

2022

An Exploration of Principal Leadership Practices to Support Gifted and Talented Programming and Academic Performance

Tiffany Deneen Williams
Walden University

Follow this and additional works at: <https://scholarworks.waldenu.edu/dissertations>



Part of the [Educational Administration and Supervision Commons](#)

This Dissertation is brought to you for free and open access by the Walden Dissertations and Doctoral Studies Collection at ScholarWorks. It has been accepted for inclusion in Walden Dissertations and Doctoral Studies by an authorized administrator of ScholarWorks. For more information, please contact ScholarWorks@waldenu.edu.

Walden University

College of Education

This is to certify that the doctoral study by

Tiffany Deneen Williams

has been found to be complete and satisfactory in all respects,
and that any and all revisions required by
the review committee have been made.

Review Committee

Dr. Mary Kropiewnicki, Committee Chairperson, Education Faculty

Dr. Emily Green, Committee Member, Education Faculty

Dr. Sydney Parent, University Reviewer, Education Faculty

Chief Academic Officer and Provost
Sue Subocz, Ph.D.

Walden University
2022

Abstract

An Exploration of Principal Leadership Practices to Support Gifted and Talented

Programming and Academic Performance

by

Tiffany Deneen Williams

MA, Prairie View A & M University, 2007

MA, Houston Baptist University, 2003

BS, University of Houston, 2000

Dissertation Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Education

Walden University

October 2022

Abstract

The purpose of this qualitative multiple case study was to explore how elementary and middle school principals perceive their leadership to address the decline in the academic performance of gifted and talented students in their transition from elementary to middle school, addressing a gap in the literature. Transformational leadership served as the conceptual framework to inform the data collection and analysis. The three research questions focused on elementary and middle school principals' perceptions of their experiences with gifted and talented education, their perceptions of the decline in gifted and talented student academic performance, and their perceived leadership practices to address the decline in academic performance. This multiple case study examined cases of six elementary principals and four middle school principals. The selection criteria consisted of having 1 year of experience as a principal and at least a 3% gifted and talented enrollment in the school. A cross-case synthesis was conducted and revealed that although both elementary and middle school principals implemented transformational leadership practices to support the academic performance of gifted and talented students in their transition from elementary to middle school, there were patterns of similarity and patterns of difference between the two cases. Elementary principals implemented more transformational leadership practices than middle school principals. Positive social change is achieved through the identification of principal leadership practices to support gifted and talented students to be able to experience success and make contributions to their communities.

An Exploration of Principal Leadership Practices to Support Gifted and Talented
Programming and Academic Performance

by

Tiffany Deneen Williams

MA, Prairie View A & M University, 2007

MA, Houston Baptist University, 2003

BS, University of Houston, 2000

Dissertation Submitted in Partial Fulfillment
of the Requirements for the Degree of
Doctor of Education

Walden University

October 2022

Dedication

Completing this masterpiece would not have been possible without the unconditional love, patience, sense of humor, and unwavering support of my accountability partner and superhero husband, Billy Dean Williams Jr.

I am grateful for my guardian angels who protected and guided me on this research journey: Charles E. Jackson Sr., Ella Mae Carter, Billy D. Williams Sr., Elaine Williams, and Derrick Nash Taylor. I miss you, I love you, and I hope I made you proud!

Acknowledgements

I praise God for my unique gifts and talents that allowed me to express my creativity and wisdom through this work of art.

I am exceedingly appreciative of my doctoral chair, Dr. Mary Kropiewnicki for the commitment and the immense knowledge, resources, time, and immediate feedback you provided me throughout this journey. Your contribution to my research study is priceless! I would also like to express gratitude to my committee member, Dr. Emily Green for your insightful feedback and encouragement during each phase of my doctoral study. Also, to my executive coach, Keniq Coney, I acknowledge you for your insight and for leading me to create pathways for success.

I am forever grateful for the contributions of the principal participants included in this research study. Your voice has an impact on gifted and talented education and on my growth as an emergent researcher.

Thank you to my first student, Raisa Andrea Andrews for your presence during every step of my professional career.

Special thanks to my loving family: Mother, Benita Davis; Grandmother, Juanita Jackson; Aunt, Mildred Davis; Uncles Barry Davis and Charles E. Jackson, Jr.; Sister-in-Law Dr. Alecia Williams; and my two favorite Brothers Bryan Davis and Donovan Darby. I am a better person because of the love and support you pour into me!

Table of Contents

List of Tables	v
Chapter 1: Introduction to the Study	1
Background.....	3
Problem Statement.....	6
Purpose of the Study.....	8
Research Questions	9
Conceptual Framework	10
Nature of the Study.....	11
Definitions	13
Assumptions	14
Scope and Delimitations.....	14
Limitations.....	15
Significance	17
Summary.....	18
Chapter 2: Literature Review	20
Literature Search Strategy	21
Conceptual Framework	22
Literature Review Related to Key Concepts	28
Transformational Leadership Contributions in the Education Context.....	28
Federal Role in Conceptualizing Gifted and Talented Education	35
National Advocacy for Conceptualizing Gifted and Talented Education	38
Gifted and Talented Assessment and Identification Practices.....	39

National Gifted and Talented Standards and Evidence-Based Practices	41
National Gifted and Talented Programming Standards Implementation	43
Gifted and Talented Professional Development Requirements.....	46
Gifted and Talented Professional Development Implementation Practices	48
The Elementary to Middle School Transition	54
Gifted and Talented Academic Underachievement.....	57
Principal Leadership Effectiveness	63
Principal Leadership Practices and Gifted and Talented Education.....	65
Summary and Conclusions	69
Chapter 3: Research Method	71
Research Design and Rationale	71
Role of the Researcher.....	73
Methodology.....	74
Participant Selection.....	75
Instrumentation.....	76
Procedures for Recruitment, Participation, and Data Collection.....	78
Data Analysis Plan	80
Trustworthiness	83
Ethical Procedures	86
Summary.....	88
Chapter 4: Results.....	89
Setting.....	90
Data Collection.....	95

Semistructured Interviews	95
Campus Improvement Plans	96
Data Analysis.....	97
Data Analysis Process	97
Results	101
Elementary Principal Case Study	102
Middle School Principal Case Study	123
Evidence of Trustworthiness	137
Credibility.....	137
Transferability	138
Dependability	139
Confirmability	139
Summary.....	140
Chapter 5: Discussion, Conclusions, and Recommendations	142
Interpretation of the Findings	144
Research Question 1: Key Finding 1.....	146
Research Question 2: Key Finding 2.....	147
Research Question 3	148
Limitations of the Study	154
Recommendations	155
Implications	156
Implications for Positive Social Change	156
Theoretical Implications	158

Methodological Implications.....	158
Implications for Local Practice	159
Conclusion.....	161
References	163
Appendix A: Partner Organization Agreement	185
Appendix B: Interview Protocol.....	187
Appendix C: Research Question and Interview Question Alignment Table.....	189
Appendix D: Document Analysis-Campus Improvement Plan Checklist	191
Appendix E: Member Check Agenda.....	192

List of Tables

Table 1. State Assessment Overall Masters Level Performance-Mathematics, Reading, and Science7

Table 2. Transformational Leadership Practices in Education.....28

Table 3. Preliminary Deductive Codes.....81

Table 4. Elementary Principal Participant Demographic Data.....91

Table 5. Middle School Principal Participant Demographic Data.....93

Table 6. Coding Example for Elementary Principal Interview Responses-RQ3100

Table 7. Coding Example for Middle School Principal Interview Responses-RQ3101

Table 8. Elementary and Middle School Case Study Theme Summary145

Table 9. Elementary and Middle School Gifted and Talented Enrollment and Campus Improvement Plan Goal Comparison151

Chapter 1: Introduction to the Study

Gifted and talented education represents one component of a comprehensive educational program. In the United States, the Jacob K. Javits Gifted and Talented Students Education Program acknowledges gifted and talented students as having diverse needs that extend beyond the traditional classroom setting (U.S. Department of Education, 2019). The National Association of Gifted Children (NAGC, 2019b) developed programming standards to support the development of gifted and talented students at all stages of development. The programming standards combine both student outcomes and evidence based practices to ensure equity, excellence, and continuous improvement of gifted and talented programs.

Gifted and talented programming mandates and decision making are governed by individual states and local education agencies (Rinn et al., 2020). This local authority of gifted and talented programming enables individual states and local education agencies with the autonomy to interpret, develop, and implement definitions of giftedness, adopt gifted and talented identification procedures, and determine gifted and talented programming and service designs (Jolly & Robbins, 2016). State mandates, funding, student enrollment, and educators can have a significant impact on the quality of specialized programming for gifted and talented students (Callahan et al., 2017). The 2018-2019 State of the States in Gifted Education reported 44 out of 50 states and Washington, D.C. have a state-developed definition of giftedness and about half of the states have state-developed gifted and talented programming standards (Rinn et al., 2020). Decentralization of gifted and talented programming often results in a disparity of

services across and within states (Callahan et al., 2017; Jolly & Robbins, 2016; VanTassel-Baska, 2018). This disparity requires critical leadership from district administrators and principals to commit to effective gifted and talented programming (Guilbault & Kirsch, 2020).

Traditionally, gifted and talented students have been characterized by their ability to perform at high intellectual levels; however, the academic underachievement of gifted and talented students, referred to as the discrepancy between ability and performance, has been prevalent for decades (Barbier et al., 2019; Obergriesser & Stoeger, 2015; Reis & McCoach, 2000; Renzulli et al., 1992; Steenbergen-Hu, Olszewski-Kubilius, & Calvert, 2020). The principal plays an essential role in determining the success and accountability of gifted and talented programs and has the capacity to develop and foster learning environments to embrace the needs of gifted and talented students (Davis, 2016; McHatton et al., 2010). With the implementation of the Every Student Succeeds Act of 2015 (ESSA), emphasis has been placed on improving school leadership to ultimately impact student achievement. Specifically, ESSA sets forth mandates for state education agencies to improve school leaders' professional learning and practices to equip them with the ability to support students with diverse learning needs, including students with disabilities, English Learners, students identified as gifted and talented, and students with low literacy levels (ESSA, 2015).

Although teachers are the vehicle through which student learning occurs and the delivery of instruction is their primary responsibility, principal leadership is key to ensuring differentiated learning experiences for gifted and talented students (Handa,

2019). However, the efforts of the principal to narrow achievement gaps have frequently focused on the minimum competency of underperforming students and a misconception that gifted and talented students have less urgent academic needs (Johnsen, 2013).

Understanding principal leadership practices of gifted and talented programming is essential to ensure gifted and talented students reach their full potential, develop healthy academic standards of excellence, and make positive contributions to society. The aim of this case study was to explore how elementary and middle school principals provide leadership to support the academic performance of gifted and talented students. Chapter 1 contains the background of the study followed by the problem statement, purpose, research questions, conceptual framework, nature of the study, and definitions. The chapter concludes with assumptions, scope and delimitations, limitations, significance, and a summary overview.

Background

The National Center for Research on Gifted Education (2019) analyzed longitudinal data from three states and found that third grade gifted and talented student reading academic achievement starts about two levels above their peers and their academic achievement grows at a slower rate from third grade to fifth grade. There has been a focus on narrowing the achievement gaps between demographic groups and a lack of focus on closing the achievement gap between groups of students at the advanced level of achievement (NAGC, 2015).

The prevalence of gifted underachievement has been a topic of concern to gifted and talented researchers for decades (Steenbergen-Hu, Olszewski-Kubilius, & Calvert,

2020). Gifted underachievement was identified as a research priority for gifted and talented education by the National Research Center on the Gifted and Talented (Renzulli et al., 1991). The underachievement of gifted and talented students is complex and involves social and emotional development, psychological issues, lack of interest, low teacher expectations, and undiagnosed learning disabilities (Ritchotte et al., 2016). Teachers of gifted and talented middle school students are often puzzled to encounter students who were high achievers in elementary but achieve at lower levels in middle school (Zabloski & Milacci, 2012). A phenomenological case study was conducted by Zabloski and Milacci to explore the life experiences of seven rural gifted and talented students who dropped out of school. Zabloski and Malicci found that students' decisions to drop out were related to the influence of relationships and influence of teachers during their middle school years.

Desmet et al. (2020) conducted a multiple narrative inquiry to examine the experiences of four underachieving gifted and talented girls 15-16 years of age in the Midwest region of the United States. The researchers explored the inception and resolution of underachievement aspects through a narrative lens. Desmet et al. found that participants' negative self-perceptions, lack of learning skills, and negative teacher relationships impacted their academic achievement in the transition to middle or high school. The findings of these research studies indicated a need to gain an understanding of the gifted and talented education and programming during major transition periods within students' years of schooling (Desmet et al., 2020; Ritchotte, 2016; Zabloski & Milacci, 2012).

Research in the area of gifted and talented underachievement has focused on the experiences and perspectives of the student (Barbier et al., 2019; Mofield & Peters, 2019; White et al., 2018). For example, Barbier et al. (2019) applied a case study approach to examine the factors associated with the academic achievement of gifted secondary school students. The study included interviews of three high performing gifted and talented students and three underperforming gifted and talented students in seventh and eighth grade. Participants provided more insight into the complexity of underachievement, noting elementary education experiences in creativity and higher-order thinking as positive experiences, while secondary education presented socially challenging events (Barbier et al., 2019).

The literature on gifted and talented education is concentrated on definitions of giftedness, identification practices, gifted and talented programming, teacher qualifications, teacher professional development, policy, program evaluation, and curriculum and instruction (e.g., Callahan et al., 2017; Guilbault & Kirsch, 2020). However, research on the best practices associated with principal leadership in gifted and talented programming is scarce (e.g., Grantham et al., 2013; Guilbault & Kirsch, 2020; McHatton et al., 2010). The principal has the responsibility to transform school culture and implement leadership practices to impact student learning and transform school culture (Anderson, 2017). The role of the principal involves the implementation of leadership practices that impact student learning and is the second most important factor aside from the teacher that determines student achievement (Davis et al., 2005). Long et al. (2015) used an exploratory qualitative case study to investigate how the gifted and

talented policy contributed to the scope of gifted and talented programming from the perspective of principals, gifted coordinators, and teachers. An analysis of the interviews with 10 principals, 11 gifted coordinators, and 37 teachers revealed three overarching themes: (a) schools with gifted and talented policies were more likely to provide more support to gifted and talented students, (b) schools with specialty programs were more likely to offer specific programming, and (c) principals of schools with policies were likely to provide support through professional development although principal desire to adhere to policy did not always align to the availability of resources (Long et al., 2015). The gap in practice was the need to explore how elementary and middle school principals provide leadership to address the underachievement of gifted and talented students in their transition from elementary to middle school.

Problem Statement

The problem addressed in this study was the gap in practice concerning how elementary and middle school principals provide leadership to address the academic performance of gifted and talented students in their transition from elementary to middle school. Student achievement measures and academic performance in one state located in the southern region of the United States are reported annually by demographics, special education students, economically disadvantaged students, and English learners. Gifted and talented students are a subgroup that is often overlooked and may not be included in the academic performance report and are among those who underachieve (Davis, 2016). While gifted and talented student academic performance information is not reported by

the target state’s academic performance report, it is compiled within the target school district’s gifted and talented program evaluation.

Within the study site, the overall percentage of gifted and talented students scoring above the grade level passing standard on the state assessment in all subjects indicated a declining pattern when students transitioned from elementary to middle school. Table 1 illustrates the 3-year gifted and talented student performance data from the study site.

Table 1

State Assessment Overall Masters Level Performance-Mathematics, Reading, and Science

Grade (Level), Subgroup	2017-2018	2018-2019	2020-2021
Fifth Grade (Elementary School), Gifted and Talented	65%	69%	78%
Sixth Grade (Middle School), Gifted and Talented	49%	48%	46%

Note. Due to the COVID-19 pandemic, the administration of the state assessment was cancelled for the 2019-2020 academic year.

As displayed in Table 1, the data indicated a pattern of decline in gifted and talented student overall academic performance in all tested subject areas as students transition from fifth grade (elementary school) to sixth grade (middle school). In this

context, it was unknown how principal leadership practices are implemented at the elementary or middle school levels to support gifted and talented students.

Underachievement in gifted and talented students often surfaces in the transition from elementary to middle school (Evans et al., 2018; Ritchotte et al., 2016). Desmet et al. (2020) found that underachieving gifted and talented students felt unprepared for the increased rigor in middle school courses. The pattern of underachievement that surfaces in middle school may transfer into high school and college (Wai & Rindermann, 2019).

White et al. (2018) conducted an analysis of peer-reviewed academic journals between January 2005 and August 2015 to explore the factors associated with gifted and talented underachievement and revealed that prior gifted and talented underachievement research focused on student individual factors with less attention on school-related factors. Gifted and talented research is confounded by the lack of universal mandates, policies, and protocols (Plucker & Callahan, 2020). Recommendations for future research emphasized the need to study how the school environment may contribute to gifted and talented underachievement (Brown, 2018; White et al., 2018). In my study, I addressed a meaningful gap in the practice as identified in the research literature and at the study site as to how elementary and middle school principals provide leadership to address the decline in the academic performance of gifted and talented students in their transition from elementary to middle school.

Purpose of the Study

The purpose of this qualitative multiple case study was to explore how elementary and middle school principals perceive their leadership to address the decline in the

academic performance of gifted and talented students in their transition from elementary to middle school. It is important to understand principals' roles to identify best practices to build and sustain effective gifted and talented programs. My intent with this study was to fill a gap in practice to explore principal leadership perceptions and practices in gifted and talented education. Participants included elementary and middle school principals at the study site who participated in semistructured interviews to gather data on their experiences as leaders of gifted and talented students. Understanding gifted and talented programming and gifted and talented student performance is important for school leaders to be able to effectively advocate for the success of gifted and talented students (Brown, 2018). The findings of this case study research may lead to the incorporation of effective leadership practices for principals who lead gifted and talented programs and inform the development of campus improvement plans and gifted and talented professional development for principals. By gaining this understanding, district leaders will be able to collaborate with principals to develop strategic plans to solve the problem of the decline in gifted and talented student academic performance in the transition from elementary school to middle school.

Research Questions

The research questions that guided this qualitative case study were as follows:

RQ1: How do elementary and middle school principals perceive their experiences with gifted and talented education?

RQ2: How do elementary and middle school principals perceive the problem of the decline in gifted and talented student academic performance in the transition from elementary to middle school?

RQ3: How do elementary and middle school principals perceive their leadership to address the decline in academic performance of gifted and talented students in their transition from elementary to middle school?

Conceptual Framework

Burns' (1978) transformational leadership focused on values and motivations of both the leader and follower. Transformational leadership emphasizes a mutual and collaborative relationship between the leader and the follower, whereby the followers are cultivated into leaders (Burns, 1978). This leadership framework emphasizes the leader's ability to influence through inspiration and high motivation (Burns, 1978). A transformational leader's purpose is to motivate followers to work toward achieving goals through creative problem solving that result in the transformation of the organizational culture beyond individual self-interests (Sun & Leithwood, 2012). According to Anderson (2017), transformational leadership is an appropriate practice for leaders who strive to shift schools to meet stakeholder expectations.

Sun and Leithwood (2012) conducted a meta-analysis of four reviews of transformational leadership research to examine the effectiveness of transformational leadership on student achievement. This analysis found transformational leadership had direct and indirect effects on student achievement. The transformational leadership practices with the most significant contribution to student achievement included building

collaborative structures and providing individualized consideration (Sun & Leithwood, 2012). Valentine and Prater (2011) researched the relationship between instructional, transformational, and managerial leadership practices and student achievement and found transformational leadership contributed to student achievement in the areas of identifying a vision for the school and the social interactions of the principal serving as a role model for staff members.

Transformational leadership was used as the contextual lens to explore and analyze the leadership practices of principals to support gifted and talented academic performance. The case study design included interviews with elementary and middle school principals regarding their leadership practices and experiences as they relate to gifted and talented programming and gifted and talented student academic performance. The conceptual framework, transformational leadership, informed my development of the interview questions that correspond with each research question to explore principals' perceptions and experiences as they relate to their transformational leadership characteristics. The transformational leadership framework was useful in identifying principal leadership practices that support gifted and talented student performance. Chapter 2 provides a thorough explanation of the literature related to transformational leadership.

Nature of the Study

To address the research questions of this study, a qualitative case study design was used. According to Burkholder et al. (2020), "Qualitative research is an exploratory investigation of a complex and social phenomenon conducted in a natural setting through

observation, description, and thematic analysis of participants' behaviors and perspectives for the purpose of explaining and/or understanding the phenomenon" (p. 83). Case study research designs are appropriate to examine an issue or case within a real-world context focused on a bounded unit to capture a comprehensive understanding of the phenomenon (Creswell, 2013; Yin, 2014). Specifically, a multiple case study was used to obtain an understanding of two bounded systems, elementary and middle schools, and the phenomenon, the decline in academic performance as gifted and talented students transition from elementary to middle school. A multiple case study design afforded me the ability to analyze within cases, between cases, and across cases (Yin, 2014). A multiple case study was appropriate because this type of case study enabled me to explore the similarities and differences between both elementary and middle school principal leadership practices in gifted and talented programming within the study site (see Baxter & Jack, 2008).

To develop converging lines of inquiry, multiple sources of data was used (see Yin, 2014). This multiple case study design included semistructured interviews of six elementary principals and four middle school principals. The use of semistructured interviews allowed me to insert probes after interview questions to capture a thorough amount of information to describe and understand principal perceptions and leadership practices (see Burkholder et al., 2020). In addition to semistructured interviews, a physical artifact, campus improvement plans, were analyzed and compared to the participants' interview responses.

During the data analysis phase, I used thematic analysis to code and categorize the data provided by the elementary and middle school principals (see Braun & Clarke, 2006). Thematic analysis involves a structured yet flexible process to become familiar with the data, code the data, develop categories, and generate themes to facilitate the interpretation of the results (Lester et al., 2020). The conceptual framework, transformational leadership, was integrated in the data analysis process to identify transformational leadership practices that support gifted and talented student performance. The analysis of the interview data coupled with the campus improvement plans was used to generate findings related to the research questions.

Definitions

Academic underachievement: The discrepancy between predicted ability and observed academic performance (Reis & McCoach, 2000).

Elementary school/campus: A school for students enrolled in grades prekindergarten through fifth grade in the study site. At the research study site, the terms *school* and *campus* are used interchangeably.

Gifted and talented learner: An individual who has the “capacity to perform at higher levels compared to others of the same age, experience, and environment in one or more domains” (NAGC, 2019a, p.1).

Middle school/campus: A school for students enrolled in Grades 6 through 8 in the study site. At the research study site, the terms *school* and *campus* are used interchangeably.

Local education agency (LEA): According to ESSA, a board of education within the state that serves as the governing administrative authority in school districts or counties for public elementary and secondary schools (U.S. Department of Education, 2019).

Transformational leader: Leaders who focus efforts on innovation and transformation to impact student academic performance (Serin & Akkaya, 2020).

Assumptions

I assumed that principals provided honest and precise information regarding their perceptions and experiences with gifted and talented education and gifted and talented student academic performance. Voluntary participation in this study ensured that principals did not feel coerced to participate and increased the likelihood that the data obtained are accurate and a true account of their experiences. This assumption was essential to the meaningfulness of this study to gain an understanding of how elementary and middle school principals provide leadership to support the academic performance of gifted and talented students in their transition from elementary school to middle school.

Scope and Delimitations

This study was bounded by the study site and participants in one school district located in the southern region of the United States. Gifted and talented student achievement measures were limited to the state's assessment for third through sixth grade mathematics, reading, science, and writing. Assessment results for the previous 2 years at the study site indicated a decline in gifted and talented student academic performance when gifted and talented students transition from elementary to middle school, therefore,

the target population for the study included elementary and middle school principals. High school principals were excluded from the target population to focus on the prevalence of the problem during the transition from elementary to middle school. A balanced number of elementary and middle school principals were invited to participate to address the study's research questions. The purpose of this multiple case study was to explore how elementary and middle school principals perceive their leadership to address the decline in the academic performance of gifted and talented students in their transition from elementary (fifth grade) to middle school (sixth grade). The focus on one student group, gifted and talented students, was a delimitation. Because of the design of this study, the findings may not be transferable to other student subpopulations such as English learners or special education students. However, the results of this study may be transferable to school districts and gifted and talented programs where gifted and talented student academic performance may need to be addressed in the transition from elementary to middle school. In addition, the findings of this research may be valuable to advocates of gifted and talented programs and add to the research on principal leadership practices in gifted and talented education.

Limitations

This research study was limited to one school district located in the southern region of the United States, in which there has been a declining pattern of the academic performance of gifted and talented students in their transition from elementary to middle school. The gap in practice was specific to this research setting and may limit the transferability of the findings to other students and schools with varying gifted and

talented programming, demographics, enrollment, and academic student performance. As I was the primary investigator of this study, and I am a central office administrator in the district where the data was collected, professional relationships with participants were a potential unintended bias. I served in a collaborative role and did not have any supervisory or evaluative capacity over principals.

Qualitative researchers use the term *trustworthiness* to describe the confidence in the value, application, consistency, and neutrality of the research findings. (Anney, 2014; Burkholder et al., 2020). The attributes of trustworthiness that were addressed in this multiple case study include credibility, confirmability, and dependability, all of which incorporate triangulation (Lincoln & Guba, 1985). Credibility refers to the alignment between the data collected and the research questions (Burkholder et al., 2020). Confirmability in qualitative research separates the researcher from the study to minimize researcher bias (Anney, 2014; Burkholder et al., 2020). Dependability in qualitative research signifies the consistency in the data analysis, data collection, and data reporting (Burkholder et al., 2020).

To meet the standards of credibility, confirmability, and dependability, triangulation is one strategy that was used to evaluate this study (see Anney, 2014). Triangulation refers to the collection and use of multiple data sources to mitigate or account for the validity and reliability of qualitative research findings (Yin, 2014). This study design included multiple sources of data: semistructured interviews of elementary and middle school principals and an analysis of campus improvement plans. The interview responses of both elementary principals and middle school principals were

compared to one another and to the contents of the campus improvement plans to verify the basis of the research findings. The confirmability of this research study was established using reflexive journaling. Reflexivity acknowledges the biases, experiences, and values researchers bring to qualitative research designs (Creswell, 2013, Yin, 2014). As a novice scholar-practitioner, I used a reflexive journal to document my perspective in narrative form to address the potential challenges when conducting qualitative research (see Burkholder et al., 2020; Meyer & Willis, 2019).

Significance

Gifted and talented education is decentralized at the state and local school district levels, which results in inconsistent programming and services across states and within states (Davidson Institute, 2020; NAGC, 2019a). To prepare students to engage in a global environment and make an impact on society, gifted and talented students need opportunities to learn and grow. The findings of this research study provide the school district and gifted and talented program administrators' greater insight to support principals who lead gifted and talented programs and has the potential to influence principal leadership practices and impact gifted and talented policy. There was limited existing research on the influence of principal leadership practices on gifted and talented student academic performance. This research study filled a gap in practice for district leaders to better understand how principals provide leadership to support the academic performance of gifted and talented students. This research study was intended to contribute to the body of knowledge on gifted and talented education to lead to the

development of leadership practices and solutions for district leaders and advocates to better support gifted and talented communities of students.

District leaders may use the findings of this multiple case study to develop local policies, procedures, and plans to guide principals to implement leadership practices that develop and sustain effective gifted and talented programs district wide (see Long et al., 2015; Ritchotte et al., 2016). The outcomes of this research study may lead to principal advocacy for gifted and talented education and increased gifted and talented student academic performance. To advocate for implementing reform efforts, leaders of gifted and talented students must understand the research-based practices to enhance the learning trajectories of gifted and talented students (Brown, 2018). Ultimately, this study has the potential to impact positive social change to transform gifted and talented student programming and academic performance in school districts with similar demographic profiles.

Summary

In an educational climate that is increasingly directed by the demands of accountability, the viability and sustainability of principal leadership practices can be determined by their success in supporting and enhancing the academic achievement of gifted and talented students (Guilbault & Kirsch, 2020). This introductory chapter has afforded the reader with an understanding of the problem of gifted and talented academic performance in the transition from elementary to middle school. The purpose of this multiple case study was to gain an understanding of how elementary and middle school principals perceive their leadership to address the decline in the academic performance of

gifted and talented students in their transition from elementary (fifth grade) to middle school (sixth grade). This study contributes to the research and body of knowledge for principal leadership and gifted and talented programs. Data were collected via semistructured interviews of elementary and middle school principals and an analysis of campus improvement plans. Transformational leadership was the conceptual lens through which this multiple case study achieved the purpose of this study and addressed the three research questions.

In Chapter 2, I present a comprehensive review of the literature that focuses on gifted and talented education and the principal leadership practices associated with gifted and talented student academic performance. Specifically, the next chapter includes the literature search strategy, the conceptual framework, the historical antecedents of gifted and talented education, demystifying giftedness, gifted and talented programming standards, gifted and talented professional development, gifted and talented underachievement, transformational leadership, and principal leadership practices in gifted and talented education. These focus areas were explored to build an overall foundational understanding of gifted and talented education. A multitude of research-based and theoretical sources were examined to paint a portrait of gifted and talented education.

Chapter 2: Literature Review

Gifted and talented students are traditionally characterized as a student with advanced academic skills who require minimal academic supports; however, decades of educational research have acknowledged the academic underachievement of gifted and talented students (Barbier et al., 2019; Renzulli et al., 1992). Understanding why gifted and talented students underachieve, or fail to achieve their full potential, is a problem for which educators seek to find solutions (Cavilla, 2017). There is a pattern of overall decline in gifted and talented student performance as students transition from fifth grade (elementary) to sixth grade (middle school) in the study site. The research on gifted and talented underachievement focuses primarily on defining underachievement, identifying the factors associated with underachievement, and interventions to reverse underachievement (Steenbergen-Hu, Olszewski-Kubilius, & Calvert, 2020).

The role of the principal has been identified as an important influence on the academic performance of students (Hutton, 2018). The scarcity of research in gifted and talented education that focuses on the school factors and principal leadership practices emphasizes the need for this multiple case study (see Guilbault & Kirsch, 2020).

There is a gap in practice concerning the leadership elementary and middle school principals provide to address the academic performance of students in their transition from elementary to middle school. Without an understanding of how principals provide leadership to address the problem of the decline in gifted and talented student academic performance in the transition from elementary to middle school, this problem may persist, and may negatively impact the future success and societal contributions of gifted and

talented students. The purpose of this multiple case study was to explore how elementary and middle school principals perceive their leadership to address the decline in academic performance of gifted and talented students in their transition from elementary to middle school. The overall intent of this research study was to identify the transformational leadership practices principals implement to support gifted and talented programming and academic performance in their schools. Chapter 2 provides an exhaustive review of the seminal and current research literature related to transformational leadership in education, gifted and talented education, and principal leadership practices followed by a summary and conclusions.

Literature Search Strategy

A review of the literature was achieved through a systematic search conducted using the Walden University library website and included EBSCO, ERIC, and ProQuest. Google Scholar was used as a search engine to locate additional journal articles and peer-reviewed resources. The search engines were used to engage in basic and advanced searches. Basic searches for articles were conducted to gain an overview of seminal research in gifted and talented education. After the initial literature review search, an academic word bank was developed and organized around broad categories (Butin, 2010). The search engine parameters for the basic search were set for gifted and talented academic achievement, gifted and talented underachievement, gifted and talented principal leadership, gifted underachievement and principal role, principal leadership and student achievement, and principal perceptions of gifted education. Manipulating the advanced search option narrowed the focus of the search to include publications within

the last 5 years. This literature search generated publications to support the development of the background, problem statement, and purpose of the study. Through this literature search, four journals emerged multiple times: *Educational Administration Quarterly*, *Gifted Child Quarterly*, *Journal for the Education of the Gifted*, and *Gifted Child Today*. Key search terms that facilitated the acquisition of research to support the conceptual framework included principal leadership styles, principal leadership practices, gifted and talented leadership, and transformational leadership. A review of the NAGC resources and dissertations provided insight on the organizational structure of the literature review.

Conceptual Framework

From a historical perspective, instructional leadership and transformational leadership are the two most influential leadership models in educational leadership research (Sebastian et al., 2019). The conceptual framework for this study is based on the transformational leadership models from the seminal research of Burns (1978) that was then applied to education by Leithwood (1994). Transformational leadership, first conceptualized by Burns in the field of business, emphasized the mutualistic relationship between the leader and the follower. Bass (1985) later suggested transformational leadership behaviors have an impact on the performance and outcomes of organizations outside the field of business. Bass's model of transformational leadership broadened Burns' model and asserted that transformational leaders initially engage in transactional strategies that involve transactions and exchanges between leaders, colleagues, and followers (Bass & Avolio, 1994).

The application of transformational leadership was later applied to education research as a leadership model to lead school improvement endeavors by Leithwood (1994) and Hallinger (2003). Transformational leadership from an educational perspective emerged from the idea that instructional leadership focused on the principal or leader as the source of expertise, power, and authority (Burns, 1978), while transformational leadership flowed from a bottom-up perspective in which the leader engages teachers and staff in the development of the school improvement process (Hallinger, 2003). Hallinger identified overlapping characteristics of instructional leadership and transformational leadership; both instructional leadership and transformational leadership models emphasize a shared vision and goals, developing a strong learning climate, incentivizing good instructional practices, and promoting the development of staff. Proponents of the transformational leadership model may vary in the specific leadership practices that define transformational leadership.

Bass and Avolio (1994) extended the seminal work of Burns (1978) to define transformational leadership in terms of four components, known as The Four I's: (a) idealized influence, (b) inspirational motivation, (c) intellectual stimulation, and (d) individualized consideration. The Multifactor Leadership Questionnaire (MLQ) was developed by Bass and Avolio to measure transformational leadership behaviors and is a common instrument used to assess The Four I's of Bass and Avolio's transformational model. Idealized influence encompasses the leader's ability to serve as a role model for followers and take risks. The transformational leader is described as an inspirational motivator who is enthusiastic, optimistic, and communicates a commitment to the

organization's goals and the development of a shared vision (Bass & Avolio, 1994; Bass & Riggio, 2006). Intellectual stimulation efforts encompass the transformational leader's ability to use creativity and innovation to develop solutions. Individualized consideration describes the transformational leader as a coach providing feedback and support for followers. Transformational leaders who incorporate individualized consideration into their leadership behaviors support individual needs to develop leadership capacity (Bass & Avolio, 1994; Bass & Riggio, 2006). Leaders who embrace transformational leadership "empower followers and pay attention to their individual needs and personal development, helping followers to develop their own leadership potential" (Bass & Riggio, 2006, p.4).

The seminal education research of Leithwood (1994) explored the relationship between school restructuring and the practices of transformational leadership. Survey data were collected from teachers and principals revealing that the use of transformational leadership practices had indirect and direct effects on school restructuring and teacher-perceived student performance outcomes (Leithwood, 1994). Additionally, Leithwood found that transformational leadership behaviors in educational contexts positively influenced school improvement initiatives. Leithwood further suggested that transformational leadership is a useful model for understanding the dynamic role of principals.

In a subsequent study, Leithwood and Jantzi (2005) reviewed research studies conducted between 1996 and 2005 and found that redesigning the organization was studied less frequently than setting directions and helping people. Leithwood and Jantzi's

research extended previous transformational leadership attributes to include three primary categories of transformational leadership behaviors: (a) setting directions, (b) helping people, and (c) redesigning the organization. Setting directions included vision, group goals, and high-performance expectations; helping people was comprised of individual support, intellectual stimulation, and modeling; and redesigning the organization focused on collaborative cultures and building relationships with parents and community partners (Leithwood & Jantzi, 2005). Leithwood and Jantzi suggested future research may be beneficial to explore redesigning organizations and incorporating transformational leadership behavior.

Kouzes and Posner (2008) refined the former transformational models further and developed the Leadership Practices Inventory (LPI). This inventory was created after in-depth interviews and case study research involving individuals in leadership positions within various leadership positions across the world between 2007-2017. The inventory is comprised of five exemplary leadership practices: (a) model the way, (b) inspire a shared vision, (c) challenge the process, (d) enable others to act, and (e) encourage the heart (Posner, 2021). The LPI revealed leaders who frequently exhibited these five leadership practices as being more effective than those who implemented the practices less frequently (Posner, 2021).

Modeling the way as described in the LPI encompasses the leader's ability to display actions that align with the values and goals of the organization to build their credibility with followers (Kouzes & Posner, 2008). When followers can visualize the standards and values in leadership action, they, too, begin to exemplify similar leadership

actions. Leaders who challenge the process rely on the shared vision to take risks by developing innovative solutions to build leadership capacity in others and achieve excellence (Kouzes & Posner, 2017). According to Kouzes and Posner, challenging the process enables leaders to view problems as opportunities to challenge the status quo. Transformational leaders enable others to act by building trusting relationships; these relationships build and facilitate cultures of collaboration and empower others to work toward the shared vision. To obtain desired results, transformational leaders recognize the efforts of followers and encourage the heart by celebrating others for their significant contributions to motivate and encourage future success (Kouzes & Posner, 2017).

The concentration of transformational leadership frameworks within business and education organizations characterizes transformational leadership as sets of behaviors, practices, and categories. Bass and Avolio (1994) described transformational leadership in terms of four leadership behaviors; whereas Leithwood and Jantzi (2005) acknowledged three transformational categories, while Kouzes and Posner (2008) recognized five leadership practices. There are similarities in the transformational leadership models that may be used interchangeably to illustrate leadership qualities of principals and other school leaders.

When school leaders recognize the value of implementing transformational leadership concepts, they can develop healthy learning environments through motivation and collaboration to achieve academic success (Tookes et al, 2020). The collaborative efforts of the principal to include all stakeholders and encourage shared responsibility on the school improvement process is a key element to achieving positive school outcomes.

To apply the concept of transformational leadership to gifted and talented education, all stakeholders would play an important role in providing support to gifted and talented students (NAGC, 2014). With the flexibility of policies, practices, and procedures in gifted and talented education, leaders have the responsibility to bring about the transformation of gifted and talented programs to advocate for and meet the diverse learning needs of gifted and talented students (Brown & Rinko-Gay, 2017; Guilbault & Kirsch, 2020).

The research on principal leadership practices in relation to supporting gifted and talented students is limited (Guilbault & Kirsch, 2020). A qualitative approach utilizing transformational leadership as the conceptual framework in gifted and talented education is an opportunity to explore the leadership practices of principals who lead their campus gifted and talented programs. This multiple case study focused on the leadership practices of elementary and middle school principals through the conceptual lens of transformational leadership by conducting semistructured interviews with principals and analyzing campus improvement plans which are developed under the direction of the principal to identify the leadership practices that support gifted and talented students in their transition from elementary to middle school. Table 2 outlines the transformational leadership practices that were used to develop interview questions to gain an understanding of how elementary and middle school principals provide leadership to support the academic performance of gifted and talented students in their transition from elementary to middle school.

Table 2*Transformational Leadership Practices in Education*

Transformational Leadership Practices	References
Builds collaborative structures	Leithwood & Jantzi, 2005
Challenges the process	Kouzes & Posner, 2008, 2017
Develops a strong learning environment	Hallinger, 2003
Distributes leadership	Hallinger, 2003
Enables others to act	Kouzes & Posner, 2008, 2017
Encourages intellectual stimulation	Bass & Riggio, 2006
Encourages the heart	Kouzes & Posner, 2008, 2017
Establishes high performance expectations	Leithwood, 1992; Leithwood & Jantzi, 2005
Incentivizes effective instructional practices	Hallinger, 2003
Inspires a shared vision	Leithwood, 1994; Hallinger, 2003; Bass & Riggio, 2006; Kouzes & Posner, 2017
Models the way	Leithwood, 1992; Bass & Riggio, 2006; Kouzes & Posner, 2008, 2017
Motivates followers	Bass & Riggio, 1994, 2006
Promotes the development of staff	Hallinger, 2003
Provide individualized support	Leithwood, 1994; Bass & Riggio, 2006
Takes risks	Bass & Riggio, 2006

Note. The transformational leadership practices are listed in chronological order and include the literature references.

Literature Review Related to Key Concepts

Transformational Leadership Contributions in the Education Context

Transformational leadership practices of school leaders are often explored through teacher perceptions of such leadership practices. In the seminal research of Leithwood et al. (2008), understanding teachers' perspectives of their principals' leadership style has been found to affect teachers' emotions and motivation and indirectly stimulate student learning. Serrin and Akkaya (2020) conducted a correlational study to

determine if there was a relationship between the transformational leadership behaviors of principals and teacher motivation. Participants included 418 teachers who completed three data collection tools. Based on the results, there was no significant relationship between transformational leadership and teacher motivation. However, teachers noted a positive relationship between their perceptions of principal transformational leadership behaviors in the areas of vision, group commitment, individual support, and intellectual stimulation (Serrin & Akkaya, 2020).

In another study addressing principal transformational leadership from the teacher perspective, Hauserman and Stick (2013) examined principal transformational leadership qualities. Hauserman and Stick collected quantitative data using Bass and Avolio's (1996) MLQ to categorize principals into two categories: high or low transformational leaders. Qualitative data sources included interviews with five teachers who rated principals as high in transformational leadership qualities and five teachers who rated principals as low in transformational leadership. Principals perceived by teachers as highly transformational leaders served as role models for students and teachers and encouraged collaborative opportunities and maintained an open mindset to the incorporation of innovative ideas to enhance school effectiveness (Hauserman & Stick, 2013).

Likewise, from the teacher perspective, Litchka and Shapira-Lishchinsky (2016) surveyed 615 Israeli teachers and 514 American teachers to measure their perceptions of the transformational leadership practices of principals by location, Israel and United States, and school level—elementary, middle, or high school. The results were that Israeli

principals were perceived by Israeli teachers to be more transformational as leaders than teachers' perceptions of principals in the United States. The results also indicated that teachers' perceptions of the transformational leadership style of their principals decreased from elementary to middle and high school in both Israel and the United States (Litchka & Shapira-Lishchinsky, 2016).

Additionally, Bryant et al. (2017) used Kouzes and Posner's (2008) Transformational Leadership Model and the LPI to discover how three principals who represented elementary, middle, and high school, build and foster leadership capacity in their schools. To triangulate the findings, data were obtained through interviews, observations, and documents and analyzed through the lens of Kouzes and Posner's (2008) transformational leadership practices. Bryant et al. found all principals demonstrated three transformational leadership practices: modeling the way, inspiring a shared vision, and enabling others to act. Results indicated the principals' leadership styles were encouraging, collaborative, and involved mentorship practices, emphasizing the role model dimension of transformational leadership.

Using a different research design but achieving similar results as Bryant et al. (2017), Metz et al. (2019) conducted a mixed methods research study to explore the transformational leadership practices of principals. Quantitative data were collected from a total of 110 participants (55 elementary principals and 25 middle school principals) using Kouzes and Posner's (2013) LPI and the qualitative data involved interviews with 28 principals. Principal respondents perceived their leadership style as transformational, describing transformational leadership as "a principal's ability to transform the school

culture and community” (Metz et al., 2019, p. 400). The LPI survey results highlighted the principals’ perspective of transformational leadership in the areas of enabling others to act and model the way (Metz et al., 2019). Enabling others to act was described as treating others with respect and high regard while modeling the way was expressed as setting an example for exemplary expectations. Metz et al. further concluded principals viewed their transformational leadership behaviors in varying degrees; however, principals expressed their active attempts to integrate transformational leadership behaviors into their principal leadership style.

Combining both teacher and principal perspectives, Mayes and Gethers (2018) used a quantitative research design to examine the principals’ practices of transformational leadership to determine the most effective transformational leadership characteristics, how often principals implemented transformational leadership characteristics, and if there was a relationship between principal perceptions and staff perceptions. In total, 14 participants from the elementary and middle school levels completed a survey instrument and identified collaborating with school staff to develop the school’s vision as the most effective transformational leadership practice; however, principals perceived themselves as transformational leaders, while teachers’ perceptions indicated their principals exhibited transformational leadership characteristics less frequently. Mayes and Gethers attributed the differences in principal and teacher perceptions to a lack of understanding of transformational leadership components and transformational leadership practices interpreted by others.

Transformational leadership practices when applied to gifted and talented education was recently found to impact an online gifted education program (Ronksley-Pavia & Neumann, 2022). One gifted and talented team leader and two gifted and talented teachers participated in semistructured interviews to explore the leadership practices for supporting an online program developed to re-engage gifted learners. The data revealed five themes: (a) understanding the unique needs of gifted students and the online learning environment, (b) digital creativity for engaging gifted students, (c) leveraging the skills of specialists, (d) encouraging active re-engagement of gifted students, and (e) follow-up and advocacy to meet the needs of gifted students and their families (Ronksley-Pavia & Neumann, 2022). Participants reported the importance of shared team goals, innovation, creativity, and inspiration as essential transformational leadership practices. Participants also voiced the importance of a leader who served as a facilitator and collaborator (Ronksley-Pavia & Neumann, 2022).

A prevalent theme in the literature on transformational leadership in the education context is the emphasis on the principal serving in the capacity of a role model (Bryant et al., 2017; Hauserman & Stick, 2013; Metz et al., 2019). As a role model, principals have the opportunity to lead by example and influence teachers to adopt similar leadership behaviors to achieve collective goals for student subpopulations such as gifted and talented students. As noted by Bryant et al. (2017), Hauserman and Stick (2013), and Mayes and Gethers (2018), teachers and principals perceived the collaborative nature of principals in developing a shared vision as an important element of transformational leadership. Bryant et al. (2017) believed transformational leadership attributes can be

used by principals to manage the complex role of the principalship. Reviewing transformational leadership research in the education context indicated that the transformational leadership capacity of principals has the potential to influence overall school effectiveness in the areas of school environment and academic performance.

Transformational Leadership, School Climate, and Student Achievement

Shatzer et al. (2014) compared instructional and transformational leadership models to determine the leadership behaviors that had the most impact on student achievement. The sample included 590 elementary teachers who rated their principals' leadership style using the Principal Instructional Management Rating Scale and Bass and Avolio's (1996) MLQ. Shatzer et al. concluded instructional leadership scores explained the variance in student achievement and reported the two dimensions that were found that significantly predicted student achievement, management by exception-passive, and laissez-faire leadership. However, management by exception-passive and laissez-faire leadership were associated with a weak transformational leader (Shatzer, 2014). Utilizing a qualitative research design, Adams et al. (2017) also studied the principal leadership role and student learning capacity. This research study involved 3,175 students who completed a variety of instruments to measure student perceptions of principal support for social emotional needs, instructional practices of teachers, grit, and transformational leadership behaviors as a control variable. Evidence suggested the principal role is critical to developing and nurturing an instructional environment where students experience success. Adams et al. believed this research study "establishe[d] school principals as essential drivers of student learning capacity." (p. 577).

A related quantitative study by Nash (2010) also used the MLQ to discover the relationship between transformational leadership and student achievement. Nash predicted a positive relationship between transformational leadership practices and student achievement. In this study, 15 elementary school principals were surveyed using Bass and Avolio's (1996) MLQ (Nash, 2010). Survey results indicated principals who used the dimensions of idealized behavior, intellectual stimulation, and instructional motivation were predictors of student achievement in third grade mathematics, third grade reading, and fifth grade mathematics (Nash, 2010). Similar to Nash, Allen et al. (2015) also used the MLQ to investigate the relationship between transformational leadership, school climate, and student achievement in mathematics and reading. Allen et al. found a positive relationship between transformational leadership and school climate; however, the results revealed no relationship between transformational leadership and student achievement.

Conversely, the LPI was used by Quin et al. (2015) to determine the leadership practices required to develop positive school change and improve student learning outcomes and found that the components of transformational leadership that exhibited the largest impact on student achievement were shared vision and challenging the process. The findings of this study suggested the use of transformational leadership as a leadership model to develop quality school leaders (Quin et al., 2015).

Further research on transformational leadership and student achievement used a mixed methods study to explore the relationship between principal and assistant principal perceptions of school discipline policies, transformational leadership, and student

achievement (Tookes et al., 2020). This study included 51 participants categorized as either a high-achieving principal/assistant principal or a low-achieving principal/assistant principal. Tookes et al. found that when school leaders recognize the value of implementing transformational leadership concepts, they could develop healthy learning environments through motivation and collaboration to achieve academic success. Results revealed high-achieving principals and assistant principals used a balance of transformational leadership qualities (Tookes et al., 2020). Tookes et al. posited that low achieving schools might have fewer opportunities to engage in transformative and innovative leadership practices due to the focus on improving student achievement.

In summary, transformational leadership has been used to explore the relationship between leadership practices, school improvement, school climate, and student achievement. The studies related to transformational leadership and student achievement primarily applied both Bass and Avolio's (1996) MLQ and Kouzes and Posner's (2008) LPI as survey instruments. The combined results of these studies, with the exception of Allen et al. (2015) and Shatzer (2014), recommended transformational leadership as a framework in which educators can explore the educational context to influence school climate and student achievement. Understanding the historical background of giftedness provides additional context for applying the transformational leadership framework specifically to gifted and talented education.

Federal Role in Conceptualizing Gifted and Talented Education

The Marland Report (Marland, 1972) contained the first published formal definition of giftedness. The report presented the federal government's formal definition

and included any combination of academics, intellectual ability, leadership, visual and performing arts, creativity, and psychomotor ability (Marland, 1972). Additionally, the report contained the distinctive needs of gifted and talented learners, the lack of an appropriation of funds for gifted and talented education, and inconsistencies in implementing services for gifted and talented students (Marland, 1972). The passage of the Jacob K. Javits Gifted and Talented Students Education Act of 1988 was prompted by workforce limitations, student performance, and school reform efforts as part of the Elementary and Secondary Education Act (ESEA) (Jolly & Robins, 2016).

The Jacob K. Javits Gifted and Talented Children and Youth Education Act of 1988, also referred to as the Javits Act, was created to reduce the achievement gap among students from diverse backgrounds (Eckes & Russo, 2020). As the sole federal funding source for gifted and talented education, the Javits Act supports the National Center for Research on Gifted Education and provides resources and funding for conducting research and developing innovative practices to serve underrepresented student populations in gifted and talented programs, economically disadvantaged students, English learners, students with disabilities, and gifted and talented students (U. S. Department of Education, 2019). Grant opportunities through the Javits Act were most recently reauthorized during fiscal year 2020 and require annual federal approval of funds (NAGC, 2021).

The No Child Left Behind Act (NCLB) of 2001 incorporated the Javits Act and included an updated definition of gifted and talented students. The NCLB legislation focused on all students meeting proficiency levels in literacy and numeracy, may have

resulted in teachers focusing less on the learning needs of gifted and talented students (Jolly & Robins, 2016). Like the Marland Report (Marland, 1972), the NCLB Act of 2001 emphasized the unique needs of gifted and talented students that extend beyond the traditional classroom environment. The Marland Report established the federal definition of gifted and talented and after over 40 years the definition includes,

Gifted and talented children are those identified by professionally qualified persons who by virtue of outstanding abilities, are capable of high performance. These are children who require differentiated educational programs and/or services beyond those normally provided by the regular school program to realize their contribution to self and society. Children capable of high performance include those with demonstrated achievement and/or potential ability in any of the following areas, singly or in combination (1) general intellectual ability, (2) specific academic aptitude, (3) creative or productive thinking, (4) leadership ability, (5) visual and performing areas, and (6) psychomotor ability. (Marland, 1972, p. 10).

The reauthorization of ESSA in 2017 included the Marland Report (Marland, 1972) federal definition for gifted and talented students, but it did not include expectations for above-grade level achievement, a requirement for state accountability systems, or a mandate for providing gifted and talented students with effective instructional programming (Kaul & Davis, 2018). However, the reauthorization gives promise to gifted and talented education through the inclusion of gifted and talented within Title II, Part A Supporting Effective Instruction. For example, Lockhart et al.

(2021) examined the ESSA State Plans for Gifted and Talented Education from 11 states and found similarities between their identification, curriculum, service options, professional development, and program evaluation. The findings confirmed the flexibility of gifted and talented programming at the state level. Lockhart et al. concluded that flexibility of programming and standardized programming was at opposite ends and “neither extreme would produce optimal results or adequately prepare gifted and talented students for postsecondary talent development opportunities (p. 33). A review of gifted and talented research from the administrative leadership lens recommended that educational leaders seek guidance from their individual state plans to support, develop, and sustain gifted and talented programming (Guilbault & Kirsch, 2020).

National Advocacy for Conceptualizing Gifted and Talented Education

The NAGC provides guidance to gifted and talented advocates, educators, policymakers, and researchers to develop a common perspective of giftedness (Makel & Johnsen, 2020). The NAGC’s (2019a) conceptualization of giftedness embraces prior federal definitions of giftedness but also includes,

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 education experience(s) to learn and realize their potential. (p. 1)

The NAGC definition of giftedness encompasses students from diverse backgrounds and with learning disabilities, addresses social and emotional competencies, and instructional services to meet their unique learning needs (Makel & Johnsen, 2020).

Defining giftedness has been noted as a crucial aspect of gifted programming because the definition impacts how students are serviced in state and localized school district programs (Callahan et al., 2017). Callahan et al. surveyed 2,000 elementary school districts, 1,752 middle school districts, and 1,160 high school districts in a comprehensive study of gifted and talented practices and policies in the United States. The surveys were sent to school district coordinators and directors of gifted and talented programs. Callahan et al. found that most states embedded the NAGC giftedness definition in their local definition with variations in the definition of giftedness that included academic ability, intellectual ability, leadership, and performing/visual arts with the intellectual aspect of giftedness being used most commonly at the elementary level. After almost 50 years since the establishment of a federal definition of giftedness, there remains no universal agreement at the state or school district level as to what identifies a student as gifted and talented (Worrell et al., 2019).

Gifted and Talented Assessment and Identification Practices

The identified gifted and talented enrollment in the United States elementary and middle schools showed a slight decline from 69.5% of schools in 2012 to 68.5% of schools in 2016 (Yaluma & Tyner, 2021). Although the decline was minimal, the decline indicates no growth in the number of identified gifted and talented students between 2012 and 2016. Yaluma & Tyner also found gifted and talented identification is increasing faster in low-poverty schools than in high-poverty schools. Hodges et al. (2018) recommended the use of a combination of traditional and nontraditional identification practices.

A variety of identification tools have been used to measure giftedness in children. Common gifted and talented assessments are standardized tests that measure intelligence or achievement (Callahan et al., 2017; Worrell et al., 2019). Identification practices often rely on a predetermined score or a set of scores, that when combined, are calculated using a matrix (Callahan et al., 2017). Additional criteria for gifted and talented identification also include alternative assessments that measure nonverbal skills and creativity (Peters et al., 2020). As a result of the comprehensive study by Callahan et al., researchers concluded the identification of students primarily occurs during the elementary school years and typically occurs because of teacher referrals.

Traditional identification practices also rely on measures of cognitive ability and utilize the teacher as the source of student referrals for gifted and talented identification, whereas nontraditional identification practices may include universal screening or the development of local norms (Worrell et al., 2019). A universal screening process provides an opportunity to screen students for gifted and talented services through a holistic approach whereby designated groups of students are administered assessments to determine eligibility for gifted and talented services. Universal screening has recently received attention as an evidence-based practice that meets the ESSA “Tier 2 Moderate Evidence, suggesting a statistically significant difference on student outcomes (Johnsen et al., 2021). Researchers recommend the use of universal screening practices to address the possible assessment bias noted in standardized testing (Card & Giuliano, 2015; Erwin & Worrell, 2012; Morgan, 2020). Implementing universal screening practices removes

the traditional referral process and eliminates the subjectivity of an individual's ability to recognize giftedness (Mathewson, 2016).

Another nontraditional identification practice is the use of local norms. The development of local norms allows schools to determine the highest performers within a school setting as opposed to comparing students to national norms. Developing local identification norms has received recent attention to ensure equity within and across gifted and talented programs (Peters et al., 2020). Gifted and talented assessment and identification practices impact an organization's gifted and talented programming options.

National Gifted and Talented Standards and Evidence-Based Practices

In addition to providing a definition of giftedness, the NAGC developed the National Gifted and Talented Programming Standards to support the development and implementation of gifted and talented programming. In the absence of federal mandates for gifted and talented programming, the standards support local education agencies with developing local gifted and talented policies, practices, and programming (Corwith & Johnsen, 2020). The NAGC Programming Standards provide a framework for states and local education agencies to develop effective and equitable gifted and talented programs.

The framework serves as a tool to engage district and school leaders in self-assessment to inform district gifted and talented policies and practices. The most recent version of the standards from NAGC (2019b) includes six programming standards: (a) learning and development, (b) assessment, (c) curriculum planning and instruction, (d) learning environments, (e) programming, and (f) professional learning. Each

programming standard specifies student outcomes aligned with evidence-based practices. Evidence-based practices are practices that have been shown through rigorous research to impact student outcomes (Johnsen et al., 2019; Johnsen et al., 2021). The most reported NAGC evidence-based practices are acceleration, assessment, collaboration, differentiation, and grouping (Johnsen & Kaul, 2019). Within the NAGC Programming Standards, the evidence-based practices that meet ESSA's criteria for "Tier 1 Strong Evidence" are acceleration and grouping (Johnsen et al., 2019).

Acceleration. An accelerated perspective flows from the idea that gifted and talented students process and master information at a faster pace than their grade-level peers (Worrell et al., 2018). Accelerated instruction allows the student the opportunity to access above-grade level or subject area. The goal of acceleration is to allow students to progress at an instructional level that maintains and sustains their potential and capacity (Worrell et al., 2018). While there are various forms of acceleration, acceleration can be classified as content-based acceleration or grade-based acceleration (Southern & Jones, 2015). Content-based acceleration occurs when students engage in curriculum content at a higher level in a general education classroom or in an advanced grade (Johnsen et al., 2019). On the other hand, grade-based acceleration is when students are placed in a higher grade level for all subjects as a result of skipping a grade or grade levels (Johnsen et al., 2019). Johnsen et al. (2019) advised school leaders to consider developing a clear plan that establishes acceleration guidelines, to engage in progress monitoring, and evaluate the plan to effectively implement acceleration as an evidence-based practice.

Grouping. Grouping gifted and talented students in a homogeneous or general education classroom is a common programming service design in elementary gifted and talented programs (NAGC, 2015). Ability grouping clusters groups of gifted and talented students in one classroom to allow teachers to differentiate instruction. Grouping students by ability provides a flexible learning environment structure that allows the teacher to adjust groups and activities based on learning needs. Steenbergen-Hu, Makel, and Olszewski-Kubilius (2016) also explored the effects of ability grouping of middle school and junior high students' academic performance through the meta-analysis of 12 experimental studies and found small but positive effects of ability grouping. Considerations for implementing ability grouping include school-based data decision making to determine the individual needs of students and ensuring teachers have professional learning opportunities to support ability grouping (Johnsen et al., 2019).

National Gifted and Talented Programming Standards Implementation

Lewis and Boswell (2020) conducted a document analysis of four school districts' local gifted and talented education plans to determine the level of implementation of the NAGC programming standards. The collective data revealed inconsistencies between the contents of the local plans and the NAGC programming standards. The inconsistencies were attributed to a lack of local gifted and talented handbooks, policies, and procedures; only one district had a gifted and talented handbook (Lewis & Boswell, 2020).

Callahan et al. (2017) also assessed the degree to which national programming standards were implemented and found that the current practices reflected the same degree of implementation from over 20 years ago. Callahan et al. found that 53.6% of

elementary respondents and 39.1% of middle school respondents reported utilizing the NAGC Standards to direct gifted and talented programming. Across elementary and middle school grade levels, Callahan et al. found that curriculum planning and instruction were the most commonly reported standard. Regarding program service delivery options, the most prevalent service delivery model for the elementary level was part-time, pull-out classes offered in blocks of 1-4 hours per week. At the middle level, homogeneous groups of gifted and talented students in the general education setting were the most reported service delivery option. Acceleration by grade was the least reported program delivery option by elementary and middle school respondents (Callahan et al., 2017).

In contrast to Callahan et al.'s (2017) research findings, Rinn et al. (2020) found that the top three reported delivery models reported at the elementary level were differentiation in the general education classroom environment, acceleration by grade, and use of the resource room, whereas the top middle school delivery models were differentiation, honors and advanced coursework, and the resource room. On behalf of the NAGC and the CSDPG, Rinn et al. prepared the comprehensive *2018-2019 State of the States in Gifted Education*. Survey results were collected from state education agency representatives in all 50 states and the District of Columbia. Respondents distinguished between service options required by the state education agency and service options determined by local education agencies; 24 states mandated gifted and talented service options, 15 states did not have any mandates, and 11 states had mandates for gifted and service options that were governed by the local education agency (Rinn et al., 2020).

The common themes noted across states in the *2018-2019 State of the States in Gifted Education* were related to the decentralization of the decision-making authority coupled with limited accountability, limited service options, and training and professional learning (Rinn et al., 2020). As recorded in the report, the decision-making authority for identifying and serving gifted and talented students remained a state and local education agency responsibility. Half of the respondents reported state monitoring or auditing of gifted and talented programs, while only 19 states' implementation plans required approval by the state education agency, revealing limited accountability of state and local programs (Rinn et al., 2020). Differentiation within the general education classroom was reported as the most common service option for gifted and talented students at the elementary and middle school levels (Callahan et al., 2017; Rinn et al., 2020). This focus on differentiation as the primary service option for gifted and talented students emphasized the importance of teacher and administrator professional learning opportunities to address the needs of gifted and talented students in a variety of learning environments (Rinn et al., 2020).

VanTassel-Baska and Hubbard (2019) also examined the implementation of the NAGC's programming standards through the lens of eight school districts in the Eastern United States. Qualitative and quantitative data revealed the majority of school districts' gifted and talented programs addressed assessment, learning environment, and professional development; however, less than 40% of the standard indicators were met in the areas of curriculum planning and instruction, programming, and learning and development (VanTassel-Baska & Hubbard, 2019). Additionally, the findings revealed a

lack of consistent delivery systems for gifted and talented students at the primary and middle school levels. In contrast to Rinn et al.'s (2020) findings, Van Tassel-Baska & Hubbard reported a lack of differentiated learning at the middle school level and limited targeted professional development to support differentiation.

Subsequent research conducted by VanTassel-Baska et al. (2020), involved observations of 329 elementary, middle school, and high teachers in six school districts to evaluate the frequency of the implementation of differentiated practices for gifted learners. The observation data suggested differentiation practices for gifted learners were underutilized. Of the 26 differentiated practices, 10 were implemented in over 50% of the observed classrooms (VanTassel-Baska et al., 2020). Findings also revealed that the use of differentiation was implemented less in middle school classrooms. The results further emphasized the need for professional learning experiences targeted at differentiation and meeting the needs of gifted and talented teachers and students (Lewis & Boswell, 2020; VanTassel-Baska et al, 2020). Kaplan (2022) noted the gap between differentiation pedagogy and implementation may be a result of the variety of professional development experiences.

Gifted and Talented Professional Development Requirements

As noted in the *2018-2019 State of the States in Gifted Education* report by Rinn et al. (2020), individual states varied in the professional development requirements for gifted and talented educators. Rinn et al. (2020) reported that “state-level oversight regarding the training and credentials of those professionals who work with gifted students is minimal” (p. 6). Professional development requirements as reported by Rinn

et al. (2020) revealed the following: five states required a gifted and talented license from a graduate level program, nine states required a gifted and talented certification, 17 states required teachers to obtain a gifted and talented endorsement, 17 states shifted the authority for professional development training requirements to local education agencies, four states offered noncredentialed professional development programs for gifted and talented at the local level, while 18 states did not require any gifted and talented professional development training (Rinn et al., 2020).

For example, the Texas Education Agency's (2019) professional development requirements for teachers who provide classroom instruction and services to gifted and talented students enrolled in grades K-12 at the study site include a 30-hour foundational gifted and talented training. The training includes specific strands: nature and needs of gifted and talented students; assessing student needs; and curriculum and instruction. Teachers who provide instruction to gifted and talented students are also required to complete an additional 6-hour update in gifted and talented education each year (Texas Education Agency, 2019). Administrators and counselors who lead campus gifted and talented programs are also required to obtain a minimum of 6 hours annually in gifted and talented education in the areas of nature and needs and program options. Texas also offers a Gifted/Talented Supplemental Certificate through the State Board of Educator Certification; however, this supplemental certification is not a professional development requirement for gifted and talented teachers (Texas Education Agency, 2015).

Callahan et al. (2017) previously found teacher qualification requirements for gifted and talented also varied across grade levels. According to Callahan et al., a state

endorsement in gifted and talented education was required for teachers who provide instruction to gifted and talented students in 53.6% of the school districts at the elementary level and 49.1% at the middle level, as reported by district-level administrators across the United States. There appears to be a discrepancy in the gifted and talented professional learning requirements and opportunities targeted at ensuring teachers of gifted and talented are equipped with the knowledge and skills to provide instruction and support the individual needs of the gifted and talented learner.

The variety of professional development requirements for gifted and talented teachers across states, school districts, and grade levels may impact the academic development of gifted and talented students (Callahan et al., 2017). State and local education agencies are responsible under ESSA to improve the capacity of leadership to address the academic achievement of gifted and talented students with diverse learning needs. Despite this federal requirement, there remains a lack of understanding the professional development needed to enhance gifted and talented teacher performance (Brigandi et al., 2019). Kaplan (2022) suggested that professional learning focused on differentiation is beneficial when the learning experiences incorporate exemplars of differentiated curriculum to enhance the transfer and implementation of practices in the classroom setting.

Gifted and Talented Professional Development Implementation Practices

According to Plucker and Callahan (2020), questions regarding the effectiveness of professional development in gifted education remain unanswered. Gifted education research from quantitative and qualitative research designs have shown limited

participation in and implementation of professional development for gifted and talented education (Benny & Blonder, 2016; Brigandi et al., 2019; Fraser-Seeto et al., 2015; Johnsen & Kaul, 2016, 2019; Peters & Jolly, 2018). The gap between differentiation pedagogy and implementation may be a result in the varied opportunities for professional development. Peters and Jolly (2018) hypothesized that teachers who participated in greater amounts of gifted and talented professional development would report a higher level of implementation of effective gifted and talented education instructional practices. Participants represented three groups: (a) 35 general education teachers who had not received gifted and talented professional development, (b) 86 teachers who obtained a partial certificate of gifted and talented education, and (c) 116 teachers who obtained a full certificate of graduate or master's level work in gifted and talented education. Results from the survey data revealed higher amounts of professional development in gifted and talented did not translate into classroom practices, disproving Peters and Jolly's hypothesis.

Utilizing a longitudinal single case study design, Brigandi et al. (2019) reported similar results as Peters and Jolly's (2018) research study. Brigandi et al. explored the relationship between participation in a professional development enrichment model and one gifted and talented teacher's knowledge and practice with a focus on differentiated instruction. The study participant, an elementary level teacher with 20 years of teaching experience including 6 years as a gifted and talented teacher for an elementary school pull-out program engaged in the Renzulli Enrichment Triad Model professional development workshop. Brigandi et al. collected data over a 7-month period through

semistructured interviews, researcher observations, teacher reflection journal entries, and field and analytic notes. Although participation in the Renzulli Enrichment Triad Model professional development increased the participant's understanding of gifted and talented instructional strategies, the participant noted barriers to implementation including insufficient time to provide learning experiences for students to create authentic products and the lack of time to provide differentiated instruction to meet the individual needs of all students.

Fraser-Seeto et al. (2015) used a quantitative research design to examine elementary teachers' awareness of and willingness to engage in self-directed gifted and talented professional development that consisted of modules designed to support teachers with identifying gifted and talented students, differentiating instruction, and responding to student learning needs. Of the 96 kindergarten through sixth grade teacher respondents, 51% reported participating in gifted and talented professional development while 74% were unaware of the gifted and talented professional development sessions prior to engaging in the study. Fraser-Seeto et al. concluded that self-directed professional development opportunities are most effective when there are systems of ongoing support to encourage participation and ensure implementation.

Comparable findings resulted from Benny and Blonder's (2016) qualitative study revealed the need for ongoing support from the principal or district administration so that teachers could better address the needs of gifted and talented students in the regular education classroom. An analysis of the 14 teacher reflections and photo narratives revealed the factors that promoted teaching gifted and talented students ages 15-18 were

associated with enrichment programs and technology; and the factors that inhibited teaching gifted and talented students included lack of time and gifted and talented students in the general education classroom. The teachers perceived the factors that hindered teachers from supporting gifted and talented students could be managed by the principal or district administrators.

An approach to facilitate a professional learning opportunity between middle school general education and gifted and talented teachers was explored through a collaboration model by Mofield (2020). Middle school general education and gifted education teachers collaborated to plan differentiated learning for gifted and talented students to address underachievement among gifted learners. Survey and interview data were collected from 16 middle school teachers who participated in the collaboration model. Participants reported growth in teachers' capacity to differentiate and improvement in student learning outcomes (Mofield, 2020). Like the findings of Benny and Blonder (2016) and Brigandi et al. (2019), Mofield reported a lack of time as a barrier to collaboration and differentiated learning within the general education classroom.

According to Benny and Blonder (2016), "Attention should be given to raise the awareness of schools principals, district administration, and their recognition of their responsibility to provide appropriate education services for all students including the gifted student in the regular classroom" (p. 9). Administrative leadership that reinforces the factors associated with supporting gifted and talented students and minimizes the barriers associated with teaching gifted and talented students in a general education

classroom can impact teaching and may lead to positive student learning outcomes (Benny & Blonder, 2016; Mofield, 2020). Like Benny and Blonder, Spoon et al. (2020) engaged teachers in a professional learning series that included training with follow-up sessions throughout the school year and expressed the importance of future professional learning opportunities for administrators to be able to design learning opportunities for teachers.

Johnsen and Kaul (2016) had a larger participant group than Benny and Blonder (2016) to examine the implementation of gifted and talented practices. The Texas Association for the Gifted and Talented collaborated with Baylor University to examine the gifted and talented education practices in the state (Johnsen & Kaul, 2016). Over 500 gifted and talented educators responded to a survey to assess their beliefs regarding the implementation of gifted and talented instructional practices. The survey data revealed at least 90% of gifted and talented educators understood and believed in the gifted and talented best practices; however, the belief in the practices did not equate to the implementation of the instructional practices developed by the NAGC (Johnsen & Kaul, 2016). Gifted and talented educators also reported a lack of professional development opportunities related to providing instruction to gifted and talented students that translates to improved student achievement (Johnsen & Kaul, 2016).

In 2019, Johnsen and Kaul conducted a follow-up study of 682 teachers from a suburban school district in Texas. Respondents completed an online survey to assess their beliefs of gifted and talented education practices, based on the NAGC Programming Standards. The two most frequently implemented practices were ability grouping and

adding depth and complexity to the curriculum; however, teachers perceived ability grouping to have a more positive impact on student outcomes than adding depth and complexity (Johnsen & Kaul, 2019). Teachers who rarely or never implemented research-based practices cited a lack of resources needed to differentiate instruction, a lack of district support, and limited professional development opportunities for teaching gifted and talented learners as barriers to implementing gifted and talented research-based practices (Johnsen & Kaul, 2019).

An approach to facilitate a professional learning opportunity between middle school general education and gifted and talented teachers was explored through a collaboration model. Middle school general education and gifted education teachers collaborated to plan differentiated learning for gifted and talented students and to address underachievement among gifted learners (Mofield, 2020). Survey and interview data were collected from 16 middle school teachers who participated in the collaboration model. In contrast to the findings of Johnsen and Kaul's (2019) results, Mofield reported growth in teachers' capacity to differentiate and improvement in student learning outcomes (Mofield, 2020).

Overall, the research findings demonstrated gifted and talented professional development opportunities provide teachers with an understanding of the instructional strategies to support the learning needs of gifted and talented students. Benny and Blonder (2016) and Johnsen and Kaul (2019) concluded that professional development for teachers and administrators is needed to increase teacher confidence in the implementation of practices and to provide information to administrators on the best

practices for achieving positive outcomes for gifted and talented students. The qualitative studies from Benny and Blonder (2016) and Brigandi et al. (2019), as well as the quantitative studies conducted by Fraser-Seeto et al. (2015) and Johnsen and Kaul (2016, 2019), contained similar results—limited implementation of gifted and talented practices. A lack of administrative support for gifted and talented programming (Fraser-Seeto et al., 2015; Johnsen & Kaul, 2019) and lack of time (Benny & Blonder, 2016; Brigandi et al., 2019; Lewis & Boswell, 2020; Mofield, 2020) was cited as a barrier to providing effective instruction and support to gifted and talented students. The collective data from these studies highlight the continued challenges of professional development for gifted and talented education due to the professional development structure, which is often offered in one session or of short duration without coaching or reinforcement to effectively maximize the learning potential of gifted and talented students.

The Elementary to Middle School Transition

During the transition period from elementary to middle school, students encounter changes in academic performance expectations at a time when they are experiencing changes physically, mentally, and socially (Gilewski & Nunn, 2016; Lovette-Wilson et al., 2020). The procedural factors in the middle school setting, adolescent development, academic factors, and social factors influence a student's transition to middle school (Lovette-Wilson et al., 2020). Understanding the factors associated with the transition to middle school (Coelho et al., 2017; Lovette-Wilson et al., 2020) and developing systems of support for middle school students (Fite et al., 2018; Kitsantas et al., 2017; Sewell & Goings, 2019) are critical topics for educators.

Research studies conducted by Fite et al. (2018) and Lovette-Wilson et al. (2020) examined the perceptions of middle school students, teachers, and parents. Fite et al. surveyed 86 sixth grade students to better understand the middle school transition in relation to the school transition, school attachment, depressive symptoms, and anxiety symptoms. Students expressed the support of individuals—parents and friends—rather than school-based programs as helpful to their transition to middle school. However, students reported problems adjusting to the middle school setting and associated their negative perceptions with depression and difficulty with coursework.

In a similar study, Lovette-Wilson et al. (2020) collected data from middle school parents, students, and teachers using surveys and focus groups. A total of 276 sixth grade students, 64 teachers, and 109 parents responded to the survey, while 21 students, 23 teachers, and 19 parents participated in the focus group interviews. In contrast to the research findings of Fite et al. (2018), middle school students in the study by Lovette-Wilson et al. reported positive perceptions about challenging classes and coursework. Overall, parents, students, and teachers also reported positive perceptions regarding curriculum choice and the expectation to perform well in middle school while negative perceptions were linked to student ridicule by peers and concerns about school safety (Lovette-Wilson et al., 2020). Lovette-Wilson et al. concluded, “School administrators have a great deal of influence on how the transition process proceeds as they lead in establishing the vision, mission, beliefs, and expectations of students” (p. 15).

Exploring the transition from elementary to middle school from the perspective of gifted and talented students revealed similar results. Kitsantas et al. (2017) used focus

group interviews to collect data from 34 elementary and 15 middle school students regarding their perspectives of their gifted and talented programs. Both elementary and middle school students reported their programs provided levels of challenge that were different from the general education classroom, but the levels of challenge were valued as meeting their academic needs. On the other hand, there were differences in the perceptions of elementary and middle school gifted and talented students regarding how the gifted and talented program affected their academic and social-emotional functioning. Elementary gifted and talented students reported feelings of being bullied and stereotyped as nerds but reported positive experiences with the expectations for self-regulation, whereas middle school gifted and talented students felt the middle school environment presented more opportunities for healthy competition among peers with self-regulated learning viewed as challenging (Kitsantas et al., 2017).

Utilizing a similar research focus as Kitsantas et al. (2017), Sewell and Goings (2019) explored the lived experiences of 17 former gifted and talented students, many of whom were identified by gifted and talented programs in the elementary grades. Participants noted that a positive experience in elementary gifted and talented programs did not automatically equate to a positive transition to middle school. Also, participants shared that their elementary gifted and talented programs were more diverse than those at the middle school level. Participants attributed their overall success in the transition during middle school to the support of their peers and participation in extracurricular activities and community partnerships (Sewell & Goings, 2019).

Underachievement in gifted and talented students emerges in elementary and has an impact on middle and high school success (Barbier et al. 2019). As students transition to middle school, it becomes difficult for students to reverse the pattern of underachievement (Sielge et al., 2020). In general, the middle school transition poses challenges as students undergo various stages of development and changing academic expectations. More specifically, a predominant characteristic of giftedness is asynchronous development, described as a gifted and talented student's uneven rate of development of academic, creative, emotional, intellectual, and physical domains (Galbraith & Delisle, 2015). For example, a gifted and talented student may intellectually understand social justice but may not have the emotional capacity to handle the concept (NAGC, 2016). A middle school gifted and talented student's asynchronous development, coupled with transitioning from elementary school, may adversely affect a student's transition to middle school both academically and socially (Coelho et al. 2017).

Gifted and Talented Academic Underachievement

Factors Associated with Underachievement

Gifted and talented students experience underachievement when they avoid learning opportunities that could stimulate them to increased levels of mastery (Mofield & Peters, 2019). Individual factors are often predictors of underachievement in gifted and talented students. The most common factors of underachievement are individual factors such as motivation, learning behavior, emotions, perfectionism, and self-regulation (Mofield & Peters, 2019; Obergriesser & Stoeger, 2015; White et al., 2018). For example, Siegel et al. (2020) compared teacher, parent, and student perspectives on four

individual factors associated with underachievement (a) self-efficacy, (b) goal valuation, (c) environmental perceptions, and (d) self-regulation. The collective data revealed similarities between teacher and student perceptions of self-efficacy and self-regulation, and inconsistencies in teacher and student perceptions of goal valuation (Siegel et al., 2020). Further, parent perceptions were more aligned with student perceptions than teacher perceptions across all factors. Siegel et al. concluded that underachieving gifted students' goal valuation was connected to their ability to self-regulate, emphasizes the importance of interventions targeted at goal valuation.

White et al. (2018) used a systematic literature review to explore gifted identification and the factors associated with underachievement in a review of nine empirical articles representing high-achieving gifted students and underachieving gifted students in elementary and secondary school between January 2005 and August 2015. White et al. also found that most of the research had focused on individual factors of underachievers such as motivation and self-regulation with less attention given to school-related factors (White et al., 2018). The analysis by White et al. revealed the studies of giftedness and underachievement used research designs that were not capable of distinguishing between the factors associated with gifted achievers and gifted underachievers.

Mofield and Peters (2019) also acknowledged the individual factors of underachievement by comparing the differences between mindset beliefs about intelligence, dimensions of perfectionism, and achievement attitudes among 169 middle school gifted achievers and 15 gifted underachievers. Gifted and talented underachievers

had a higher fixed mindset regarding intelligence and lower scores on perfectionism and motivation (Mofield & Peters, 2019). The findings of Mofield and Peters' research confirmed that a relationship exists between achievement attitudes, beliefs about intelligence and perfectionism, and underachievement in gifted and talented students. These research of Mofield and Peters and White et al. (2018) recommended that further research is needed to understand how school-related factors such as curriculum, teaching, differentiation, acceleration, the availability of support, and school culture may contribute to gifted underachievement.

Desmet and Pereira (2021) acknowledged both individual and environmental factors associated with underachievement. A descriptive-interpretive qualitative research study was used to explore the underachievement of three gifted middle school boys. Participants reported a lack of challenge in their early school years, family transitions, and peer relations (Desmet & Pereira, 2021). The findings revealed similar results as Desmet et al.'s (2020) study with underachieving girls, the boys identified a lack of self-regulation skills as a contributing factor of their underachievement. Gaining an understanding of the factors associated with underachievement may lead to effective interventions to support interpersonal and intrapersonal elements of gifted learners (Desmet & Pereira, 2021).

Interventions for Underachievement

McCoach et al. (2020) acknowledged that self-efficacy, task value, and self-regulation were related factors of underachievement and "the correlations among these variables demonstrate how challenging it is to identify a single factor to address within an

underachievement intervention” (p. 112). Wu (2016) contended that research in the area of underachieving gifted and talented students centered around the causes and factors associated with underachievement, with little attention on strategies and practices to reverse or prevent the phenomenon. The results from Mofield and Peters’ (2019) research suggested a need for interventions that promote a growth mindset and strategies to support a perfectionist perspective in gifted and talented students.

In a subsequent study on interventions for gifted and talented underachievement, Taghinejad et al. (2020) explored the impact of 280 middle school gifted underachievers’ participation in a growth mindset intervention through a quasi-experimental, pretest-posttest and follow-up study. Participants completed an 8-week growth mindset course and responded to academic success, learning behavior, and intelligence scales. Results indicated the growth mindset course as an intervention influenced the learning behaviors of middle school gifted underachievers; however, given the complexity of gifted and talented underachievement, Ritchotte et al. (2016) proposed that no single strategy or intervention will reverse underachievement.

Frameworks and concepts to reverse the underachievement of gifted and talented students and to prevent underachievement have been proposed by Ritchotte et al. (2016) and Ronksley-Pavia and Neumann (2020). Ritchotte et al. recommended a Functional Behavioral Analysis as a mechanism for reversing the underachievement of gifted and talented middle school students. This analysis, a seven-step process used in the field of special education, identifies the problem, includes a team approach to explore the problem through observation and data collection to verify the behavior, develops and

implements an intervention, evaluates the intervention, and monitors and modifies (Ritchotte et al., 2016).

Ronksley-Pavia and Neumann (2020) offered a new perspective, The (Re) Engagement Nexus Model, through which to explore opportunities to re-engage gifted and talented students. This perspective highlighted three independent constructs: (a) engagement dimensions: behavioral, affective, social, and cognitive dimensions, (b) four profiles of giftedness: successful, creative, underground, at-risk, and (c) twice-exceptional and pedagogical re-engagement approaches. The (Re) Engagement Nexus Model, like the analysis by Ritchotte et al. (2016), includes the interrelationship between the aforementioned constructs and the use of the model to create individualized learning experiences for gifted and talented students with the intent of ensuring educators focus on proactive efforts for the engagement of gifted and talented students (Ronksley-Pavia & Neumann, 2020).

Ridgley et al. (2020) acknowledged that gifted underachievers often lack the motivation to perform academically. A comprehensive intervention that includes selecting a task, conducting a self-regulated learning assessment, identifying student needs, developing interventions, and monitoring student progress as potential techniques to address gifted underachievement (Ridgley et al., 2020). Obergriesser and Stoeger (2015) explored the effects of a self-regulated learning intervention as a predictor of underachievement through a 7-week intervention that focused on learning behaviors to support self-regulated learning in a qualitative study involving 85 fourth grade gifted and talented students. Positive effects were found for learning behaviors as a result of the

intervention among both gifted underachievers and gifted achievers, suggesting interventions for gifted underachievers are successful in the traditional classroom setting (Obergriesser & Stoeger, 2015).

Wu (2016), in a related qualitative research study, collected interview data from three teachers working in gifted and talented programs at three different schools to gain an understanding of the patterns of underachievement that teachers observed in gifted and talented students. Wu noted the relationship between intervention strategies and the underlying causes of gifted underachievement; the themes that emerged from the teachers' interviews were the elements of self-esteem, motivation, and peer influences on underachievement (Wu, 2016). Interventions that allowed students to explore areas of interest were connected to increased motivation while peer pressure may have resulted in gifted and talented students feeling ashamed of their intellect, therefore causing students to be unwilling to express their intellectual ability.

Steenbergen-Hu, Olszewski-Kubilius, and Calvert (2020) conducted a systematic review of quantitative and qualitative empirical studies focusing on the effectiveness of underachievement interventions to support gifted students' academic and psychosocial outcomes. From a quantitative lens, the results indicated that the underachievement interventions had no significant impact on improved academic performance of gifted and talented students (Steenbergen-Hu, Olszewski-Kubilius, & Calvert, 2020). In contrast, the qualitative studies in the systematic review conducted by Steenbergen-Hu, Olszewski-Kubilius, and Calvert indicated the underachievement interventions promoted gifted and talented underachieving students to have increased motivation, improved self-regulation,

making meaningful connections to school and positive rapport with adults (Steenbergen-Hu, Olszewski-Kubilius, & Calvert, 2020).

Applying similar methods as Steenbergen-Hu, Olszewski-Kubilius, and Calvert (2020), Snyder et al. (2019) used a systematic review and meta-analysis of 53 studies involving a variety of intervention types and grade levels to examine the effectiveness of interventions for underachieving students with a focus on achievement and psychosocial outcomes. While Snyder et al. found the interventions produced moderate effects in achievement and psychosocial outcomes, the interventions were more effective for elementary and middle school students. This finding from Snyder et al. confirmed the idea that if the complex nature of the factors associated with underachievement are not addressed in elementary grades, underachievement may continue as students transition to upper grade levels (Hoover-Schultz, 2005). Studies related to the factors associated with gifted and talented underachievement (Mofield & Peters, 2019; Obergriesser & Stoeger, 2015; White et al., 2018) and the interventions for gifted and talented underachievement (Obergriesser & Stoeger, 2015; Snyder et al., 2019; Steenbergen-Hu, Olszewski-Kubilius, & Calvert, 2020; Taghinejad et al., 2020; Wu, 2016) suggested the need for future research to explore the school level factors, such as principal leadership practices that impact the academic performance of gifted and talented students.

Principal Leadership Effectiveness

In the current educational climate of school improvement, principals are expected to accept the responsibility of accountability and increased demands (Acton, 2021; Sanchez et al., 2017). The school leadership debate over the past decade has attempted to

identify the leadership practices that support positive school performance and outcomes. For example, Acton combined transformational leadership and change agent leadership practices into one conceptual framework to support principals. This proposed framework incorporated professional learning methods: (a) courses, (b) experiences, (c) feedback, (d) collegial exchanges, and (e) self-reflection; and the change process: (a) shared vision, (b) planning and resources, (c) professional learning, (d) checking progress, (e) providing continuous assistance, and (f) culture supportive of change (Acton, 2021). Using this framework, interviews with five elementary principals were conducted to discover their perceptions of their ability to serve as change agents and revealed gaps in the principals' understanding of the change agent role due to the lack of professional development experiences (Acton, 2021). Principals primarily reported their expertise was developed from hands-on, on-the-job experiences and collaboration with principal peers.

Utilizing longitudinal data, Grissom and Bartanen (2018) and Beckett (2021) investigated the link between principal effectiveness and principal turnover. Grissom and Bartanen analyzed administrative data files from school years 2011-2012 and 2014-2015 to measure the extent to which principals were more or less likely to leave principal positions. The data analysis concluded ineffective and effective principals had higher rates of turnover. Elevated turnover rates for principals were linked to schools with lower-than-average academic performance. Additionally, principals with the highest level of turnover occurred at the middle school level (Grissom & Bartanen, 2018).

Beckett (2021) examined seven independent variables related to principal turnover in an urban school district: (a) school type, (b) school size, (c) percentage of

students of color, (d) percentage of students with free and reduced lunch, (e) percentage of students with disabilities, (f) percentage of English Language Learner students, and (g) percentage of gifted and talented students. Longitudinal data revealed a 76.3% mobility rate for principals with 18% changing schools within in the district and over 58% of principals leaving the school district (Beckett, 2021). The findings of Beckett's research indicated a tendency for principals who changed schools within the district to move to schools with lower percentages of gifted and talented students. The research findings from Grissom and Bartanen (2018) and Beckett highlight the need to explore principal leadership practices within gifted and talented education.

Principal Leadership Practices and Gifted and Talented Education

The leadership of the school principal has been noted as one of the most important school-related factors that impact student learning and achievement (Dhuey & Smith, 2018; Grissom et al. 2021). Principals are accountable for overseeing the instructional and managerial components of the overall education program; however, gifted and talented services are often not the primary focus of the instructional programming (Johnsen, 2013). In addition, no state in the United States has a mandate for gifted and talented professional learning or coursework related to administrative leadership programs (NAGC, 2015). In the state of Arkansas, a formal partnership was developed between the state's gifted education association and the state's educational administrator association to strengthen gifted education policy and practices (Robinson, 2021). A similar partnership between The University of North Texas and the Texas Association of Gifted and Talented (TAGT) was developed to launch a study to better understand gifted

and talented educator perceptions of gifted education policy. Hodges et al. (2021) surveyed district coordinators and directors, classroom teachers, and TAGT public school district representatives and found participants were optimistic about the overall future of gifted education. Principals were not included in the study by Hodges et al.; however, Robinson reported principals are considered the frontline administrators and represent a group of leaders that the gifted community seldom engages with.

Although the principal's role has been identified as key to the improvement of the overall success of school programs, only a limited number of current studies have investigated the principals' impact on gifted and talented education (Guilbault & Kirsch, 2020; Handa, 2019; Hertberg-Davis & Brighton, 2006; Lewis et al., 2007; Weber et al., 2003). The seminal research of Weber et al. was an investigation of the principal's role in gifted and talented education with interviews of two principals, one from a private elementary gifted and talented school and one from a public gifted and talented elementary magnet school.

Weber et al. (2003) found that the private school principal's role in implementing gifted and talented programs included program organization, curriculum development, and teacher training. The public school principal's role involved implementing the curriculum and collaborating with teachers to identify activities, field experiences, and community resources to enrich the district-developed curriculum. The public school principal also shared the completion of a gifted and talented endorsement and also completed two gifted and talented courses as part of a graduate level program, highlighting the importance of maintaining an understanding of state and district

standards for gifted and talented education. The interview responses revealed commonalities; both principals expressed the need for communication skills and support for the nature and needs of gifted and talented students as important aspects of gifted and talented education (Weber et al., 2003).

In a similar seminal study, Lewis et al. (2007) examined the practices of two elementary principals' leadership in the implementation of their campus gifted and talented programs. The participants in this study were identified as exemplary principals and advocates for gifted and talented students because they implemented cluster grouping and differentiated instruction to meet the learning needs of students. A significant finding of Lewis et al. was that both principals acknowledged effective leadership practices for gifted and talented programs that were not being applied in their schools. For example, while principals evaluated the general education programs using a variety of assessments and input from stakeholders, a program evaluation of gifted and talented programs was not initiated. The principals also reported gifted and talented goals were developed but not incorporated into their school improvement plans (Lewis et al., 2007). Both Weber et al. (2003) and Lewis et al. recognized the lack of literature regarding the principal role in gifted and talented education and called for additional research.

A related ethnographic study in this period of time, conducted by Hertberg-Davis and Brighton (2006), involved examining the principal's role and the impact of differentiated instruction on student achievement. A total of 36 middle school teachers and 3 middle school principals participated in a 3-year study to gain an understanding of how teachers implemented differentiation through the lens of principal leadership

characteristics (Hertberg-Davis & Brighton, 2006). A variety of data sources including interviews, observations, focus groups, and field notes revealed teachers needed the support of a principal to effectively implement differentiated instruction. The results also indicated principals had an impact on teachers' willingness to implement differentiation to meet the needs of gifted and talented students in a general education classroom, and the effective implementation of differentiation required a principal with the desire to believe change was possible (Hertberg-Davis & Brighton, 2006).

A more recent mixed methods study by Handa (2019) focused on similarities and differences in principal and teacher perceptions of differentiated strategies for gifted and talented students. Handa sought to understand principals' perceptions of their leadership actions in implementing and sustaining differentiated instruction for gifted and talented students. Quantitative surveys were collected from 867 teachers and 120 principals. In addition, case study interviews were conducted with four principals. The survey results revealed a significant difference between teacher and principal perceptions of differentiated instruction; principals reported fewer opportunities for differentiation than teachers. Teachers reported principals may have limited knowledge and expertise in gifted and talented, which could impede their ability to identify any misconceptions of differentiation strategies in classroom practice (Handa, 2019). Ten themes emerged related to the principal leadership that is needed for differentiated learning: (a) identifying and communicating a visible reason for change, (b) setting up a guiding coalition, (c) developing a shared vision and strategy, (d) building and sharing knowledge and information, (e) enabling student voice, (f) committing resources to foster the collective

capacity of staff, (g) empowering teachers for schoolwide differentiation, (h) acknowledging teachers, (i) embedding changes into school culture, and (j) setting sustainable future directions (Handa, 2019).

The findings of these studies demonstrate the importance of the principal's role in understanding differentiated instruction (Hertberg-Davis & Brighton, 2006) and the leadership actions (Handa, 2019) needed to ensure differentiated instruction is a viable option for meeting the needs of gifted and talented learners. Empirical research on principal leadership practices within gifted and talented education is neither extensive nor current. Guilbault and Kirsch (2020) recommended, "More research is needed on what qualities make an effective administrative leader of education programs, best practices for effective leadership training, and how leaders impact gifted identification, programs, and services." (p. 32).

Summary and Conclusions

This chapter provided the reader with the foundational information on transformational leadership in the education context, gifted and talented education, and principal leadership practices. Principals' leadership styles were found to have indirect influences on students' academic success; however, school principals had influence on the school culture and climate, both elements that directly affect academic performance (Burkhauser, 2017). Evidence emerged that indicated transformational leadership had an impact on student achievement (Quin et al., 2015; Tookes et al., 2020) while other research found no impact on student achievement (Allen et al., 2015). Principal turnover rates were found to be higher in middle schools (Grissom & Bartanen, 2018) with a trend

among principals to move to schools with lower percentages of gifted and talented students (Beckett, 2021).

The literature review highlighted topics of gifted and talented programming (Callahan et al., 2017; NAGC, 2019b; Rinn et al., 2020), gifted and talented underachievement (Steenbergen-Hu, Olszewski-Kubilius, & Calvert, 2020; White et al., 2018), and principal leadership practices (Grissom et al., 2021; Handa, 2019; Lewis et al., 2007) with a common theme of insufficient research on the role of principal leadership in gifted and talented education noted. Although multiple studies on principal leadership practices have been conducted, limited current research was found on principal leadership practices to address the academic performance of gifted and talented students in their transition from elementary to middle school, which further underscores the need for this research study. The diversity of gifted and talented policies, practices, and procedures across schools in the United States calls for school leaders to ensure gifted and talented education is a priority (Guilbault & Kirsch, 2020). The next chapter describes the research methodology used to achieve the purpose of this multiple case study research design on understanding how elementary and middle school principals perceive their leadership to address the decline in academic performance of gifted and talented students in their transition from elementary to middle school.

Chapter 3: Research Method

The purpose of this qualitative multiple case study was to explore how elementary and middle school principals perceive their leadership to address the decline in the academic performance of gifted and talented students in their transition from elementary to middle school. Chapter 3 consists of the research design, rationale, and the role of the researcher. This chapter includes a thorough description of the methodology for this research study and includes participant selection, instrumentation, procedures for recruitment, participation, data collection, and the data analysis plan. The latter portion of Chapter 3 contains the strategies that were implemented to ensure the trustworthiness of the study as well as ethical procedures and a summary.

Research Design and Rationale

Qualitative research traditions are exploratory in nature and allow the researcher to gain an understanding of a phenomenon in an organic setting (Burkholder et al., 2020; Yin, 2014). A natural setting facilitates the researcher's ability to develop a high level of detail from participants (Creswell, 2009). Yin (2018) identified five distinguishing characteristics of qualitative research: (a) studying the lived experiences of participants, (b) representing the perspectives of participants, (c) accounting for real-world context, (d) contributing insights to explain social behavior and thinking, and (e) acknowledging the relevance of multiple sources of evidence. Qualitative research traditions are implemented when researchers seek to answer *how* and *why* questions (Burkholder et al., 2020). The research questions developed for the purpose of this research study were

aligned to conducting a qualitative research design. The research questions that guided this qualitative research study were:

RQ1: How do elementary and middle school principals perceive their experiences with gifted and talented education?

RQ2: How do elementary and middle school principals perceive the problem of the decline in gifted and talented student academic performance in the transition from elementary to middle school?

RQ3: How do elementary and middle school principals perceive their leadership to address the decline in academic performance of gifted and talented students in their transition from elementary to middle school?

Quantitative research designs are concerned with understanding phenomena to test or verify theories (Creswell, 2009) and rely on statistical analysis and the measurement of variables, whereas qualitative research designs focus on understanding phenomena from the perspective of the individual experiences of participants (Burkholder et al., 2020). The research questions in this multiple case study were developed to understand how a phenomenon happened without controlling the variables occurring around it. A quantitative research study would have limited my ability to gain insight on principals' perceptions of their leadership experiences and practices.

The rationale for selecting a qualitative research design aligns with Yin's (2018) features of qualitative research. For example, Yin identified representing participant perceptions within a real world context as key features of qualitative research. The primary goal of case study research was to "paint a comprehensive picture of a bounded

unit around some phenomenon” (Burkholder et al., 2020, p. 84). At the center of the case study is the unit of analysis (Baxter & Jack, 2008; Merriam & Tisdale, 2016). Identifying the unit of analysis establishes the boundaries of the case study and ensures the scope of the study is reasonable (Baxter & Jack, 2008). At the study site, the academic performance of gifted and talented students declines as students transition from elementary to middle school. It was unknown what leadership practices principals use to support gifted and talented students at the elementary or middle school levels. A multiple case study was an appropriate research design because this type of case study allowed me to explore the similarities and differences between the leadership practices of principals who lead gifted and talented programs at both the elementary and middle school levels (see Baxter & Jack, 2008; Yin, 2014).

Elementary and middle school principals represented the two units of analysis in this multiple case study. The data sources included semistructured interviews and document analysis to explore elementary and middle school principals as leaders with a focus on a defined subpopulation of students. The process of collecting data from a small sample in the study site facilitated the development of a descriptive commentary to provide a better understanding of the leadership practices of elementary and middle school principals to support gifted and talented students as they transition from elementary to middle school.

Role of the Researcher

According to Creswell (2013), qualitative researchers identify their biases, values, and personal background that may influence the interpretations of the research findings. I

have served as an educator in K-12 public schools for 19 years as a gifted and talented teacher, instructional coach, assistant principal, associate principal, and central office administrator. During this time span, I have gained background knowledge and experiences that have shaped my professional perspective and mindset. Operating as the primary researcher in this multiple case study, my role was to engage elementary and middle school principals in semistructured interviews and to conduct an analysis of campus improvement plans. The participants were comprised of elementary and middle school principals in my school district with whom I engaged professionally but not in a supervisory or evaluative capacity.

To mitigate any unintended biases reflexive journaling was incorporated throughout the data collection as well as during the data analysis process (see Ortlipp, 2008; Yin, 2016). To consistently monitor the research process and myself as the research instrument, I practiced transparency during the entirety of the research process by maintaining a reflexive journal (see Ortlipp, 2008). The reflexive journal was used to ensure my experiences, perspectives, reflections, and current role as a central office administrator did not interfere with this research study. Reflexive journaling facilitated the analysis of the data and allowed me to draw conclusions about principal leadership practices in gifted and talented programs from an objective perspective.

Methodology

I used a multiple case study research design to explore how elementary and middle school principals provide leadership to support gifted and talented students' academic performance in their transition from elementary to middle school within a

school district located in the southern region of the United States. The school district is comprised of approximately 35,000 students situated across 26 elementary schools, nine middle schools, one prekindergarten through eighth grade school, and five high schools. The gifted and talented enrollment is approximately 7% of the total district enrollment. Both interviews and document analysis were collected and reviewed. To triangulate the data, semistructured interviews with elementary and middle school principals were conducted followed by an analysis of campus improvement plans developed under the leadership of participant principals. Thematic analysis was used against the dimensions of transformational leadership and the literature review to code and categorize participant responses to answer the research questions.

Participant Selection

A small sample size is a common feature of case study research (Burkholder et al., 2020). The study population consisted of 10 principals total: six elementary principals and four middle school principals. In qualitative research studies, participant selection involves selecting individuals who can contribute to addressing the research questions (Burkholder et al., 2020). Selecting participants according to an identified set of criteria ensured that the data collected from the participants would be relevant to answering the research questions. To explore the gap in practice, the principal was the individual who could provide the most meaningful information regarding their perceptions and experiences leading their campus gifted and talented programs.

The most appropriate sampling strategy for this multiple case study research is purposeful sampling (see Merriam & Tisdale, 2016). Purposeful sampling is a common

sampling technique used in qualitative research whereby participants are selected for information-rich cases who can provide insight into the phenomenon under study (Patton, 2002). This sampling strategy allowed me to purposefully select individuals who can inform the understanding of the research problem (see Creswell, 2013, Merriam & Tisdale, 2016; Yin, 2016). Purposeful sampling was used to select participants from the target population of principals in the study site based on their role as an elementary or middle school principal. The selection criteria were confirmed through the study site's public records and included (a) elementary and middle school principals serving in their role for at least 1 year at their school and (b) elementary and middle school principals serving schools with at least a 3% enrollment of gifted and talented students.

Additionally, participants who previously served as an elementary principal and currently served as a middle school principal meeting the inclusion criteria were recruited to share their experiences leading at both school levels. The inclusion of this specific participant group contributed to gaining insight into how principals understand the problem of the decline in gifted and talented student academic performance in the transition from elementary to middle school. Upon approval from the school district (see Appendix A), the initial recruitment for participants took place through email. A second recruitment email was sent to the individuals who meet the selection criteria but did not respond to the initial recruitment email.

Instrumentation

According to Merriam and Tisdale (2016), the use of interviews is the most effective data collection method for case study research. Semistructured interviews

served as the primary data collection instrument. A semistructured interview involves the creation of interview questions aligned to the research questions and enabled me to modify the style and pace of the interview as needed to gain insight from the interviewee's perspective (see Qu & Dumay, 2011). A semistructured format gave me the flexibility to ask probing questions to gather more detailed and in-depth responses to answer the research questions (see Burkholder et al., 2020). To ensure the consistency of the interviews across all participants, an interview protocol was developed to guide the structure of the interviews (see Burkholder et al., 2020). The interview protocol (see Appendix B) provided the framework for data collection with an introduction, interview questions, potential probes, and a summary (Yin, 2014, 2018). The interview questions were formulated using the transformational leadership models of Bass and Avolio (1994), Hallinger (2003), Leithwood and Jantzi (2005), and Kouzes and Posner (2008). After finalizing the interview questions, the questions were aligned to their corresponding research question (see Appendix C). An important concept of instrument development is content validity (Long & Johnson, 2000). Content validity refers to the extent in which an instrument is representative of measuring the phenomenon under study (Long & Johnson, 2000). The interview protocol was field tested with an individual who was not a potential participant to ensure the questions provided sufficient information to answer the research questions. Field testing the interview protocol contributed to the content validity of the instrument.

Procedures for Recruitment, Participation, and Data Collection

Participant information were obtained from the school district's public records to confirm the criteria for participation. With permission from the study site, the initial communication to invite participants was through email. The invitation to participate in the study explained the eligibility requirements and the informed consent process. The informed consent is the communication between researcher and participant and establishes an individual's right to voluntarily participate in or withdraw from a study (Burkholder et al., 2020). Participation in this multiple case study was voluntary. Two email communication attempts were made to invite elementary and middle school principals to participate in the interviews.

Agreement to participate in the study was confirmed by the participant's email response, "I consent," and maintained as official documentation. Individual interviews were held either in-person or through a video conference platform. In-person interviews were recorded using an audio device. Approximately 60-minutes was scheduled for each interview to ensure participants had sufficient time to provide in-depth answers to the questions and to allow time for participants to respond to question probes. I used field notes to document the interview process. Field notes were recorded in the margins of the interview protocol and on additional pages to document the interview process (see Yin, 2016). Immediately following the interviews, participant responses were transcribed by listening to the recordings and transcribing the responses. Upon completion of the transcription, participants had the opportunity to clarify their responses through transcript review and member checking. I debriefed with the participants to review the purpose of

the study and to allow participants to review and validate their transcripts. Member checking is a process for participants to verify the interpretations of the collected data (Carlson, 2010; Lincoln & Guba, 1985). Approximately 30-minutes was allotted for participants to verify that their responses were transcribed accurately. During the debrief, I provided my contact information to ensure that participants knew who to contact with questions related to their participation in this study. A Microsoft word document was used to organize, manage, and maintain the data from the semistructured interviews and the document analysis checklists in a secure password-protected computer.

An additional data source, campus improvement plans of the elementary and middle school study sites were also analyzed. The state education agency in which the research study site is located sets forth the guidelines for the development of campus improvement plans (Texas Education Agency, 2022). At the research study site, campus improvement plans are developed under the leadership of the principal in collaboration with campus-level committees and are designed to provide a blueprint to guide schools in overall improvement for all student populations (TEA, 2022). The primary components of the campus improvement plans include a comprehensive needs assessment, priority problem statements, and goals in the areas of student outcomes, equity, engagement, and well-being. In addition, the plans include the strategies for goal achievement, identify resources needed, and direct progress monitoring (TEA, 2022). These plans were obtained from the school district's public records for document analysis.

Data Analysis Plan

According to Merriam and Tisdale (2016), in qualitative research, data collection and data analysis occur simultaneously as the researcher seeks to answer research questions. Patton (2002) recommended that researchers continuously interact with the collected data to be able to identify patterns and categories. The data analysis process for this study was guided by the literature review, research questions, and the conceptual framework of transformational leadership that was used in the formulation of the coding scheme that was used in the coding process (Burkholder et al., 2020; Yin, 2014).

A code is a descriptive word, phrase, or abbreviation developed to ascribe meaning to data (Saldana, 2016). I used an integrated approach to code the interview data, including both deductive and inductive coding. Deductive coding, a top-down approach, refers to a process in which researchers develop coding schemes prior to the collection of data (Nowell et al., 2017). I developed coding schemes using the literature review, research questions, and the conceptual framework of transformational leadership to apply the codes to the collected data. Table 3 includes the preliminary deductive codes that were used in the data analysis. In contrast, an inductive coding, or a bottom-up approach originates codes from the collected data (Nowell et al., 2017). Hatch (2002) described inductive coding as “a search for patterns of meaning in data so that general statements about phenomenon under investigation can be made” (p. 161). Using the inductive approach, I modified the initially generated codes based on the participants’ responses. Incorporating both deductive and inductive coding approaches lead to the development of categories to facilitate the data analysis technique (Yin, 2016).

Table 3*Preliminary Deductive Codes*

Deductive Code	Deductive Code Label
Idealized influence	II
Inspirational motivation	IM
Intellectual stimulation	IS
Individual consideration	IC
Model the way	MTW
Shared vision	SV
Challenge the process	CP
Enable others to act	EO

Thematic analysis was the qualitative data analysis technique that was used to analyze the data. Thematic analysis is a qualitative approach used to identify, organize, describe, and report themes discovered within a set of data (Nowell et al., 2017). This type of analysis is a recursive process that provided the flexibility to move back and forth between the data analysis phases (see Braun & Clarke, 2006). The analysis began by transcribing the participants' responses while listening to the recordings multiple times to ensure accuracy of the transcribed data, to identify and describe the practices of interest, and to reflect on the collected data. Coding was completed in the margins of the transcribed data. After the initial coding was completed, the codes were used to identify recurring themes within and across the participants' responses relating to the principals' leadership practices associated with the academic performance of gifted and talented students in their transition from elementary to middle school.

One of the most common ways to increase the internal validity of qualitative research is triangulation (Abdalla et al., 2018). Triangulation involves the use of multiple sources to develop converging lines of inquiry to answer the research questions and during the data analysis phase (Yin, 2016). Triangulation provides a way to confirm and strengthen the integrity of a case study's findings (Abdalla et al., 2018). Anney (2014) described three types of triangulation: (a) investigator triangulation, (b) data triangulation, and (c) methodological triangulation. Investigator triangulation occurs when multiple researchers investigate the same phenomenon (Anney, 2014). Data triangulation uses a variety of data sources or instruments to explore a phenomenon to enhance the quality of the data (Anney, 2014), whereas methodological triangulation utilizes different research methods (Lincoln & Guba, 1985).

Data triangulation was used in this multiple case study to compare the semistructured interview responses from elementary principals with those of middle school principals and from all the principal participants with their campus improvement plans to determine if the data sources intersect and to support the findings (see Merriam & Tisdale, 2016; Yin, 2016). The triangulation of the data included comparing elementary principal responses with the contents of their campus improvement plans; comparing middle school principal responses with the contents of their campus improvement plans; and then comparing responses across both elementary and middle school principal responses and campus improvement plans to identify patterns. The document analysis consisted of reviewing the school's goals related to gifted and talented student academic performance and the identified strategies to support gifted and talented

student academic performance using a researcher-designed checklist (see Appendix D). The thematic analysis allowed me to address this multiple case study's problem, purpose, conceptual framework, and research questions. Finally, I conducted a cross-case synthesis. A cross-case synthesis involves analyzing the findings of each individual case to compare and contrast the findings (Yin, 2014). The cross-case synthesis was used to identify patterns between the elementary principal leadership practices and middle school principal leadership practices (see Yin, 2014).

Trustworthiness

When using a qualitative research design, researchers seek to ensure the rigor, confidence, and strength of qualitative findings by assuring that there is trustworthiness in the research process that results in the findings of the study (Burkholder et al., 2020; Yin, 2018). The seminal research of Lincoln and Guba (1985) provides the foundational focus of trustworthiness in qualitative research by applying four criteria to achieve trustworthiness: credibility, transferability, dependability, and confirmability. It was my responsibility to incorporate strategies related to each criterion to ensure the trustworthiness of the research process and findings. I incorporated the strategies that follow to ensure credibility, transferability, dependability, and confirmability are addressed in this study.

Credibility

Instituting credibility assures that the researcher has appropriately collected and interpreted the data to yield the findings and conclusions that depict an accurate account of the data from the perspective of the participants (Lincoln & Guba, 1985; Yin, 2018).

The credibility of this study was established through triangulation. Triangulation refers to the use of multiple sources to verify or confirm the themes and findings of a study (Burkholder et al., 2020; Yin, 2018). I used data triangulation, the use of more than one data source to confirm the research findings (see Anney, 2014; Yin, 2018). The data sources included semistructured interviews of six elementary and four middle school principals and an analysis of their campus improvement plans. The data from the semistructured interviews and the document analysis of the campus improvement plans were used to determine patterns and categories as the data are checked across data sources from elementary principals and middle school principals and then from campus improvement plans to identify emerging themes that lead to the verification of the research findings.

Transferability

Transferability is concerned with whether a qualitative study's findings are applicable in other contexts and settings (Lincoln & Guba, 1985). According to Burkholder et al. (2020), qualitative researchers are faced with the challenge of sufficiently depicting the context of a study so that readers can make their own discernment about the transferability of a study. The aim of this analysis was not to generalize the findings to all principals and gifted and talented programs, but to explore how elementary and middle school principals provide leadership to address the decline in the academic performance of gifted and talented students in their transition from elementary to middle school. To achieve the criteria of transferability, I incorporated thick descriptions. Thick descriptions provide a detailed explanation of all aspects of a

study's research process including the setting, participants, and results (Anney, 2014). Utilizing thick descriptions enhances the transferability of the research findings and support researchers and practitioners who may seek to replicate this study or apply this study's findings to the context of their school sites (Anney, 2014; Merriam & Tisdale, 2016). Specifically, I included thick descriptions of the research study's methodology, the study site, the participants, and specific evidence from the data collected through the semistructured interviews and document analysis that describe the experiences, perceptions, and leadership practices of elementary and middle school principals in relation to their school's gifted and talented program (see Merriam & Tisdell, 2016; Yin, 2018).

Dependability

Dependability refers to the consistency in data collection, analysis, and data reporting over time and throughout the duration of the research study (Burkholder et al., 2020; Lincoln & Guba, 1985). I engaged a peer reviewer, a neutral colleague not involved in the study in dialogue pertaining to the study's progress, data analysis, and preliminary findings to pose questions and clarify conclusions (see Anney, 2014). I also used an audit trail to ensure the dependability of the research study. Audit trails were developed from my field notes and were used to validate the data (see Anney, 2014).

Confirmability

Confirmability is the degree to which research findings are influenced by verifiable procedures and analyses and not associated with researcher bias (Amankwaa, 2016; Burkholder et al., 2020). The cross-case synthesis comparing and contrasting the

findings of the two cases ensured the findings were confirmed (Yin, 2014). The standard of confirmability is also met when strategies are incorporated to ensure the findings and conclusions are representative of the participant's responses and not from the researcher's perspective or interests (Abdalla et al., 2018). Qualitative researchers are encouraged to take an active role to ensure researcher bias is avoided (Burkholder et al., 2020; Lincoln & Guba, 1985). As the primary research instrument of this study, I acknowledged the subjectivity of my involvement in the study. To achieve objectivity and a degree of neutrality, I maintained a reflexive journal throughout the duration of the research process (see Lincoln & Guba, 1985; Meyer & Willis, 2019). Reflexive journals are used to engage in self-critical analyses of biases to increase the researcher's positionality (Meyer & Willis, 2019; Ortlipp, 2008). During the data collection phase, journal entries were entered and reviewed and used in my ongoing analysis of the research process. This research experience presented levels of discourse and the reflexive journal supported me as a novice scholar-practitioner. Based on my knowledge and professional experiences as an educator, I recognized and acknowledged my personal biases and perceptions related to gifted and talented education. The reflexive journal was an intentional and strategic strategy to address my perspective and previous experiences to monitor any potential researcher bias.

Ethical Procedures

Qualitative research, by definition, often engages participants in providing accounts of personal experiences to gain an understanding of a phenomenon of interest (Creswell, 2013). I recognized that exploring principals' perceptions of their leadership

actions related to gifted and talented programs at their schools may reveal sensitive information regarding their role. It was my responsibility to articulate and ensure that ethical safeguards were instituted to protect participants (see Burkholder et al., 2020). The ethical considerations that guided this multiple case study research design are set forth under the direction of Walden University as required for the Advanced Education Administrative Leadership (AEAL) Program. The university developed informed consent form ensured that participant confidentiality was maintained. Interviewee codes were assigned at the beginning of each interview and used in reporting the study results. A partnership agreement between Walden University and the study site was obtained to confirm my participation in conducting this research study. I anonymized the study site by masking the name of the school district in all documents and materials. Only individuals affiliated with the study site participated in this multiple case study.

Walden University's IRB assigned an approval number for this study 05-13-22-0138397. After I received the IRB approval, I recruited participants at the study site by emailing the contents of the informed consent to participants who met the selection criteria. All data collection artifacts have been stored in a password-protected computer and will be destroyed after 5 years. Hard copies of the data collection artifacts that include the campus improvement plans are kept secure in a locked file cabinet in my home office. All responses, documents, and materials obtained through this multiple case study remain confidential. At the conclusion of the study, I shared an executive summary with the superintendent.

Summary

This qualitative multiple case study research design used research methodology aligned to the standards set forth by the Walden University's Center for Research Quality. The focus of this study was on elementary and middle school principal leadership practices to support gifted and talented students in their transition from elementary to middle school in an urban school district located in the southern region of the United States. Exploring leadership practices to address the decline in the academic performance of gifted and talented students in their transition from elementary to middle school may provide insight into which principal leadership practices influence changes in the academic success and trajectory of gifted and talented students. This chapter described the role of the researcher and the methodology to illustrate the alignment between the problem, purpose, research design, participant selection, and instrumentation to answer the study's research questions. A data analysis plan was also outlined and accompanied by the strategies to ensure the trustworthiness of the study. Chapter 4 presents an in-depth description of the case study's results and findings.

Chapter 4: Results

The purpose of this qualitative multiple case study was to explore how elementary and middle school principals perceive their leadership to address the decline in the academic performance of gifted and talented students in their transition from elementary to middle school. Prior to this research, it was unknown how elementary and middle school principals in a school district located in the southern region of the United States, provide leadership to increase the academic performance of gifted and talented students in their transition from elementary to middle school. To achieve the purpose of this study, a multiple case study was conducted using elementary and middle school principals. I chose purposive sampling and collected data from six elementary principals and four middle school principals to examine their perceived leadership role in supporting gifted and talented students.

Three research questions guided this multiple case study:

RQ1: How do elementary and middle school principals perceive their experiences with gifted and talented education?

RQ2: How do elementary and middle school principals perceive the problem of the decline in gifted and talented student academic performance in the transition from elementary to middle school?

RQ3: How do elementary and middle school principals perceive their leadership to address the decline in the academic performance of gifted and talented students in their transition from elementary to middle school?

To answer the research questions for this multiple case study, data were collected from semistructured interviews and document analysis of each participant's campus improvement plan. I used transformational leadership as the conceptual framework and the lens through which I analyzed the data. This chapter describes the setting of the study and outlines the data collection process as well as the data analysis process. Most of the chapter contains the results of the study and concludes with an explanation of the trustworthiness strategies I implemented to ensure credibility, transferability, dependability, and confirmability of the study.

Setting

The setting for the study was a public school district located in the southern region of the United States. The school district consists of 26 elementary schools, eight middle schools, one prekindergarten through eighth grade school, and five high schools serving approximately 35,000 students. The school district's gifted and talented enrollment is approximately 7% of the total district enrollment.

A total of 10 participants responded to the recruitment email by replying "I consent." A second recruitment email was sent to principals who did not respond to the initial email and four additional principals agreed to participate in the study. Each principal was assigned a participant code to ensure confidentiality. The elementary case study participants who comprised the elementary case were assigned a code from EP1 to EP6. The middle school case study participants who comprised the middle school case were assigned a code from MSP1 to MSP4. I ensured confidentiality in the nine face-to-face interviews as well as the one interview conducted in a virtual environment. All

interviews were audio recorded for transcription purposes. Table 4 and Table 5 contain the elementary and middle school participants' demographic data respectively.

Table 4

Elementary Principal Participant Demographic Data

Participant	Gender	1-3 years Principal Experience (current school)	4 or more years Principal Experience (current school)	School Gifted/Talented Enrollment
EP1	Male		X	6%
EP2	Female		X	11%
EP3	Female		X	13%
EP4	Female	X		5%
EP5	Female	X		3%
EP6	Female		X	7%

Principal EP1 had served a total of 32 years in education, with 23 years of experience as a principal. EP1 reported, "As a principal, I have served at elementary, intermediate (fourth-eighth grades), and middle school." Additionally, the participant shared, "As an administrator I've always had gifted and talented programs and I've worked with those programs in different capacities." Currently, EP1 is an elementary principal with 7 consecutive years of service.

Principal EP2 served in education for 20 years and started the education profession as a special education teacher. Also, EP2 taught mathematics in a general education classroom. In school administration EP2 served as a high school assistant principal of curriculum and instruction and principal. In addition, EP2's education experience included 2 years as a middle school assistant principal and 3 years as a middle

school associate principal. EP2 is a parent of a gifted and talented student and recently completed 4 years in the role of an elementary principal.

Principal EP3 has an undergraduate degree and graduate degree in education. EP3 shared, “I was an elementary teacher (kindergarten through sixth grade) for 16 years and I’ve been a school administrator for 16 years.” The participant’s teaching experience and administrator experience has occurred in the same school district.

Principal EP4 had also served in education for 20 years. The participant served as a second and third grade gifted and talented teacher, a literacy coach, development specialist, and teacher specialist. In addition, EP4’s leadership experiences included both school and district level having served as a high school associate principal, district coordinator of response to intervention and 2 years as an elementary principal.

Principal EP5 started in the field of education as an elementary teacher in the public and charter school settings. EP5 had served a total of 19 years of experience in the field of education, with leadership experiences such as a district gifted and talented coordinator in the current school district, a role that “provided the lens to be able to focus and advocate for G/T students.” The participant also explained, “We were charged with revamping the G/T program, we developed policies and procedures, including a G/T handbook.” After this district leadership experience, EP5 returned to school administration as a middle school assistant principal, associate principal, and was promoted to principal where they served for 5 years. Currently, EP5 is a second year elementary principal and the parent of a gifted and talented student.

Principal EP6 had served as an elementary principal for 4 years and had served in the field of education for 14 years. The participant’s teaching career involved teaching gifted and talented students for 3 years. EP6 also served as a skills specialist and was responsible for coordinating gifted and talented services and explained, “At the time my oldest child was identified as G/T in another district that had a pull-out model, so I replicated that model with approval from my principal.” EP6 was eager to share experiences with gifted and talented education from multiple perspectives.

Table 5

Middle School Principal Participant Demographic Data

Participant	Gender	1-3 Years of Principal Experience (current school)	4 or more Years Principal Experience (current school)	Gifted/Talented Enrollment
MSP1	Male	X		20%
MSP2	Female		X	16%
MSP3	Female	X		51%
MSP4	Male		X	5%

Principal MSP1 had served in the field of education for 13 years and had led at the middle school level as the principal for 3.5 years. The participant’s school leadership experience as a middle school assistant principal, middle school associate principal, and middle school principal had been at schools within the study site.

Principal MSP2 began a career in education as a special education teacher and then transitioned to a new school district and served as an elementary gifted and talented

teacher and elementary assistant principal. MSP2's school leadership experiences included 3 years as an elementary principal and 3 years as a middle school principal within the study site. Overall, MSP2 had served in the field of education for 17 years.

Principal MSP3 had served in the field of education for 20 years, including 12 years as a mathematics gifted and talented teacher. The participant also previously served as a middle school assistant principal and middle school associate principal. MSP3 recently completed 2 years as a middle school principal.

Principal MSP4 had 30 years of experience in education as a teacher and school administrator. MSP4 was a fifth grade teacher for 7 years. The participant's 23 years of administrative experience included elementary assistant principal, elementary principal, district level experience in curriculum and instruction, supervising principals. MSP4 had served as both an elementary and middle school principal in the current school district.

There was a total of six elementary principal participants and four middle school participants in this multiple case study. Of the six elementary principals participating in this case study, four had over 20 years of experience in the field of education. The middle school principals had between 13-30 years of service in education. Collectively between both cases, there were four principal participants who had served as both elementary and middle school principals: two from the elementary principal case and two from the middle school principal case. These varied perspectives contributed to understanding principal leadership practices to address the decline in gifted and talented students' academic performance in the transition from elementary to middle school.

Data Collection

Two sources of information comprised the data for this multiple case study. The primary data source was semistructured interviews with elementary and middle school principals. The second data source included the campus improvement plans of the participating principals. I developed and implemented an interview protocol (see Appendix B) to provide a consistent framework for capturing participant's responses (see Burkholder et al., 2020). Interviews ranged between 25 to 49 minutes in length and were audio recorded using the Voice Memo application on an iPad and a Sony Digital Voice Recorder to ensure accuracy and to account for any technology issues. Immediately following each interview, I listened to the recordings multiple times to complete the transcriptions. The campus improvement plans were accessed from the school's websites. There were no variations or unusual circumstances encountered in the data collection process.

Semistructured Interviews

I conducted a total of 10 interviews: six elementary principals and four middle school principals. Of the 10 interviews, nine were face-to-face, and a virtual platform was used for one interview at the request of the participant. I gathered qualitative data regarding the participants' experiences, perceptions, and leadership practices. The semistructured interviews were conducted at a location selected by the participants that provided a private environment for an open exchange of information. All participants were transparent in sharing their perspectives. I transcribed each interview within 24-48 hours of the interview by listening to the recordings multiple times as I transcribed the

interview in a Word document. After all transcriptions were completed, I emailed each participant's interview transcription document. Returning transcribed responses to participants is a member checking approach to enhance the accuracy of the data (see Carlson, 2010; Lincoln & Guba, 1985). I scheduled a 30-minute time-block to facilitate member checking sessions for participants to review and validate their transcripts. I created an agenda for each session that included a description of the purpose of the session, a summary of participant's responses grouped by research question, time for transcript validation, and I asked participants to share their reactions to and interpretations of the transcribed data (see Lincoln & Guba, 1985). I conducted a total of eight member checking sessions in a virtual environment and two participants validated their responses by email correspondence.

Campus Improvement Plans

The campus improvement plan is a blueprint that guides schools in overall school improvement, including all student demographics and subpopulations. Immediately following all interviews, I accessed each participant's campus improvement plan from their school's website. I downloaded an electronic version and printed copies of each plan. Using the document analysis checklist, I analyzed each participant's campus improvement plan that aligned to the participant's responses in the areas of gifted and talented programming in categories related to enrollment, academic performance data, gifted and talented mission, gifted and talented vision, program strengths, gifted and talented academic goals, and principal leadership strategies.

Data Analysis

The literature review, research questions, and the conceptual framework of transformational leadership guided the data analysis process. I incorporated both deductive and inductive coding approaches (see Nowell et al., 2017) to analyze the semistructured interviews of both elementary and middle school principals.

Data Analysis Process

The data analysis for each individual case study took place in six phases: (a) generate initial codes, (b) data transcription and familiarization of data, (c) code data/modification of codes, (d) search for themes, (e) document analysis, and (f) define and review themes (see Braun & Clark, 2006; Nowell et al., 2017; Yin, 2014). The final data analysis included the cross-case synthesis which is detailed in Chapter 5.

Phase 1: Generate Initial Codes

Coding allows researchers to simplify the collected data to focus on the specific features of the data (Nowell et al., 2017). Prior to conducting the semistructured interviews, I implemented a deductive approach by developing a coding scheme using the conceptual framework, the literature review, and the research questions. The research questions included

RQ1: How do elementary and middle school principals perceive their experiences with gifted and talented education?

RQ2: How do elementary and middle school principals perceive the problem of the decline in gifted and talented student academic performance in the transition from elementary to middle school?

RQ3: How do elementary and middle school principals perceive their leadership to address the decline in academic performance of gifted and talented students in their transition from elementary to middle school?

Phase 2: Data Transcription and Familiarization of Data

At the conclusion of the interviews, I listened to the recorded transcriptions multiple times to ensure the accuracy of the data, to identify and describe the practices of interest, and to reflect on the collected data. Listening to the recorded interviews afforded me the opportunity to become immersed in and become familiar with the data in preparation for the subsequent phases of the thematic analysis (see Braun & Clarke, 2006).

Phase 3: Code/Modifications of Codes

After transcribing the data, I used the codes generated in Phase 1 to label the data but then modified the codes using an inductive approach whereby codes were modified based on the principals' interview responses in addition to the codes developed in Phase 1 (see Braun & Clarke, 2006). During the second cycle of coding, I used an inductive approach whereby codes were modified based on principal interview responses. I collapsed codes that were not aligned to or associated with gifted and talented education. After all codes were developed and modified across the data set, I compiled the codes and categories into a table.

Phase 4: Search for Themes

This phase of the data analysis involved sorting the codes into categories to identify recurring themes amongst participants' responses. I used the codes and

categories, and subcategories to form broad themes that reflected the data analysis and coding scheme. Then, I used the topics to generate thematic statements. The thematic statements were then aligned by each research question.

Phase 5: Document Analysis

Using the Document Analysis-Campus Improvement Plan Checklist (Appendix D), I analyzed each participant's campus improvement plan. The contents of the campus improvement plan were compared to the participants' interview responses. I used the codes from Phases 1 and 3 and noted the codes in the margins of the campus improvement plans.

Phase 6: Define and Review Themes

During Phase 6, I reviewed the initial broad themes and thematic statements to determine if the themes were relevant and appropriate based on the research problem and research questions. Additionally, I reflected on the collected data to determine if there was a need to re-code the interview data (see Braun & Clarke, 2006).

Examples of the coding scheme and the development of categories and thematic statements for the elementary principal case study for RQ3 can be found in Table 6 and Table 7. At the conclusion of the data analysis phases, no discrepant cases conflicted with the thematic statements in the elementary and middle school cases (see Yin, 2018). In the results section, I elaborated on each theme aligned to the research questions for the elementary and middle school cases.

Table 6*Coding Example for Elementary Principal Interview Responses-RQ3*

RQ Focus	Code	Category	Participants	Sample Excerpt	Theme
Principal leadership in Gifted and Talented	Gifted and Talented Goals	High Expectations	EP1, EP2, EP3, EP4, EP5, EP6	EP5: I would like to see all of G/T students scoring at the masters level.	Elementary principals implemented three transformational leadership practices to support the academic performance of gifted and talented students in the areas of high performance expectations,, individualized consideration, and intellectual stimulation.
	Data Focus	High Expectations	EP1, EP2, EP4, EP5, EP6	EP4: We set goals centered around our G/T students	
	Model	Individualized Consideration	EP1, EP2, EP3, EP4, EP5	EP4: I'm living this work with teachers, I attend G/T training.	

Table 7*Coding Example for Middle School Principal Interview Responses-RQ3*

RQ Focus	Code	Category	Participants	Sample Excerpt	Theme
Principal leadership in Gifted and Talented	Professional Development	Intellectual Stimulation	MSP1, MSP2, MSP3	MSP3: Our biggest focus is differentiation	Middle school principals implemented transformational leadership practices,
	Gifted and Talented Team	Enable others to act	MSP2, MSP3, MSP4	MSP4: A G/T team oversees the G/T program	enables others to act and provide intellectual stimulation.

Results

Principals implement a variety of strategies in the pursuit of improving student learning outcomes. To achieve success for all student groups and subpopulations, principals are also accountable for supporting gifted and talented students. There was a need to understand the leadership practices elementary and middle school principals use at the study site given the state assessment data that evidenced a decline in the academic performance of gifted and talented students in their transition from elementary to middle school.

The results of this study emerged from exploring the experiences, perceptions, and leadership practices of elementary and middle school principals to address the decline in gifted and talented students academic performance in their transition from elementary to middle school. This multiple case study examined two units of analysis,

elementary principals and middle school principals. In presenting the results of this multiple-case study, I focused on each case separately, including semistructured interviews, document analysis, and a thematic analysis organized by each research question. This structure allowed me to provide a thematic analysis of each case, answer each research question, and provide a cross-case synthesis (see Stake, 2006; Yin, 2014). Upon review of the data from both the elementary and middle school cases there were no discrepant cases in this study.

Elementary Principal Case Study

A total of six elementary principals who lead gifted and talented programs comprised the elementary case study. Their school's gifted and talented student enrollment ranged from 3%-13%. All elementary principal participants had served as school leaders at the study site for 4 or more years.

Research Question 1

After an in-depth analysis of the six participant transcripts, a review of participants' campus improvement plans, and different phases of coding, the theme that emerged for RQ1 "How do elementary and middle school principals perceive their experiences with gifted and talented education?" was in the areas of personal experiences, professional experiences and gifted and talented programming options.

All six elementary principals had either personal or professional experience with gifted and talented education that contributed to their capacity to provide leadership in gifted and talented programming. For example, EP1 and EP5 shared similar experiences with gifted programming first as middle school principals and now as elementary school

principals. As a former middle school principal, EP5 allocated funds in the school budget for gifted and talented students to participate in field trips. The participant also shared, “I would like to do the same for elementary, but the budget is different [less].”

EP1 explained a professional experience,

As an administrator I have always had gifted and talented programs and I’ve worked with those programs in different capacities--the programs on certain campuses where the gifted and talented students were homogeneously mixed and how we currently have them heterogeneously mixed. I have been at the elementary campus, intermediate campus which is fifth and sixth grade . . . one middle school for example was fourth through eighth grades and the traditional middle school sixth through eighth grades.

EP2 and EP6 are both parents of gifted and talented students and served as gifted and talented teachers. EP2 shared, “They [teachers] realize the importance of addressing the needs of students and seeing how the lens of a parent can impact children if we don’t work to meet their needs.” EP2 and EP6 reported completing the foundational gifted and talented professional development hours as a teacher and working with students to complete G/T projects. EP6 shared, “As a parent, I have the two-sided lens.” The participant expressed a dual perspective as a parent of a gifted and talented child and principal with gifted and talented programs, by sharing an understanding of the challenges teachers encounter when implementing curriculum while trying to be innovative and engage gifted and talented students in inquiry-based learning experiences.

In the role as a skills specialist, EP6 served as the school's gifted and talented coordinator where the responsibility was to increase the number of students identified for gifted and talented and leading a gifted and talented student showcase event. While EP6 participated in school-based leadership experiences in gifted and talented education, EP5 held a leadership position as a district gifted and talented coordinator. As a district gifted and talented coordinator, EP5 provided a historical lens of the district's gifted and talented program and explained,

We were charged with revamping the G/T program. We engaged in a lot of meetings with parents because of the transition of the program. We provided professional development to schools. In the area of policies and procedures we developed a G/T handbook to ensure staff and parents had access.

In reference to professional development experiences, all six principals reported engagement in gifted and talented professional development in their current and previous roles. For example, EP1, EP4, and EP6 completed the state's required 30-hour foundational gifted and talented training and the 6-hour training update. EP4 shared, "As a classroom teacher I was assigned gifted and talented students. As a principal, I attended gifted and talented hours and/or received the initial gifted and talented professional development."

EP2 and EP6 both participated in the teacher gifted and talented training presented through the local regional education service center. EP2, EP3, and EP5 shared their professional learning experiences related to differentiation and student choice. Further, EP3 reported participation in the state's gifted and talented association's

conference and was responsible for sharing the learning experience with principal peers on the topic of menus and choice boards for gifted and talented students.

The collective responses of the elementary principals illustrated that their experiences in gifted and talented education were in different capacities. Professional experiences were described as both school-based and district-level gifted and talented leadership practices with a focus on gifted and talented professional development and training. Personal experiences involved parenting gifted and talented children. These personal and professional experiences in gifted and talented education informed the elementary principal's advocacy for gifted and talented students and the implementation of gifted and talented programs at their respective schools.

Theme 1. Elementary principals implement and lead different types of gifted and talented programming options and identified unique strengths and challenges specific to their schools. The elementary principals' description of the gifted and talented programs at their schools were defined as gifted and talented students grouped in the general education classroom setting. All elementary principal participants reported that their gifted and talented program design was cluster grouping. Cluster grouping, often referred to as heterogenous grouping, involves grouping gifted and talented students in one class with students who have high academic ability in the same class. For example, EP6 described that the gifted and talented students are "cluster grouped in the general education and bilingual education classrooms." EP3 and EP4 described their cluster groups as a cohort who travel together from one grade level to the next. EP4 shared, "Over the last two years we grouped our gifted and talented students into cohorts within

each grade level to allow us to track the implementation of the gifted and talented program and the students.” Two principals, EP2 and EP5 explained that their low number of gifted and talented students at each grade level validated their implementation of a cluster grouping program structure, while EP3 attributed the gifted and talented cluster grouping program to a design that allows for acceleration, “Here we group our G/T students in one classroom, and we group them with other high achieving students in the grade level. This creates a classroom that can be accelerated.”

In contrast, EP2 and EP6 described their gifted and talented program as a combination of cluster grouping and pull-out. EP2 adopted a pull-out program structure to facilitate opportunities for acceleration for gifted and talented students. EP2 noted, “We tried to accelerate them more than having them sit in a classroom while other students receive intervention.” EP6 justified that their school’s pull-out program structure for students in third through fifth grades allow time for students to work on their gifted and talented projects. During a 5-week period, gifted and talented students have the opportunity to explore their topics of interest for their projects. The participant shared, “It was challenging. We want to do the same in the primary grades, but the barrier is finding the person and the time.” EP6 went on to attribute the success of the third through fifth grade pullout program to the school’s gifted and talented coordinator. EP6 expressed, “I have a very eager G/T coordinator who believes in the work, and she puts in the time even though it is not part of her job description.” Similar sentiments were mentioned regarding the leadership role of the school’s gifted and talented coordinator by EP1 who shared that the gifted and talented team leader or coordinator “is committed to being the

representative and working in conjunction with the counselor to positively impact our program and move in the right direction so that it gets better each year.”

Interview responses revealed that elementary principals encountered various challenges associated with implementing gifted and talented programs at their schools. For example, maintaining a consistent gifted and talented coordinator and a decline in parental involvement for students in fourth and fifth grades were challenges reported by EP4. EP5 and EP6 acknowledged challenges with low numbers of students identified for gifted and talented services. Four of the six elementary principal participants agreed that in their schools there exists a misconception that gifted and talented students automatically excel in academic areas therefore, teachers tend to focus their attention on students who are underperforming. EP5 stressed the need to increase the number of gifted and talented students at the school, noting that “the teacher focus is often on students who need intervention.” EP1 explained,

Many times, the teachers are giving their attention to the low performing students.

We do want to focus on the students who are low performing, but we have to focus on our G/T students to make sure that they’re maintaining masters level.

All principals repeatedly articulated the perception that gifted and talented students possess the high ability to perform academically and require minimum instructional supports. For example, EP3 reported, “G/T students remain in their classroom and the interventionist works primarily with struggling students.” EP5 also expressed this perception, “I think academically G/T students will be fine, referring to the academic ability of gifted and talented students. EP2 shared, “[teachers tend to focus on]

trying to teach the lower performing students and the G/T students don't grow at the level they should." EP2 shared, "As administrators we start looking at the data and tend to focus on those that are really falling off trying to meet accountability. "I'm stressed about accountability ratings and that hinders G/T students from exploring." EP2 emphasized that gifted and talented students should be able to demonstrate their giftedness, but this is a challenge when faced with pressure to meet accountability standards for other targeted student groups.

Competing priorities was also voiced as a challenge in implementing and supporting the academic performance of gifted and talented students by EP6. The participant openly conveyed, "I think there is not a single principal that thinks everything is perfect with G/T. It is something that we all know needs to get better. We don't take enough action. It's the competing priorities." EP6 described competing priorities by providing a scenario, "If I have \$10,000 to spend and I have low math scores, will I hire a tutor or will I use those funds to invest in G/T? I'll probably hire a tutor." EP6 further expressed, "If there were funds that we were forced to allocate for G/T then we would be able to swing the pendulum in a different way."

Two elementary principal participants reported gifted and talented staffing as challenges in implementing their school's gifted and talented program. EP3 shared under the previous gifted and talented program structure a gifted and talented teacher was allocated within the budget to provide small group instruction for gifted and talented students. While this is not the current gifted and talented programming structure, EP3 described the previous structure as beneficial to supporting the academic performance of

gifted and talented students. EP6 shared the challenge of having the “human capital to be able to provide extra experiences” for gifted and talented students. This limitation impacted EP6’s ability to offer learning experiences during the instructional day across all grade levels in the school.

Overall, these participant excerpts support the theme that elementary principal participants have autonomy in leading and implementing different types of gifted and talented programs at their schools. However, the elementary principals expressed limitations of their programs due to accountability, enrollment, and funding. The challenges that were disclosed by the elementary principal participants revealed both similarities and differences in implementing and supporting gifted and talented programming. For example, the role of the gifted and talented coordinator was emphasized as a contributing factor to the success of the majority of the elementary gifted and talented programs, whereas EP4 experienced challenges sustaining a staff member in the role of gifted and talented coordinator. A primary challenge that was disclosed by the elementary principal participants was the perception that competing commitments and accountability standards place emphasis on supporting underperforming students that can often overshadow the academic needs of gifted and talented students.

Research Question 2

RQ2 stated, “How do elementary and middle school principals perceive the problem of the decline in gifted and talented student academic performance in the transition from elementary to middle school?” In describing their perceptions of the decline in gifted and talented students’ academic performance in the transition from

elementary to middle school, all six elementary principals reported percentages of their gifted and talented students as underachieving ranging between 5%-20%. EP3, EP4, and EP5 attributed the underachievement, in part, to the loss of learning from the COVID-19 pandemic. In response to this learning loss, five of the six elementary principal participants shared that they are focused on tracking gifted and talented student data discussed as part of a later theme in the results. The majority of the elementary principal participants clarified, gifted and talented students are meeting the grade level standards, however gifted and talented students are scoring at the minimum level of proficiency rather than at the highest level of proficiency.

Theme 2. Elementary principals perceived the decline in gifted and talented academic performance in the transition from elementary to middle school is linked to teacher knowledge and skills, a lack of rigor in elementary school, and limited opportunities for acceleration. Under this theme, the majority of participants placed value on the importance of the teachers' ability and skills. EP1 mentioned the importance of hiring a teacher who has both gifted and talented teaching experience and has completed gifted and talented training. For example, a new teacher may have to simultaneously teach gifted and talented students while obtaining their gifted and talented training hours. EP1 indicated a gap in the teacher's practice if, "they [teachers] understand that they're still responsible for the differentiation but may not have the training and knowledge base." Similar to EP1, EP4 stated the importance of "an experienced and knowledgeable teacher in the field of gifted and talented and his/her content area. Someone who has

taught gifted and talented students over long periods of time and know how to differentiate for students.”

The importance of teacher knowledge and expertise in supporting gifted and talented students was also expressed by EP2 who stated “The biggest challenge is people tend to teach to the middle. A lot of times teachers have a hard time differentiating and the gifted and talented students are impacted.” EP3 shared, “I feel we hold G/T students back. There was a time when our G/T students worked on above grade level material. When they left elementary school they were ready for advanced classes.” To counter this effect, EP3 explained that “I’m intentional in choosing the teacher to work with the G/T students.” The participant continued, “With G/T students the teacher has to have the ability to think outside of the box.”

EP2, EP3, and EP6 attributed the decline in gifted and talented students academic performance in the transition from elementary to middle school to a lack of opportunities for acceleration and classroom rigor. Specifically, most of the elementary principal participants stated a lack of rigor in elementary classes and limited opportunities for acceleration within the instructional day that is compounded by the increased rigor in middle school classes.

Drawing from previous middle school leadership experience, EP2 elaborated on the decline in academic performance of gifted and talented students to the level of rigor at the elementary level. The participant stressed, “The tough part was some of the G/T students had not been pushed or exposed to rigorous material in elementary school, so they were definitely underperforming so the [middle school teacher] found themselves

having to spiral down a lot and then before you know it they're right back to teaching to the middle." EP2 continued, "They [students] haven't been challenged over the years which is a failure on our part, we haven't coached them [students] to that level of rigor and thinking."

Likewise, EP6 perceived the decline in gifted and talented student's academic performance as a reflection of the increased rigor during the transition from elementary to middle school. The participant shared, "If students enroll in advanced classes in middle school there is an increase in workload, an increase in rigor." EP3 and EP6 agreed that while advanced courses are not currently offered at elementary school, this is a missed opportunity to offer rigorous coursework at the elementary level. From a historical perspective, EP3 shared, in previous years, the budget allocated funding to provide a gifted and talented teacher to pull out gifted and talented students to work on above grade level material. EP6 passionately shared the need for offering accelerated mathematics courses at the elementary level. EP6 conveyed there is a need to create an elementary advanced mathematics cohort to identify students during the fourth grade to provide accelerated instruction for gifted and talented students who show the academic ability to excel in advanced courses before enrolling in middle school.

The responses from the majority of the elementary principal participants provide evidence that support the perception that teacher knowledge and skills is linked to the decline in gifted and talented student academic performance in their transition from elementary to middle school. To address the need for teacher knowledge and expertise, all elementary principal participants reported promoting the development of staff as a

transformational leadership practice. As examples, EP5 requires all teachers to participate in gifted and talented trainings, while EP4 encourages teacher participation in summer gifted and talented training. EP2 acknowledged, “I really want to grow and push myself and my teachers to differentiate for our G/T students.” Also, EP2 expressed that in the future they would like to lead professional development with the gifted and talented teachers to modify curriculum lessons to meet the needs of gifted and talented students. All elementary principal participants shared that they rely on the district-level gifted and talented professional development to train their teachers and that the professional development offerings are communicated throughout the school year.

Engaging students in opportunities for acceleration during the instructional day was reported by elementary principal participants to focus on gifted and talented students’ academic performance. The majority of the elementary principal participants mentioned an intervention block that occurs during the school day that targets underperforming students in general. However, only two elementary principals shared that gifted and talented students had opportunities to attend weekday and weekend tutorials and one elementary principal reported receiving support from a district staff member to work with gifted and talented students in preparation for the state assessment. EP2 reported, “We invited G/T students to tutorials based on their subject area data which in the past has not always been the case. We were intentional with inviting them to tutorials.” Similarly, EP1 mentioned the inclusion of gifted and talented students in weekend tutorials. EP1 explained, “Our content area coaches held sessions with the G/T students on Saturdays to make sure that we definitely provided the reinforcement for their

targeted TEKS [standards] to ensure that they scored at the masters level.” In contrast, EP5 shared a district-level staff member provided support,

It was helpful for the district to provide support for a couple of days, but on our [school-level] we can pull them out at some point during the day to meet their needs. I think we need to pull them separately. Our plan for next year is to start earlier in the year.

The elementary principal participant responses provide evidence that the participants perceive the problem of the decline in the academic performance of gifted and talented students in their transition from elementary to middle school as related to school-level elements including the knowledge and expertise of the teacher, limited opportunities for acceleration, and low levels of rigor in the classroom. Elementary principal participants shared their perceptions and the leadership practices they use to overcome the perceived barriers. The subsequent emerging theme specifies the practices that elementary principals perceive would facilitate the transition of gifted and talented students from elementary to middle school.

Theme 3. Elementary principals perceived a need to provide opportunities for gifted and talented teachers to engage in collaborative vertical planning to support the academic performance of gifted and talented students in their transition from elementary to middle school. In reference to offering opportunities to support gifted and talented students in their transition from elementary to middle school, the common theme was vertical planning between elementary and middle school teachers. Four of the six of the elementary principal participants suggested collaborative planning between elementary

and middle school teachers and staff. For example, EP4 suggested aligning the practice that the school district engages in with transition meetings for special education and emergent bilingual students. EP4 explained this practice if adopted could involve, “the G/T coordinator for elementary, along with the G/T coordinator for middle school, the student and the parent and one or two sixth grade teachers...meet to set goals for the middle school and identify strengths and opportunities for the student to show growth as a sixth grader.” To facilitate the transition process, EP4 described a creative idea that involved a color-coded system that includes a portfolio that travels with the student and serves as a checklist for the receiving school to ensure access to the gifted and talented student information. Sharing a similar perspective, EP5 mused, “Teachers receive rosters for special education accommodations or emergent bilingual accommodations, but what are the needs of the G/T students?” These responses illustrate the elementary principal participant’s views that there is a need to incorporate collaborative systems of support for gifted and talented students.

Aligning professional development across grade levels was another example of collaborative vertical planning offered by EP1. The participant further shared that at the school all gifted and talented teachers meet to discuss expectations and the requirements from each grade level; however, “Currently that doesn’t happen from school level to school level, for example elementary to middle.” EP3 shared a similar thought to “work with our middle schools on planning and making sure students are prepared for advanced courses. It would help us [elementary schools] to know what is needed at the elementary level to achieve vertical alignment.” EP5 proposed that gifted and talented students’

surveys and academic interests should be shared with middle school teachers to meet the needs of students during their transition to the next school level. EP6 did not specifically state the need for collaborative planning between elementary and middle school teachers; however, based on the recommendation to offer advanced courses in elementary school, it can be inferred that elementary and middle school teachers would benefit from the opportunity to engage in instructional planning and structures in place to effectively implement the advanced level content.

Elementary principal participants attributed the decline in the academic performance of gifted and talented students in their transition from elementary to middle school to a gap in curriculum planning between elementary and middle school levels and a lack of transition meetings. A teacher's skill set and ability to differentiate for gifted and talented students were also mentioned as a perceived barrier to supporting the academic performance of gifted and talented students. Ensuring that teachers have the knowledge and skills to meet the diverse needs of gifted and talented students may facilitate high levels of classroom rigor and increased opportunities for acceleration and differentiated learning experiences for gifted and talented students. The elementary principal participant responses revealed examples of their current leadership practices accompanied with ideas to address the need for increased teacher knowledge and skills, acceleration, and academic rigor to address the decline in the academic performance of gifted and talented students.

Research Question 3

RQ3 asked, “How do elementary and middle school principals perceive their leadership to address the decline in academic performance of gifted and talented students in their transition from elementary to middle school?” For this question, I analyzed transformational practices of elementary principals in leading gifted and talented programs.

Theme 4. Elementary principals implemented three transformational leadership practices to support the academic performance of gifted and talented students in the areas of establishing high performance expectations, individualized consideration, and intellectual stimulation. The elementary principal participants reported practices consistent with individualized consideration, an attribute of transformational leadership. Individualized consideration involves a leader encouraging followers through coaching and feedback (Bass & Avolio, 1994). EP1 shared that teachers are engaged in conversations after classroom observations to discuss opportunities for improvement. EP1 also explained that instructional resources are readily available for teachers to incorporate in their classrooms to improve their instructional practices. The participant expressed, “I’ve participated in the workshops and the updates I can utilize that expertise in coaching the teachers.” This response provided evidence of the implementation of individualized consideration as a leadership practice to support the academic performance of gifted and talented students. EP1 stressed the importance of modeling and engaging in professional development experiences, “I participate and find resources to introduce these

resources to teachers so they can have more tools in their toolbelt when they're differentiating for gifted and talented students in the classroom."

EP3, EP4, and EP5 all reported engaging in leadership practices to model professional development participation and modeling for gifted and talented teachers. EP4 shared that each year teachers are encouraged to complete gifted and talented training and expressed, "As a leader I am living the work that they're living. I've completed the 30-hour training." EP3 noted,

I attend G/T training to model the importance of G/T. During observations or walkthroughs, I share different activities that teachers can use in the classroom. For example, menus I keep samples of menus to share samples of menus that allow choice. I show the menus as examples of meaningful work as opposed to busy work and being able to provide that support.

EP5 described how the importance of supporting gifted and talented students through the facilitation of school-based professional development sessions is modeled for teachers, "We needed a reset on differentiation and workstations. I led the professional development." EP5 shared that as a previous gifted and talented coordinator at the district level, "I have the lens to be able to focus and advocate for gifted and talented students." The participant was very reflective, stating, "We did some work around vision and mission this year. Now I want to meet with my team and ask them to review the mission to make sure it addresses our G/T students." Similar to EP1, these responses provided by EP5 provide evidence of intellectual stimulation, a component of transformational leadership.

EP6 was the only elementary principal who described their leadership practices in reference to supporting gifted and talented students through professional learning communities. The assistant principal, principal, and content area coach lead professional learning communities once per week. EP6 eagerly explained,

That's my style! When we're in PLCs I push teachers to target their G/T students using Habits of Discussion. Moving away from G/T students or high achievers answering all the questions but the student working as the facilitator of the discussion. We're looking for ways to differentiate within the curriculum.

Overwhelmingly, five of the six elementary principal participants reported the transformational leadership practice of setting high performance expectations. Specifically, they shared an emphasis on data analysis for gifted and talented students. EP1 shared the importance of goal setting and a focus on data. The detailed response in describing the expectations for the student data folders provides evidence that he has expectations for student data folders and aligns to the leadership practice of high performance expectations. EP1 explained,

Teachers have data talks with students about the level of mastery that was part of our campus improvement plan as it pertains to G/T students, that was part of our goals...focusing on G/T to a higher level than we have in previous years. Students have data folders where they chart their progress on the tested areas. The data folders are yellow, they cannot leave the classroom. We need it there because if a parent arrives the teacher can pull the folder and share. Students are expected to share their goals with their parents.

EP1 reported that serving as a former middle school administrator has impacted the role as a current elementary principal. The participant expressed, “I know where the elementary students need to go I know what they need. I think it was a good experience because it really helped me as an administrator being able to see the alignment between elementary and middle school at a higher level.” Sharing similar experiences from their previous middle school leadership experience, EP2 explained,

I think as an elementary principal coming from middle school, students come to you so much further behind than you expect them to and wondering ‘how did this happen?’ It has pushed me at the elementary level to be intentional to help my teachers get engaged in the data. Elementary teachers were not as savvy when it came to analyzing data. I did a lot of helping them understand how to dig through the data to determine their student’s areas of need.

Communicating the gifted and talented expectations to teachers and parents was identified as a strength of EP4’s gifted and talented program. The participant explained that communicating the expectations for subpopulations ensures that “teachers understand that G/T students are not an afterthought.” EP4 confidently shared,

We set goals centered around our gifted and talented students. The expectation is that our gifted and talented students perform higher than our general education students. Our data tracker identified a section for gifted and talented students to monitor their performance on local and state assessments.

In the area of high performance expectations, EP6 assertively stated,

We review data, we're not just looking at pass/fail we're looking at how G/T students performed and what do we need to do to get them to masters. During our data digs we use a data protocol. I have teachers to look at thresholds and discuss what do we need to differentiate so that students score masters.

EP5 explained that all teachers at the school are expected to participate in the gifted and talented training "even if they do not service G/T students because a G/T student can be placed in a classroom at any time." EP5 and EP6 both shared that although their gifted and talented enrollment is lower than their expectations, their standard is to ensure all gifted and talented students are scoring at the masters level on the state assessment. According to EP6, the student goals and expectations are communicated with teachers on an ongoing basis.

Elementary principal participants articulated their leadership experiences and practices to support gifted and talented students. Their responses provided evidence that high performance expectations was the most widely reported transformational leadership practice the elementary principal participants implemented.

After an in-depth analysis of the six elementary principal participant transcripts and different phases of coding, four themes emerged.

- Elementary principals implement and lead different types of gifted and talented programming options and identified unique strengths and challenges specific to their schools.
- Elementary principals perceived the decline in gifted and talented academic performance in the transition from elementary to middle school is linked to

teacher knowledge and skills, a lack of rigor in elementary school, and limited opportunities for acceleration.

- Elementary principals perceived a need to provide opportunities for gifted and talented teachers to engage in collaborative vertical planning to support the academic performance of gifted and talented students in their transition from elementary to middle school.
- Elementary principals implemented three transformational leadership practices to support the academic performance of gifted and talented students in the areas of establishing high performance expectations, individualized consideration, and intellectual stimulation.

Although the emerging themes in the elementary principal case study were aligned to a particular research question, some of the themes were interrelated. For example, all elementary principal participants emphasized, in various responses, school-related elements that contributed to the academic performance of gifted and talented students in their transition from elementary to middle school. The elementary principal participants indicated that they promoted the development of staff, established high performance expectations for gifted and talented students, and implemented different gifted and talented programming opportunities within their school's gifted and talented programs. Also, the majority of the elementary principal participants acknowledged a recent shift in their leadership practices to focus on gifted and talented students as a sub population as opposed to the focus in previous years being on underperforming students.

Middle School Principal Case Study

The middle school principal case study included four principals who lead gifted and talented programs at their schools. Their school's gifted and talented student enrollment ranged from 5%-51%. Two of the middle school principal participants, MSP2 and MSP4 had served as both elementary and middle school principals at the study site.

Research Question 1

RQ1 asked, "How do elementary and middle school principals perceive their experiences with gifted and talented education?" Middle school principals shared their experiences in gifted and talented education from both personal and professional experiences. Two middle school principals shared their personal experiences, one as a parent of a gifted and talented student and one as a gifted and talented student when enrolled in school. MSP3 enthusiastically expressed, "When I was a G/T student, it was special to be G/T!" Professional experiences of the middle school principal participants included gifted and talented professional development, gifted and talented teacher, and gifted and talented school administrator.

All middle school principal participants reported that they completed the foundational gifted and talented training and the required gifted and talented training update. MSP2 and MSP3 shared that their participation in gifted and talented professional development focused on differentiating instruction for gifted and talented students. MSP1 noted that participation in district-level professional development focused on "improving different gaps that have been targeted within the district to focus on elevating G/T students."

Three of the four middle school principals, MSP2, MSP3, and MSP4, reported serving as gifted and talented teachers. MSP2 elaborated on the experience as a fifth grade gifted and talented teacher at the study site, “I taught Tier 1 and Tier 2. They [students] were operating one year above grade level. I taught math and science and we were able to provide instruction at an accelerated level.” In addition to MSP3’s experience as a gifted and talented teacher, MSP3 shared “As an associate principal that [G/T] was my target demographic at the middle school.” MSP3 who served as the former associate principal expressed that the school has a large number of gifted and talented students, and their responsibility was to concentrate on the gifted and talented program. As principal, MSP3 openly shared that the goal is to provide exposure and increased opportunities for gifted and talented students. The middle school principals’ experiences serving as former gifted and talented teachers contributed to their experiences in gifted and talented education.

Theme 1. Middle school principals perceived that their gifted and talented programs provide instructional and enrichment opportunities despite the constraints of the master schedule. The instructional component of MSP2 and MSP3’s gifted and talented programs were described as embedded within the core content areas with opportunities for acceleration, for example, middle school gifted and talented students may enroll in courses to obtain high school credit. MSP2 and MSP3 shared parallel perceptions regarding the misconception that gifted and talented student expectations involve completing extra work. MSP2 expressed,

I don't want students to think I'm a G/T student and all I have to do is this one project or modules then, all of a sudden, I meet that standard. I really want them to dive more to the critical thinking and teach them how to inquire and learn.

MSP3 echoed this position,

I don't want them [G/T students] to feel like G/T is just another task or an extra assignment. We're working on ways to build it [the G/T program], so they have opportunities throughout the school year that makes them feel more like a 'gift' to be gifted and talented.

Gifted and talented student interests were met by participating in enrichment opportunities offered outside of the instructional day, in the middle schools led by MSP3 and MSP4. In addition, MSP2, a former elementary school principal shared, "My experience with gifted and talented in this district has morphed and transformed and changed into more of an enrichment and acceleration program." MSP2 also explained that the student's area of giftedness determined their assignment for specific accelerated courses. MSP4 mentioned that the new curriculum in reading and mathematics meets the instructional needs of all students, including gifted and talented students because the curriculum can be adjusted to the student's level. MSP4 added, "We worked with the reading and mathematics curriculum consultants. We made a conscious effort with our G/T students who were scoring at the meets level to move them to the masters level."

MSP4 also explained the school's focus on offering an advanced academics course during the school day for instruction and enrichment for gifted and talented students. The advanced academics course, similar to a pull-out class, is an elective course

for gifted and talented students designed to provide opportunities for gifted and talented students to engage in learning experiences during the instructional day. Due to the size of the school's gifted and talented enrollment, they combine multiple grade levels to create a section within the master schedule. MSP4 expressed the decision to offer the advanced academics course because as a former elementary principal, students preferred to be in a class with their gifted and talented peers and taught by a gifted and talented teacher. MSP4 also shared apprehensions in offering the course, "Initially in middle school students didn't want to take the advanced academics course. That prompted us to identify another teacher to make the course more interesting for the students. This year students wanted to remain in the class." MSP4 shared this course has been offered for the last four years because, "it is a district expectation." Although MSP4 explained the advanced academics course is a district expectation, MSP1, MSP2, and MSP3 reported that the course is not currently offered at their schools due to limitations within the master schedule.

In describing their school's gifted and talented program, MSP1 and MSP3 shared different sentiments than MSP2 and MSP4. MSP1 candidly commented, "I can't say that I have a program [G/T]. I have gifted and talented students that meet the criteria to be classified and I structure the master schedule and supports around these students to promote the best student outcomes possible." MSP1 transparently shared the experience as a novice principal and explained,

The focus of elevating and pushing G/T students to the next level can be to the

untrained an afterthought, particularly to the novice. As a novice, with my learning curve that's not the first thing I'm thinking about. I'm looking at data relative to G/T students. I think it is taking me some time to put systems and structures in place that are targeted for gifted and talented students.

In reference to the advanced academics course, MSP1 shared that the course has been offered in previous years but not with fidelity. MSP1 explained that they offered the course and then had to adjust the schedule based on teacher availability and the master schedule. MSP1 voiced, "It was something that I understood needed to be done as a charge, but not fully grasping how it fit within the totality of the school." MSP3 expressed, "We have a large amount of G/T students. I am in the process of revamping the program because we want to make sure we're meeting their needs." They also communicated that the school's master schedule dictates whether the school is able to offer the advanced academics course because, "in order for students to leave with a high school credit, they have to remain in the pathway so they [students] can't take the supplemental course." The constraints of the master schedule were also reported by MSP4 as a barrier to supporting middle school gifted and talented students. MSP4 explained that as a former elementary principal, they grouped all the gifted and talented students in one classroom; however, "At the middle school level the master schedule and bell schedule determine how to ensure gifted and talented students are scheduled properly into courses as well as electives."

The excerpts of the middle school participants support the theme that middle school principals implement programs with instructional or enrichment opportunities.

One middle school principal participant expressed plans to redesign the school's gifted and talented program, while one middle school principal communicated the lack of a gifted and talented program. Nearly all middle school principal participants expressed the limitations of their school's master schedule as a barrier in offering instructional and enrichment opportunities during the instructional day.

Research Question 2

RQ2 stated, how do elementary and middle school principals perceive the problem of the decline in gifted and talented student academic performance in the transition from elementary to middle school? All middle school principal participants reported the occurrence of gifted and talented underachievement. Middle school principal participants reported that approximately 30%-40% of their gifted and talented are underachieving. MSP4 reported a lower percentage of underachieving gifted and talented students and explained, "We made a conscious effort with our G/T students who were scoring at the meets level to move them to masters level." MSP1 was very specific in describing their definition of underachieving, "About 30% of the G/T students passed but they didn't score masters level which is considered not meeting the mark." MSP3 stated, "G/T students are underperforming because they [G/T students] score at the approaches level, and they've embraced the thought that passing is enough." MSP2 also elaborated on the underachievement,

It [underachievement] depends on the content. While we might see a higher number at approaches or higher level at meets, – with our G/T students we're not getting as a high a number at all in masters in science and social studies.

Theme 2. Middle school principals identified structural challenges, limited teacher capacity, and the asynchronous development of gifted and talented students as elements that impact gifted and talented students' academic performance in the transition from elementary to middle school. All middle school principal participants acknowledged that the overall structural changes inherent at the middle school level have an impact on the students' transition from elementary to middle school. MSP1 stressed, "Middle school is the hardest level from a space of navigating life." MSP2 and MSP4, both former elementary principals shared that gifted and talented students in elementary engage with a small group of teachers who know the students in depth and are often more nurturing, but in middle school gifted and talented students have to adjust to more teachers and classes. MSP3 expressed, "Often G/T students are not as prepared to take on the structural changes that happen, more classes and different people. It takes an adjustment, especially for G/T students who were successful in elementary."

MSP2, a former elementary principal shared that they implemented the systems and structures from the previous elementary school at the current middle school that supported gifted and talented students facilitating their own learning. For example, the middle school classrooms are set up in cooperative learning structures and contain workstations. While MSP2 reported that they incorporated structures from elementary school to allow gifted and talented students to facilitate their own learning; however, middle school teachers are unfamiliar with their gifted and talented students "at depth level" to be able to differentiate and meet their individual needs. A review of MSP2's campus improvement plan indicated an intervention block as a strategy for emergent

bilingual students, but there was no mention of an intervention or acceleration block for gifted and talented students.

The excerpts provided by MSP2 and MSP3 provided evidence to support the theme that changes in the structures of the school pose challenges for gifted and talented students in their transition from elementary to middle school. The adjustment to structural changes was linked to the asynchronous development of gifted and talented students. Gifted and talented students often have variations in their development; MSP1 and MSP4 referred to the physical, emotional, mental, and social development along with the increased academic standards from elementary to middle school that pose a challenge for gifted and talented students. According to MSP4, offering the advanced academics course in middle school resembles the cluster grouping structure offered at the elementary level and provides a structure to support the academic and social needs of gifted and talented students.

The changes in the content standards between fifth grade and sixth grade was also perceived as a challenge. MSP3 explained, “There is an automatic rigor difference between fifth grade math and sixth grade math.” This statement regarding a lack of rigor was also confirmed by MSP3’s campus improvement plan’s problem statement. The change in the content standards between elementary core content courses and middle school core content courses coupled with the capacity of the teacher to be able to offer differentiation was viewed as challenges related to supporting gifted and talented students in the transition from elementary to middle school.

All middle school principal participants mentioned, in a variety of responses, the importance of the gifted and talented teacher possessing the capacity to engage gifted and talented students in higher level questioning and provide opportunities for students to explain their thinking process. MSP1 communicated the difficulty of “developing, maintaining, and retaining teachers to grow and understand gifted and talented students.” They also explained that true differentiation is a complex task for teachers.

MSP4, also a former elementary principal mentioned that “the teacher level of questioning for G/T students has been at a lower level.” To support teachers in this area, MSP4 explained that they provide on the spot feedback to teachers and resources such as a “booklet of higher order thinking questions and sentence stems to model how to probe gifted and talented students’ thinking.” MSP3 also expressed that they would like teachers to be able to have the capacity to ask questions to deepen gifted and talented students’ understanding rather than seeking an absolute answer and then moving on to the next question. MSP3 conveyed the importance of building teacher capacity by providing differentiated professional learning experiences for gifted and talented teachers so that teachers understand how to differentiate in the classroom.

The underachievement of gifted and talented students in the transition from elementary to middle school was perceived by middle school principal participants as a problem related to the changes in school structures between elementary and middle school and limited teacher capacity. The asynchronous development, or discrepancy between an individual’s cognitive, social, emotional, and physical development was discussed as an individual factor related to gifted and talented students’ academic

performance. The challenges described by the middle school principals were perceived as challenges that may be supported through fostering a strong learning environment for gifted and talented students.

Research Question 3

RQ3 stated, “How do elementary and middle school principals perceive their leadership to address the decline in the performance of gifted and talented students in their transition from elementary to middle school?” Similar to the elementary principal case study, I analyzed transformational leadership practices of middle school principals in leading gifted and talented programs.

Theme 3. Middle school principals implemented the transformational practices of enabling others to act and provide intellectual stimulation, to support the academic performance of students in their transition from elementary to middle school. The majority of the middle school principal participants explained that they rely on members of their leadership team to ensure the school’s gifted and talented program is implemented. Enabling others to act is a transformational leadership practice that fosters collaboration in order to meet goals or expectations (Kouzes & Posner, 2017). MSP4 noted, “The G/T team includes a G/T administrator who oversees the G/T program along with the teacher and the literacy coach.” MSP2 was proud to share that, although the gifted and talented coordinator plays a significant role in their gifted and talented program, “I’m not a principal who sits in the office. I’m out leading and working.” MSP2 also shared that they collaborate with the gifted and talented coordinator to ensure implementation of the program but, the gifted and talented coordinator is responsible for

communicating the school's vision for the gifted and talented program when visiting elementary schools. MSP3's gifted and talented coordinator plays a role in ensuring gifted and talented students have access to enrichment opportunities. MSP3 also shared that in the future, the gifted and talented coordinator will research opportunities for gifted and talented students to expose them to a variety of enrichment activities and learning experiences to support their academic performance. These excerpts from MSP2, MSP3, and MSP4 illustrate that the majority of the middle school principal participants implement the transformational leadership practice enabling others to act.

Intellectual stimulation, a transformational leadership attribute was reported by the majority of the middle school principal participants in their leadership practices to address the limited capacity of teachers to differentiate instruction for gifted and talented students. Leaders who engage followers in opportunities to engage in professional development will encourage new ideas and approaches (Bass & Riggio, 2006; Hallinger, 2003). MSP1 highlighted that they lead the development of a school-wide professional development calendar that provides a framework for the learning that teachers will engage in to support different student subpopulations, such as gifted and talented students. MSP1 explained that the calendar is based on the needs of students and teachers using both qualitative and quantitative data; "observation data or assessment data may indicate training is needed because teachers are not differentiating enough. We then determine if we will offer this training as a school or reach out to the district's advanced academic department."

Similar to MSP1, MSP4 provided evidence to support the implementation of the transformational leadership practice of intellectual stimulation. MSP4 explained that they encourage and approve teachers' attendance at gifted and talented professional development opportunities outside of the school district's professional development offerings. When supporting teachers with lesson planning, MSP2 explained, "Our unit plans include a section for differentiation. We talk about differentiating for our G/T students. We offer professional development on implementing choice boards." MSP2 described the choice boards as an instructional strategy that provide gifted and talented students to extend their learning by providing opportunities to choose the activity and or product to demonstrate their mastery of a topic.

Theme 4. Middle school principals perceived a need to offer effective learning environments during the summer to support the academic performance of gifted and talented students in their transition from elementary to middle school. Hallinger (2003) characterized a leader's ability to develop a strong learning climate as a transformational leadership practice. The questions posed to middle school principal participants during the semistructured interviews revealed principal perceptions related to gifted and talented education. The interview questions prompted the participants to reflect on their leadership practices in gifted and talented education to determine leadership practices and ideas to implement in the future to support gifted and talented students. Three of the four middle school principal participants reported the need for summer activities to support gifted and talented students in their transition from elementary to middle schools.

Of the three middle school principal participants who recommended summer activities, two middle school principals specifically referred to the activity as a “summer bridge activity.” The enrichment opportunities described by the middle school principal participants would involve engaging gifted and talented fifth graders in learning opportunities to support their transition to sixth grade. MSP1 and MSP4 provided detailed ideas on the summer enrichment activity. Currently this leadership practice is not offered at the participant’s schools. Funding was mentioned as a barrier to offering summer learning opportunities for gifted and talented students.

MSP1 suggested offering “a district or centralized initiative with a G/T Summer Bridge to work to get G/T scholars acclimated to middle school, for example, one- or two-week sessions.” The participant envisioned the activity could provide a transitional space where gifted and talented students can begin to process with their gifted and talented peers. MSP1 further detailed that, “this would provide the student with a reference on the quality of work that is required, and the teacher has a reference of the student’s capability so that they [teachers] don’t approach them [students] with a deficit thinking mindset.” MSP4 shared similar thoughts regarding a summer bridge activity, “We’re planning an activity to support G/T students to explain the program offerings and the expectations of the advanced academics class.” MSP4 mentioned this type of activity was implemented by a former colleague and it was beneficial for gifted and talented students transitioning from elementary to middle school. Likewise, MSP3 has plans to offer a camp in the future for gifted and talented students to provide opportunities for these students to learn the campus culture, understand expectations, meet their gifted and

talented peers, and become exposed to middle school literature and to ultimately “build resilience.”

The consensus among middle school principal participants in reference to supporting gifted and talented students in their transition from elementary to middle school were the transformational leadership practices of enabling others to act and intellectual stimulation. However, MSP2 expressed that their leadership practices to support gifted and talented students is “probably lacking because we don’t have as much information when students are coming from G/T programs up to the middle school.” While MSP3 described their leadership practices as “transformational because I’m working hard to meet the needs of G/T students” by exposing and engaging gifted and talented students in a variety of learning opportunities and to demystify the thought that gifted and talented students will inevitably succeed without systems of support. The need for developing effective learning environments was mentioned by the majority of the middle school participants as a leadership practice that middle school principals aspire to implement to support gifted and talented students in their transition from elementary to middle school.

The results from the middle school principal interviews and the analysis of their campus improvement plans revealed four themes.

- Middle school principals perceived that their gifted and talented programs provide instructional and enrichment opportunities despite the constraints of the master schedule.

- Middle school principals identified structural challenges, limited teacher capacity, and the asynchronous development of gifted and talented students as elements that impact gifted and talented students' academic performance in the transition from elementary to middle school.
- Middle school principals primarily implemented two transformational practices, enables others to act and provide intellectual stimulation, to support the academic performance of students in their transition from elementary to middle school.
- Middle school principals perceived a need to offer strong learning environments, a component of transformational leadership, during the summer to support the academic performance of gifted and talented students in their transition from elementary to middle school.

Evidence of Trustworthiness

Credibility

I increased the credibility of my findings through multiple perspectives of the participants and the triangulation of data sources. I collected data from semistructured interviews and campus improvement plans. The elementary and middle school principal participants served in various leadership roles that contributed to answering the study's research questions. For example, across both cases, four principal participants had served as elementary and middle school principals during their educational careers. Data triangulation was achieved by conducting semistructured interviews, an analysis of the participant's campus improvement plans, through within case analysis, and a cross-case synthesis (see Yin, 2014). The use of multiple sources of data allowed me to corroborate

the findings and increase the likelihood that the elementary and middle school cases were represented accurately.

Upon completion of each interview, I transcribed the responses and engaged participants in a member checking session for participants to validate their responses. I used the agenda that was created for each session that included a description of the purpose of the session, a summary of participant's responses, and time for transcript validation, so participants could share their reactions and validate the transcribed data (see Appendix E). I conducted a total of eight member checking sessions in a virtual environment and two participants validated their responses through email correspondence. The document analysis of the campus improvement plans was used to substantiate the data collected during the principal participant interviews and revealed that elementary and middle school principals set goals and expectations related to the academic performance of gifted and talented students.

Transferability

Transferability refers to a study's generalizability across contexts (Nowell et al., 2017). I achieved transferability by collecting data through semistructured interviews with six elementary principals and four middle school principals and provided thick descriptions throughout the explanation of the study's setting and the participant's demographic and educational backgrounds. Descriptive narratives contained through direct quotes incorporated the voices, perspectives, and experiences of the elementary and middle school principal participants. I did not expect that this multiple case study's interpretations and findings would be transferable to all school settings because the gap in

practice was specific to this study site's elementary and middle school gifted and talented programs. A reader can determine if this study's results are applicable in the context of their school sites because of the use of the thick description.

Dependability

According to Lincoln & Guba (1985), dependability is the consistency of the research process throughout the duration of the research study. To achieve dependability, I engaged a peer reviewer who was not affiliated with the research study or the study site to consult with on the progress of the study at various points throughout the research process. I shared updates on participant recruitment, data collection, and data analysis. The peer reviewer also reviewed the tables and figures that I developed during the data analysis phase to provide feedback from the lens of a reader to determine if the information was more appropriate as thinking or presentation tools. An audit trail was also developed that included how the data were collected and analyzed using codes and categories to determine the themes. The audit trail served as a running record of the research process (Merriam & Tisdell, 2016). The peer reviewer coupled with the audit trail enhanced the dependability of the study's findings.

Confirmability

The degree to which research findings are shaped by procedures and not associated with researcher bias is confirmability (Burkholder et al., 2020). As the primary research instrument in this study, I acknowledged my experiences and perspectives in a reflexive journal beginning at the participant recruitment phase of the study. I continued to reflect on all aspects of the research process, including similarities in participants'

responses and my reflections as a novice researcher. I ensured that I focused on the problem and purpose of the study while journaling to ensure that my professional perspectives or personal experiences did not unduly influence the data collection or data analysis. I also conducted a cross-case synthesis to compare the elementary principal and middle school principal cases to determine similarities and differences between the two cases (see Yin, 2014).

Summary

In this multiple case study, I explored elementary and middle school principal leadership practices supporting the academic performance of gifted and talented students in their transition from elementary to middle school. I developed three research questions to analyze the principal leadership practices through the lens of the conceptual framework of transformational leadership. The three research questions sought to understand how elementary and middle school principals: (a) perceive their experiences with gifted and talented education; (b) perceive the problem of the decline in gifted and talented students' academic performance, and (c) perceive their leadership to address the decline in gifted and talented students' academic performance.

The elementary and middle school principal participants perceived their experiences and perspectives in gifted and talented education from a variety of professional roles, including gifted and talented teacher, parent, district gifted and talented coordinator, and assistant principal. Elementary principals perceived that the decline in the academic performance of gifted and talented students was linked to teacher knowledge, lack of rigor, and limited opportunities for acceleration and vertical planning.

Middle school principals also perceived that the decline in the academic performance of gifted and talented students was linked to limited teacher capacity in addition to structural challenges and the asynchronous development of gifted and talented students. In reference to principal leadership practices, I found that collectively, elementary and middle school principals use a small number of transformational leadership practices to support the academic performance of gifted and talented students. I also found that in alignment with the study site's gifted and talented historical data, middle school principals reported higher percentages of gifted and talented underachievement than elementary principals. In Chapter 5, I continued analyzing the findings through a cross-case synthesis and an interpretation of the overall findings. The limitations of the study are explained followed by recommendations for future research. Chapter 5 concludes with the impact this study has on positive social change.

Chapter 5: Discussion, Conclusions, and Recommendations

The purpose of this multiple case study was to explore how elementary and middle school principals perceive their leadership to address the decline in the academic performance of gifted and talented students in their transition from elementary to middle school. This study was relevant because limited research existed on principal leadership practiced and supporting gifted and talented students in their transition from elementary to middle school. I investigated the perceptions, perspectives, and leadership practices of six elementary principals and four middle school principals. A qualitative case study design provided me the opportunity to gain an in-depth understanding of participants' experiences through semistructured interviews. Given that the academic performance of gifted and talented students at the study site revealed a declining trend as students transition from elementary to middle school, a multiple case study allowed me to explore the similarities and differences between the elementary and middle school principal leadership practices. I developed three research questions that guided the study:

RQ1: How do elementary and middle school principals perceive their experiences with gifted and talented education?

RQ2: How do elementary and middle school principals perceive the problem of the decline in gifted and talented student academic performance in the transition from elementary to middle school?

RQ3: How do elementary and middle school principals perceive their leadership to address the decline in the academic performance of gifted and talented students in their transition from elementary to middle school?

Participants shared their personal and professional experiences in gifted and talented education as well as their perspectives about their role as leaders of gifted and talented programs at their schools. I asked elementary and middle school participants questions pertaining to their leadership practices to support the academic performance of gifted and talented students. A key finding was the perception of elementary principals that gifted and talented students require fewer academic needs than underperforming students. The individual case studies revealed that elementary and middle school principals have common perceptions regarding the problem of the decline in the academic performance of gifted and talented students in the transition from elementary to middle school; the decline in gifted and talented students' academic performance was linked to the capacity of the teacher. Three key findings were related to the conceptual framework of transformational leadership. Elementary principals implemented slightly more transformational leadership practices in leading their school's gifted and talented programs than middle school principals. Also, a review of the elementary and middle school principals' campus improvement plans revealed goal setting and expectations for the academic performance of gifted and talented students. Another key finding was the implementation of the transformational leadership practice of intellectual stimulation by both the elementary and middle school principal participants.

An explanation of the key findings of this multiple case study are reported in this section through a cross-case synthesis. This structure allows me to produce a comprehensive and thorough explanation of the findings that encompasses both the elementary and middle school principal case studies (see Merriam & Tisdale, 2016; Yin,

2014). The sections that follow include the interpretation of the findings, limitations of the study, recommendations, and conclusions.

Interpretation of the Findings

This multiple case study reflected the perspectives and leadership practices of six elementary principals and four middle school principals who lead gifted and talented programs at their schools at a school district. Of the 10 principal participants, half of the elementary principal participants and half of the middle school principal participants had school leadership experiences in both elementary and middle school serving gifted and talented populations. To interpret the findings of this study, the results of both case studies were analyzed using a cross-case synthesis in alignment with the conceptual framework and in relation to the current research discussed in the literature review in Chapter 2. The cross-case synthesis of the elementary principal case study and the middle school principal case study revealed patterns of differences in the thematic statements. In my interpretations I have grouped the key findings from the cross-case synthesis under the corresponding research questions that guided this study. As shown in Table 8, there are differences in the thematic statements of the elementary and middle school case studies in relation to each research question.

Table 8*Elementary and Middle School Case Study Theme Summary*

Research Questions Focus	Elementary Case Study Themes	Middle School Case Study Themes
Principal experiences in Gifted and Talented	Theme 1: Elementary principals implement and lead different types of gifted and talented programming options and identified unique strengths and challenges	Theme 1: Middle school principals perceived that their gifted and talented programs provide instructional and enrichment opportunities despite the constraints of the master schedule
Principal perceptions of the decline in gifted and talented students' academic performance in the transition from elementary to middle school	Theme 2: Elementary principals perceived the decline in gifted and talented academic performance is linked to teacher knowledge and skills, a lack of rigor in elementary school, and limited opportunities for acceleration Theme 3: Elementary principals perceived a need to provide opportunities for gifted and talented teachers to engage in collaborative vertical planning	Theme 2: Middle school principals identified structural challenges, limited teacher capacity, and the asynchronous development of gifted and talented students as elements that impact gifted and talented students' academic performance
Principal leadership practices to address the decline in gifted and talented students' academic performance	Theme 4: Elementary principals implemented three transformational leadership practices: high performance expectations, intellectual stimulation, and individualized consideration	Theme 3: Middle school principals implemented two transformational leadership practices, enables others to act and provide intellectual stimulation Theme 4: Middle school principals perceived a need to offer effective learning environments, a component of transformational leadership during the summer

Research Question 1: Key Finding 1

The elementary principals emphasized a prior focus on underperforming students. The leadership efforts of the principal to narrow the achievement gap focus on the basic levels of academic competence has been a national focus of the ESSA federal mandates (ESSA, 2015). Gifted educators contend that in addressing the achievement gaps amongst student groups, schools fail to address excellence gaps or the differences in the academic performance of students at advanced level of achievement (NAGC, 2015; Plucker et al., 2017).

The majority of the elementary principal participants expressed that supporting gifted and talented students at the elementary level has often been dominated by a focus on students who are not meeting grade level standards. Elementary principals expressed their perceptions that while they, in recent years, have set goals for gifted and talented students, the focus within a school year can sometimes shift to underperforming students. Also, a common response expressed by elementary principals was the perception that gifted and talented students require minimal academic supports. However, one middle school principal participant, MSP4, a former elementary principal shared that gifted and talented students do not receive the additional supports as students who are underperforming. MSP4 also stressed that current funding for gifted and talented students is misaligned with the funding provided for underperforming students. This perception is consistent with Tookes (2020), who concluded that schools with underperforming students have fewer opportunities to engage in transformational leadership practices. Overall, elementary principals expressed the demands to meet the minimum standards

often can become the focus of their leadership efforts, and thus reducing the excellence gaps of gifted and talented students becomes a low-level priority.

Research Question 2: Key Finding 2

Elementary and middle school principals perceived the decline in the academic performance of gifted and talented students is linked to limited teacher capacity to differentiate instruction. The role of the teacher, their knowledge and skills and limited ability to provide differentiated instruction to gifted and talented students was consistently reported by elementary and middle school principals as a factor that contributes to the decline in the academic performance of gifted and talented students in their transition from elementary to middle school. Promoting the development of staff, a transformational leadership attribute was collectively reported by elementary and middle school principal participants as a leadership practice to address the limited teacher capacity. Although elementary and middle school principals explained their transformational leadership efforts to promote teacher development through connecting teachers to in-district or out of district trainings as well as providing school level professional development, the teacher's ability to effectively differentiate instruction for gifted and talented students was continually reported as a challenge. This perception is aligned to the perception of Johnsen and Kaul (2016), who emphasized that while gifted and talented professional development may be available to gifted and talented educators, there is a lack of professional development experiences related to addressing gifted and talented pedagogy that converts to improved gifted and talented students' academic performance.

While the elementary and middle school principal participants emphasized the importance of teachers having the knowledge and skills to be able to differentiate instruction to support gifted and talented students, recent research conducted by Peters and Jolly (2018) found that higher participation in differentiated professional learning experiences did not transfer into classroom instructional practices. To support gifted and talented teacher development, the elementary principal case study suggested the implementation of vertical planning between elementary and middle school teachers. This collaborative structure is a transformational leadership practice that may have an impact on gifted and talented students' academic performance (see Kouzes & Posner, 2017). However, vertical planning is not a current leadership practice of elementary or middle school principals. In contrast to Johnsen and Kaul (2016), other research indicated that a collaboration between general education teachers and gifted and talented teachers was found to impact teacher's capacity to differentiate and improvements in student success outcomes (Mofield, 2020).

Research Question 3

Key Finding 3

Elementary principals reported the implementation of slightly more transformational leadership practices than the middle school principals in supporting the academic performance of gifted and talented students in the transition from elementary to middle school. Elementary principal participants implemented three transformational leadership practices, while middle school principal participants implemented two transformational leadership practices. The most common responses reported by

elementary principals were aligned with the transformational leadership frameworks of Bass and Avolio (1994) in the practice of individualized consideration and intellectual stimulation and with Leithwood (1992) in the practice of establishing high performance expectations; whereas, the middle school principals' leadership practices were aligned with the transformational leadership frameworks of Kouzes and Posner (2008) in the practice of enabling others to act and with Bass and Avolio (1994) in the practice of intellectual stimulation. Similar research by Litchka and Shapira-Lishchinsky (2016) found that the incorporation of principal's transformational leadership practices decreased from elementary to middle school.

Although few, the implementation of the transformational leadership practices reported by the elementary principals may hold promise for addressing the academic performance of gifted and talented students. For example, Ronksley-Pavia and Neumann (2022) found that when applying transformational leadership practices to gifted and talented education, shared team goals was an important practice that impacted a gifted and talented program. Li and Karankxha (2022) conducted a literature review and found that eight of the 14 research studies confirmed that transformational leadership practices showed positive impacts on student achievement. Like the leadership practices reported by the elementary and middle school principal participants in this study, Li and Karanhxha concluded that the most frequently adopted transformational practices were aligned to Bass and Avolio's (1994) transformational leadership framework.

Key Finding 4

A review of both the elementary and middle school principal's campus improvement plans revealed similarities and differences within the elementary and middle school cases and across both cases. All elementary and middle school principal participant's campus improvement plans included a school specific mission and vision; however, a mission and vision specific to gifted and talented students was not evident in any of the documents. Seminal research that explored principal leadership in gifted and talented education revealed that principals developed gifted and talented goals, but the goals were not incorporated in their school improvement plans (Lewis et al., 2007). However, this research study revealed that the collective responses of elementary and middle school principals related to goal setting for gifted and talented students were confirmed by the contents of their campus improvement plans.

Four of the six elementary principals' campus improvement plans incorporated a performance objective of at least 40% of gifted and talented students scoring at the masters level on the state assessment in mathematics, reading, and science while the campus improvement plan for EP4 and EP5 contained a performance objective of at least 20% of gifted and talented students scoring at the masters level on the state assessment in mathematics, reading, and science. In comparison, MSP3's campus improvement plan included the strengths of the gifted and talented program, MSP1's campus improvement plan included gifted and talented data in the campus needs assessment, and MSP2's campus improvement plan included gifted and talented demographic data. Three of the four middle school principal participants' campus improvement plan set a goal of at least

40% of gifted and talented students scoring at the masters level on the state assessment in mathematics, reading, science, and social studies, while MSP4's goal set a goal of at least 20% of gifted and talented students scoring at the masters level on the state assessment. The document analysis also revealed only one participant's campus improvement plan, EP3, included a specific strategy related directly to the gifted and talented performance goal. I concluded that a lower standard was set for elementary and middle schools with a gifted and talented enrollment of 5% or lower. This conclusion is illustrated in Table 9 below.

Table 9

Elementary and Middle School Gifted and Talented Enrollment and Campus Improvement Plan Goal Comparison

Participant	Gifted and Talented Enrollment	At least 40% of GT students will reach the masters level on the state assessment.	At least 20% of GT students will reach the masters level on the state assessment.
EP1	6%	X	
EP2	11%	X	
EP3	13%	X	
EP4	5%		X
EP5	3%		X
EP6	7%	X	
MSP1	20%	X	
MSP2	16%	X	
MSP3	51%	X	
MSP4	5%		X

Key Finding 5

Elementary and middle school principals both adopted the transformational leadership practice of intellectual stimulation. According to Bass and Avolio (1994), intellectual stimulation involves a leader's ability to encourage new approaches. The elementary and middle school principal participants collectively emphasized that they engage teachers in professional development to help increase gifted and talented teachers' knowledge base to meet the needs of gifted and talented students. The most common area of need reported by the principals was for intellectual stimulation centered around differentiating instruction for gifted and talented students.

Collaborative structures, through professional learning communities (professional learning communities, were reported by more middle school principals than elementary principals as a leadership practice. Collaborative structures refer to the process of establishing and engaging followers in building relationships. Building collaborative structures is a component of Kouzes and Posner's (2017) transformational practice, enabling others to act and an attribute of Bass and Avolio's (1994) intellectual stimulation. The majority of the middle school principals explained that they implement and lead professional learning communities at their schools. Professional learning communities were described by middle school principals as a professional development structure that involves administrators and teachers in the instructional planning process. This collaborative structure was also described as time for teachers and principals to review learning standards, analyze data, practice lessons and plan differentiated learning experiences for students.

While collaborative structures were noted as a common practice among middle school principals, only one elementary principal reported the use of professional learning communities as a specific practice related to addressing the academic performance of gifted and talented students. EP6 explained that during professional learning community meetings, the conversations are centered around how gifted and talented students are performing on local assessments and ways to implement lessons to challenge and grow gifted and talented students. Schildkamp et al. (2019) recommended that transformational leaders develop learning teams focused on analyzing student data and that a key element of intellectual stimulation was fostering innovation to solve problems of practice. This study's findings suggest that elementary and middle school principals may benefit from incorporating professional learning communities with a focus on gifted and talented students' academic performance as well as leadership practices to build teacher capacity to incorporate differentiation into instruction.

Seminal research conducted by Nash (2010) identified intellectual stimulation as a predictor of student achievement. The identification of intellectual stimulation as a transformational leadership practice adopted by elementary and middle school principals is a promising practice that, if continued, could increase the capacity of the gifted and talented teacher to become better equipped to support the instructional needs of gifted and talented students.

The cross-case synthesis disclosed patterns of similarity and differences among the elementary and middle school principal case studies. The similarities and differences between the two case studies provided insight in gaining an understanding of how

elementary and middle school principals provided leadership to support the academic performance of gifted and talented students in their transition from elementary to middle school. The results from the two individual cases and the cross-case synthesis highlighted the one overarching finding--the limited implementation of innovative leadership practices beyond traditional leadership practices to specifically support gifted and talented students.

Limitations of the Study

The transferability of the study was limited to the scope of the elementary and middle school cases studied in the unique context of a single school district in the southern region of the United States. Another limitation to the study was the potential for researcher bias because I was the sole researcher conducting this multiple case study and I am a current central office administrator at the study site. The organizational structure of the study site's schools, and the central office administrator position that I serve in does not include direct supervision or appraisal responsibility of elementary or middle school principals. This study was voluntary in nature and the professional relationships that were previously established posed minimal risk of unintended biases.

The accuracy of this study's findings may be achieved through multiple participants and multiple data sources (see Stake, 1995). I took the appropriate steps to minimize researcher bias by acknowledging my subjectivity through documenting reflexive journal entries, engaging participants in member checking, and using both semistructured interviews and document analysis. I recorded journal entries in my reflexive journal on a continuous basis throughout the duration of the research process. I

engaged participants in member checking sessions to validate their interview transcripts within 24-72 hours after conducting the participant interviews. When conducting a multiple case study, the results may report the individual case studies within the cross-case as opposed to detailing the individual cases within the final study (see Yin 2014). To ensure transparency in my reporting, I determined that it was more appropriate to include the results of both case studies separately and using thick descriptions followed by the cross-case synthesis.

Recommendations

The results of this multiple case study and the scarcity of research literature affirms the lack of specificity related to the principal leadership practices to support gifted and talented students and establishes the need for future research. Guilbault and Kirsch (2020) suggested that there is a need for more empirical research to determine the effective leadership practices of administrators who lead gifted and talented programs. The following recommendations for future research may contribute to the body of research on the topic of principal leadership in gifted and talented education with practical implications for public school districts in supporting gifted and talented students in their transition from elementary to middle school.

Participants in this multiple case study shared the importance of a collective team to implement and monitor gifted and talented programs. I recommend exploring the leadership practices assistant principals use at the elementary and middle school levels to support students in their transition from elementary to middle school. The assistant principal responses could validate the principals' responses and provide insight in

establishing effective leadership practices for school-based leaders as they support gifted and talented programs.

The middle school case study identified a gap in practice when offering the advanced academics course for gifted and talented students at the middle school level. Three of the four middle school principal participants reported that they currently do not offer the advanced academics course, or the course had not been implemented with fidelity, although one MSP reported the course is a district expectation. One middle school principal participant acknowledged offering the course for the past 4 years and reported the smallest percentage of underachieving gifted and talented students. Additional research is needed to explore the implementation of an advanced academics course as an intervention for gifted and talented students in their transition from elementary to middle school. A mixed methods design, collecting quantitative and qualitative data, could be used to better understand the impact of implementing the advanced academics course on sixth grade gifted and talented students' academic performance.

Implications

Implications for Positive Social Change

Gifted and talented students often exhibit uneven development where their cognitive ability may surpass their maturity level and can contribute to perfectionism and negative self-concept (Szymanski, 2020). To overcome some of the challenges associated with perfectionism, self-concept, and underachievement, gifted and talented students need opportunities within their learning environments to develop academic and social

skills. Principals who lead gifted and talented programs have the responsibility and opportunity to create learning environments that facilitate the academic, social, and emotional needs of gifted and talented students. Creating learning environments that foster the development of gifted and talented students may build resiliency in students so that students experience success beyond the classroom environment and make contributions to their communities. To cultivate positive social change, the implications of this study's findings are relevant to principals as gifted and talented practitioners develop innovative practices, policies, and procedures for improvements in gifted and talented students' academic performance in their transition from elementary to middle school.

This study's findings could be used to support the gifted and talented professional development of principals and teachers. At the organizational level, leaders may seek guidance from ESSA to leverage funds to support professional learning in gifted and talented education (see Guilbault & Kirsch, 2020). Facilitating collaborative structures while maintaining high expectations through professional learning opportunities may decrease the occurrence underachievement of gifted and talented students in their transition from elementary to middle school. This study's findings may also lead to the development of professional learning pathways to support gifted and talented teachers and leaders of gifted and talented programs to enhance their leadership practices and to impact student growth. Closing the excellence gap of gifted and talented students will nurture positive social change through ensuring effective principal leadership practices

are implemented as educators prepare gifted and talented students to thrive in a global society.

Theoretical Implications

This multiple case study confirmed that elementary and middle school principals implement transformational leadership practices to support gifted and talented students. While transformational leadership practices were first applied to the field of business (Burns, 1978); thereafter, transformational leadership was applied to the field of education (Leithwood, 1994; Serrin & Akkaya, 2020). Current research has since applied transformational leadership to gifted and talented education (Ronksley-Pavia & Neumann, 2022), to which this research study has added with its focus on transformational leadership frameworks in gifted and talented education programming. As an example, the National Standards in Gifted and Talented Education (NAGC, 2019b) provide evidence-based practices aligned to five standards. Although NAGC standards do not specifically include transformational leadership frameworks, these national standards embed various elements of transformational leadership that can be used to guide gifted and talented programs within the elementary and middle schools at the study site and in similar contexts.

Methodological Implications

Transformational leadership has been shown to have both indirect and direct effects on student achievement (Leithwood, 1994; Li & Karanxha, 2022). Prior research that applied transformational leadership in the education context used either the Leadership Practices Inventory (LPI) (Kouzes & Posner, 2008) or the Multifactor

Leadership Questionnaire (MLQ) (Bass & Avolio, 1994). A quantitative study that uses either the LPI or MLQ in the context of the study site coupled with qualitative data collected through a multiple case study, modeled after this study's design, could provide statistical data that would be beneficial to understanding how elementary and middle school principals provide leadership to address the academic performance of gifted and talented students in their transition from elementary to middle school.

Implications for Local Practice

The academic performance reports compiled and published by the state education agency, in which the study site is located, reports student assessment data on the state assessment by demographic groups and special populations such as economically disadvantaged, emergent bilingual, and special education students. Gifted and talented students' academic performance is only reported at the local level through data analysis that is included in the school district's program evaluation. The elementary and middle school principal participants' campus improvement plans contained goals and strategies for the subpopulations that are included in the state's academic performance; however, the campus improvement plans only reflected the development of goals for gifted and talented students' academic performance on the state assessment.

When discussing gifted and talented students in reference to their academic performance, it was natural for elementary and middle school principal participants to compare gifted and talented students to other subpopulations for example, special education and emergent bilingual students. This perception is connected to the problem that gifted and talented students' academic performance levels are often omitted from

state reporting. Two elementary principals and two middle school principals suggested leadership practices to support gifted and talented students in their transition from elementary to middle school that mirror the protocols that are implemented for emergent bilingual and special education programs.

The elementary and middle school principals who connected the work of supporting gifted and talented students to other subpopulations recommended collaborative structures through transition meetings, whereby elementary and middle school stakeholders connect and collaborate to discuss student profiles and set individual gifted and talented goals to support the transition from fifth grade to sixth grade. Currently, transition meetings are held for emergent bilingual and special education students; however, this is not a practice for gifted and talented students. The elementary and middle school principal participants shared creative ideas to support the transition from elementary to middle school. Based on their responses and their connections to the other subpopulations with mandated processes, I concluded that elementary and middle school principals believe the implementation of transition meetings for the gifted and talented program is a district level decision rather than a school level decision. There is a need to collaborate with the district level leaders of the emergent bilingual and special education programs to gather information on their transition meeting structures. Engaging in this collaboration may result in the development of gifted and talented transition meeting practices that can be implemented district-wide in alignment with other subpopulations' transition practices.

Conclusion

The intent of this study was to fill a gap in practice by identifying the leadership practices elementary and middle school principals use to support gifted and talented students in their transition from elementary to middle school. The existing research on the underachievement of gifted and talented students has focused on conceptualizing gifted and talented underachievement and interventions, with limited current research on principal leadership practices to support the academic performance of gifted and talented students. This study was relevant because limited research existed on principal leadership practices to support gifted and talented students in their transition from elementary to middle school.

Elementary and middle school principal participants shared their perceptions and experiences in leading gifted and talented programs at their schools. The findings of this study extend previous research to better understand the principal leadership practices elementary and middle school principals use to support the academic performance of gifted and talented students in their transition from elementary to middle school. Since the reauthorization of ESSA (2015) principals have focused on ensuring all student groups meet academic performance standards. The results of this study revealed that elementary and middle school principal participants collectively demonstrated attributes of transformational leadership in the areas of enabling others to act, high performance expectations, individualized consideration, and intellectual stimulation to support the academic performance of gifted and talented students. It can be concluded from this study that elementary principals implemented slightly more transformational leadership

practices than middle school principals. The primary challenge identified by elementary and middle school principals revolved around the capacity of the classroom teachers to provide differentiated instruction for gifted and talented students.

Through a review of the multiple sources of data, it appears that these practices have not yet resulted in significant increases in the academic performance of gifted and talented students in the transition from elementary to middle school. However, elementary and middle school principals were optimistic that their leadership practices to support the academic performance of gifted and talented students would result in overall increases in gifted and talented students' academic performance in the future. Based on the interview responses from both the elementary and middle school principal participants, their participation in this study provided the participants with an opportunity to be reflective of their current leadership practices and led to the stimulation of ideas for more creative leadership practices that can be enacted in their school's gifted and talented programs in the future.

References

- Abdalla, M. M., Oliveira, L. G., Azevedo, C. E. F., & Gonzalez, R. K. (2018). Quality in qualitative organizational research: Types of triangulation as methodological alternative. *Administração Ensino e Pesquisa*, 19(1), 66-98.
<https://doi.org/10.13058/raep.2018.v19n1.578>
- Acton, K. S. (2021). School leaders as change agents: Do principals have the tools they need? *Management in Education*, 35(1), 43-51.
<https://journals.sagepub.com/doi/pdf/10.1177/0892020620927415>
- Adams, C. M., Olsen, J. J., & Ware, J. K. (2017). The school principal and student learning capacity. *Educational Administration Quarterly*, 53(4), 556-584.
<https://doi-org.ezp.waldenulibrary.org/10.1177/0013161X17696556>
- Allen, N., Grigsby, B., & Peters, M. (2015). Does leadership matter? Examining the relationship among transformational leadership, school climate, and student achievement. *NCPEA International Journal of Educational Leadership Preparation*, 10(2), 1-22. <https://files.eric.ed.gov/fulltext/EJ1083099.pdf>
- Amankwaa, L. (2016). Creating protocols for trustworthiness in qualitative research. *Journal of Cultural Diversity*, 23(3), 121-127.
- Anderson, M. (2017). Transformational leadership in education: A review of existing literature. *International Social Science Review*, 93(1), 1-13.
<http://digitalcommons.northgeorgia.edu/issr/vol93/iss1/4>
- Anney, V. N. (2014). Ensuring the quality of the findings of qualitative research: Looking at trustworthiness criteria. *Journal of Emerging Trends in Educational*

Research and Policy Studies, 5(2), 272-281. www.jeteraps.scholarlinresearch.org

Barbier, K., Donche, V., & Verschueren, K. (2019). Academic (under)achievement of intellectually gifted students in the transition between primary and secondary education: An individual learner perspective. *Frontiers in Psychology*, 10, 1-12.

<https://doaj.org/article/d2bdfd1b0a8b4b1889c6ca18d975c10b>

Bass, B. M. (1985). *Leadership and performance beyond expectations*. Free Press.

Bass, B. M., & Avolio, B. J. (1994). *Improving organizational effectiveness: Through transformational leadership*. SAGE Publishing.

Bass, B. M., & Avolio, B. J. (1996). *MLQ multifactor leadership questionnaire for teams*. Mind Garden.

Bass, B. M., & Riggio, R. E. (2006). *Transformational leadership*. Lawrence Erlbaum Associates, Inc.

Baxter, P., & Jack, S. (2008). Qualitative case study methodology: Study design and implementation for novice researchers. *Qualitative Report*, 13(4), 544-559.

<https://nsuworks.nova.edu/cgi/viewcontent.cgi?article=1573&context=tqr>

Beckett, L. O. (2021). Predictors of urban principal turnover. *Urban Education*, 56(10), 1695-1718. <https://doi.org/10.1177/0042085918772629>

Benny, N., & Blonder, R. (2016). Factors that promote/inhibit teaching gifted students in a regular class: Results from a professional development program for chemistry teachers. *Education Research International*, 2016, 1-11.

<https://doi.org/10.1155/2016/2742905>

Braun, V., & Clarke, V. (2006). Using thematic analysis in psychology. *Qualitative*

Research in Psychology, 3, 77-101. <https://doi.org/10.1191/1478088706qp063oa>

- Brigandi, C. B., Gilson, C. M., & Miller, M. (2019). Professional development and differentiated instruction in an elementary school pullout program: A gifted education case study. *Journal for the Education of the Gifted*, 42(4), 362-395. <https://doi.org/10.1177/0162353219874418>
- Brown, E. (2018). Leadership in specialized schools and programs for high-ability learners. In B. MacFarlane (Ed.), *Specialized schools for high-ability learners: Designing and Implementing programs in specialized school settings* (pp. 61-74). Prufrock Press.
- Brown, E. F., & Rinko-Gay, C. (2017). Moral frameworks for leaders of gifted programs and services. *Roeper Review*, 39, 121-131. <https://doi.org/10.1080/02783193.2017.1289485>
- Bryant, J. B., Escalante, K., & Selva, A. (2017). Promising practices: Building the next generation of school leaders. *Journal of School Administration Research and Development*, 2(1), 32-41. <https://files.eric.ed.gov/fulltext/EJ1158096.pdf>
- Burkhauser, S. (2017). How much do school principals matter when it comes to teacher working conditions? *Educational Evaluation and Policy Analysis*, 39(1), 126-145. <https://journals.sagepub.com/doi/pdf/10.3102/0162373716668028>
- Burkholder, G. J., Cox, K. A., Crawford, L. M. & Hitchcock, J. H. (Eds.) (2020). *Research designs and methods: An applied guide for the scholar-practitioner*. SAGE.
- Burns, J. M. (1978). *Leadership*. Harper & Row.

- Butin, D. W. (2010). *The education dissertation: A guide for practitioner scholars*. SAGE.
- Callahan, C. M., Moon, T. R., & Oh, S. (2017). Describing the status of programs for the gifted: A call for action. *Journal for the Education of the Gifted*, 40(1), 20-49. <http://dx.doi.org/10.1177/0162353216686215>
- Card, D., & Giuliano, L. (2015). *Can universal screening increase the representation of low income and minority students in gifted education*. National Bureau of Economic Research. <http://dx.doi.org/10.3386/w21519>
- Cavilla, D. (2017). Observation and analysis of three gifted underachievers in an underserved, urban high school setting. *Gifted Education International*, 33(1), 62-75. <https://doi.org/10.1177/0261429414568181>
- Coelho, V. A., Marchante, M., & Jimerson, S. R. (2017). Promoting a positive middle school transition: A randomized-controlled treatment study examining self-concept and self-esteem. *Journal of Youth & Adolescence*, 46, 558-569. <https://doi.org/10.1007/s10964-016-0510-6>
- Corwith, S. R., & Johnsen, S. K. (2020). Gifted programming standards. In J. A. Plucker & C. M. Callahan (Eds.), *Critical issues and practices in gifted education: A survey of current research on giftedness and talent development* (3rd ed., pp. 229-247). Prufrock Press.
- Creswell, J. W. (2009). *Research design: Qualitative, quantitative, and mixed methods approaches* (3rd ed.). SAGE.
- Creswell, J. W. (2013). *Qualitative inquiry and research design: Choosing among five*

approaches (3rd ed.). SAGE.

- Davidson Institute (2020). *Federal policies*. <https://www.davidsongifted.org/search-database/region/s10000>
- Davis, J. L. (2016). Keep gifted students challenged. *Principal*, 95(3), 16-19.
- Davis, S., Darling-Hammond, L., LaPointe, M., & Meyerson, D. (2005). *Developing successful principals: School leadership study*. Stanford Educational Leadership Institute. <https://edpolicy.stanford.edu/sites/default/files/publications/school-leadership-study-developing-successful-principals.pdf>
- Desmet, O., & Pereira, N. (2022). Gifted boys' perceptions of their academic underachievement. *Gifted Education International*, 38(2). 229-255.
<https://doi.org/10.1177/02614294211050294>
- Desmet, O. A., Pereira, N., & Peterson, J. S. (2020). Telling a tale: How underachievement develops in gifted girls. *Gifted Child Quarterly*, 64(2), 85-99.
<https://doi.org/10.1177/0016986219888633>
- Dhuey, E., & Smith, J. (2018). How school principals influence student learning. *Empirical Economics*, 54, 851-882. <https://doi.org/10.1007/s00181-017-1259-9>
- Eckes, S. E., & Russo, C. J. (2020). Legal issues and gifted education. In J. A. Plucker & C. M. Callahan (Eds.), *Critical issues and practices in gifted education: A survey of current research on giftedness and talent development* (3rd ed., pp. 273-281). Prufrock Press.
- Erwin, J. O., & Worrell, F. C. (2012). Assessment practices and the underrepresentation of minority students in gifted and talented education. *Journal of*

Psychoeducational Assessment, 30(1), 74-87.

<https://journals.sagepub.com/doi/pdf/10.1177/0734282911428197>

Evans, D., Borriello, G. A., & Field, A. P. (2018). A review of the academic and psychological impact of the transition to secondary education. *Frontiers in Psychology*, 9, 1-18.

<https://doaj.org/article/2556927279b64f25a31d4a23a0a279c7>

Every Student Succeeds Act, 2015 U.S.C. § 6301 (2015).

<https://www.congress.gov/bill/114th-congress/senate-bill/1177>

Fite, P., Frazer, A., DiPierro, M., & Abel, M. (2018). Youth perceptions of what is helpful during the middle school transition and correlates of transition difficulty. *Children and Schools*, 41(1), 55-62. <https://doi.org/10.1093/cs/cdy029>

Fraser-Seeto, K., Howard, S. J., & Woodcock, S. (2015). An investigation of teachers' awareness and willingness to engage with a self-directed professional development package on gifted and talented education. *Australian Journal of Teacher Education*, 40(1), 1-7. <https://files.eric.ed.gov/fulltext/EJ1049328.pdf>

Galbraith, J., & Delisle, J. (2015). *When gifted kids don't have all the answers: How to meet their social and emotional needs*. Free Spirit.

Gilewski, C. D., & Nunn, M. L. (2016). *Research summary: Transitioning young adolescents from elementary to middle schools*.

<https://www.amle.org/research/transitioning-young-adolescents-from-elementary-to-middle->

Grantham, T. C., Collins, K., & Dickson, K. T. (2013). Administrative leadership in

gifted education. In J. Plucker & C. M. Callahan (Eds.), *Critical issues and practices in gifted education: What the research says* (3rd ed., pp. 29-46).

Prufrock Press.

Grissom, J. A., & Bartanen, B. (2018). Principal effectiveness and principal turnover. *Education Finance and Policy, 14*(3), 355-382.

https://doi.org/10.1162/edfp_a_00256

Grissom, J. A., Egalite, A. J., & Lindsay, C. A. (2021). *How principals affect students and schools: A systematic synthesis of two decades of research*. The Wallace Foundation.

Guilbault, K. M., & Kirsch, L. B. (2020). Administrative leadership. In J. A. Plucker & C. M. Callahan (Eds.), *Critical issues and practices in gifted education: A survey of current research on giftedness and talent development* (3rd ed., pp. 23-35). Prufrock Press.

Hallinger, P. (2003). Leading educational change: reflections on the practice of instructional and transformational leadership. *Cambridge Journal of Education, 33*(3), 329-352. <https://doi.org/10.1080/0305764032000122005>

Handa, M. C. (2019). Leading differentiated learning for the gifted. *Roeper Review, 41*, 102-118. <https://doi.org/10.1080/02783193.2019.1585213>

Hatch, J. A. (2002). *Doing qualitative research in education settings*. State University of New York Press.

Hauserman, C. P., & Stick, S. L. (2013). The leadership teachers want from principals: Transformational. *Canadian Journal of Education, 36*(3), 184-203.

<https://jstor.org/stable/canajeducrevucan.3.6.3.184>

- Hertberg-Davis, H. L., & Brighton, C. M. (2006). Supporting and sabotage: Principal's influence on middle school teachers' responses to differentiation. *Journal of Secondary Gifted Education, 17*(2), 90-122. <https://doi.org/10.4219/jsge-2006-685>
- Hodges, J., Mun, R. U., Roberson, J. J., & Flemister, C. T. (2021). Educator perceptions following changes in gifted education policy: Implications for serving gifted students. *Gifted Child Quarterly, 65*(4), 338-353. <https://doi.org/10.1177/00169862211023796>
- Hodges, J., Tay, J., Desmet, O., Ozturk, E., & Pereira, N. (2018). A meta-analysis of gifted and talented identification practices. *Gifted Child Quarterly, 62*(2), 147-174. <https://doi.org/10.1177/0016986217752107>
- Hoover-Schultz, B. (2005). Gifted underachievement: Oxymoron or educational enigma. *Gifted Child Today, 28*(2), 46-49. <https://doi.org/10.4219/gct-2005-171>
- Hutton, D. (2018). Critical factors explaining the leadership performance of high performing principals. *International Journal of Leadership in Education, 21*(2), 245-265. <http://dx.doi.org/10.1080/13603124.2016.1142118>
- Johnsen, S. K. (2013). Addressing the challenge of administrator support of gifted education programming. *Gifted Child Today, 36*(4), 221-222. <https://doi.org/10.1177/1076217513498219>
- Johnsen, S. K., & Kaul, C. R. (2016). Texas GT teachers' beliefs and practices survey: Supporting advocacy efforts. *Tempo, 37*(1), 6-18.

<https://doi.org/10.1177/1076217519862332>

Johnsen, S. K., & Kaul, C. R. (2019). Assessing teacher beliefs regarding research-based practices to improve services for GT students. *Gifted Child Today*, 42(4), 229-239. <https://doi.org/10.1177/1076217519862332>

Johnsen, S., Simonds, M., & Voss, M. (2019). *Evidence-based practices in gifted education: Acceleration, ability grouping, and universal screening*. TEMPO+. <https://tempo.txgifted.org/evidence-based-practices-in-gifted-education-acceration-ability-grouping-and-universal-screening/>

Johnsen, S. K., Simonds, M., & Voss, M. (2021). *Implementing evidence-based practices in gifted education: Professional learning modules on universal screening, grouping, acceleration, and equity in gifted programs*. Routledge.

Jolly, J. L., & Robins, J. H. (2016). After the Marland Report: Four decades of progress? *Journal for the Education of the Gifted*, 39(2), 132-150. <https://doi.org/10.1177/0162353216640937>

Kaplan, S. N. (2022). Factors affecting the perceptions and practices of differentiated curricula and pedagogies for gifted and talented students. *Education Sciences*, 12(1), 41-49. <https://doi.org/10.3390/educsci12010041>

Kaul C. R., & Davis, B. K. (2018). How the state education agencies addressed gifted education in the Title II sections of their ESSA state plans. *Gifted Child Today*, 41(3), 159-167. <https://doi.org/10.1177/1076217518769700>

Kitsantas, A., Bland, L., & Chirinos, D. S. (2017). Gifted students' perceptions of gifted programs: An inquiry into their academic and social-emotional functioning.

Journal for the Education of the Gifted, 40(3), 266-288.

<https://journals.sagepub.com/doi/pdf/10.1177/0162353217717033>

Kouzes, J., & Posner, B. Z. (2008). *The leadership challenge* (4th ed.). Jossey-Bass.

Kouzes, J. M., & Posner, B. Z. (2013). *Leadership practices inventory; Self* (4th ed.). The Leadership Challenge.

Kouzes, J. M. , & Posner, B. Z. (2017). *The leadership challenge: How to make extraordinary things happen in organizations* (6th ed.). Jossey-Bass.

Leithwood, K. (1994). Leadership for school restructuring. *Educational Administration Quarterly*, 30(4), 498-518. <https://doi.org/10.1177/0013161X94030004006>

Leithwood, K., & Jantzi, D. (2005). A review of transformational school leadership research 1996-2005. *Leadership & Policy in Schools*, 4(3), 177-199.
<https://doi.org/10.1080/15700760500244769>

Lester, J. N., Cho, Y., & Lochmiller, C. R. (2020). Learning to do qualitative data analysis: A starting point. *Human Resource Development Review*, 19(1), 94-106.
<https://doi.org/10.1177/1534484320903890>

Lewis, J. D., Cruzerio, P. A., & Hall, C. A. (2007). Impact of two elementary principals in their buildings. *Gifted Child Today*, 30(2), 56-62.
<https://files.eric.ed.gov/fulltext/EJ756555.pdf>

Lewis, K. D., & Boswell, C. (2020). Reflections on rural gifted education in Texas: Then and now. *Theory & Practices in Rural Education*, 10(2), 119-139.
<https://doi.org/10.3776/tpre.2020.v10n2p119-139>

- Li, Y. & Karanxcha, Z. (2022). Literature review of transformational school leadership: Models and effects on student achievement (2006-2019). *Educational Management Administration & Leadership*, 1-23.
<https://doi.org/10.1177/17411432221077157>
- Lincoln, Y. S. & Guba, E. G. (1985). *Naturalistic inquiry*. SAGE.
- Litchka, P. R., & Shapira-Lishchinsky, O. (2016). Planning educational policy: Teacher perceptions of school principal transformational leadership in Israel and the United States. *Educational Planning*, 23(2), 45-58.
<https://files.eric.ed.gov/fulltext/EJ1208277.pdf>
- Lockhart, K., Meyer, M. S., & Crutchfield, K. (2021). A content analysis of selected state plans for gifted and talented education. *Journal of Advanced Academics*, 33(1), 1-40. <https://doi.org/10.1177/1932202X211026240>
- Long, L. C., Barnett, K., & Rogers, K. B. (2015). Exploring the relationship between principal, policy, and gifted program scope and quality. *Journal for the Education of the Gifted*, 38(2), 118-140. <https://doi.org/10.1177/0162353215578279>
- Long, T., & Johnson, M. (2000). Rigor, reliability, and validity in qualitative research. *Clinical Effectiveness in Nursing*, 4, 30-37.
<https://doi.org/10.1054/cein.2000.0106>
- Lovette-Wilson, C., Orange, A., & Corrales, A. (2020). Factors influencing student transition from elementary to middle school. *Educational Studies*, 48(3), 424-411.
<https://doi.org/10.1080/03055698.2020.1767039>
- Makel, M. C., & Johnsen, S. K. (2020). Conceptions of giftedness. In J. A. Plucker & C.

- M. Callahan (Eds.), *Critical issues and practices in gifted education: A survey of current research on giftedness and talent development* (3rd ed., pp. 113-122). Prufrock Press.
- Marland, S. P. (1972). *Education of the gifted and talented: Report to the Congress of the United States*. U.S. Department of Health, Education, and Welfare, Office of Education. <https://files.eric.ed.gov/fulltext/ED056243.pdf>
- Mathewson, T. G. (2016, November). Schools turn to universal screening to increase equity in gifted programs. *K-12 Dive*. <https://www.k12dive.com/news/schools-turn-to-universal-screening-to-increase-equity-in-gifted-programs/430797/>
- Mayes, E., & Gethers, K. (2018). Transformational leadership: Creating a learning culture in an age of accountability. *AASA Journal of Scholarship & Practice*, 15(3), 12-31. <https://www.aasa.org/uploadedFiles/Publications/JSP-Fall2018.pdf>
- McCoach, D. B., Siegle, D., & Rubenstein, L. D. (2020). Pay attention to inattention: Exploring ADHD symptoms in a sample of underachieving gifted students. *Gifted Child Quarterly*, 64(2), 100-116. <https://doi.org/10.1177/0016986219901320>
- McHatton, P. A., Boyer, N. R., Shaunessy, E., Terry, P. M., & Farmer, J. L. (2010). Principals' perceptions of preparation and practice in gifted and special education content: Are we doing enough? *Journal of Research on Leadership Education*, 5(1), 1-22. <https://files.eric.ed.gov/fulltext/EJ875413.pdf>
- Merriam, S. B., & Tisdell, E. J. (2016). *Qualitative research: A guide to design and implementation* (4th ed.). Jossey-Bass.
- Metz, S., Piro, J. S., Nitowski, H., & Cosentino, P. (2019). Transformational leadership:

- Perceptions of building-level leaders. *Journal of School Leadership*, 29(5), 389-408. <https://doi.org/10.1177/1052684619858843>
- Meyer, K., & Willis, R. (2019). Looking back to move forward: The value of reflexive journaling for novice researchers. *Journal of Gerontological Social Work*, 62(5), 578-585. <https://doi.org/10.1080/01634372.2018.1559906>
- Mofield, E. (2020). Benefits and barriers to collaboration and co-teaching: Examining perspectives of gifted education teachers and general education teachers. *Gifted Child Today*, 43(1), 20-33. <https://doi.org/10.1177/1076217519880588>
- Mofield E., & Petters M. P. (2019). Understanding underachievement: Mindset, perfectionism, and achievement attitudes among gifted students. *Journal for the Education of the Gifted*, 42(2), 107-134. <https://doi.org/10.1177/0162353219836737>
- Morgan, H. (2020). The gap in gifted education: Can universal screening narrow it? *Education*, 140(4), 207-214. <https://eric.ed.gov/?id=EJ1304434>
- Nash, W. (2010). Transformational school leadership and student achievement: A case study. *Southeastern Teacher Education Journal*, 3(1), 55-66.
- National Association for Gifted Children. (2014). *Collaboration among all educators to meet the needs of gifted learners*. <https://www.nagc.org/sites/default/files/Position%20Statement/Collaboration%20Among%20Educators.pdf>
- National Association for Gifted Children. (2015). *Addressing excellence gaps in K-12 education*.

<https://www.nagc.org/sites/default/files/Position%20Statement/Excellence%20Gaps%20Position%20Statement.pdf>

National Association for Gifted Children. (2016). *Asynchronous development*.

[https://www.nagc.org/sites/default/files/Publication%20PHP/NAGC%20TIP%20Sheet-Asynchronous%20Development-FINAL%20REVISED-OCTOBER%202017\(1\).pdf](https://www.nagc.org/sites/default/files/Publication%20PHP/NAGC%20TIP%20Sheet-Asynchronous%20Development-FINAL%20REVISED-OCTOBER%202017(1).pdf)

National Association for Gifted Children. (2019a). *A definition of giftedness that guides best practice*.

<https://www.nagc.org/sites/default/files/Position%20Statement/Definition%20of%20Giftedness%20%282019%29.pdf>

National Association for Gifted Children. (2019b). *2019 Pre-K-grade 12 gifted programming standards*.

<http://www.nagc.org/sites/default/files/standards/Intro%202019%20Programming%20Standards.pdf>

National Association for Gifted Children. (2021). *Jacob Javits Gifted & Talented*

Students Education Act. <https://www.nagc.org/resources-publications/resources-university-professionals/jacob-javits-gifted-talented-students>

National Center for Research on Gifted Education. (2019). *National center for research on gifted education (NCRGE) brief on gifted education curriculum and gifted*

achievement growth of gifted students in three states. <https://ncrge.uconn.edu/wp-content/uploads/sites/982/2019/04/NCRGE-Brief-on-Gifted-Education-Curriculum-and-Gifted-Achievement-Growth.pdf>

No Child Left Behind Act. 20 U.S.C. §6301 (2001).

<https://www.congress.gov/107/plaws/publ110/PLAW-107publ110.pdf>

Nowell, L. S., Norris, J. M., White, D. E., & Moules, N. J. (2017). Thematic analysis:

Striving to meet the trustworthiness criteria. *International Journal of Qualitative Methods*, 16, 1-13. <https://doi.org/10.1177/1609406917733847>

Obergriesser, S. & Stoeger, H. (2015). The role of emotions, motivation, and learning

behavior in underachievement and results of an intervention. *High Ability Studies*, 26, 167-190. <https://doi.org/10.1080/13598139.2015.1043003>

Ortlipp, M. (2008). Keeping and using reflective journals in the qualitative research process. *Qualitative Report*, 13(4), 695-705.

<https://nsuworks.nova.edu/cgi/viewcontent.cgi?article=1579&context=tqr>

Patton, M. Q. (2002). *Qualitative research and evaluation methods* (3rd ed.). SAGE.

Peters, S., Ottwein, J., Lee, L. E., & Matthews, M. S. (2020). Identification. In J. A.

Plucker & C. M. Callahan (Eds.), *Critical issues and practices in gifted education: A survey of current research on giftedness and talent development* (3rd ed., pp. 261-272). Prufrock Press.

Peters, S. J., & Jolly, J. L. (2018). The influence of professional development in gifted

education on the frequency of instructional practices. *Australian Educational Researcher*, 45(4), 473-491. <http://dx.doi.org/10.1007/s13384-018-0260-4>

Plucker, J. A., & Callahan C. M. (Eds.) (2020). *Critical issues and practices in gifted*

education: A survey of current research on giftedness and talented development (3rd ed.). Prufrock Press.

Plucker, J. A., Peters, S. J., & Schmalensee, S. (2017). Reducing excellence gaps: A research-based model. *Gifted Child Today*, 40(4), 245-250.

<https://doi.org/10.1177/1076217517723949>

Posner, B. Z. (2021). Bringing the rigor of research to the art of leadership: Evidence behind the five practices of exemplary leadership and the LPI Leadership Practices Inventory. *The Leadership Challenge*.

<https://www.leadershipchallenge.com/LeadershipChallenge/media/SiteFiles/research/TLC-Research-to-the-Art-of-Leadership.pdf>

Qu, S. Q., & Dumay, J. (2011). The qualitative research interview. *Qualitative Research in Accounting & Management*, 8(3), 238-264.

<https://doi.org/10.1108/11766091111162070>

Quin, J., Deris, A., Bischoff, G., & Johnson, J. T. (2015). Comparison of transformational leadership practices: Implications for school districts and principal preparation programs. *Journal of Leadership Education*, 14(3), 71-85.

<https://doi.org/10.12806/V14/I3/R5>

Reis, S. M., & McCoach, D. B. (2000). The underachievement of gifted students: What do we know and where do we go? *Gifted Child Quarterly*, 44(3), 152-170.

<https://doi.org/10.1177/001698620004400302>

Renzulli, J. S., Reid, B. D., & Gubbins, E. J. (1992). *Setting an agenda: Research priorities for the gifted and talented through the year 2000*. The National Research Center on the Gifted and Talented.

<https://files.eric.ed.gov/fulltext/ED358660.pdf>

- Ridgely, L. M., Rubenstein, L. D., & Callan, G. L. (2020). Gifted underachievement within a self-regulated learning framework: Proposing a task-dependent model to guide early identification and intervention. *Psychology in the Schools, 57*(9), 1365-1384. <https://doi.org/10.1002/pits.22408>
- Rinn, A., N., Mun, R. U., & Hodges, J. (2020). *2018-2019 State of the states in gifted education*. National Association for Gifted Children and the Council of State Directors of Programs for the Gifted. <https://nagc.org/2018-2019-state-states-gifted-education>
- Ritchotte, J., Rubenstein, L., & Mury, F. (2016). Reversing the underachievement of gifted middle school students. *Gifted Child Today, 38*(2), 103-113. <https://doi.org/10.1177/1076217514568559>
- Ronksley-Pavia, M., & Neumann, M. M. (2020). Conceptualising gifted student (dis)engagement through the lens of learner (re)engagement. *Education Sciences, 10*(274), 1-13. <https://files.eric.ed.gov/fulltext/EJ1272799.pdf>
- Ronksley-Pavia, M., & Neumann, M. M. (2022). Exploring educator leadership practices in gifted education to facilitate online learning experiences for (re)engaging gifted students. *Education Sciences, 12*(2), 99-109. <https://doi.org/10.3390/educsci12020099>
- Saldana, J. (2016). *The coding manual for qualitative researchers* (3rd ed.). SAGE.
- Sanchez, J. E., Usinger, J., Thornton, B. W., & Sparkman, W. E. (2017). I'm paying the time for someone else's crime: Principals and core teachers at rural middle schools under chronic academic stress. *Rural Educator, 38*(3), 1-11.

<https://doaj.org/article/87999a494b514777ab79104c768b5a1b>

Schildkamp, K., Poortman, C. L., Ebbeler, J., & Pieters, J. M. (2019). How school leaders can build effective data teams: Five building blocks for a new wave of data-informed decision making. *Journal of Educational Change*, 20(3), 283-325.

<https://doi.org/10.1007/s108333-019-09345>

Sebastian, J., Allensworth, E., Widermann, W., Hochbein, C., & Cunningham, M. (2019).

Principal leadership and school performance: An examination of instructional leadership and organizational management. *Leadership and Policy in Schools*, 18(4), 591-613. <http://doi.org/10.1080/15700763.2018.1513151>

Serin, H., & Akkaya, A. (2020). The relationship between school principals' perceived

transformational leadership behavior and teachers' motivation. *International Education Studies*, 13(10), 70-87. <https://files.eric.ed.gov/fulltext/EJ1272676.pdf>

Sewell, C. J. P., & Goings, R. B. (2019). Navigating the gifted bubble: Black adults reflecting on their transition experiences in NYC gifted programs. *Roeper Review*,

41(1), 20-34. <https://doi.org/10.1080/02783193.2018.1553218>

Shatzer, R. H., Caldarella, P., Hallam, P. R., & Brown, B. L. (2014). Comparing the

effects of instructional and transformational leadership on student achievement: Implications for practice. *Educational Management Administration & Leadership*, 42(4), 445-459. <https://doi.org/10.1177/1741143213502192>

Siegle, D., Rubenstein, L. D., & McCoach, D. B. (2020). Do you know what I'm

thinking?: A comparison of teacher and parent perspectives of underachieving gifted students' attitudes. *Psychology in Schools*, 57(10), 1596-1614.

<https://doi.org/10.1002/pits.22345>

Snyder, K. E., Fong, C. J., Painter, J. K., Pittard, C. M., Barr, S. M., & Patall, E. A.

(2019). Interventions for academically underachieving students: A systematic review and meta-analysis. *Educational Research Review*, 28, 1-22.

<https://doi.org/10.1016/j.edurev.2019.100294>

Southern, W. T., & Jones, E. D. (2015). Types of acceleration: Dimensions and issues. In

S. G. Assouline, N., Colangelo, J., VanTassel-Baska, & A. Lupkowski-Shoplik

(Eds.), *A nation empowered: Evidence trumps the excuses holding back*

America's brightest students (pp. 5-12). The Connie Belin & Jaqueline N. Blank

International Center for Gifted Education and Talent Development.

Spoon, R., Rubenstein, L. D., Shively, K., Stith, K., Ascolani, M., & Potts, M. L. (2020).

Reconceptualizing professional learning within the gifted field: Exploring the

instruct to innovate model. *Journal for the Education of the Gifted*, 43(3), 193-

226. <https://doi.org/10.1177/0162353220933001>

Steenbergen-Hu, S., Makel, M. C., & Olszewski-Kubilius, P. (2016). What one hundred

years of research says about the effects of ability grouping and acceleration on K-

12 students' academic achievement: Findings of two second-order meta-analyses.

Review of Educational Research, 86(4), 849-899.

<https://doi.org/10.3102/0034654316675417>

Steenbergen-Hu, S., Olszewski-Kubilius, P., & Calvert, E. (2020). The effectiveness of

current interventions to reverse the underachievement of gifted students: Findings

of a meta-analysis and systematic review. *Gifted Child Quarterly*, 64(2), 132-165.

<https://doi.org/10.1177/0016986220908601>

Sun, J., & Leithwood, K. (2012). Transformational school leadership effects on student achievement. *Leadership and Policy in Schools, 11*, 418-451.

<https://doi.org/10.1080/15700763.2012.681001>

Szymanski, A. (2020). Social and emotional issues in gifted education. In J. A. Plucker & C. M. Callahan (Eds.), *Critical issues and practices in gifted education: A survey of current research on giftedness and talent development* (3rd ed., pp. 23-35). Prufrock Press.

Taghinejad, M., Abedi, A., & Ghamarani, A. (2020). Effectiveness of the growth mindset intervention on learning behaviors in the middle school gifted underachievers. *Journal of Preventive Counseling, 1*(3), 61-78.

http://jpc.uma.ac.ir/article_1163_e3cf54d4e18321313a8ef1ea756abfb7.pdf

Texas Education Agency. (2015). *State board for educator certification (SBEC): Texas examinations of educator standards (TExES) gifted and talented supplemental certificate*.

<https://tea.texas.gov/sites/default/files/RequiredGTTeacherTraining0407%20updated.pdf>

Texas Education Agency. (2019). *Texas state plan for the education of gifted/talented students*. https://tea.texas.gov/sites/default/files/GT_State_Plan_2019_1.pdf

Texas Education Agency (2022). *Education code*.

<https://statutes.capitol.texas.gov/docs/ed/htm/ed.11.htm>

Tookes, G. D., Aly, E. R., & Avant, I. M. (2020). A study on the correlation between

- school administrators' perceptions of school discipline policies, transformational leadership, and student achievement. *International Journal of Educational Organization and Leadership*, 27(2), 1-19. <https://doi.org/10.18848/2329-1656/CGP/v27i02/1-19>
- U. S. Department of Education. (2019). *Jacob K. Javits Gifted and Talented Students Education Program*. <https://www2.ed.gov/programs/javits/index.html>
- Valentine, J. W., & Prater, M. (2011). Instructional, transformational, and managerial leadership and student achievement: High school principals make a difference. *NASSP Bulletin*, 95(1), 5-30. <https://doi.org/10.1177/0192636511404062>
- VanTassel-Baska, J. (2018). American policy in gifted education. *Gifted Child Today*, 41(2), 98-103. <https://doi.org/10.1177/1076217517753020>
- VanTassel-Baska, J., & Hubbard, G. F. (2019). A review of the national gifted standards implementation in eight districts. *Gifted Child Today*, 42(4), 215-228. <https://doi.org/10.1177/1076217519862336>
- VanTassel-Baska, J., Hubbard, G. F., & Robbins, J. I. (2020). Differentiation of instruction for gifted learners: collated evaluative studies of teacher classroom practices. *Roeper Review*, 42(3), 153-164. <https://doi.org/10.1080/02783193.2020.1765919>
- Wai, J., & Rindermann, H. (2019). What goes into high educational and occupational achievement? Education, brains, hard work, networks, and other factors. *High Ability Studies*, 28(1), 127-145. <https://doi.org/10.1080/13598139.2017.1302874>
- Weber, C. L., Colarulli-Daniels, R., & Leinhauser, J. A. (2003). A tale of two principals.

Gifted Child Today, 26(4), 55-65. <https://files.eric.ed.gov/fulltext/EJ787958.pdf>

White, S. L. J., Graham, L. J., & Blaas, S. (2018). Why do we know so little about the factors associated with gifted underachievement? A systematic literature review. *Educational Research Review*, 24, 55-66.

<https://doi.org/10.1016/j.edurev.2018.03.001>

Worrell, F. C., Subotnik, R. F., Olszewski-Kubilius, P., & Dixson, D. D. (2019). Gifted students. *Annual Review of Psychology*, 70, 551-576.

<https://www.annualreviews.org/doi/pdf/10.1146/annurev-psych-010418-102846>

Wu, J. (2016). Gifted underachievement: The causes of gifted underachievement, and interventions to reverse this pattern. *ANU Undergraduate Research Journal*, 8, 13-26. <https://dx.doi.org/10.22459/AURJ.08.2016.04>

Yaluma, C. B., & Tyner, A. (2021). Are U.S. Schools closing the “gifted gap”? Analyzing elementary and middle schools’ gifted participation and representation trends. *Journal of Advanced Academics*, 32(1), 28-53.

<https://doi.org/10.1177/1932202X20937633>

Yin, R. K. (2014). *Case study research: Design and methods* (5th ed.). SAGE.

Yin, R. K. (2016). *Qualitative research from start to finish* (2nd ed.). Guilford Press.

Yin, R. K. (2018). *Case study research and applications: Designs and methods*. (6th ed.). SAGE.

Zabloski, J., & Milacci, F. (2012). Gifted dropouts: Phenomenological case studies of rural gifted students. *Journal of Ethnographic & Qualitative Research*, 6(3), 175-190. <https://eric.ed.gov/?id=EJ970720>

Appendix A: Partner Organization Agreement



A higher degree. A higher purpose.

Partner Organization Agreement
for AEAL Dissertation
(content edits not permitted)

April 12, 2022

The doctoral student, Tiffany Deneen Williams will be conducting a dissertation study as part of the AEAL (Education Administration and Leadership for experienced administrators) EdD program. The student will be completing Walden IRB requirements and our organization's research approval processes.

I understand that Walden's IRB has given the student tentative approval to interview leaders (supervisors, board members, PTA leaders, community partners, state department personnel, and similar decision-makers) with whom the student has no power relationship. Details will be created for the final proposal, and the informed consent letter attached will be used. Depending upon the details of the student's study, deidentified organization data* may be requested.

**At the discretion of the organization's leadership, the student may analyze deidentified records including: aggregate personnel or student records that have been deidentified before being provided to the doctoral student, other deidentified operational records, teaching materials, deidentified lesson plans, meeting minutes, digital/audio/video recordings created by the organization for its own purposes, training materials, manuals, reports, partnership agreements, questionnaires that were collected under auspices of the partner organization as part of continuous improvement efforts (SIPs, for example), and other internal documents.*

I understand that, as per doctoral program requirements, the student will publish a dissertation in ProQuest as a doctoral capstone (withholding the names of the organization and participating individuals), as per the following ethical standards:

- a. The student is required to maintain confidentiality by removing names and key pieces of evidence/data that might disclose an organization's or individual's identity.
- b. The student will be responsible for complying with policies and requirements regarding data collection (***including the need for the organization's internal ethics/regulatory approval as applicable***).
- c. Via the Interview Consent Form, the student will describe to interviewees how the data will be used in the dissertation study and how all interviewees' privacy will be protected.

I confirm that I am authorized to approve research activities in this setting.

Signed,

This template has been designed by Walden University for the purpose of creating a partnership agreement between an education agency or district/division and a Walden doctoral student in support of that student's dissertation. Walden University will take responsibility for overseeing the data collection and analysis activities described above for the purpose of the student's doctoral dissertation.

Appendix B: Interview Protocol

Date:
 Start Time:
 End Time:
 Interviewee Code #:
 Interview Location:

Introduction
<p>Greetings! My name is _____, doctoral student at Walden University conducting a research study in partial fulfillment of the requirements of the degree of Doctor of Education, in Educational Administration and Leadership for Administrators. Thank you for participating in this interview. I am interested in gaining an understanding of how elementary and middle school principals provide leadership to address the decline in the academic performance of gifted and talented students in their transition from elementary to middle school. This interview will be audio recorded for transcription purposes and will last approximately 60 minutes. Your identifying information (name, school, etc.) will be masked to maintain confidentiality. Participation in this interview is voluntary and at any point during the interview you can choose to stop the session. At the conclusion of all principal interviews, I will access and review your campus improvement plans as part of my data collection and data analysis. Are there any questions before we proceed? Again, thank you for your time to participate in this interview. Let's begin with an introductory question. Can you tell me about your background in the field of education?</p>
Interview Questions
<ol style="list-style-type: none"> 1. What are your personal experiences with gifted and talented education? Probing Question: <ol style="list-style-type: none"> a. What professional development experiences in gifted and talented education have you participated in? 2. Can you describe your school's gifted and talented program? Probing Questions: <ol style="list-style-type: none"> a. Approximately what percentage of your students are identified as gifted and talented? b. What are the strengths of your school's gifted and talented program? c. What challenges have you experienced with implementing gifted and talented programming at your school? 3. What factors do you feel contribute to gifted and talented students' academic performance of masters level on the state assessment at your school? Probing Question: <ol style="list-style-type: none"> a. Approximately how many gifted and talented students are underachieving in your school? 4. What are your perceptions of the decline in gifted and talented students' academic performance in the transition from elementary to middle school?

5. What do you feel would support gifted and talented students' academic performance in their transition from elementary to middle school?
6. How do you describe your leadership practices to support the academic performance of gifted and talented students in their transition from elementary to middle school?

Probing Questions:

- a. How do you communicate your school's vision and mission for your gifted and talented program?
- b. How do you engage teachers of gifted and talented students in professional development?
- c. What leadership practices do you model for teachers that support gifted and talented students?

Closing Remarks

Is there anything you would like to add? Thank you for your responses and for taking the time to engage in this interview. Your responses will help me gain an understanding of the principal leadership practices elementary and middle school principals use to address the decline in gifted and talented student academic performance in their transition from elementary to middle school. As a participant in this interview, you will have an opportunity to review your responses to ensure your responses were captured accurately. If you have any questions after our time together today, please feel free to contact me by email at _____ or phone _____. I appreciate your time.

Appendix C: Research Question and Interview Question Alignment Table

Research Question (RQ)	Interview Questions
<p>RQ1: How do elementary and middle school principals perceive their experiences with gifted and talented education?</p>	<ul style="list-style-type: none"> • What are your personal experiences with gifted and talented education? Probing Question: <ul style="list-style-type: none"> ○ What professional development experiences in gifted and talented education have you participated in? • Can you describe your school's gifted and talented program? Probing Questions: <ul style="list-style-type: none"> ○ Approximately what percentage of your students are identified as gifted and talented? ○ What are the strengths of your school's gifted and talented program? ○ What challenges have you experienced with implementing gifted and talented programming at your school?
<p>RQ2: How do elementary and middle school principals understand the problem of the decline in gifted and talented student academic performance in the transition from elementary to middle school?</p>	<ul style="list-style-type: none"> • What factors do you feel contribute to gifted and talented students' academic performance of masters level on the state assessment at your school? Probing Question: <ul style="list-style-type: none"> ○ Approximately how many gifted and talented students are underachieving in your school? • What are your perceptions of the decline in gifted and talented students' academic performance in their transition from elementary to middle school? • What do you feel would strengthen gifted and talented students' academic performance in their transition from elementary to middle school?
<p>RQ3: How do elementary and middle school principals provide leadership to address the decline in academic performance of gifted</p>	<ul style="list-style-type: none"> • How do you describe your leadership practices to support the academic performance of gifted and talented students?

and talented students in their transition from elementary to middle school?

Probing Questions:

- How do you communicate your school's vision and mission for your gifted and talented program?
- How do you engage teachers of gifted and talented students in professional development?
- What leadership practices do you model for teachers that support gifted and talented students?

Appendix D: Document Analysis-Campus Improvement Plan Checklist

The campus improvement plan includes...	Included: Y (Yes) or N (No)	Campus Improvement Plan Evidence	Participant Interview Response
gifted and talented student enrollment and prior academic performance data.			
the school's mission and vision.			
the school's mission and vision for gifted and talented students.			
strengths of the school's gifted and talented program.			
academic goals for gifted and talented on the state assessment			
principal leadership strategies to support teachers of gifted and talented students			
Researcher's Reflections			

Appendix E: Member Check Agenda

- I. Introduction (2-3 minutes)

Greetings and Happy _____ (insert day of the week)! Thank you for your participation in this research study. The purpose of our time today is to engage in transcript validation, a type of member checking that allows the research participant the opportunity to review your interview responses for accuracy. This process will enhance the credibility of the research study. Prior to our time today, I shared your transcribed responses by email. If needed, I will re-send the document to you at this time. (Allow time for participant to access the document.)
- II. Summary of Participant Responses (5 minutes)
- III. Transcript Review and Validation (15-20 minutes)
 - a. At this time, I will pause to allow you time to review your transcript responses (in blue font) on the transcript that was emailed to you.
 - b. What are your reactions to the transcribed responses?
 - c. Do you have any questions?
- IV. Closing (2 minutes)

Again, thank you for your time today to engage in validating your interview responses. Your responses will help me gain an understanding of the principal leadership practices elementary and middle school principals use to address the decline in gifted and talented student academic performance in their transition from elementary to middle school. If you have any questions after our time together today, please feel free to contact me by email at _____ or by phone _____.
I appreciate your participation.