#### **BEYOND UNIVERSAL SCREENING:**

# PRACTICES AND ATTITUDES THAT PROMOTE EQUITY IN IDENTIFICATION FOR AN ACCELERATED PROGRAM

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## Agenda

- Study overview
- Literature Review
- Methodology
- Findings & Key Highlights
- New Contributions to the Research Literature
- Confirming Existing Research
- Surprises & Counterpoints
- Future Research



### Rationale

- Many gifted students are never identified (Gentry et al., 2019, pp. 4-5)
  - 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
  - 59-72% of Native Hawaiian/Pacific Islander students
  - 29-42% of White students
  - 20-26% of Asian students
- Also under-identified are low-income students (Grissom et al., 2019;
  Ricciardi et al., 2020; Yaluma & Tyner, 2018, 2020), English learners (Coronado & Lewis, 2017), and twice-exceptional students (Peters et al., 2019)

"It is an individual heartbreak—but it is also a societal tragedy" (Coleman & Shah-Coltrane, 2015, p. 71)



### Problem Statement

Best practices for equitable identification exist

- Universal screening (Card & Guiliano, 2016)
- Local norms (Peters et al., 2021; Peters, Rambo-Hernandez et al., 2019; Peters, Gentry, et al., 2019; Peters & Engerrand, 2016)
- Multiple measures/pathways (Cao et al., 2017; McBee et al., 2014)
- Combination rules (Lakin, 2018; McBee et al., 2014)
- Rating scales (Greathouse et al., 2015)
- Professional development (Rinn et al, 2020)

However, few studies use these practices in combination in real situations.

Districts can't always replicate good results.



## Qualitative Descriptive Case Study

- "Blockbridge" a pseudonym
  - Suburban School District in Washington State
  - District initiative for equitable identification since 2016
- Washington State context
  - All school districts must offer a "highly capable program" for grades K-12
  - Districts must provide "accelerated learning and enhanced instruction" for identified HiCap students

aka "HiCap"



## Purpose

Describe the practices and attitudes used in Blockbridge school district

to equitably identify

low-income students, multilingual learners, and twice-exceptional students

for an accelerated education program



### Research Questions

- 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?



## Literature Review

#### **Definitions of Giftedness**

#### **Twice-Exceptionality**

#### Underrepresentation

Variance Between Schools, Rural Issues, Low-Income, Multilingual, Bias in Teacher Referrals; Prejudice, Deficit Thinking and Stereotype Threat; Stereotypes about Gifted Students, Excellence Gaps, Range in Achievement Levels

#### **Gifted Identification**

History, Assessments, Universal Screening, Local Norms, Multiple Measures, Equity-Informed Practices, Alignment to Services, Space Constraints

#### **Gifted Education**

Purpose, Service Models, Acceleration, Ability Grouping, Self-Contained Classrooms, Curriculum, Perceptions and Attitudes, School Leadership, Professional Development

## Theoretical Framework

## Educational Equity Theory

(Brookover & Lezotte, 1981)

#### **Equity of Access**

"equal access to facilities and services" (p. 66)

"barriers to access have been removed" (p. 66)

### **Equity of Participation**

"programs conform to the equal participation standard." (p. 68)

### **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)

## Methodology

- Qualitative descriptive case study (Stake, 1995)
- Interviews & focus groups
  - 60-90 minutes, most in person, two interviews via Zoom
  - Audio recorded/transcribed (Otter & Rev); human checked
  - Member checks for interviews
- Document analysis
  - Washington state statistical data
  - District-provided statistical data
  - District website
  - District-provided historical documentation
  - Advisory team meeting minutes
  - Parent group meeting minutes
- Open coding to generate themes
  - Coding interviews, recursive, grouping into themes, annotating documents, consolidating
  - MaxQDA software



## Four Participant Types

- District Leaders (8)
  - Individual interviews
- Program Administrators (3)
  - Individual interviews
- Principals (2)
  - Individual interviews
- Teachers (15)
  - 3 focus groups, plus one interview
  - Self-Contained Accelerated, General Education, Hybrid



### **Ethics**

- All participants signed an informed consent form
- IRB application approved in January 2023
- School district given a pseudonym, and identified only as a suburban district in WA state
- School district identifying info rounded/approximated to prevent inadvertently identifying the district
- All data and verbatim comments reported by role type only i.e. district leader, program administrator, principal, teacher, not by an individual role or title



## Positionality

- I have a long history of advocacy in Blockbridge
- Parent to two gifted/2e students at Blockbridge
- I come from an immigrant family
  - I was an English learner in Kindergarten
  - I was identified for public school gifted programming in Kindergarten despite my diverse status
  - I experienced being "othered" and bullied



## FINDINGS

#### Limitations

Case Study, n=1

Only 2 principals participated

All statistics reported as provided by Blockbridge or WA state (no p values or statistical analysis)

My long history of involvement with Blockbridge

### Themes

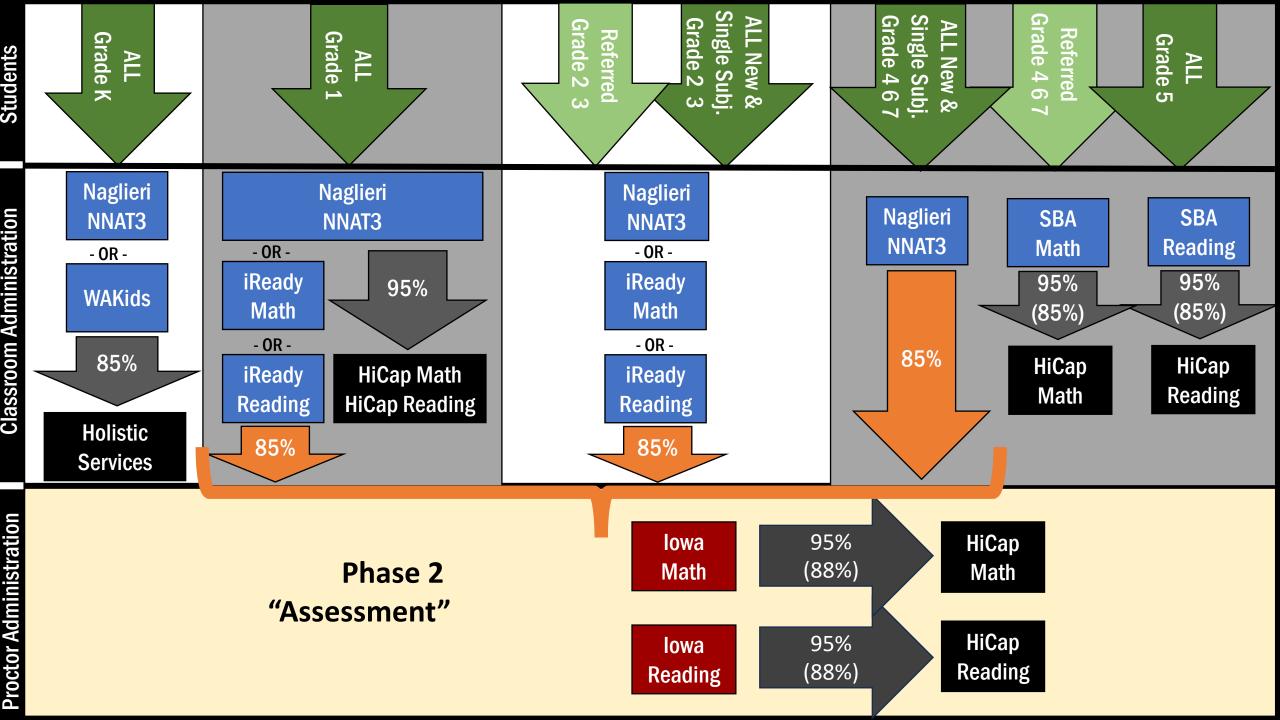
- A. Identification featured universal screening; static, group-based local norms; and OR-rules with multiple pathways
- B. Services featured math acceleration and self-contained classrooms with high variability in service levels and models
- C. Professional development was scarce and optional; individuals 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
- H. Despite a broad desire to meet every student's individual needs, many questions arose on how to accomplish that goal



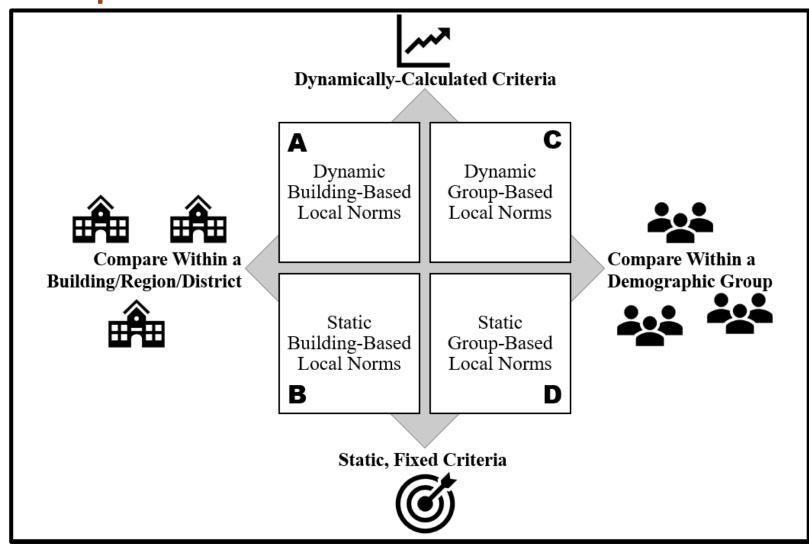
## A: Identification featured universal screening; static, group-based local norms; and OR-rules with multiple pathways

	Number of	Coded	Supporting
Sub-Theme	Participants	Segments	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





### Proposed Nomenclature for Local Norms



Four primary types of local norms can yield very different results in different situations.

What do we actually mean when we tell districts to "use local norms?"

Need more precise language in research and guidance.

## B: Services featured math acceleration and self-contained classrooms with high variability in service levels and models

	Number of	Coded	Supporting
Sub-Theme	Participants	Segments	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



## Blockbridge Service Models

- Kindergarten & 1st Grade
  - Holistic services, differentiation in neighborhood classroom
- Grades 2-5
  - **Differentiation** in neighborhood classroom (40%)
    - Students who qualify in HiCap Math OR HiCap Reading
    - Students who choose not to change schools
    - Online math or walk-to-math in grade 4 & 5 (and sometimes earlier)
  - Accelerated self-contained classrooms (60%)
    - In more than half of elementary schools
    - Students who qualify in HiCap Math AND HiCap Reading
    - Instances of "backfilling" single-subject students in self-contained classrooms
    - Reading/ELA accelerated 1 grade level
    - Math accelerated 2-3 grade levels (algebra in 6<sup>th</sup> grade)



## Blockbridge Service Models

- Kindergarten & 1st Grade
  - Holistic services, differentiation in neighborhood classroom
- Grades 2-5
  - **Differentiation** in neighborhood classroom (40%)
  - Accelerated self-contained classrooms (60%)
- Grades 6-8
  - Accelerated sections for core academic subjects in all middle schools
    - Math-qualified → Accelerated math, science
    - Reading-qualified 
      Accelerated ELA, social studies



## C: Professional development was scarce and optional; individuals relied heavily on their personal experience

	Number of	Coded	Supporting
Sub-Theme	Participants	Segments	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></none>



"...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." – District Leader

"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." —Teacher

"...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." – District Leader



## D: Equitable representation improved significantly in many ways but disproportionality remained

	Number of	Coded	Supporting
Sub-Theme	Participants	Segments	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



			[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)	129²	99ª	99	62	389
Newly identified in 2019-20 (universal screening K, 1, 5; local norms for FRL & ML; ORcriteria; 1st grade NNAT3-only)	58	73	80	181 <sup>b</sup>	392
Newly identified in 2020-21 (same protocol, due to pandemic some testing conducted online & ML status self-reported)	63	58	68	244 <sup>c</sup>	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

## HiCap Identification of Special Populations

Annual identification of students in these groups:

- Section 504
- Special Education (IEP)
- Low-Income (FRL)
- Multilingual (ML/ELL)

#### **Between 2015 and 2023**

- 16x growth in identification of special populations (29 -> 463)
- 4x overall program growth
   (7% -> 28% of students identified as
   HiCap district-wide)

#### 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

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

#### First Grade

Proportional HiCap identification for Active Multilingual and Section 504 students

Other groups still disproportional.

#### **District Wide**

Proportional HiCap identification in EVER multilingual and Section 504 students



	Representation Rep		lockbridge presentation lex (2021-22)	
American Indian/ Alaskan Native	.29		.61	
Black/ African American	.26		.40	
Hispanic/Latino of any race(s)	.26		.36	
Native Hawaiian/ Other Pacific Islander	.37		.31	
Two or More Races	.89		.91	
White	.74		.87	
Asian	2.93		1.69	

Historically underrepresented racial/ethnic groups disproportional, but somewhat higher indexes.

Two or More Races and White indexes proportional.

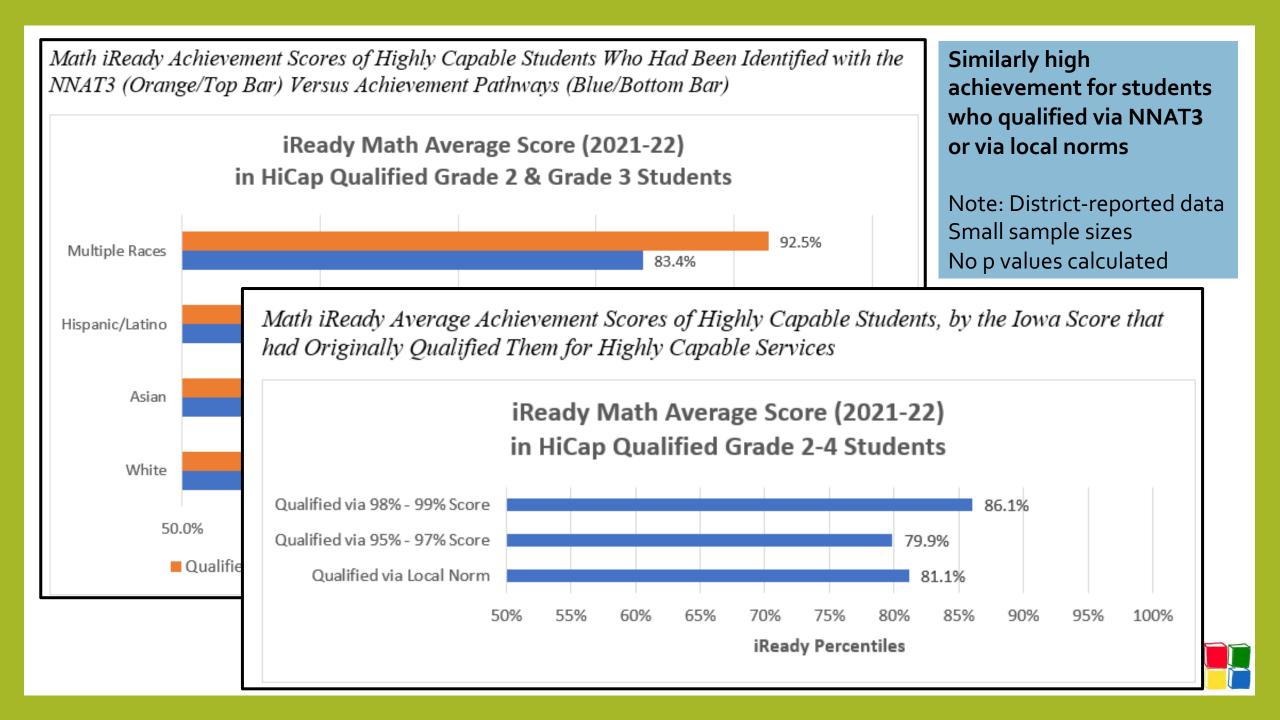
Asian decreased.



## E: Identified students were achieving at high levels regardless of identification criteria used

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





## F: The change was driven top-down; team was empowered and felt a moral imperative

	Number of	Coded	Supporting
Sub-Theme	Participants	Segments	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



"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...that the system has to spin out of, otherwise it gets sucked back to what it always did." – District Leader

"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." – Advisory Team Meeting Minutes

"...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." – Program Administrator

"...this is around an equity move to include students...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." – District Leader

## G: Debates about overidentification surfaced differing definitions of highly capable

	Number of	Coded	Supporting
Sub-Theme	Participants	Segments	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



- "There's some disbelief that there's that many kids that actually, quote unquote, are highly capable." District Leader
- "...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." –Teacher
  - "...there are some who really get it...they actually see that there's potential in kids that they didn't see potential in before." District Leader
- "...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" Teacher
- "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." Teacher
  - "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." District Leader



## H: Despite a broad desire to meet every student's individual needs, many questions arose on how to accomplish that goal

	Number of	Coded	Supporting
Sub-Theme	Participants	Segments	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></none>



"We have to do right by our students.

This is one of the ways that we are serving each and every child"—District Leader

"If these kids are not challenged, they don't develop grit. "-Program Administrator

"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." —District Leader

"...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."—District Leader

"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."—Teacher



"...if you're moving us towards inclusion in special education, then why aren't we including highly capable kids as well?" –District Leader

"You're taking all of the good kids, you take all of the smart kids. We have nothing to work with now." –Teacher

"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." –District Leader

"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." –District Leader

"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?" —Teacher



#### New Contributions to the Research Literature

- Universal screening on its own may not improve equity
- Combining multiple approaches can yield bigger equity results
- OR-rules may be the key to identifying 2e students
- Proposed nomenclature for 4 types of local norms
- Value of static, group-based norms for targeting OTL in non-racial groups
- Top-down leadership can instigate successful change
- Need for "just right learning levels" nomenclature (students & adults)
- Purpose of gifted programs: to build resilience in advanced students
- Equitable identification practices -> massive program growth?



### Confirming Existing Research

- Many more students are ready for acceleration (Firmender et al., 2013; Pedersen et al., 2023; Peters et al., 2017)
- Missingness in all demographics, including White and Asian (Gentry et al., 2019)
- Still not fully proportional in all categories (Peters, 2022)
- Easier to find 2e students by identifying as gifted first and placing in accelerated programming (Foley-Nicpon & Cederberg, 2015; Rogers, 2011)
- "Baking a bigger pie" to serve more students (Peters, Carter, & Plucker, 2020)
- Teacher attitudes toward gifted/2e under-informed and widely variable, more PD desperately needed (Carman, 2011; Haworth, 2020; Kaya, 2015; McCoach & Siegle, 2007; Moon & Brighton, 2008; Russell, 2017)



#### Surprises & Counterpoints

- SO MUCH PROGRAM GROWTH (and implications)
- Blockbridge unaware/disbelieving of the significance of their work
  - Because they didn't achieve full proportionality?
- Twice exceptional recognized! (but not fully understood)
- Results were achieved with objective measures only
  - No teacher feedback, rating scales, creativity, non-academic measures
  - Cheaper/easier to scale & more perceived fairness
- Student achievement high even when identified via local norms or NNAT3
  - NNAT3 may be an equivalent/better predictor of future achievement (!)



#### Future Research

- Replicate this combination approach with OR-rules in other districts
- Study students identified via NNAT3 and local norms with formal statistical analysis, and more longitudinal data
- Which types of local norms work best for what situations
- Impacts of test prep on equitable identification, how to make assessments more resistant to test prep impacts
- Impact of online vs. paper testing on identifying 2e students
- Incidence of 2e in HiCap identified students, with 504/IEP versus not
- How to provide acceleration to large numbers of students in public school
- So many more...



Instagram @kuso.kame.gunso

## THANK YOU

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