washington state, and specific schools will not be named. Your contributions will be held strictly confidential and comments will not be traceable back to any individual in the final report. All participants will sign an informed consent form approved by my university's Institutional Research Board. This study has been approved by [Blockbridge]'s district leadership.

This focus group will be audio recorded for transcription purposes. If you have any documents that you believe would be useful for me to include as part of this study, you can give them to me during this session or email them to me later.

Participants agree to treat comments made in the focus group environment confidentially, and to not repeat or share comments that are said in this room. Can you please give me a thumbs up to show your agreement to this important ground rule?

Do you have any questions?

<Offer the consent form to read and sign>

Thank you for agreeing to participate. Our goal for this focus group is to surface a wide variety of opinions to represent the breadth of experiences and perspectives at [Blockbridge]. Please don't make assumptions or try to speak about what others think or experience, but rather

speak from your own personal experience and be as candid as possible. If you disagree or have a different perspective from someone else, please share it. We are not trying to reach consensus or decide anything. My goal is a long list of ideas and responses about every question from many different perspectives. Each person will get a chance to answer each question, and we'll rotate who answers first. If you don't want to answer a question, you can say "pass."

Let's get started by having everyone say what grade level and type of classroom they teach, and how long they have been teaching that grade.

In your view, do we do a good job of identifying students for the highly capable program? Which kids do we miss? Are we qualifying too many kids? (Followup: What would you change?)

How does the highly capable screening process affect your classroom? What do students say about the screening process?

Now let's talk about services. Do you have any highly capable students in your classroom this year or in the past? How are they served? How well do those HiCap services work? Probe on:

> Grade level differences (K-1, 2-5, 6-8, 9-12), elementary vs. middle
>
> Math-only vs. reading-only vs. dual qualified
>
> [ACCELERATED SELF-CONTAINED] vs. [MIDDLE SCHOOL ADVANCED CLASSES] vs. neighborhood school vs. alternative programs

How well does [Blockbridge]'s HiCap program address the social/emotional needs of highly capable students?

Have you ever had any twice-exceptional students in your classroom: HiCap students who also have a disability such as autism, ADHD, or dyslexia? Talk about your experiences working with 2e students. Have you seen more 2e students identified as highly capable in the past few years?

What impacts have there been on your classroom as the HiCap program has grown and more diverse students have entered the highly capable program over the past 5 years? How has your teaching or classroom changed?

What kind of training have you had in the needs of highly capable or other special needs students? Do you feel well prepared and supported? Preservice, in-service, endorsement, conferences, clock hours, mentorship, etc.

Why do we have a highly capable program? What purpose does the highly capable program serve in [Blockbridge]?

What other impacts has the HiCap program had on you as a teacher, your students, or your school that we haven't discussed yet? Any surprises, learnings, or challenges?

What would you recommend for next steps for the HiCap program in the coming years?

Appendix I: Informed Consent Form for Interviews

Institutional Review Board for the Protection of Human Subjects

Statement of Informed Consent For Adult Participants

Title of Study: Beyond Universal Screening: Practices and Attitudes that Promote Equity in Identification for an Accelerated Program

Study Investigator(s): Austina De Bonte
Contact information: austina.debonte@bridges.edu, 425-[redacted]
Capstone Advisor: Dr. Matt Fugate **Email:** matt.fugate@bridges.edu

INTRODUCTION
You are being asked to be in a research study about the highly capable program at [Blockbridge] School District. This study is being conducted at [Blockbridge] School District. This study is being conducted by Austina De Bonte in the Doctoral Program at Bridges Graduate School of Cognitive Diversity in Education (BGS).

You were selected as a possible participant because you are a current or former superintendent, assistant superintendent, administrator, principal, assistant principal, or teacher in the [Blockbridge] school district who has had direct or indirect experience with this program.

The goal of the study is to capture a comprehensive case study of [Blockbridge]'s highly capable program at this moment in time, including how the program impacts the greater school community, and how that has changed over the past 4 years. It is vitally important for this study to record not only the positives but also the challenges. The study hopes to hear a wide variety of perspectives.

Please read this consent form and ask any questions you have before agreeing to be in the study.

PROCEDURES:
If you agree to be in this study, you will be asked to do the following:

You will participate in a 60-90-minute interview where you will be asked questions about how [Blockbridge]'s highly capable programs are administered and perceived by others. You can choose to "pass" on any question or discontinue the interview at any time. The interview will be audio recorded

using the automatic transcription software Rev and Otter in order to ensure accurate transcription. Transcripts will be stored under password protection.
You will be asked to identify and provide copies of any documents you are aware of and have access to that you believe may be relevant to the study (e.g. policy statements, procedures, parent information sheets, presentations). You may choose to not provide documents or select which documents to provide at your discretion.

COMPENSATION/INCENTIVES:
You will receive a gratuity for your participation. When the transcript is completed and provided for your review, participants will receive a gift card for a free ice cream cone at [Local Ice Cream Parlor] in [Town].

CONFIDENTIALITY:
The records of this interview will be kept private and your confidentiality will be protected. In any sort of report the researcher(s) might publish, no identifying information will be included. **Data in any reporting will be attributed only by general role (e.g. administrator, district leader) and will not identify individuals, titles, or school names.** [Blockbridge] will be given a pseudonym and will be identified only as a suburban school district in Washington state.

Research records will be stored securely and only the researcher(s) will have access to the records. All data will be kept on the researcher's password-protected laptop or in a locked filing cabinet in the researcher's home office. All study records, including audio tapes, transcripts, and signed consent forms, will be destroyed by shredding and/or deleting after 3 years. Audio recordings will be saved under password protection via Rev and Otter, will only be accessible to the researcher and her dissertation committee.

You will receive a copy of the interview transcript by email. The audio recording will be erased as soon as you approve the transcription, or a month later, whichever comes sooner. Your name and other information that can directly identify you will be deleted from the research data collected as part of the project.

It is possible that other people may need to see the information we collect about you. These people may include the Bridges Graduate School faculty advisor and doctoral committee.

RISKS/BENEFITS:
Subjects participating in this study encounter no more risks than occur in their everyday experiences. Breach of confidentiality is a risk common to all research. Safeguards will be used to minimize this risk as outlined in the confidentiality section.

There are no known direct benefits to you from participating in this study, though this study may help you learn about or reflect on our district's highly capable program in more detail. However, it is hoped that information gained from this study will help other school districts learn from our district's experiences.

VOLUNTARY NATURE OF THE STUDY:
Participation in this study is voluntary and requires your informed consent. Your decision whether or not to participate will not affect your current or future relations with Bridges Graduate School or [Blockbridge] School District. If you decide to participate, you are free to skip any question that is asked. You may also withdraw from this study at any time without penalty.

CONTACTS AND QUESTIONS:
The researcher conducting this study is Austina De Bonte. If you have questions, **you are encouraged** to contact the researcher at austina.debonte@bridges.edu or 425-[redacted].
The faculty advisor for this project is Dr. Matt Fugate, matt.fugate@bridges.edu, 832-[redacted].

STATEMENT OF CONSENT:
I am 18 years of age or older. I have read and understood the above information. I consent to participate in the study.

Print Name:_____

Signature:_____ Date: _____

I agree to be audiotaped ____ *Yes* ____*No*
Audio recording is greatly preferred for this interview. If you do not wish to be audiotaped, the interview may still occur but will need an additional 30 minutes of time in order for the researcher to take detailed notes, and you will not receive a full transcript of the interview.

Signature of Investigator:_____ Date: _____

Please keep the second copy of this informed consent for your records.

For more Information
gradschoolinfo@bridges.edu

Appendix J: Informed Consent Form for Focus Groups

Institutional Review Board for the Protection of Human Subjects

Statement of Informed Consent For Adult Participants

Title of Study: Beyond Universal Screening: Practices and Attitudes that Promote Equity in Identification for an Accelerated Program

Study Investigator(s): Austina De Bonte
Contact information: austina.debonte@bridges.edu, 425-[redacted]
Capstone Advisor: Dr. Matt Fugate **Email:** matt.fugate@bridges.edu

INTRODUCTION
You are being asked to be in a research study about the highly capable program at [Blockbridge] School District. This study is being conducted at [Blockbridge] School District by Austina De Bonte in the Doctoral Program at Bridges Graduate School of Cognitive Diversity in Education (BGS).

You were selected as a possible participant because you are a principal, assistant principal, or teacher in [Blockbridge] school district and you responded to a request for participation. If you are a teacher, you have been in a similar role at [Blockbridge] school district for the past 4 years.

The goal of the study is to capture a comprehensive case study of [Blockbridge]'s highly capable program at this moment in time, including how the program impacts the greater school community, and how that has changed over the past 4 years. It is vitally important for this study to record not only the positives but also the challenges. The study hopes to hear a wide variety of perspectives.

Please read this consent form and ask any questions you have before agreeing to be in the study.

PROCEDURES:
If you agree to be in this study, you will be asked to do the following:

You will participate in a 90-minute focus group where you will be asked questions about how [Blockbridge]'s highly capable programs have affected your school and/or classroom over the past four years. You can choose to "pass" on any question or leave the focus group at any time. The focus group will

be audio recorded using the automatic transcription software Rev and Otter in order to ensure accurate transcription. Transcripts will be stored under password protection.

You will be asked to identify and provide copies of any documents you are aware of and have access to that you believe may be relevant to the study (e.g. policy statements, procedures, parent information sheets, presentations). You may choose to not provide documents or select which documents to provide at your discretion.

COMPENSATION/INCENTIVES:
You will receive a gratuity for your participation. At the conclusion of the focus group, participants will receive a gift card for a free ice cream cone at [Local Ice Cream Parlor] in [Town].

CONFIDENTIALITY:
The records of this focus group will be kept private and your confidentiality will be protected. In any sort of report the researcher(s) might publish, no identifying information will be included. **Data in any reporting will be attributed only by general role (e.g. middle school principal, elementary accelerated program teacher) and will not identify individuals or school names.** [Blockbridge] will be given a pseudonym and will be identified only as a suburban school district in Washington state.

Please be advised that although the researchers will take every precaution to maintain confidentiality of the data, the nature of focus groups prevents the researchers from guaranteeing confidentiality. **The researcher would like to remind participants to respect the privacy of your fellow participants and not repeat what is said in the focus group to others.**

Research records will be stored securely and only the researcher(s) will have access to the records. All data will be kept on the researcher's password-protected laptop or in a locked filing cabinet in the researcher's home office. All study records, including audio tapes, transcripts, and consent forms, will be destroyed by shredding and/or deleting after 3 years. Audio recordings will be saved under password protection via Rev and Otter, will only be accessible to the researcher and her dissertation committee, and will be erased as soon as they are transcribed. Your name and other information that can directly identify you will be deleted from the research data collected as part of the project.

It is possible that other people may need to see the information we collect about you. These people may include the Bridges Graduate School faculty advisor and doctoral committee.

RISKS/BENEFITS:
A participant's statements during the focus group regarding their practices and beliefs might be heard by colleagues or repeated to superiors, which may have negative impact to their job. Subjects participating in this study encounter no more risks than occur in their everyday experiences. Breach of confidentiality is a risk common to all research. Safeguards will be used to minimize this risk as outlined in the confidentiality section, such as getting an oral commitment from all focus group participants to keep comments shared during the focus group session private and confidential.

There are no known direct benefits to you from participating in this study, though this study may help you learn about or reflect on our district's highly capable program in more detail. However, it is hoped that information gained from this study will help other school districts learn from our district's experiences.

VOLUNTARY NATURE OF THE STUDY:

Participation in this study is voluntary and requires your informed consent. Your decision whether or not to participate will not affect your current or future relations with Bridges Graduate School or [Blockbridge] School District. If you decide to participate, you are free to skip any question that is asked. You may also withdraw from this study at any time without penalty.

CONTACTS AND QUESTIONS:

The researcher conducting this study: Austina De Bonte. If you have questions, **you are encouraged** to contact the researcher at austina.debonte@bridges.edu or 425-[redacted].
The faculty advisor for this project is Dr. Matt Fugate, matt.fugate@bridges.edu, 832-[redacted].

STATEMENT OF CONSENT:

I am 18 years of age or older. I have read and understood the above information. I consent to participate in the study.

Print Name:_____

Signature:_____ Date: _____

I agree to be audiotaped ____ *Yes* ____*No*
Audio recording is necessary for this study. If you do not wish to be audiotaped, you cannot participate in this study.

Signature of Investigator:_____ Date: _____

Please keep the second copy of this informed consent for your records.

Appendix K: Curriculum Vitae

Austina De Bonte

austina@smartisnoteasy.com (for hire)
austina.debonte@bridges.edu (academia)
community@nwgca.org (volunteer)

POSITIONS

Consultant, Smart is not Easy, LLC, www.smartisnoteasy.com (2017 – present)
Private consultant for school district teams, professional development for educators, parent education, and individual parent consulting. UBI: 604-172-702 EIN: 82-2801469

President, WA Coalition for Gifted Education, www.wacoalition.com (2021 – present)
WA statewide organization for legislative advocacy. Member since 2015.

Past President, NW Gifted Child Association (NWGCA), www.nwgca.org (2010 – present)
WA statewide non-profit organization for families with gifted children. Membership of 4,000+ families. Board member from 2010. President from 2012-2021. Currently serving as Past President.

Member, WA State OSPI Highly Capable Advisory Committee (2017 – present)
Advising the WA state superintendent of public instruction on matters relating to highly capable programs.

Member, NAGC Public Policy and Advocacy Committee, www.nagc.org (2023 – present)
Member of national advocacy committee on the topic of gifted education policy.

Facilitator, SENG Model Parent Discussion Groups (2013 – present)
Facilitating parent discussion groups for families with gifted or 2e students.

Advisor/Partner, The G Word Film, www.thegwordfilm.com (2017 – present)
Member of advisory board to groundbreaking documentary about gifted individuals, equity, and neurodiversity.

Member, NAGC Parent Editorial Content & Advisory Board, www.nagc.org (2016 – 2019)
Reviewing articles for publication in the Parenting for High Potential Magazine, as well as authoring content.

AWARDS

Carolyn Callahan Doctoral Student Award, November 2023 (National Association of Gifted Children)
People to Watch, Fall 2020 (Variations 2e Magazine)
Advocacy Award, October 2019 (Washington Association of Educators of Talented and Gifted)
PTA Outstanding Advocate Award, June 2018
PTA Outstanding Advocate Award, June 2017
PTA Outstanding Advocate Award, June 2015

SPEAKING ENGAGEMENTS FOR COMMUNITY AUDIENCES *Dates before 2016 available upon request*

April 2024: Edmonds School District
January 2024: Bear Creek Campus PTSA
November 2023: Shoreline School District
November 2023: Mount Vernon School District
November 2023: Seabury School, Tacoma
Jan 2023: Lake Washington GEAC (online)
Oct 2022: Equity in HiCap Week (online)
Sept 2022: Inst. for Ed. Advancement (online)
Sept 2022: Seattle Homeschoolers (online)
May 2022: Sumner-Bonney Lake SD
May 2022: Arc of King County (online)
February 2022: Bellingham SD (online)
February 2022: Kent SD (online)
May 2021: Feynman School, MD (online)
January 2021: MIT Club of Wash DC (online)
January 2021: Edmonds CP Assoc. (online)
December 2020: MIT '98 Reunion (online)
November 2020: Bellingham Schools (online)
October 2020: Blaine School District (online)
January 2020: Central Kitsap School District
November 2019: MIT Splash Parent Program
November 2019: Seabury School, Tacoma
October 2019: Edmonds Challenge Parents Assoc.
May 2019: Sumner School District
March 2019: Shoreline School District
January 2019: Edmonds School District
December 2108: Seattle Schools, Thornton Elem
October 2018: Riverview SD, Carnation
October 2018: Marysville School District
April 2018: International School, Kirkland
April 2018: Seabury School, Tacoma
March 2018: Snohomish Public Library
January 2018: Camas School District
November 2017: Lake Washington School District
November 2017: BK Play Academy (Bellevue)
November 2017: Northshore School District
October 2017: Shoreline School District
October 2017: Leavenworth School District
September 2017: Mount Vernon School District
May 2017: Federal Way School District
March 2017: Seabury School in Tacoma
February 2017: Highline School District
January 2017: Edmonds School District
November 2016: Renton School District
October 2016: Northshore School District
October 2016: Mount Vernon School District
October 2016: Kelso School District
October 2016: Bear Creek Elementary PTA
October 2016: Lake Washington School District
October 2016: Shoreline School District
June 2016: Highline School District
May 2016: Lynden School District
April 2016: Centered in Wellness, Kirkland
April 2016: Mukilteo School District
March 2016: Issaquah School District
January 2016: Lake Stevens School District
January 2016: Mount Vernon School District

PROFESSIONAL DEVELOPMENT FOR EDUCATORS

November 2023: Battle Ground School District, 2-hour PD session

February 2023: WAETAG Monthly Webinar, Getting to the Root of 2E: Beyond the Usual Suspects

December 2022: North Carolina Association for Gifted & Talented, Talent Unleashed, invited session, One School District's 6-Year Equity Journey with Universal Screening and Local Norms

May 2022: Sumner/Bonney Lake School District, 2-hour PD session, Smart is not Easy – What Research Says about Highly Capable Learners

January 2022: North Carolina Association of the Gifted and Talented, Talent Unleashed, invited session, One School District's 5-Year Equity Journey with Universal Screening and Local Norms

September/October 2021: 4-Session PD series for Monroe & Sultan School Districts, Smart is not Easy – What Research Says about Highly Capable Learners

March 2020: Rehab Seminars, Full day PD in Seattle, WA, Smart is not Easy – What Research Says about Highly Capable Learners

March 2020: Blaine School District, Half day consult, Program models & equitable identification strategies

February 2020: NW ESD 189 (Anacortes), Full day PD for Hi-Cap Cooperative (Districts across the ESD)

January 2020: Northshore School District, 1-hour PD for Canyon Park Middle School, all staff

January 2020: Central Kitsap School District, 2-hour PD session, Parent evening presentation

January 2020: Lynden School District
- 3-hour PD for HiCap specialists
- 1.5-hour PD for superintendent leadership team
- Parent evening presentation

November 2019: Multicare Behavioral Health, Puyallup, PD session

October 2019: Shoreline School District, Presentation and consult with HiCap Committee

August 2019: Central Kitsap School District, Three 90-minute PD sessions

June 2019: Central Kitsap School District, Two 3-hour PD sessions

May 2019: Sumner School District, 2-hour PD session

January 2019: NW ESD 189 (Anacortes), Full day PD for Hi-Cap Cooperative (Districts across the ESD)

January 2019: Arlington School District
3-hour PD, all elementary staff
2-hour consult, HiCap Committee

December 2018 – February 2019: Central Kitsap School District, Multiple site visits, phone consultation, data analysis for administrators & HiCap Committee

August 2018: Mount Vernon School District, 1.5 hour PD session, LaVenture middle school staff

August 2018: Kent School District, Full day PD for all school counselors

February 2018: ESD 113 (Olympia/Tumwater), 3-hour PD session

January 2018: Camas School District, 2-hour PD session for all staff

January 2018: Shoreline School District, 2-hour PD session for elementary staff

January 2018: Burlington-Edison School District, 2-hour PD session, district offices

October 2017: NW ESD 189 (Anacortes), 3-hour keynote presenter, plus breakout session
What Educators and Administrators Need to Know About Smart Kids
Peeling the Onion: Equity in Highly Capable (HiCap)

October 2017: Leavenworth School District, 2-hour PD for all staff, Cascade School District

September 2017: Mount Vernon School District, PD for elementary and middle cluster group teachers

August 2017: Mount Vernon School District, PD for Jefferson Elementary, all staff

June 2107: Seattle School Board, presentation on Equity in HiCap for school board study session

March 2017: Mount Vernon School District, 3-hour PD session for Elementary PD Day

March 2017: Lake Stevens School District, 2-hour PD session for Lake Stevens Middle School, all staff

January 2017: Federal Way School District, 2-hour PD session for Highly Capable staff

October 2016: Leota Junior High School, Science Department

August 2016: Lake Stevens School District, 3-Hour PD session for Highly Capable staff

March 2016: King County Juvenile Court, 2-hour PD session for King County truancy officers

January 2016: Madison Middle School, PD session Madison Middle School, all staff

CONFERENCE PRESENTATIONS GIVEN

February 2024: University of Denver 2024 Gifted Education Policy Symposium and Conference (online), The Devil is in the Details: Mandating Universal Screening (w/Dr. Nancy Hertzog)

February 2024: Gift-a-Palooza 2024, Breakout presenter (online), It's Probably Not (Just) ADHD: Teasing Apart APD, VPD, ADHD, and Stealth Dyslexia (w/Dr. Megan Locke & Dr. Hilary Wisdom)

October 2023: WAETAG 2023, Breakout presenter (Bellevue, WA), Getting Students Writing – How to Support Twice-Exceptional Students and Other Reluctant Writers

July 2023: SENG 2023 Conference, Breakout presenter (Philadelphia, PA), Getting Students Writing – How to Support Twice-Exceptional Students and Other Reluctant Writers

February 2023: William & Mary 2e 23 Conference (online), Getting Students Writing – How to Support Twice-Exceptional Students and Other Reluctant Writers

February 2023: Gift-a-Palooza (online), Getting to the Root of 2E: Beyond the Usual Suspects

November 2022: NAGC 2022 Conference, Full concurrent sessions (Indianapolis, IN), One School District's 6-Year Equity Journey with Universal Screening and Local Norms, I Think This Student is 2e, But Now What? Getting to the Root Causes of Twice-Exceptionality, Drilling Down on Universal Screening and Local Norms (invited panel)

October 2022: WAETAG 2022 Breakout presenter x2 (Bellevue, WA)

October 2021: WA Coalition for Gifted Education, Benefit Event, Keynote presenter (online)

July 2021: World Council for Gifted and Talented Children, 2021 Virtual World Conference (online)

June 2020: NWGCA Webinar, Keynote presenter (Online)

April 2020: NWGCA Webinar, Keynote presenter (Online)

March 2020: Rehab Seminars, Full Day Seminar presenter (Seattle, WA)

February 2020: Whitworth University Gifted Education Institute, Breakout presenter (Spokane, WA)

May 2019: SENG Regional Conference, Breakout presenter (Olympia, WA)

March 2019: WA School Counselor's Association, Breakout presenter (Seattle, WA)

December 2018: NW ESD Social Emotional Learning Summit, Breakout presenter (Anacortes, WA)

November 2018: SENGinar Series, Webinar presenter (Online) – sold out!

November 2018: National Association for Gifted Children, Full concurrent session (Minneapolis, MN)

October 2018: WAETAG 2018 Conference, Breakout presenter x2

July 2018: Supporting the Emotional Needs of the Gifted (SENG), Breakout presenter (San Diego, CA)

March 2018: WA School Counselor's Association, Breakout presenter (Seattle, WA)

November 2017: National Association for Gifted Children (NAGC), Full concurrent session (Charlotte, NC)

October 2017: WAETAG 2017 Conference, Breakout presenter x2 (Tacoma, WA)

August 2017: Supporting the Emotional Needs of the Gifted (SENG), Breakout presenter (Naperville, IL)

April 2017: WA State PTA Convention, Breakout presenter (Seatac, WA)

November 2016: NAGC 2016 Conference, Full concurrent session (Orlando, FL)

November 2016: NW Gifted Child Association (NWGCA) Workshop, (Washougal/Vancouver, WA), Keynote speaker

October 2016: Washington Association of Educators of the Talented and Gifted (WAETAG) 2016 Conference, Breakout presenter (Tacoma, WA)

October 2016: Oregon Association for Talented and Gifted (OATAG) 2016 Conference, Breakout presenter (Portland, OR)

October 2015, WAETAG 2015 Conference, Breakout presenter (Tacoma, WA)

November 2014, NWGCA Regional Workshop, Keynote speaker ([Town], WA)

October 2014, WAETAG 2014 Conference, Breakout presenter (Tacoma, WA)

March 2014, NWGCA Connections Conference 2014, Breakout presenter (Seattle, WA)

November 2013, NWGCA Regional Workshop, Keynote speaker ([Town], WA)

February 2013, NWGCA Connections Conference 2013, Breakout presenter (Puyallup, WA)

PUBLICATIONS

De Bonte, A., McCaffrey, C. A., Wisdom, H. K., Locke, M. E., Torgerson, N. G., & Lucero, T. (2024). Auditory Processing Disorders and Vision Processing Disorders in Twice-Exceptionality (2e): Are These Foundational Factors Being Overlooked? Journal for the Education of the Gifted, 47(1), 30-53. https://doi.org/10.1177/01623532231214568

De Bonte, A. (2022). Case seminar: A model for improving complex 2e diagnosis.

(Contributor) Open letter to California Department of Education. (2021). https://docs.google.com/document/d/19pOJZf8CrRe084tSBMyGpzY4WynsLXSwEtKzZMxnWNA/mobilebasic?mibextid=Zxz2cZ&usp=gmail

De Bonte, A. (2020). Accelerated learning and enhanced instruction. http://tinyurl.com/acceleratedinstruction

(Featured in) The G Word. (2020). Highly Capable [video]. https://vimeo.com/414816589

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EDUCATION

M.Eng., S.B., Massachusetts Institute of Technology (MIT), 1998
Masters thesis completed in the MIT Media Lab, Epistemology and Learning Group, on the topic of constructionist learning environments for elementary age students to learn computer programming.
Thesis advisor: Dr. Mitchell Resnick, Mentor: Dr. Amy Bruckman

Ed.D., Bridges Graduate School of Cognitive Diversity in Education, 2024
Certificate in Twice-Exceptional Education, 2022
Doctor of Education, expected graduation June 2024
Doctoral student in Ed.D. program, with a concentration in Educational Leadership.
Focus areas: Equitable identification, Twice-exceptional students.
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BIO

Austina De Bonte is a consultant, speaker, coach, and advocate for gifted and twice-exceptional students with Smart is not Easy, LLC (smartisnoteasy.com). She is also President of the WA Coalition for Gifted Education (wacoalition.com), Past President of NW Gifted Child Association (nwgca.org), member of the NAGC Public Policy and Advocacy Committee (nagc.org), and Advisor to The G Word documentary (thegwordfilm.com). A dynamic and engaging presenter, Austina speaks regularly at regional and national conferences, as well as conducts professional development workshops for educators, and provides consulting for individual families. She works with school district teams to develop and fine-tune their program models, especially concerning equitable identification strategies. Her signature style combines her experience as a student, parent, and family consultant along with synthesized research, current district practices, and cutting-edge neuroscience. She has particular passion for supporting gifted and twice-exceptional students in public schools and helping families get to the root causes of their child's challenges, looking beyond the usual suspects. She received the NAGC Carolyn Callahan Doctoral Student Award (2023), People to Watch by Variations 2e Magazine (2020), WAETAG Advocacy Award (2019), and has won three PTA Outstanding Advocate awards. She has a Masters degree from MIT and is a doctoral candidate at The Bridges Graduate School of Cognitive Diversity in Education. Contact Austina at austina@smartisnoteasy.com