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Implementing and Sustaining Gifted Programs in High Minority Low-Income Schools

Jolene Marie Meyers
Walden University

Walden University

College of Education

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Jolene Marie Meyers

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Review Committee
Dr. Pamela Harrison, Committee Chairperson, Education Faculty
Dr. Cathryn Walker White, Committee Member, Education Faculty
Dr. Anita Dutrow, University Reviewer, Education Faculty

Chief Academic Officer
Eric Riedel, Ph.D.

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MA, Governors State University, 2007

BS, DePaul University, 2000

Project Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

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Abstract

Students who have been identified as gifted have the opportunity to participate in enrichment activities in many but not all school districts across the United States. Students from disadvantaged populations who are underrepresented in gifted programs fail to advance academically at the same rate as other students. The problem addressed in this study was the lack of an official gifted program in a high ethnic minority low-income school district in Illinois. The purpose of this study was to examine how leaders of school districts with demographics similar to the district lacking a gifted program create, implement, and sustain gifted programs. Using Senge's systems thinking theory as the conceptual framework, the research questions examined the creation, implementation process, and support needed to sustain the programs. A collective instrumental multicase study design was employed. Data collection included semistructured interviews with 7 school administrators from 2 districts using predetermined interview protocols. District financial documents and strategic plans were used as a secondary data source. Within-case and cross-case analysis was used to identify common themes, including vision-supported decision-making and planning to create gifted programs, team member collaboration to implement gifted programs, and values-driven leadership structures to sustain gifted programs. A white paper based on these themes was developed containing recommendations for school districts to incorporate shared vision, strategic planning, and innovative organizational structures. These recommendations may lead to more gifted students from disadvantaged populations reaching their academic potential, creating social change for students, families, and communities.

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Section 1: The Problem

The terms gifted and talented (GT) are often used in unison and as synonyms, but the terms are different. According to Gagné (2009), to be gifted is to have a natural intellectual ability, while being talented is a trait that can be refined and perfected through practice. The focus of this study was giftedness. At onetime, gifted education was seen as a catalyst to improve the national image of the United States by advancing the knowledge base of the country's brightest students to compete in an advancing scientific world. As a result, leaders of many states embraced the opportunity to initiate gifted programs in order to identify students who had an aptitude for mathematics and sciences.

In 1971, with the release of the Marland Report, gifted education within the United States was described as loose and barely existent (Sisk, 2008). As a result, Marland (1971) recommended to the federal government that support provided to exceptional children be increased through the use of Title III and Title V federal funds. This report was one of the first documents to officially define the term *gifted students* and acknowledge the need for related programs in order for U.S. students to compete for academic excellence on a global basis.

Following the Marland Report was the formation of The National/State Leadership Training Institute on the Gifted and the Talented in 1972. This institute provided seminars to teams of educators and political leaders for the purpose of developing programs for gifted education. Each team returned to their respective state with a working plan to improve gifted education in order to create increased awareness of

gifted education in the United States. Over time, increased awareness provided additional experiences for students who qualified for gifted education.

Initially, the students who benefited from GT programs were those who attended districts with the financial means to provide enriching experiences. Typically, these were suburban middle-to-upper class citizens who relied more on tax revenues from their affluent neighborhoods than federal funding to support schools. If a deficit in federal funding occurred in a more lucrative community, therefore, the impact would not be as detrimental as it would be in an impoverished area that relied predominantly on federal funds (Advance Illinois, 2013).

During the second half of the 20th century, and after the Jacob Javits Gifted and Talented Act was passed in 1988 (NAGC, 2015), leaders of individual states were determining whether to mandate the identification of GT learners as well as the percentage of the budget that would be funded to gifted programs. In 2013, legislators in Georgia, Texas, and Montana reserved over $100 million of their annual educational budgets for gifted education; combined, just over 600,000 students were identified as gifted learners in these three states (National Association for Gifted Children [NAGC], 2013a). During the same time period, leaders of a dozen other states like Arizona, Delaware, Oregon and Rhode Island allocated no monies for gifted education (NAGC, 2013a). In contrast, legislators in Rhode Island and West Virginia mandated that services be provided to gifted students yet did not require the identification of gifted learners. Conversely, political leaders of five other states (e.g., Connecticut, Kansas, Minnesota, Ohio, and Tennessee) mandated the identification of gifted learners but did not mandate

services (NAGC, 2013a). If gifted education had been at the forefront of educational initiatives throughout the United States, a clear continuum of expected roles and responsibilities of school leaders would have existed (Cross & Coleman, 2014).

The elderly, underprivileged children, and ethnic minorities are most affected when governmental funding cuts occur (International Budget Partnership, 2016). Baker, Sciarra, and Farrie (2014) suggested that schools with higher percentages of student poverty should receive additional government funding. This is not always the case, often because political leaders do not recognize all variables that affect student achievement (Baker et al., 2014). In order for government leaders to appropriately allocate educational funds, they must analyze and adjust organizational budgets when a decrease in revenue must occur (Roza, 2009). These analyses and adjustments can assist in the acquisition of award grants to fund ongoing projects for minority and underprivileged students within schools.

In 1975, Commissioner Boyer of the United States Department of Education pushed for a focus on gifted education to include the representation of minority and underprivileged students (Sisk, 2008). Boyer encouraged state leaders to create projects that specifically targeted disadvantaged groups in an effort to award grants to those states. The grant submissions from those states, however, were few in number (Sisk, 2008). As a result, the monies that could have been attributed to gifted programs for students in low-income areas were left unclaimed.

In 1981, when the Omnibus Budget Reconciliation Act was passed, the remaining funds for gifted education and various other programs were merged into one grant and

distributed to state departments of education (Sisk, 2008). With this legislation, the monetary mandates that specifically included gifted education were no longer included; state leaders were able to use the money toward chosen initiatives. As a result, the number of GT programs dwindled (Sisk, 2008). It was not until after the publication of *A Nation at Risk* that gifted education reappeared as an important, separate entity.

Educators have implemented gifted education programs in a variety of ways since their inception. This study focused on gifted programs in high minority low-income school districts. Even though the recommendation has been made throughout the years to enrich gifted students, minimal movement has occurred toward implementing gifted programs in one high minority low-income Illinois school district. Educational opportunities within several other districts in Illinois with high minority low-income populations, however, include gifted programs (Illinois State Board of Education [ISBE], 2015). The study examined how these district leaders create, implement, and sustain gifted programs.

The Local Problem

The local problem addressed in the study was the lack of an official gifted program in a high ethnic minority low-income school district in Illinois. According to the superintendent of the school district, several factors may be responsible for this occurrence: (a) district leaders have made the decision to apply available funds elsewhere; (b) there is a lack of an organizational structure to support supplemental programming; (c) there is a lack of a systems thinking approach to accomplish the district vision of providing students with ample opportunity to reach their goals. Despite the

historical federal mandate regarding gifted programs, the high minority low-income school district in Illinois that was the focus of this study lacks an official gifted program.

Historically, U.S. government leaders have not only mandated gifted programs but also provided support to sustain such programs (Baker et al., 2014). With the recession of 2007, however, many school districts were in financial stress (Baker et al., 2014). According to Oliff, Mai, and Leachman (2012), the strain on many school district leaders across the nation, and especially those receiving the most federal state aid, was detrimental to supporting educational programs such as gifted student programs. Illinois was one of 26 states during the 2012-2013 school year that decreased its per-student spending by 11% (Oliff et al., 2012).

Moreover, according to the NAGC (2013a), Illinois was one of 10 states wherein the identification and/or services of GT students was not mandated. Excluding 13 states that had no funding data available, Illinois was one of a dozen states with no funds allocated to gifted education during the 2012-2013 school year (NAGC, 2013a). Without federal mandates for gifted education, leaders of individual states are at liberty to decide whether programs for the gifted will become a functioning facet of public education.

Successful school district leaders incorporate systems thinking to strategically plan for needs throughout their districts (Mittenthal, 2002; Senge, 1990; Senge et al., 2000). District leaders need to be flexible in their program planning and implementation in order to meet the needs of all learners, including gifted students (Mittenthal, 2002; Spaulding, 2014; Wu, 2013; Zubrzycki, 2014). In the school district central to this study, no evidence of systems thinking, strategic planning, or the use of an organizational model

to support gifted programs is apparent. Childress, Elmore, and Grossman (2006) expressed that only limited information is available to leaders of school districts involving the management of schools; moreover, in some instances school management is more complex than business management. Some leaders, therefore, may lack knowledge regarding how to transform their management structure into one that yields the best results (Childress et al., 2006). Several surrounding school districts have more complex administrative hierarchies than the district identified in the problem; as a result, district leaders can provide a model of effective systems thinking for strategic planning and program management for educational initiatives such as those involving gifted students. It is evident within the high minority low-income school district in Illinois central to this study that these programs are essential to aid gifted students with academic success.

The problem addressed in this study also exists beyond the local research setting. Based upon the numerous definitions of gifted students and variances involving related policy mandates and programming interventions, gifted education is lacking in research-based empirical studies necessary for making sound decisions to meet the needs of GT students (Plucker & Callahan, 2014). Other researchers have called for more rigorous investigations to minimize the design flaws of studies involving gifted education (Leavitt, 2007; Mandelman & Grigorenko, 2013; VanTassel-Baska, 2013). With only minimal public documentation regarding student performance available, the amount of research in the area of giftedness will remain limited.

Rationale

A local high minority low-income school district in Illinois comprised of nine kindergarten through eighth grade schools and one preschool has no official gifted program. According to the superintendent of the school district, a $3 million deficit has impeded the implementation of unfunded and unmandated programs such as a gifted program. In a conversation with the assistant superintendent of curriculum and instruction, the time and personnel needed to research effective methods for creating and implementing a new program are not an affordable commodity for the district. Moreover, without the understanding of the processes involved in creating, implementing, and sustaining a gifted program, school district leaders are at a disadvantage without a guiding model to follow. Students, who qualify as gifted, would benefit from a gifted program within the school district (NAGC, 2013a).

According to the Illinois Association for Gifted Children (IAGC, 2016), students who perform in the top 5% on local assessments in English language arts (ELA) and mathematics, as well as those who perform at or above their peers of comparable age, environment, and ability should be labeled GT. Students from disadvantaged populations are less likely than their peers to be identified as gifted "because of the established link between disadvantage and lowered educational achievement" (Graham, 2014, p. 35). The former enrichment facilitator of the school district stated that, over the years, district leaders had to lower the acceptance level of student performance to the 75th percentile in order to be considered eligible to participate in the enrichment opportunities. Without this lowered level of performance acceptance, the diminishing number of qualified

students receiving related instruction would ultimately lead to the dissolution of the enrichment program. The superintendent and assistant superintendent supported the facilitator's statement and recognized that the lack of identification of gifted students partially stems from the diminished level of past student performance resulting in lowered levels of expectation from the school district. Other administrators in the district have agreed that the addition of a gifted program would be a benefit to the students but they do not see how this can be accomplished without the needed funding, certified personnel, and an implementation plan.

Although Illinois leaders have defined what it means to be GT in Public Act 094-0151 of the School Code, state leaders do not provide additional monetary aid for GT students (Augenblick & Silverstein, 2013). Funds are only provided once a request for proposal (RFP) is submitted and only if the funds are available (ISBE, 2014). Developing a RFP is time consuming, and in a school district with a limited organizational structure, securing those funds through the formal request process can be a challenge. The funding crisis in Illinois has stressed school district leaders to the point that two thirds of the school districts are deficit spending (Advance Illinois, 2013). Moreover, the student population in this study is high racial minority and low income.

The ISBE (2015) reported that 61% of the student population within the school district research setting is Hispanic, and African American students comprise 34% of the population. The remaining 5% includes White and multiracial students (ISBE, 2015). Approximately 95% of the student body receives free or reduced meals (ISBE, 2015).

These demographics support the need for enrichment programs within the school (Stephens, 2011).

In 2013, a limited enrichment program was reestablished within a science, technology, engineering, and mathematics classroom to service the needs of eighth grade students from across the school district who met entrance criteria. In 2014, the program was expanded to include students in the seventh grade. Because of budget constraints, this program was not made available to students in additional grade levels. Enrichment activities such as the fine arts fair, the social studies bowl, mathematics olympics, and the spelling bee were offered on a voluntary basis to students in other grade levels. These enrichment activities, however, do not constitute gifted education, and thus students were not being identified as gifted, nor were they receiving targeted instruction based upon their abilities (Johnsen, 2008; VanTassel-Baska, 2013).

In a comparison to surrounding school districts with similar demographics, leaders of six districts out of 10 offer gifted programs (ISBE, 2014). Based on these data, it is apparent that some district leaders have provided gifted education to students of ethnic minorities despite budgetary concerns. Specifically, in 2015, leaders within the school district central to this study did not take advantage of the gifted education grants made available through the State of Illinois. Ford (2014b) identified a need for leaders within all school districts to provide students who qualify for gifted education the opportunity to participate in special programs. In contrast, funding is readily available, without an RFP, for programs related to at-risk, special education, and limited-English-proficient students (Augenblick & Silverstein, 2013). Based on a statement by the data

specialist in the district central to this study, testing is also available to monitor student academic achievement.

The Partnership for Assessment of Readiness for College and Careers (PARCC) test measures academic performance in the areas of ELA and mathematics for students in Grades 3 through 8 and high school. Table 1 shows the total number of students assessed in Grades 3 through 8 in ELA and mathematics in the school district research setting where leaders offer no gifted program and the neighboring school districts wherein gifted programs are in place (ISBE, 2015). Based on these data, each school district has a small percentage of students out of the tested population who achieved in the top 5% on the PARCC assessment, thereby meeting the IAGC standard for giftedness (IAGC, 2016). Although District A shows no overall percentage of students performing in the top 5% for mathematics, 1% did exceed in grades 3-5.

Table 1

Percentage of Students in Grades 3 – 8 Scoring in the Top 5% on the Partnership for Assessment of Readiness for College and Careers Assessment

School district	English language arts %	Mathematics %
Research District[a]	0.90	0.15
District A[b]	1.00	0.00
District B[c]	1.40	0.60

Note. N = 5,750. Data depict performance during School Year 2014-2015 as reported on the school district report cards (ISBE, 2015). Data rounded to the nearest 100th.
[a] n = 2,010. [b] n = 1,722. [c] n = 2,446.

The PARCC data depicted in Table 1 additionally indicate that a smaller percentage of students within the research setting, when compared to their grade level peers within Districts A and B, score in the top 5% on the assessment. This discrepancy may indicate a need for targeted instruction in the form of a gifted program for the high-performing students. Despite the need for gifted programs within the school district, a lack of personnel to implement the program remains.

The identified school district has one superintendent, two assistant superintendents, and a business manager. The district does not have any curriculum supervisors or department leaders who focus on curricular programming such as gifted education. Danielson (2002) stated that a school district's organizational structure should support student learning. The majority of district leaders, however, maintain the same organizational structure regardless of progress and changing times (Zubrzycki, 2014).

To provide support to school district leaders who lack structure, Leavitt (2007) recommended the use of a five-step infrastructure model when planning to meet the needs of gifted learners. The first step is to understand the state laws regarding the education of gifted students; the second step is to focus on ensuring that district leaders employ competent teachers with the skills to differentiate their instruction. The remaining three steps are to develop a plan, create ownership, and evaluate the plan to ensure that the goals are met (Leavitt, 2007).

Mittenthal (2002) stated that successful school district leaders examine all available resources as well as the district mission and goals when shaping programs. In the district central to this study, a large percentage of discretionary resources are provided

to the lower performing students. As Mittenthal (2002) additionally urged, "A vision statement should be explicit, straightforward, and above all, concise" (p. 6). Based on this definition, the vision and mission statement of the identified school district does not meet the criteria because it is a series of broad statements: "It is our vision and mission to provide our students with as many opportunities as possible to meet their far reaching professional and personal goals. By combining our resources, internally and externally, we can, we will, help them achieve and succeed" (School District 170, 2016). The aforementioned vision and mission statement adopted by school district leaders reflect that neither strategic planning nor specific methods to assist students in achieving success was mentioned.

Senge et al. (2000) recommended that school district leaders complete yearly priority exercises with all stakeholders using a systems thinking approach to adjust the vision and goals. While using this approach, stakeholders should keep in mind that reductions in funding may occur. Creating and implementing gifted programs can be problematic without the necessary organizational structure of school district leaders or a systems thinking framework (Senge et al., 2000). Moreover, the creation and implementation of gifted programs can also be problematic without a clear understanding of specific terms and definitions associated with gifted education. The purpose of this study was to examine how leaders of school districts with demographics similar to the district lacking a gifted program create, implement, and sustain gifted programs.

Definition of Terms

The following is a list of salient terms and associated definitions. For consistency and clarity, these definitions will be used throughout this manuscript.

Acceleration: The progression of grades in less number of years (Olszewski-Kubilius & Limburg-Weber, 2014). The term additionally refers to the acceleration of content material for a specific subject (Coleman, 2010; Southern, 2014).

Enrichment: The teaching of material that extends beyond the scope and sequence of the curriculum (Olszewski-Kubilius & Limburg-Weber, 2014).

Gifted and talented (GT): To be gifted is to have a natural intellectual ability, and to be talented is to excel at a particular skill with additional practice (Gagné, 2009).

In-class clustering: A method used to allow students to remain with their peers in the general education classroom while receiving differentiated instruction. The term is used when the quantity of students is insufficient to fill a whole class of gifted students (Olszewski-Kubilius & Limburg-Weber, 2014).

Request for proposal (RFP): A document that outlines the details of a solicitation or bid for programs and organizations (Ferriere, 2017).

Socioeconomic status: The social class of an individual or group (American Psychological Association, 2016).

Underprivileged ethnic minority: Although other ethnic minority groups exist, for the purpose of this study, this definition pertains to Hispanic and African American students from low socioeconomic backgrounds (Ford, 2014a, 2014b).

Zero-based budgeting: A process for annually managing line item budget considerations by starting from a zero base for each line item for each new period (Callaghan, Hawke, & Mignerey, 2014; Ogden, 1978).

Significance

This study provided an original contribution to the problem of the lack of gifted education opportunities for ethnic minority students in low-income school districts. Ford (2014b) identified this inequity affecting minority students, and Slocumb and Payne (2000) called for a shift in the way the needs of disadvantaged gifted students are met through tailored programs that consider each student's unique background. Equally, researchers have called for a change in the ways that leaders of school districts plan for and implement related programs (Childress et al., 2006; Danielson, 2002; Zubrzycki, 2014). The results added to the research about the ways in which leaders of high minority low socioeconomic school districts are able to create, implement, and sustain gifted programs. Although these programs are beneficial to students, it is necessary that teachers are able to identify gifted students in order for the students to have the opportunity for program participation (Briggs et al., 2008).

Application to the Local Problem

Frasier et al. (1995) suggested that it is the teachers' lack of ability to recognize giftedness, specifically with regard to minority populations, that limits the number of students involved in gifted programs. According to state licensing officials, educators have mastered the pedagogy necessary to provide enrichment for individual students; when they recognize students who demonstrate superior skills in an area, that area should

be encouraged and supported (Wagner, 2008). In the school district central to this study, however, no evidence exists of teachers' ability to recognize giftedness in ethnic minority populations. Instead, it appears that classroom teachers are without resources to support the students' identified skills. Resources can be provided to students, however, during enrichment opportunities.

At one time, an enrichment facilitator in the local school district provided enrichment opportunities for high performing students outside of the regular classroom. Students who performed well on annual achievement tests were offered an opportunity to participate in special enrichment activities. When the facilitator retired, district leaders no longer staffed the position. Without the presence of a facilitator, high performing students on state-mandated tests were not identified to receive enrichment opportunities. In neighboring school districts A and B, a job position dedicated to overseeing gifted programs existed. As reflected in Table 1, those districts experienced higher student achievement with a similar population than the local district. This success may have resulted from the enrichment opportunities developed and championed by the facilitator.

This study may provide direction to the leaders of the local school district in establishing a gifted program for students. This study focused on demographically similar districts wherein leaders have created, implemented, and sustained gifted programs. Findings from the study led to a project that provides a model and motivation for leaders in the local district to offer gifted programs to high minority low-income students.

Application to the Profession

This study contributed to the professional literature by adding an understanding of what is needed to create, implement, and sustain gifted education programs within populations of underprivileged high minority students. Analyzing current budget practices and collecting data through personal interviews with administrators from two high minority school districts achieved this purpose. Benefactors of this study may be current leaders of administrator-preparation programs, high minority school districts without gifted programs, school districts with students of low socioeconomic status, and school superintendents.

When teachers decide to further their education, these professionals select programs that meet their career goals. One aspiration of many teachers is to become school administrators. This study benefits teachers as future administrators with applicable and current information regarding how leaders of high minority school districts create, implement, and sustain gifted programs. As Mittenthal (2002) said, school board members could be directly impacted by this study because results could potentially provide them with a platform to gain support from community members. Since the voters within the community elect school board members, findings of the study provide an opportunity for board members to showcase their involvement and commitment toward ensuring that the needs of all learners are being met. Lastly, by conducting a study involving the creation, implementation, and sustainability of gifted programs, a presentation of findings or policy recommendation to the school district superintendent gives administrators at the local site a clear pathway to establish similar

organizational structures and programs (Childress et al., 2006; Spaulding, 2014). There is a broad spectrum of possible uses for results of this study, because the information that was presented is based upon an educational model that has resulted in improved academic performance of gifted students. In addition to these benefits, a potential for social change exists.

Potential for Social Change

This study promotes positive social change by creating the opportunity to identify gifted students, assess their needs, and ultimately support gifted programs in school districts that have high minority low-income populations. The underrepresentation of minority students in gifted education is an injustice (Ford, 2014b). Additionally, the needs of gifted students are being dismissed because of the focus on providing academic interventions for struggling learners (Plucker & Callahan, 2014). Because of low performance results on standardized assessments, school district leaders are trying to close the achievement gap for some while forgetting to enrich those who are performing at or above grade level (Vance, 2009). Enriching the academic experience of students who perform above grade level, however, typically requires additional funding.

Interventions for GT programs are costly, and school district administrators often dedicate a measurable amount of funds to provide interventions (Ludwig, 2016). Coleman (2010) suggested that gifted students who have mastered curriculum content receive interventions through acceleration and enrichment. In support of related interventions, Steenbergen-Hu and Moon (2011) asserted that students reap long- and short-term benefits when offered acceleration. Some researchers further maintain that

these benefits are enhanced with parental involvement (Diorio, 2013; Fleming, 2013; Huat See & Gorard, 2015)

Parents whose children are gifted want exceptional opportunities for their children. Often, because of a lack of communication or knowledge concerning resources, parents do not know how to advocate for their children (Fleming, 2013). The findings of this study will help to fill the gaps regarding what parents know about program offerings by providing research-based practices that are implemented in other districts. Parents may additionally realize the resources and benefits of providing gifted programs for minority students.

Potentially, by increasing the representation of ethnic minority students in gifted programs at the elementary level, an expansion in the number of students who are offered advanced classes in high school may occur (Olszewski-Kubilius et al., 2004). In turn, this could lead to higher graduation rates with possible continued education to the college level, ultimately increasing the number of contributing members to society (Beegle, 2003). As a result, the recognition and fostering of student talents could help reduce the cycle of generational poverty that exists in the local school district research setting.

Moreover, to diminish related inequities, school district leaders could follow the model of Alexandria, Virginia, and begin to recognize and use more than one method to identify intellectual talent (Chandler, 2009; Renzulli, 2012). Recognizing the many domains and ways in which students could be identified as gifted learners would allow for more differentiated methods of teaching to be used in the classrooms. Tomlinson (2001) proposed the differentiation of instruction as a method for ensuring that the

diverse learning needs of all learners are met through multiple pathways and not just by labels indicating advanced or struggling learners. When comparing the traditional teaching model of standardized instruction for all students to the differentiated model in relationship to student performance, De Jesus (2012) found that differentiated instruction leads to successful schools wherein students are more motivated and engaged. De Jesus additionally concluded that student performance increased when the personal learning needs of students were met.

Guiding Research Questions

The purpose of this study was to examine how leaders of school districts with similar demographics to the district lacking a gifted program create, implement, and sustain gifted programs. The problem identified in the local setting guided this research. When trying to create a climate of change, Senge (1990) recommended that organization leaders use a systems thinking approach to question how parts of an organization affect the whole. Further research is needed to understand how some school district administrators apply systems thinking to prioritize instructional program needs and then address those needs. The following research question was designed to elicit experiences and perceptions of stakeholders at high ethnic minority low-income schools who have successfully implemented and sustained gifted programs at their sites.

1. How is systems thinking used to create a gifted program in a high ethnic minority low-income school district within the elementary grades?
2. How is systems thinking used to implement a gifted program in a high ethnic-minority, low-income school district within the elementary grades?

3. How is systems thinking used to sustain a gifted program in a high ethnic-minority, low-income school district within the elementary grades?

Review of the Literature

In the upcoming sections, I will first present the conceptual framework, which guided the study. To begin the review of the broader problem, I will provide a brief discussion of the search strategy for the review. This will be followed by an overview of the topics included in the review.

Conceptual Framework

Systems thinking is a concept that explores how one component of a system influences another component to promote change (Betts, 1992; Mase, 2012; Senge et al., 2000; Zmuda, Kuklis & Kline, 2004). Historically, the concept of systems thinking was associated with the sciences and the exploration of the relationships that different parts have with the whole (Mase, 2012). Mase (2012) used the analogy of a team dynamic to explain the interactions between parts of a system; Betts (1992) wrote, "everything is a system but nothing really is treated as one" (p. 38). Schools are considered open systems (Betts, 1992) and are believed to be competent only when staff recognize that they are a part of a collective whole (Zmuda et al., 2004).

Senge (1990) reported that organizational leaders are crippled by their inability to recognize their own deficits. Later, Senge et al. (2000) expressed a need for systems thinking to be used to push students and staff into a different way of thinking about the structure of school organizations and the behaviors that affect one another. Systems thinking is the concept of working with the reality of what needs to be changed and how

that change affects other parts of the educational system (Zmuda et al., 2004). School organizations can potentially have complex hierarchies (Betts, 1992; Checkland, 2012). As a result, it is important for all stakeholders to understand the process of systems thinking and the role of systems in the learning organization (Checkland, 2012). Systems thinking is just one of five disciplines of learning organizations; the others include personal mastery, mental models, shared vision, and team learning (Senge, 1990). All five disciplines work cohesively to change the structure and function of an organization.

Leaders of school districts who lack personal mastery, or the ability to self-reflect, fail to make choices that are relevant to the short- and long-term goals of the organization; as a result, these leaders become reactive during the change process (Senge et al., 2000). The discipline of personal mastery is important for true change to occur from within the organization and with its members, because an understanding of the current reality and how it relates to what is important exists among organizational members (Senge et al., 2000). The second discipline, mental models, is the process of understanding that a person's perception influences the ways in which experiences are interpreted; conversely, a shared vision takes those experiences and shapes the focus of change toward a common goal (Senge 1990; Senge et al. 2000). The last discipline is team learning. By design, teachers and students make up a classroom, and each classroom creates a team of teacher and learner systems within the school district (Rodriguez, 2013). Senge et al. (2000) recommended that the school teams have continual conversations on how to improve the organization by suspending their own assumptions and embracing other viewpoints. Change will not occur immediately but

with patience for the time required, tolerance for others' viewpoints, and the right resources, schools can become competent systems (Zmuda et al., 2004). When this change occurs, a set of principles may be applied to assist in improving the academic achievement of students.

Reform initiatives have been at the forefront of educational change for a number of years in an effort to close the achievement gap between and among students in the United States and around the world (Marzano, 2003; Mehta, 2013; Wagner, 2008). Such initiatives are sometimes carried out based more upon a political agenda and less on necessary need and performance data. Often, program administrators haphazardly make mandates without a deeper look into what purpose the program would serve (Long et al., 2015). At times, acquiring the necessary funds and dedicating the time required to make such programs materialize are not considered (Kettler, 2016). One way to ensure that a program is worth implementing and can be financially sustained is through systems thinking (Senge, 1990). The conceptual framework, systems thinking, lead this study focused on how gifted programs are created, implemented, and sustained in school districts of high ethnic-minority and low-income students. Globally, a perception exists that U.S. educational leaders offer gifted education to all students (Ieridou, 2013; Sarouphim, 2015). Results of this study may be helpful in alleviating the absence of gifted programs within school districts throughout America and in fulfilling the global perception that Ieridou (2013) and Sarouphim (2015) reported.

Review of the Broader Problem

Through the Walden University library, I conducted a database search using Thoreau, EBSCOhost, and ERIC. Additional searches were accomplished through Google Scholar. Specific keywords related to the study included *gifted education*, *minority giftedness*, *systems thinking, strategic planning, organizational structure*, *school funding*, *underprivileged,* and *zero-based budgeting*. Additionally, I used the Illinois State Report Card, the IAGC, and the NAGC websites and focused on peer-reviewed journals published within the last 5 years. When the research was completed I decided on the framework that I would utilize to guide this study.

This review was developed on literature relevant to the area of gifted education. Issues of societal perceptions, program inclusion and implementation, and program challenges are discussed. The impact on underserved gifted students is presented to support the problem of a lack of minorities being identified as gifted. Likewise, understanding ways to identify students as gifted is presented through gifted domains. A subsection on minority gifted and impoverished students inspects the discrepancies in education that exist for minority-gifted students. Additionally, the gifted theories and effective strategies in programming used by school leaders to provide gifted education, as well as how school administrators budget to meet the demands incurred by implementing related programs, are presented.

Gifted education and the broader society. Sarouphim (2015) conducted a mixed-methods, two-tiered study to analyze the success of a nontraditional assessment to identify gifted Lebanon students in Grades 3 through 5. In Lebanon, high achieving

students from upper-socioeconomic backgrounds are provided enrichment opportunities, yet assessment tools are not available to measure giftedness (Sarouphim, 2015). Similar to schools in the United States, the needs of struggling learners in Lebanon are a priority over the needs of advanced students. Prior to the study conducted by Sarouphim, Ieridou (2013) researched the need for utilizing responsive teaching while providing gifted education.

Ieridou (2013) focused on the status of gifted education in Cyprus where educators were not providing the services needed by high achieving students. When enrichment was offered, teachers feared that an elite group of students would result and parents would, consequently, express related concerns. Over time, educational leaders began to address culturally relevant approaches such as inclusion, the nurturing of unique abilities of students, and the borrowing of educational philosophies and practices of other countries. These approaches can be utilized within various gifted programs.

Like the global perception, many parents and community members are under the assumption that gifted programs exist in every school district across the nation. Because of earlier mandates that were left to individual state officials, however, directives to pursue gifted programs are no longer at the forefront of educational initiatives in the United States (Sisk, 2008). This resulted in minimal, if any, identification of gifted students in some school districts (Sisk, 2008) or an underrepresentation of some populations within the gifted population (Matthews & Shaunessy, 2008; Olszewski-Kubilius & Thomson, 2010). The identification of gifted students, however, is the critical first step to gifted-program inclusion.

Gifted program inclusion and implementation. Due to immigrant-rich populations of the United States, increasing the number of culturally different and underrepresented high-poverty students in gifted programs has been a concern of numerous educational scholars for many years (Briggs et al., 2008; Ford, 2014b; Vanderslice, 1998). Briggs et al. (2008) conducted a study to investigate methods that administrators of school districts use to identify and include students from diverse backgrounds within gifted education. In a case study of 25 programs, the researchers noted five categories that were proven to be successful, and each provided a glimpse into successful gifted programs: (a) modified identification procedures, (b) front loading, (c) curriculum/instructional designs, (d) establishing parent connections, and (e) evaluation practices (Briggs et al., 2008).

Modified identification allows for the use of different tools and areas of giftedness to be used in recruitment. This method was successful in a Missouri kindergarten-through- 12th-grade program (Briggs et al., 2008). The purpose of modified identification was to identify and serve underrepresented populations of students. At its inception, the program had 10 students; that number grew to 202 identified students over the past 10 years. Front loading is an additional method that was successful in identifying and including diverse students in gifted programs.

Front loading is the foundational work that is done years before officially placing culturally diverse students in advanced programs (Olszewski-Kubilius, Lee, Ngoi, & Ngoi, 2004). Project Excite, for example, was successful in closing the achievement gap between culturally diverse students and the rest of the student population by providing

early interventions in elementary school in the areas of mathematics and science (Olszewski-Kubilius et al., 2004; Sherman, 2012). The goal of the program was to increase the number of students who enrolled in advanced coursework in an Illinois high school. Early interventions are useful in improving academic achievement and assisting teachers in developing curriculum/instructional designs beneficial in gifted programs.

Through the Mentor Connection, Connecticut high school students in Grades 11 and 12 worked with mentors to expand their interests and abilities. Participating students were able to increase problem-solving skills over the summer at the University of Connecticut (Briggs et al, 2008). In California, bilingual students were taught using many enrichment activities and alternate assessments (Los Angeles Unified School District [LAUSD], 2015a). Both of these curricular approaches were used to meet the needs of students and increase the populations of gifted minorities. An additional method that was successful in meeting the needs of students, as well as increasing the number of students who applied to college, was to establish parent connections within the school.

Project College Bound is a program that was developed in a Los Angeles school district in an effort to increase the number of students who applied to college (LAUSD, 2006). Program educators provided assistance in the application and financial-aid process. Program outcomes included a 150% increase in African American students and a 31% increase in Latino students attending colleges (Briggs et al., 2008). By increasing the opportunities for parents to be involved at the school through volunteering or leading focus groups, a school-to-home connection was made. The final category noted by

Briggs et al. (2008), evaluation practices, is crucial in identifying and including diverse students in gifted programs.

Across the United States, educators are developing programs to increase the representation of minority and culturally diverse students. Evaluating the effectiveness of a program, however, is a necessary step in determining whether the program is successful (Spaulding, 2014). As a popular approach, surveys can be issued to participating students and their parents in order to examine the level of satisfaction as well as to gather information for future program needs (Briggs et al., 2008; Olszewski-Kubilius et al., 2004). In addition to gathering information for future needs, it is important to note any challenges when implementing gifted programs.

Gifted program challenges. Mandelman and Grigorenko (2013) explored the efficacy and variations of gifted programs and how to meet the needs of gifted learners. Findings reflected that educational practices resulted in missed opportunities to enrich the educational environment for gifted students. Additionally, Mandelman and Grigorenko called for changing the (a) ways in which school leaders define giftedness, (b) methods that are used for identifying gifted students, and (c) development of new ways to provide relevant education. In concurrence with the evidence from the local school district, Leavitt (2007) and VanTassel-Baska (2013) found that the accurate identification of gifted students can be a challenge. It is important, however, for educators to know the difference between high achievers, gifted learners, and creative thinkers (Leavitt, 2007). Additionally, Ford (2014b) stated that educators must change their stagnant methodologies to meet the demands of today's learners. Teachers also need to be

knowledgeable of effective approaches for delivering curriculum to gifted students (Leavitt, 2007; VanTassel-Baska, 2013). Without a change in the educational system, gifted students will continue to be unidentified and mismatched with programs that do not foster their abilities.

The work of Leavitt (2007) and Murray (2008) provided a contrast in philosophies involving gifted education; this phenomenon also can create problems for local school district leaders. Leavitt stated that, when implementing a gifted program, educators should avoid "elitism" (p. 73). Murray, in contrast, maintained that it is America's elite, or gifted, who will become the political leaders; these students, therefore, must be provided effective education beginning as early as elementary school in order to fully develop related skills. Waiting until high school or college before challenging gifted students or teaching to their abilities is too late. In addition, Murray stated that American leaders need to "structure their education so that they have the best possible chance of becoming not just knowledgeable but wise" (p. 232). Ford (1996) similarly wrote that school leaders need to be proactive in the ways they address the education of gifted, ethnically minority students. Leavitt, furthermore, concluded that school district leaders need to accurately identify and provide appropriate opportunities for gifted students, train teachers on effective instructional strategies, increase parental support for GT programs, and design curriculum to meet student needs.

In a related study, Long, Barnett, and Rogers (2015) found that teachers of gifted students were limited in training pertaining to gifted education and that most who did have training received it through professional-development opportunities rather than in

university classes. Kettler (2016) argued that educational leaders should identify a common standard of student identification and program expectations in the field of gifted education. One of the most pressing, yet least documented, problems associated with gifted education is the study of how school district leaders implement gifted programs and the success rate, in terms of student achievement, of the programs (VanTassel-Baska, 2013).

Bui, Craig and Imberman (2011), as well as Murray (2008), held that a reduction in funding for gifted programs could result in minimal impact on student performance if school administrators manipulated their allocated funds to implement changes in educational practices. More specifically, Murray stated that identifying students' abilities, maintaining proper classroom management, teaching a strong curriculum to every student, and allowing gifted students to move at their own pace would meet the needs of gifted students without spending additional money. Utilizing these strategies can also assist teachers in identifying gifted students within the classroom (2008).

Similarly, Ford (1996) emphasized the need for early identification of gifted, underprivileged students as well as programs that are geared toward student abilities. For Black students, however, related practices could be problematic because of the cultural insensitivities of educators. Ethnically minority students, and specifically Black students, would need time to acclimate to GT programs after being accustomed to heterogeneous classrooms that were not influenced by student capabilities and aptitude (Ford, 1996). The identification of gifted students in elementary school, therefore, is beneficial for student adjustment to GT programs.

In many states, gifted programs have been created and implemented to increase the identification of elementary students from low-socioeconomic and ethnic-minority backgrounds (Ford, 1996). For example, California educators designed Project First Step to identify a greater number of Black, Hispanic, and English-language-learner students in prekindergarten through Grade 2 so they could participate in the GT program (Ford, 1996). In Kentucky, educational leaders designed Project Discovery to increase the number of rural and low-socioeconomic students in kindergarten through the third grade (Luvisi, 1994). Project SEARCH, in South Carolina, is designed to increase the number of rural, low-socioeconomic, ethnic-minority students in the GT program; the intent of the project was to identify nontraditional means to measure student giftedness (Swanson, 1995). In each of these programs, additional teacher training for the recognition of student talents beyond traditional testing measures was required (Ford, 1996). Because of the traditional hierarchy of organizational leadership that most district leaders follow, it is imperative that teachers be trained to identify students who have talents that are not measured by traditional tests (Briggs, Reis, & Sullivan, 2008; Renzulli, 2012).

The traditional hierarchy of organizational leadership depicts members of the school board on top, followed by the school district superintendent, school principals, and then teachers at the bottom (Childress et al., 2006). This model of leadership is one that does not put school board members and other stakeholders in direct contact with student achievement; therefore, these individuals must rely on the information retrieved from others to inform their decisions (Childress et al., 2006). Traditional hierarchies, which

are void of a systems thinking approach (Douglas, 2012), are multilayered and do not result in immediate action toward reform efforts (Nordmeyer, n.d.).

A call exists for school district leaders to recognize that reform efforts require a systems thinking framework to support programs and increase student achievement (Childress et al., 2006; Douglas, 2012; Senge et al., 2000). As one example, the Public Education Leadership Project (PELP) was created in 2003 at Harvard University to provide organizational and leadership assistance to administrators of urban school districts (Childress et al., 2006) in an effort to increase student achievement. The PELP team met with district leaders to address the various strategies that were being implemented. The program was successful in several of the districts wherein a new management model was implemented. All participants, however, did not recognize that a connection existed between the strategic items, the strategies of implementation, and student performance. In Memphis, Tennessee, the superintendent of the school district was successful at changing the vision for the district through meetings with all stakeholders. Together, the community, teachers, and district leaders developed a new belief system, created higher standards for student success, adopted a school reform program, and improved support for families (Senge et al., 2000). This change in process occurred over several years before it was realized. Changes such as these can ultimately impact underserved gifted students.

Impact on underserved gifted students. One of the biggest problems in gifted education, and one stemming from a failure for policy makers to prioritize gifted education, is the underrepresentation of students from ethnic-minority backgrounds

(Kettler, 2016; Subotnik, Olszewski-Kubilius & Worrell, 2011; VanTassel-Baska, 2013). McBee (2010) similarly focused on the probability of student identification in the area of giftedness in the state of Georgia and concluded that some underrepresentation could stem from identification, referral, and participation issues. Frequently, students from low-socioeconomic backgrounds are underrepresented and tend to be identified less frequently than their grade-level peers of higher socioeconomic status (McBee, 2010; Subotnik et al., 2011).

Students from disadvantaged populations that are underrepresented in GT programs fail to advance academically at the same rate as other students (McBee, 2010; NAGC, n.d.a). This phenomenon is typically because educators hold a misconception that these students are smart and will succeed regardless of available opportunities and resources (NAGC, 2013b, Subotnik et al., 2011). Providing services to meet the social and academic needs of gifted students positively impacts their future success, as a large percentage of gifted students go on to pursue and achieve advanced degrees (NAGC, n.d.b). When the intellectual needs of gifted students are not met, these individuals can be seen as unmotivated and failing to work toward their potential (Page, 2010; Trepanier, 2015). In addition to an emphasis on academic needs, teachers and counselors should endeavor to assist gifted students by meeting their social, emotional, and intellectual needs.

The social and emotional wellbeing of gifted students is equally important as their academic achievement (Cross, 2011; Work, 2014). Often, gifted students try to conform to societal expectations and sometimes withdraw to hide their talents (Cross, 2011),

because they do not want to be seen as different. Additionally, gifted students can become so focused on academic achievement that they put an unwarranted amount of stress on themselves (Work, 2014). Cross (2011) stated that gifted students would benefit from counseling services to support their level of educational attainment and psychological needs. School district administrators, therefore, need to create environments that are rich in opportunity not only for all students but especially for those identified as gifted (NAGC, 2013b).

When considering initial program development or formative changes, it is imperative that educational leaders match the needs of all students, but especially the gifted, with program offerings (Leavitt, 2007). A partnership with stakeholders, a focus on teamwork and constant reflection, and frequent evaluation of goals and outcomes should be central to program designs (Leavitt, 2007). School programs, especially those for the gifted, need to be readily available through public education to reduce social disparities (Subotnik et al., 2011). In addition, effectively evaluating students is an essential step in identifying students who qualify for gifted education.

Gifted domains. In order to provide gifted education to students, a method of identification must be developed. Once a student is identified, an appropriate domain and learning disposition must be considered. Gagné (2009) differentiated the levels of giftedness into four mental domains of intellectual, creative, social, and perceptual as well as the two physical domains of gross and fine motor skills. Coinciding with the mental and physical domains, two primary learning dispositions also need to be assessed.

Cross and Coleman (2014) cited the two learning dispositions of foundational and performance that are predominantly used in schools. The first, foundational, represents the ability of achievement based on some form of assessment; the second disposition consists solely of classroom performance. A discrepancy exists in the way these two domains are used in schools; some school leaders use the whole-child model to identify ways to minimize a gap in learning instead of fostering potential, while the talent/ multiple abilities model is designed to maximize and encourage student strengths (Cross & Coleman, 2014). Through their research, Cross and Coleman found discrepancies between students who exhibited giftedness in testing but did not demonstrate the performance capabilities of their potential. To assist students in reaching their full academic potential, it is crucial to identify the particular learning disposition that each gifted learner possesses (Adcock, 2014). The use of instructional practices reflecting the specific learning styles of students, however, significantly improves academic performance (Adcock, 2014; De Jesus, 2012; Gardner, 1983). Effective instructional practices are central to enabling students to maintain the gifted label (Cross & Coleman, 2014).

Just because students are labeled as gifted, they may not maintain that title permanently (Cross & Coleman, 2014). Once children no longer perform to their expected potential, the gifted label should be removed; likewise, if students who were never labeled gifted suddenly begin to perform as if they are gifted, then the label should be applied (Cross & Coleman, 2014). This phenomenon occasionally happens as students grow older and new talents emerge or previous talents disappear. The early

identification of gifted students, however, increases the opportunity for students to develop their talents. Gender is one factor that should not be considered when identifying gifted students.

Gender is a descriptor that impacts education. Girls who are encouraged to pursue interests in mathematics, science, and technology maximize their full potential. The same holds true for boys when they are encouraged to be creative (Kerr, Vuyk, & Rea, 2012). Equality between the sexes is typically present in today's classrooms, but the stereotypical, gender-based norms that members of society harbor may impact the identification of gifted students.

In an exploration of the differences between gifted boys and girls, Kerr et al. (2012) found little difference between interests, as well as performance, from an early age through adolescence. The researchers suggested that the minimal difference between the genders was exaggerated due to the social need for each of the sexes to fit into the preidentified roles and differing expectations reinforced through the media. Additionally, girls who could have been identified as gifted in early childhood were thought to be succeeding due to rote memorization, while boys were not encouraged to enter school right away as a means to help them develop socially (Kerr et al., 2012). This practice is based on assumptions that may represent good intentions but can be more detrimental to some students as they progress through school (Kerr et al., 2012). Several researchers have conveyed that teachers should disregard the gender of students and utilize other measures to identify gifted students (Freeman & Garces-Bacsal, 2015; Reis & Hebert, 2008; Rose, 1999).

The research on gifted domains indicates that giftedness is more than just intelligence and can be identified through several methods rather than tests of intelligence (Renzulli, 2005). Many domains could aid in qualifying a student as gifted. As some school district leaders continue to adopt a traditionally narrow definition of giftedness, low numbers of high-minority students typically participate in these programs. Equally, the parents of these students are at a disadvantage because of the absence of knowledge or resources to fully advocate for their children (Fleming, 2013). High minority students, despite the level of poverty in which they may live, should be included when identifying potentially gifted students.

Minority giftedness and poverty. Minority giftedness is the idea that a student's ethnicity is not a factor when providing gifted education (Ford, 1998). Ford (2014a) focused on the number of minority students involved in gifted education. Specifically, the case of *McFadden v. Board of Education for Illinois School District U-46* (2013) was cited because of the discrepancies found in gifted program offerings and identification. Although district leaders thought they were providing an appropriate education for students, the leaders were discriminating by separating the Hispanic gifted students from the general population. One explanation was a deficit in teacher thinking for why low minority populations were in gifted education, meaning that the level of expectation involving minority students was not as high as it was for nonminority students. A similar case occurred in Alexandria, Virginia, where minority students were not provided opportunities that matched their abilities. An explanation offered in this school district was that teachers potentially had a predetermined notion of what gifted looks like

(Chandler, 2009). De facto segregation is prevalent all over the country (Ludwig, 2017) but is most noticeable in areas of high poverty.

Vance (2009) extended the concept of de facto segregation a step further to include socioeconomic status with privilege and disadvantage. Currently, leaders of very few states consider the socioeconomic status of students in their description of the identification of gifted education. The majority of the state definitions include academics and intelligence, while a few other state definitions include students' creative abilities and ethnic diversities (NAGC, 2013a). Recently, Ford (2014b) proposed this social inequality is due to White privilege and promoted the belief that neighborhood school leaders perpetuate the problem. Ethnic communities tend to gravitate to the same location based on similar interests and backgrounds (Ludwig, 2017; Vance, 2009). Often, this practice perpetuates generational poverty (Beegle, 2003).

Generational poverty is the tendency for families to remain poor and with limited education for multiple generations (Beegle, 2003). The cycle often is continued because of a lack of knowledge and/or available resources. When educating students from a background of poverty or those of ethnic-minority status, it is important for educators to recognize the abilities and talents of these students in order to enhance their educational experiences as well as their academic achievement.

Ford (2014b) posited that an injustice occurs when educators do not offer gifted programs to ethnic-minority students. Finding fault in the practices of the current educational system, Ford (2014b) addressed the inequity of gifted education using the Relative Difference in Composition Index. Findings indicated that a segregation among

gifted, ethnic-minority students and gifted, nonminority students was apparent. To avoid segregation, other techniques should be utilized for identifying all gifted students including those from a poverty background.

Slocumb and Payne (2000) and Olszewski-Kubilius and Thomson (2010) discussed the opportunities for identifying and meeting the needs of poor, gifted students. Students who are both gifted and poor require a different approach, because they have different needs. The resources available to them may not be the same as their peers; to treat these students as if they were in a different social class could be detrimental to their success (Ford, 2014b; Olszewski-Kubilius et al., 2004). Additionally, a value is placed on knowledge; students of poverty may be street smart and creative to avoid being in trouble, whereas their grade-level peers only may be able to cite facts about history or a specific subject. Students who can do the latter tend to be seen as bright, while the prior group of students could be viewed with skepticism (Slocumb & Payne, 2000). Until teachers recognize that both sets of skills are equally important, educators may neglect children who could be identified as gifted. Multiple theories related to giftedness further impact discussion of the topic.

Gifted theories. Numerous researchers have contributed differing theories involving intelligence (Gardner, 1983; Renzulli, 2005, 2011, 2012; Spearman, 1904; Sternberg, 1985; Thurstone, 1938). Consistent with the teachings of Renzulli (2005, 2011, 2012), a general ability for giftedness is recognized among younger students; as students grow older, however, the ability begins to unfold into a specific area or skill. Educators who recognize a difference between achievement and performance adjust their

curriculum accordingly when offering gifted programs. Adjusting curriculum to the needs of students, while also administering aptitude tests and conducting factor analyses, is a successful method for promoting academic achievement within gifted programs.

Spearman (1904), a psychologist in the field of intelligence, concluded that a way exists to identify the general intelligence of individuals. Through aptitude tests and factor analyses, Spearman determined that cognitive ability could be measured and thus quantified. General intelligence is the ability to think, act, problem solve, and react to situations (Gottfredson, n.d.; Spearman, 1904). Spearman additionally determined that results of cognitive-ability tests are similar between tests, resulting in a more accurate predictor of student achievement. Employees of many universities and companies use intelligence tests to determine if individuals have the necessary aptitude to succeed.

Most similar in thinking among intelligence theories are those of Gardner (1983) and Thurstone (1938). Each believed that several mental abilities collectively define intelligence. As Gardner reported, humans may possess general intelligence alone or in combination with other types of intelligence such as (a) linguistic, (b) visual-spatial, (c) musical, (d) logical, (e) bodily-kinesthetic, (f) interpersonal, and (g) intrapersonal. Thurstone contributed numerous other types of intelligence: (a) verbal comprehension, (b) reasoning, (c) associative memory, (d) word fluency, (e) numerical ability, (f) perceptual speed, and (g) spatial visualization. Thurstone did not rely on just one measure to account for a person's intelligence, and he rejected the idea of an ideal mental age. According to Adcock (2014), all people possess some element of these areas of intelligence, yet only one or two of the areas will be fully realized and developed. Due to

the variation in the areas of intelligence, it is imperative to differentiate gifted programs to meet learners' needs.

Mandelman and Grigorenko (2013) provided insight into general intelligence and discussed variations of gifted programs and how to meet the needs of gifted learners. The research of Mandelman and Grigorenko focused on Sternberg's (1985) triarchic theory of intelligence. Triarchic theory identifies three types of intelligence including creative, practical, and analytical.

Creative intelligence is the approach used by individuals to perform a task; the two types of creative intelligence are novelty and automatization (Sternberg, 1985). Novelty can be measured by how people initially react to a new situation, and automatization is the way in which individuals automatically respond with repeated tasks (Sternberg, 1985). Most people use what they already know about a subject and apply that knowledge to their current situation. How a person relates to their environment and adjusts their behavior is practical intelligence, the second type of intelligence comprising Sternberg's theory. In layman's terms, practical intelligence is having common sense; in contrast, analytical intelligence is the ability to problem solve (Sternberg, 1985). Beyond the use of Sternberg's theory of intelligence, Mandelman and Grigorenko (2013) called for a clear purpose for providing gifted education and needed improvements in the methods through which gifted students are identified. In the process of providing gifted instruction, other researchers identified various strategies that educators can effectively utilize.

Effective strategies in gifted programming. Southern (2014) discussed the definition of *acceleration* and the different ways in which educators could implement the approach with their gifted students. Providing material above grade level to students who are ready for more challenging content is one way to provide acceleration. Another way to accelerate students is to promote them to the next grade level because of the requirement for a different curriculum. Early promotion, however, requires that the maturity of each student be taken into consideration. Consequently, this type of accommodation is rarely used because of possible social implications.

Acceleration is a practice that has to be carefully and methodically planned with clear protocols, as the effective management of early promotion is difficult to achieve (Olszewski-Kubilius & Limburg-Weber, 2014). A major challenge that school district administrators need to consider is how the students will adjust socially with peers who are chronologically older (Southern, 2014). Acceleration, however, can be provided through three different methods within the classroom and thus not require students to be physically promoted to the next grade level.

Olszewski-Kubilius and Limburg-Weber (2014) recommended the following three methods as the most effective when educating gifted students: (a) *in-class clustering,* wherein students are able to stay with their peers but receive an advanced curriculum; (b) *pull out/resource method,* through which students attend a special class for a few hours each week in an attempt to enrich the curriculum with projects of interest; and (c) *ability grouping,* wherein students are in classes with other gifted peers. Each style has its own risks and rewards. Regardless of the method chosen, researchers agree

that students who are high-ability learners perform better in school when they are offered programs that meet their learning needs (Coleman, 2010; Olszewski-Kubilius & Limburg-Weber, 2014; Steenbergen-Hu & Moon, 2013). It is critical for school leaders to provide gifted programs to meet the varying needs of gifted students.

School budgets and gifted programs. United States government officials have mandated school leaders to provide equitable education to all children since the 1960s (Sisk, 2008). To achieve such a task in districts with a high percentage of students from low socioeconomic backgrounds, federal funds are available through Title I legislation. The effective use of Title I funds ensure that disadvantaged students receive the same resources and programs as students from more affluent environments (U.S. Department of Education, Elementary and Secondary Education, 2004). Included in this group are those students who are gifted or talented (Sisk, 2008).

Legislators additionally established the Jacob K. Javits Act (U.S. Congress, 1988) in an effort to provide GT programs to students in underserved populations. According to the NAGC (2015), Congress awarded $10 million for the 2015 fiscal year under this legislation to expand the outreach of gifted education initiatives. Because Congress funds this program on an annual basis, the available amount can fluctuate from year to year. As a result, school district leaders who rely on federal funding are subject to reductions and fluctuations of the expected funds to support programs.

School districts are funded from local, state, and federal sources. The local tax base is figured on the value of properties and typically represents the largest percentage of district funding (ISBE, 2015). State and federal monies are dependent upon specific

programs and what each program provides. Since 2013, the Illinois general state aid for per-pupil funding remained constant at $6,119 (ISBE, 2014). It is important to note, however, that no school district receives this full amount directly, but rather as a combination of resources and grants based upon a formula that entails the local wealth (ISBE, 2015). These funds can be utilized to pay for operational expenses of a school district (ISBE, 2015).

The cost to maintain buildings, hire staff, and procure other resources is a part of a school district's operational spending. Concurrently, per-pupil spending is the cost associated with expenditures that are directly related to the teaching and learning of students (ISBE, 2015). Unfortunately, many districts in low-income areas with high percentages of ethnic-minority students are very reliant on state and federal funds that can be cut without warning. This reliance can create a substantial issue for school administrators operating on a tight budget and often result in deficit spending (Khimm, 2013; Oliff et al., 2012).

Khimm (2013) reported how federal budget cuts affect different school districts in Virginia. Title I funding for schools with low-income populations is distressed more by government mandates than wealthier districts receiving little federal aid. Although government funding is spread out throughout the country, no equality is apparent between districts (Khimm, 2013). The number of students living in poverty has increased throughout the years and, as a result, the percentage of poverty-stricken students in today's classrooms has increased; this is a variable that should be considered when funds are allocated from the state and federal governments (Baker et al., 2014).

Additionally, Oliff et al. (2012) described the ramifications of state budget cuts for schools. In 35 states throughout the country, some school district leaders have been forced to operate on a budget that was lower than before the 2007 recession. Due to budget cuts, many state leaders will need to explore their program offerings in an effort to maintain the core subject areas in their curriculum. Reducing the amount of state aid to school districts can have serious consequences for students, parents, and staff.

Members of the International Budget Partnership (2016) discussed the importance of a budget system and the impact that fluctuating budgets can have on certain groups. Previously, Ogden (1978) proposed a combination of incremental and zero-based budgeting. Zero-based budgeting follows a step-by-step process for analyzing the cost of programs each year and requires a justification for each expenditure. The first step is to create decision packages that operate on the lowest functioning level. The second step is to rank all packages based upon their success and priority. This approach is costly and requires a major time commitment but may be necessary when major changes are being introduced. To alleviate related burdens, Ogden recommended the inclusion of an incremental budget system.

Incremental budgeting is rooted in political agendas (Ogden, 1978). When the public is accustomed to certain programs, it is in the best interest of those setting the budget to find the means to financially support the public's expectation. Having a previously approved budget amount for certain programs would give perspective to those in charge of the line-item review (Ogden, 1978). In addition, an examination of previous appropriations must be performed (Wetherbe & Montanari, 1981). These appropriations

consist of four steps when examining the different types of data: (a) establish a base of staff and money, (b) look at the proposed changes to the tax base, (c) make decisions in favor or against programs, and (d) analyze all existing and suggested components to determine if the whole budget needs to be reexamined. It is in this last step that zero-based budgeting may merge with the incremental budget practice. With the merge of these two programs, the need to complete a zero-base budget exists only every 5 years.

McCaffery (1981) examined a variation of zero-based budgeting known as alternative program levels system (APLS), an approach that allows need-driven decisions for programs to be implemented, continued, or discontinued. An APLS uses an adjustment base of 85% to prioritize decision packages. Consequently, less emphasis should be concentrated on the money and more on the significance of what is being offered. Using a system such as APLS or a combination of incremental and zero-based budgeting might benefit school districts because, at times, programs may need to be restructured due to low enrollment or classes may need to be combined because of the budget. One concern is that, if the same amount of money continues to be appropriated for programs simply out of tradition, implementing new and previously unfunded programs is difficult (Wetherbe & Montanari, 1981).

Roza (2009) suggested a spending-on-services procedure when analyzing what programs are provided in schools and whether it is sensible to continue with status quo. The spending-on-services method involves an examination of the relationship between the budget and per-pupil spending. This method additionally includes a consideration of the money spent versus the outcome and then determines where changes can occur (Roza,

2009). Using this method, a study of three school districts was conducted to compare per-pupil spending; findings revealed that more money was spent on higher-level courses than on low or midlevel courses regardless of class size. This way of examining the budget allows for programs to be prioritized based upon need and outcomes.

The ways in which school district leaders appropriate budgetary funds are key components to examine when creating, implementing, and sustaining programs (Subotnik et al., 2011). Specifically, gifted programs for ethnic-minority students in low-income areas are neglected (Olszewski-Kubilius & Thomson, 2010). Brooks-Young (2007) argued that district leaders rely too heavily on the prior year's spending to dictate future needs. Instead, district leaders might consider using a systems thinking approach when deciding budgetary needs to ensure that the programs that are being funded are for the betterment of the whole organization and not just previously funded programs.

Summary of the Review

This review of literature included an examination of multiple aspects related to the problem addressed through this study. Senge's (1990) systems thinking approach was the conceptual framework that provided an understanding of how organizations work collaboratively toward meeting a common goal. Understanding how program implementation, challenges, and theory impacts minority gifted students adds to the body of research in education. Included in the discussion were studies related to gifted domains, gifted programs, and related budgetary strategies. In an upcoming section, a thorough look into the ways in which leaders of school districts with large populations of

ethnic-minority students prioritize program needs and allocate funds is examined through a case study analysis.

Implications

An analysis of the findings, supported and explained with the review of literature, provided the rationale for the creation of the project related to the case study. The project that emerged as a result of this study was a white paper. The white paper project includes the paper document and a PowerPoint presentation. While there are numerous studies regarding gifted education, they are limited in regards to the creation, implementation, and sustainability of programs. I will present recommendations based on the study findings to the decision-makers in the local school district on the creation, implementation, and sustainability of gifted programs.

Summary

The problem addressed through the study is the lack of an official gifted program in a high minority low-income school district in Illinois. The purpose of this study was to examine how leaders of school districts with similar demographics to the district lacking a gifted program create, implement, and sustain gifted programs. The conceptual framework was rooted in systems thinking.

The research questions were developed for use in determining an understanding of how systems thinking is used to create, implement, and sustain gifted programs in two school districts that are demographically similar to the district within the research setting. Examining the successful gifted practices of leaders within these two districts may help to address related challenges within a demographically and economically similar district

without gifted programs. The budget considerations, the organizational structure of the sample districts, and the strategic planning by district leaders and stakeholders were examined to provide a better depiction of the decision-making process. An expanded literature review was used to determine the needs of gifted students.

The literature review demonstrated that a global perception exists that the needs of all students are being met through public education. These needs are often met through various inclusion programs that are offered to gifted students. Students are selected for these programs based on various gifted domains; these include academic performance and learning dispositions. Systems thinking, strategic planning, and the organizational structure of school districts offered a glimpse into the ways in which organizational leaders develop and implement programs. Methods to identify students and strategies utilized to implement these programs were also examined.

Researchers, such as Ford (2014a), focused their studies on the identification of ethnic-minority students in gifted education while Spearman (1904) and Sternberg (1985) focused on gifted theory. Multiple strategies exist to assist in providing services for gifted children. Some students are enrolled in accelerated classes, while others experience grade promotion. Weston (1989) and Baker et al. (2014) focused their studies on the area of school budgets. Ogden (1978), as well as McCaffery (1981), provided expertise in the area of incremental and zero-based budgeting. Despite the existing strategies, the problem underscored through this study remains an issue.

This study makes an original contribution to the problem of the lack of gifted education opportunities for ethnic-minority students within low-income school districts.

A direct implication of this research could be the recognition by administrators and school board members of the need to consider offering gifted education programs in the future. The significance of the study may lie in the potential to solve the local problem while also adding to the body of research about the considerations that are made when implementing such programs.

The significance of the study occurs through the opportunity to promote social change. By increasing the representation of ethnic-minority students in gifted programs at the elementary school level, an increase may occur in the number of students who enroll in advanced courses in high school. This, in turn, could improve graduation and college-enrollment rates. Moreover, the school district administrators identified in the research setting could reassess the organizational structure and initiate a systems thinking approach for program planning when considering student needs. The methodology for the study is presented in Section 2.

Section 2: The Methodology

The problem addressed in this study was the lack of an official gifted program in a high minority low-income school district in Illinois. Based on the experiences and perceptions of stakeholders within the study districts and to gain an understanding of how gifted programs are created, implemented, and sustained in school districts, this study focused on the following research question: (1) How is systems thinking used to create, implement, and sustain a gifted program in high ethnic minority low-income school districts within the elementary grades? (2) How is systems thinking used to implement a gifted program in high ethnic minority low-income school districts within the elementary grades? (3) How is systems thinking used to sustain gifted programs in high ethnic minority low-income school districts within the elementary grades?

In Section 2, I establish that the research design was logically derived from the local problem and the research questions. I discuss the semi-structured interviews with staff members from two districts to gain insight into their practices. These interviews, along with an examination of archival documents, provided information about the mission, vision, and belief system of the organizations. Also, I was able to gain an understanding of how the organizational structure of each district, the strategic planning process, and the budgeting process impacts the their respective programs and decision making. A description of participants, data collection methods, and analysis approach are explained.

Qualitative Research Design and Approach

This qualitative research study was a collective instrumental multicase study. Case studies allow a researcher the opportunity to delve deep into a program, event, or process over a specific period of time (Bogden & Biklen, 2007; Creswell, 2009). Merriam (2009) stated that case studies can be defined by particularistic, descriptive, and heuristic features. Particularistic features of case studies focus on a specific phenomenon as it relates to everyday practice, where a descriptive feature focuses on the end result of the case study and the rich descriptions used to describe the case. Heuristic features of case studies tend to bring about new meaning, confirm what is know about a topic, or extend a person's understanding of the studied phenomenon. By conducting a multicase study, the opportunity exists for greater validity of the data gathered and a richer description of the case (Merriam, 2009).

In a case study, a clear picture is presented through visual and narrative formats. The approach additionally allows for just the facts to be presented in order to understand or describe a phenomenon (Baxter & Jack, 2008; Merriam, 2009). The case study design was the best choice for this topic because the flexibility of the design allowed for information to emerge naturally (Merriam, 2009). This flexibility comes from the ways in which information can be gathered and analyzed. A quantitative study design was rejected because the research questions cannot be answered using a numerical analysis of descriptive or inferential statistics. Additionally, a quantitative design is structured with a predetermined hypothesis (Creswell, 2009).

Other qualitative methodologies were considered and subsequently rejected for use in this study. While researchers selecting qualitative methodologies manage data in similar ways, the interpretation and presentation of the data differ. For the purpose of this study, it would not be beneficial to use a narrative model because the researcher has no personal story to tell (Merriam, 2009). Grounded theory was rejected due to the constant comparative nature of the data and the coding of information to build a story (Creswell, 2007; Merriam, 2009). Phenomenology requires a personal judgment as well as a description of the phenomenon experienced through the bracketing of information (Bogdan & Biklen, 2007), and this study is not judging the quality of the programs. Although similar to case studies, ethnography relies on descriptive measures to help understand a culture or group on a larger scale (Bogdan & Biklen, 2007; Lodico, Spaulding, & Voegtle, 2010). In ethnography, the researcher spends extensive time in the field and becomes a part of the environment in order to provide a deeper understanding of the study (Lodico et al., 2010). The collective instrumental multicase study design was best suited for the stated purpose of this study.

Participants

Participant Selection Criteria

Before beginning this study, I used my knowledge about local neighborhoods and school districts to conduct an Internet search. I specifically selected areas that I knew had populations similar to the district identified in the problem (see Table 2). The first criterion for participant selection was to find school districts with gifted programs. Of 10 local districts, six had gifted programs. I was specifically looking for school districts

with populations of low-income high ethnic minority students. Using report card data from the ISBE website, the information was further reduced to districts based upon per-pupil expenditures. During the selection process, maximal variation and convenience sampling were considered.

Maximal variation sampling is a strategy that represents multiple perspectives and characteristics of a case and was appropriate for use in the study. This approach was warranted because the demographics of the two case school districts are similar to the school district identified in the local problem in the percentage of ethnic minority students, yet differ in terms of specific ethnic minorities represented. Furthermore, I used convenience sampling, because the location of Districts A and B are in close proximity to the school district research setting, meet the selection criteria, and are available to be studied.

During the 2014-2015 school year, District A, with four schools and per-pupil expenditures of $5,794.00, had an ethnic minority population of 75%, which was represented by a combination of Hispanics and African Americans (ISBE, 2014). During the same time period, the ethnic minority population of District B, with 11 schools, was 76.6% represented by a combination of Hispanics and African Americans with per-pupil expenditures of $6,587.00 (ISBE, 2014). The research district where the problem for the study was identified had nine schools and per-pupil expenditures of $7,572.00 as well as an ethnic minority population of 94.4% consisting predominantly of Hispanics (ISBE, 2015). By comparison, socioeconomic status, as determined by the percentage of students qualifying for free or reduced price meals between the school district research

setting and the other two districts is similar (see Table 2). Leaders within Districts A and B offered specialized instructional services to identified gifted students. Exploring leadership practices of school districts with gifted programs could potentially provide guidance and direction to district leaders who are limited in terms of these offerings.

Table 2

Student Ethnicity and Socioeconomics by School District

School district	Hispanic %	African American %	White/Other %	Free/reduced-price meals %
Research District[a]	60.7	33.7	5.5	94.3
District A[b]	27.0	48.0	25.0	74.1
District B[c]	27.1	49.5	22.0	81.0

Note. N = 10,922. Data depict ethnicity and socioeconomic data during School Year 2014-2015 as reported on the school district report cards (ISBE, 2014). Data rounded to the nearest 10th.
[a] n = 3,400. [b] n = 2,537. [c] n = 5,470.

In School Districts A and B, I interviewed individuals who could discuss the budget and how monies are used to fund programs. The interviews were conducted onsite. A protocol of questions was made available to participants prior to the interview (see Appendices B-D). This study provided valuable data to leaders of the high ethnic minority low-income school district identified as the research setting, as leaders are currently operating the district without a gifted program. By studying demographically similar school districts with gifted programs, the findings of this study provided direction on how gifted programs are created, implemented, and sustained in such school districts. In total, I interviewed three administrators and one teacher from District A and three administrators from District B for a total of seven participants.

In District A, the participants were the support programs coordinator, the campus program administrator, the gifted resource teacher, and the business manager. The programs coordinator was interviewed to understand the process the district leaders use to create and implement the gifted program. The campus program administrator, who is also an elementary school principal, oversees the program in the buildings. The interview with the gifted resource teacher and the campus program administrator focused on the implementation and sustainability of the program, and the final interview in District A was with the business manager to ascertain additional budget information. Following these interviews, I interviewed three administrators in District B.

The three administrators in District B included the director of enrichment programs, the assistant superintendent of curriculum and professional development, and the business director. Initially, there was a fourth administrator that retired before the data collection began and the director of enrichment programs absorbed her position duties. The director of enrichment programs and the assistant superintendent of curriculum and professional development provided information to understand the modifications and program alignment for special services. The assistant superintendent of curriculum was interviewed to understand the grant funds that are procured as well as the district curriculum leader's needs. The final interview was with the director of business services to understand the school district budget. In total, there were five women and two men interviewed.

The information collected during the interviews and through analysis of archival data was combined with other facts from this study and provided valuable data to the

high-minority, low-income district identified in the local problem that is currently operating without a gifted program. By studying demographically similar districts wherein gifted programs are offered, the findings of this study may provide direction on how to create, implement, and sustain a gifted program in such a district. To commence the research, the intent and purpose of the study was defined for the leaders of each district.

Access to Participants

Bogdan and Biklen (2007) recommended an overt approach when conducting research. Clearly defining the intent and purpose of a study reduces any possible misunderstandings. Leaders of Districts A and B were provided with a request-for-cooperation letter describing the purpose of the study, the anticipated amount of time involved in the data collection, and the way in which the results will be reported. Signed letters of cooperation from leaders of each school district, indicating their agreement to participate, were obtained, along with signed data-use agreements from leaders of each district to provide budget and curriculum documents that relate to the study. As the next step, approval of university officials was sought.

After receiving approval from university officials, I requested consent to conduct research from the Walden Institutional Review Board (IRB). Administrators of Walden University required approval from the IRB before any researcher can begin collecting data. The IRB ensures that all humans, especially protected groups, are safeguarded throughout the research process (Creswell, 2012). Members of the IRB additionally ensure that the benefits of the research outweigh any potential risks and that the

researcher will uphold ethical standards. Individual participants were provided with an informed consent document that explained their voluntary participation and the measures used to keep their identity confidential. Once all approvals were gained from the IRB, approval number 10-31-16-0127845, I formally contacted each participant.

Researcher-Participant Relationship

In qualitative inquiry, the researcher is the key instrument, so it is important to establish a relationship with the participants (Creswell, 2007, 2009). I do not have any prior relationship with the participants in this study. As a result, Bogdan and Biklen (2007) recommended using "small talk" to help develop a rapport with the subjects (p. 103). I started each interview session by defining my role as the researcher, describing my expectations, and explaining the reason for my interest in this study. I assured participants that their identities would be kept confidential using pseudonyms. Only information pertinent to the case study is shared in the findings. Informed consent documents were obtained from all participants and ethical protection measures were implemented as well.

Ethical Protection Measures

Since qualitative research typically occurs in the natural setting, it was important for the researcher to employ some general ethical considerations. The first was to follow proper procedures to gain access to participants. To comply with this expectation, Letters of Cooperation and Data Use Agreements were received from a leader within each selected school district. Moreover, all participants signed informed consent documents. By obtaining proper consent from the subjects, the validity of the research was

maintained. I also explained that compensation would not be provided for participation. Shank (2006) recommended maintaining the integrity of all documents and facilities, refraining from disturbing the environment, avoiding harm, and being open and honest with all participants. I followed each of these recommendations.

Creswell (2009) asserted that instilling trust with each participant helps the researcher maintain the integrity of the research. Trust was gained through clear objectives that were both verbal and written in a detailed document that described the methods used for note taking during the interviews. Copies of the transcripts were provided via email to participants prior to conducting member checks. Before reporting the data, I conducted member checks in order to provide participants the opportunity to verify the findings. To keep the identities of the individuals and the school districts confidential, pseudonyms were used in the dissertation manuscript. Data were garnered utilizing a qualitative design.

Data Collection

Qualitative research was an appropriate design for this study because I was able to get a deeper understanding of the facts in each district. As the sole instrument used to gather and analyze data (Creswell, 2012), I had the ability to let the information emerge naturally. The primary method for data collection in this study was semi-structured interviews, with the archival data serving as a secondary data source. The selection of participants was purposeful and required interviews to be conducted with individuals that could answer the research questions. Initial meetings with the participants were arranged through a telephone call followed by an email confirmation. Once an interview time and

location were determined, I emailed each participant with a confirmation and the protocol questions to be used in the interview. All interviews were conducted in person, and were conducted during the weekday in each participant's office. Merriam (2010) asserted that interviews provide insight into things that happened in the past and are necessary when trying to replicate ideas. Stake (1995) recommended asking open-ended questions that illicit thorough description, while Merriam (2010) warned against asking multiple, yes-no, or leading questions. Having a clear protocol and probing questions ready beforehand kept the interviews on track and ensured that I received the data necessary to answer the research questions. (Bogdan & Biklen, 2007).

Interview Data Collection

An interview is a valuable source of data collection (Creswell, 2009, Merriam, 2009). It is an opportunity to understand a certain phenomenon through the participant's lens (Merriam, 2009). The primary data source for this study consisted of participant responses to semi-structured, one-on-one interviews. Three protocols (Appendix B-D) were created to use during the interviews. The questions on the protocols were open-ended and developed based on answering the research questions. Each interview question was expanded to include multiple questions to facilitate conversation and gain a deeper understanding of district practices. The first protocol (Appendix B) was developed with questions that supported the understanding of creating gifted programs. This protocol was used with the Business Manager in District A, and the Director of Business Services in District B. The second protocol (Appendix C) contained questions that were developed to gain an understanding of how to implement a gifted program. This protocol

was used with the Support Programs Coordinator in District A and the Assistant Superintendent of Curriculum in District B, and the third protocol (Appendix D) was administered to participants that had knowledge of sustaining gifted programs. This protocol was used with the Campus Program Administrator and Gifted Resource Teacher in District A, and the Enrichment Programs Director in District B. Each participant was interviewed with only one protocol, depending on his or her position and knowledge related to creating, implementing, or sustaining gifted programs.

I allowed up to 1.5 hours for each interview. This was more time than what was actually used, as the average length of time for the interviews was 40 minutes. I began each session with a review of the consent documents and a brief explanation about my reason for interest in the study. During this brief introduction, I was able to establish a rapport with the participants (Bogdan & Biklen, 2007). During the interviews, I took field notes on the interview protocol (Appendix B-D). This allowed me to simultaneously keep reflective notes while maintaining my position as a researcher. This activity helped me to avoid developing any bias. I used the QuickTime player on the computer to audio record the sessions to ensure that information was not missed. After each session, I reviewed my notes against the audio recording to ensure that information was accurately recorded. I transcribed each session verbatim. To manage the physical data, I used individual file folders to keep information separate for each participant and location. The analyzed data collected were utilized to answer the research questions of this study.

Archival Data Collection

Initially, during the interviews, my expectations were to receive written documentation of the guidelines for the identification of gifted students, as well as the curriculum outline used by leaders of the case districts to support their programs. I thought that I would receive a comprehensive, step-by-step manual that outlined the program requirements and budgetary considerations. No manual existed in either district. Consequently, the documents that I received were not what I expected. During the interviews, specific program requirements and program enrollment numbers were provided through conversation, but no written documentation to support the interview data was retrieved. This led to an Internet search looking for additional archival data related to each district program.

I obtained current financial documents and archival documents from the Internet regarding each district's vision, mission, and strategic plan. Specifically, these documents were obtained from the Internet for District A: Mission and Belief statements (Appendix E), Strategic Plan 2016-2019 (Appendix F) and the Greatness Indicator and Consensus and Recommendations (Appendix G). No documents were provided from the actual participants in District A.

In District B, the Mission and Vision Statement (Appendix H), and the strategic plan (Appendix I) were obtained from the Internet. Additionally, in District B, I garnered a copy of the elementary gifted education matrix (Appendix J), the gifted education compact for parents and students (Appendix K), the gifted education identification rating forms for parents (Appendix L) and teachers (Appendix M), and the

magnet school enrollment form and contract for parents (Appendix N) from one of the participants. Additionally, a modified checklist of the evidence-based practices from the NAGC Standard 5: Programming (2010) (Appendix O) was obtained from the Internet. These archival documents were used to support answering the research questions.

Sufficiency of Data

Tables 3 and 4 display the interview questions that were used for data collection to answer each of the three research questions. Before the interviews, a panel of experts reviewed the questions to ensure that they were logical and appropriate to the study, and could answer the research questions. The individuals chosen to serve on the panel of experts were knowledgeable of school programs, gifted programs, and school finance/budgets. First, I solicited a gifted education specialist who taught in a gifted program, is the director of a gifted program, and now teaches the gifted seminar classes for teachers to become endorsed in gifted education. The second person I included is a school district administrator who is knowledgeable of programming needs and budgetary considerations. Finally, a third person reviewed all of the questions with me to make sure that what I was asking was clear and that participants could answer the questions.

Table 3

Interview Questions and Corresponding Research Questions: School District A

Administrator	Interview question	Research question
Support programs coordinator	1	1, 2
	2	1, 2, 3
	3	1, 2, 3
	4	2, 3
	5	2, 3
	6	3

(table continued)

Administrator	Interview question	Research question
Campus program administrator	1	1
	2	1, 2, 3
	3	1
	4	2, 3
	5	2, 3
	6	3
Gifted resource teacher	1	1, 2
	2	1
	3	1, 2
	4	2, 3
	5	1, 2, 3
	6	1, 2, 3
Business manger	1	1, 3
	2	2, 3
	3	3
	4	3
	5	3
	6	3

Table 4

Interview Questions and Corresponding Research Questions: School District B

Administrator	Interview question	Research question
Enrichment programs director	1	1, 2
	2	1, 2, 3
	3	1, 2, 3
	4	2, 3
	5	2, 3
	6	3
Assistant Superintendent of curriculum	1	1, 2
	2	1, 2, 3
	3	1, 2
	4	1, 2, 3
	5	2, 3
	6	3
Director of business services	1	1, 3
	2	2, 3
	3	3
	4	3
	5	3
	6	3

Tables 5 and 6 demonstrate the role of the archival documents in providing data to answer the research questions. The archival data from District A and District B primarily supported research question 2 and research question 3. The analysis of these documents supported a systems thinking approach by illustrating how the organizational structure of each district supports and sustains an existing gifted program.

Table 5

Research Questions and Corresponding Archival Data: School District A

Research Question	Archival data
1. How is systems thinking used to create a gifted program in a high ethnic-minority, low-income school district within the elementary grades?	Appendix E Appendix F Appendix G Appendix O
2. How is systems thinking used to implement a gifted program in a high ethnic-minority, low-income school district within the elementary grades?	Appendix F Appendix O
3. How is systems thinking used to sustain a gifted program in a high ethnic-minority, low-income school district within the elementary grades?	Appendix E Appendix O

Table 6

Research Questions and Corresponding Archival Data: School District B

Research Question	Archival data
1. How is systems thinking used to create a gifted program in a high ethnic-minority, low-income school district within the elementary grades?	Appendix H Appendix I Appendix O
2. How is systems thinking used to implement a gifted program in a high ethnic-minority, low-income school district within the elementary grades?	Appendix J Appendix O

(table continued)

Research Question	Archival data
3. How is systems thinking used to sustain a gifted program in a high ethnic-minority, low-income school district within the elementary grades?	Appendix I Appendix O

To manage the organization of the data, I used colored file folders for each district; District A data was stored in a pink folder while District B was stored in a white folder. Then, the participant's interview protocol, consent document, interview transcripts, and archival data were housed together in a folder labeled with the participant's pseudonym and stored in the corresponding district folder. All signed consent documents will be kept for a period of 5 years, as mandated by the university, in a locked file cabinet in my home. All other data will be stored on my personal computer that is password protected. After the 5-year period, all the consent documents and the raw data will be shredded and the computer files deleted.

Role of the Researcher

The purpose of this study was to examine how leaders of school districts with similar demographics to the district lacking a gifted program create, implement, and sustain gifted programs. Creswell (2012) stated the importance of the researcher blending with the environment. I ensured that there was little to no disruption to the daily structure of the school district and personnel. In addition, I have no affiliation with any employee of the two districts incorporated within the study. Professionally, I work as a reading specialist in a large, suburban school district of Chicago. The district is characterized as one of high ethnic-minority and low income. I serve on the school-leadership team, as well as the district-leadership team. I am as a certified mentor to new

teachers. In 2016, I took the Illinois State Licensing Examination to obtain a license endorsement as a K-12 gifted education specialist. Moreover, I am a doctoral student at Walden University.

While obtaining my master's degree, I was required to complete an action research project as part of the degree requirements, yet I was a novice when considering a study of this magnitude. Merriam (2009) noted the process of epoche: an awareness of your values, opinions, and biases, and the ability to put these personal aspects aside before beginning the research process. I intentionally avoided any bias or ethical violation. It is important to note that, although I am not currently employed as a K-12 gifted education specialist, I intend to pursue a position related to gifted education in the future. Lodico et al. (2010) noted the importance of examining your own belief system and understanding how this impacted the research study. I feel that all students who have gifted abilities deserve the opportunities to have those areas enriched. It was my anticipation, therefore, that this study would provide additional insight and add to the body of research regarding gifted programs in school districts of high ethnic minority populations.

Data Analysis

Once data are collected, three steps exist that a researcher follows in qualitative data analysis, and all three can occur simultaneously. The first is to organize all data collected from the sites. Secondly, the data are to be analyzed. It is important to avoid analyzing the data separately, as all data are to be combined to represent a full case (Baxter & Jack, 2008; Merriam, 2009). To answer the research questions regarding how

district leaders create, implement, and sustain gifted programs, I analyzed the interview data separately from the archival documents for each case. I then chose to analyze all the data together. Merriam (2009) referred to the organization of all the data as the "case study database" (p. 203). The final step is to present the data in a format suitable to the audience (Bogdan and Biklen, 2007). In a case study, acceptable presentation of data can be in the form of a narrative or visual representation. I chose to present the findings through a narrative description by theme for each research question.

Interview Data Analysis Process

To organize the interview data, I kept separate files for each participant. Interviews were transcribed and emailed to the participants for member checking. A labeling system that included the district identifier was added to the interview protocol for ease of identification between the two cases. Once all of the interview data were organized and transcribed, I had a foundation for the analysis phase.

Next, all data collected from the interviews were imported to NVivo for Mac users (QSR International, 2016) to aid in coding and categorizing themes. Specifically, I looked for patterns and repetition of themes between the two school districts with gifted programs to generate the findings of the study. Although computer programs can be helpful with coding and manipulating large amounts of data (Creswell, 2012), it was in the best interest of this smaller study to physically segregate the data for comparison and then input the information into a Microsoft Excel spreadsheet. To physically see the themes and code the data, I used colored notes with a number system to represent areas that relate to the research questions (Bogdan & Biklen, 2007; Creswell, 2012).

Since this was a multicase study, I followed the within-case and cross-case analysis (Merriam, 2009). With this approach, the data for each case were analyzed separately and then together. Bogdan and Biklen (2007) recommended taking a short break from the interview process before analyzing the data. This break allowed for a period of reflection and created a more focused perspective when approaching the data analysis. Merriam (2009), however, asserted that the researcher should not wait to do all of the analysis at one time, but rather as parts are collected in the event a need to revisit sites becomes evident. In this study, I used both Bogdan and Biklen (2007) and Merriam's (2009) approach to analyze the data. I listened to the interview recordings against my notes and transcripts to ensure that I would not need to revisit the site (Merriam, 2009), and then I took a break before I reread the transcripts and began my analysis.

Archival Data Analysis Process

A modified checklist of the evidence-based practices from the NAGC Standard 5: Programming (2010) was used to compare the program provisions for Districts A and B, which were accessed as archival documents (see Appendix O). The standards set forth by the NAGC (2010) provided evidence that systems thinking was the guiding principle behind the districts' decisions. Tables 5 and 6 list the archival documents by appendices that support the research questions.

Through an informal analysis, I reviewed the archival documents looking for connections to the research questions that would support the purpose of the study. I read through the mission, vision and strategic plans (Appendix E, F, H, and I) for each district

looking for similar phrases to highlight. I made connections within each district and across the districts. The elementary gifted education matrix (Appendix J) from District B was useful in seeing all the components that go into determining students' eligibility, but provided no other support. In my proposal of this study, I anticipated that the analysis of the budget to be a viable data source, but after conducting the interviews and reviewing archival data, it was determined that comparing financial expenditures between the districts was not needed because each district operated differently.

Accuracy and Credibility

In qualitative research design, strategies are utilized to validate the researcher's findings and provide credibility to the results. When conducting research, the goal is for the data to be reliable and valid. Reliability is achieved through the researcher's ability to be consistent through the data collection and analysis stages (Creswell, 2009). Reliability was accomplished through the thorough documentation of all procedures and the use of thick, rich descriptions to ensure that a person reading the results could draw the same logical conclusions. Additionally, to avoid bias, bracketing was used to eliminate any personal thoughts and feelings about the subject. In addition to these measures, an effort was made to ensure the findings are credible.

Credibility of the findings was achieved through the triangulation of data, member-checking, and peer debriefing (Creswell, 2009, 2012). Triangulation is a term associated with qualitative research to indicate that a variety of data sources have been used to display a case (Creswell, 2012). The term also is used after data collection to mean that procedures have been utilized to confirm or deny the findings (Merriam,

2009). Bogdan and Biklen (2007) advised against using this term solely, as its use creates confusion. Instead researchers should say exactly what would be done to accomplish triangulation (Bogdan & Biklen, 2007).

For this study, triangulation occurred through member checking, a strategy that helps to ensure validity and credibility of findings (Merriam, 2009). After each interview, I emailed each participant the interview transcript and asked the individual to read through the transcript and make any notations in areas that were questionable. Only one of the participants questioned the transcript, stating that she didn't like the way it made her sound. I assured the participant that reading the transcript against the recording allows for more of a conversational tone than the jumbled one that comes from reading the transcript alone. I further explained that only the facts would be presented and that I was focusing on the themes that emerged and less on the small talk. No other participants responded.

Once the transcripts were analyzed, the preliminary themes that resulted from the study were presented to the original participants for review. The themes were sent via email. Member checking allows participants to ensure that the data are presented accurately and that no discrepancies are apparent. Two out of the seven participants responded to my email. One thanked me for sharing, and the other thanked me for sharing and for my interest in this topic. No other responses were received and no feedback was provided. This process helped to ensure the accuracy of the case.

Peer debriefing was also utilized to ensure facts pertaining to the results of the study were clear. Peer debriefing is a process through which the researcher presents data

to a person outside of the study to see if the results are plausible (Creswell, 2012; Merriam, 2009). This procedure is similar to an external audit, wherein an outside person who is unfamiliar with both the researcher and the study is hired to review the work (Creswell, 2012). I used peer debriefing with a coworker who is familiar with the intent of my study to ensure that the facts are presented clearly.

Discrepant Cases

Throughout the research, a researcher may attain information that is contrary to the majority of the data collected. This information is considered to be discrepant. It is important for all information to be acknowledged in the findings, however, to avoid researcher bias. Creswell (2012) referred to information that may go against the themes presented in the data as "contrary evidence" (p. 251). In the study, there were no discrepant data.

Limitations

In every study, limitations exist that can affect the research findings. The anticipated limitations in this study included the sampling selection procedure, the sample size, and the research questions. Each of these factors could have a significant impact on the results because (a) the sample is set by the demographics of cities near the school district research setting; (b) without a large enough sample size, it could be difficult to make generalizations to a larger population with a similar problem; and (c) the research questions are limited to a specific area and may not provide valuable data to leaders of other school districts.

Data Analysis Results

The purpose of this study was to examine how leaders of school districts with similar demographics to the district lacking a gifted program create, implement, and sustain gifted programs. Semi-structured, one-on-one interviews with six administrators and one teacher from two districts with similar demographics were conducted to gain insight into district practices. Additionally, archival documents were obtained from one study participant and the Internet.

I analyzed each case individually and then together. All subjects were given a pseudonym to protect their identities and maintain confidentiality. I conducted the interviews at each district site and audio recorded the responses; then, I transcribed the recordings. Early in the process, I determined that manually transcribing each interview was a time-consuming process that required more skill than I possess; therefore, I used a transcription service. Reading each transcript against the recording provided the opportunity to keep the data fresh and eliminated any premature conclusions or bias from forming during the transcription process. Each transcript was emailed to the participants to check for accuracy.

Coding the data and developing themes based on the interview questions were done with the assistance of the NVivo11 coding system. Each transcript was uploaded into Nvivo11 and analyzed. This coding system was beneficial to the storage and manageability of the material but still required a manual manipulation of the data to complete a narrative account. Coding nodes were developed based on the responses to

the interview questions and themes began to emerge that answer each of the research questions.

Findings

The findings are presented by the research questions, which were: (1) How is a systems thinking approach used to create a gifted program in a high ethnic-minority, low-income school district within the elementary grades? (2) How is a systems thinking approach used to implement a gifted program in a high ethnic-minority, low-income school district within the elementary grades? (3) How is a systems thinking approach used to sustain a gifted program in a high ethnic-minority, low-income school district within the elementary grades? Five themes emerged from the data to answer the three research questions. Table 7 presents a summary of the findings, including the research questions and themes for each.

Table 7

Themes by Research Question

Research Questions	Themes
1. How is systems thinking used to create a gifted program in a high ethnic minority, low-income school district within the elementary grades?	1. District decision making supports the district plan. 2. Student eligibility for participation in the gifted program supports the district vision.
2. How is systems thinking used to implement a gifted program in a high ethnic minority, low-income school district within the elementary grades?	1. Organization members work together with commitment and collaboration for a common purpose of meeting the needs of its exceptional learners.

(table continued)

Research Questions	Themes
3. How is systems thinking used to sustain a gifted program in a high ethnic minority, low-income school district within the elementary grades?	1. Structure and leadership in place provide sustainability of programs based on the culture and values supported by the organization. 2. Budgetary considerations are addressed through the allocated funds to support the gifted program.

Four overarching systems thinking components were evident in the themes, specifically: (a) team learning, (b) shared vision, (c) personal mastery, and (d) mental models. These components are critical to the discussion of the findings, as the research questions specifically asked how systems thinking is evident in each of the school district processes related to creating, implementing, and sustaining gifted programs. A clear understanding of each of the systems thinking components informs the discussion of the themes. Although, each component is a separate part of systems thinking, it was in the best interest of this study to discuss the components team learning and shared vision together, and the components of personal mastery and mental models together because they complement one another. Creating a shared vision comes from the conversations that happen during team learning, and it is the views of an individual through their mental model that supports personal mastery within the organization.

Team learning and shared vision. Although systems thinking is just one of the five disciplines of a learning organization, the five disciplines work in tandem to elicit change within a system (Senge, 1990). Systems thinking is the overarching discipline that combines all the other disciplines. Team learning and a shared vision are two components of systems thinking that are evident in the themes and are commonly used in

school districts, exemplified in leadership teams, school improvement teams, data teams, planning committees, and department teams. The team learning concept provides an outlet for conversations to develop around what is best for the organization. A shared vision is based on the involvement of the organization's members and how those members see the organization taking shape based on their desired outcome.

Personal mastery and mental models. The other two components of the five disciplines of systems thinking that are evident in the themes are personal mastery and mental models. When individuals have personal mastery, they have a commitment to the organization. There is a sense of cohesiveness, as an individual becomes an active participant based on the ability to see how all parts fit together (Senge, 1990). Mental models are an internal system, one that the individual uses by reflecting on their own views about the world around them and how things work (Senge, 1990). Both of these disciplines fit into a school system when commitment and collaboration take place. Eaker and Keating (2009) posited that by having a collaborative culture, the outcomes for student success are greater. In both districts, it is apparent that a systems thinking approach was used to implement gifted programs by working towards what is best for the students.

Research Question 1

Research Question 1 asked: How is systems thinking used to create a gifted program in a high ethnic-minority, low-income school district within the elementary grades? The questions asked from the interview protocol dealt with obtaining information about the district's planning and decision-making process. In both case

districts, the gifted programs were established years before the administrators were in their respective positions; therefore, questions pertaining to the creation of the program and understanding how a systems thinking approach was used were difficult to answer because they are being based on current district processes. However, after examination of the NAGC standards (Appendix O), the mission and vision statements (Appendix E and H), and the strategic plans (Appendix F and I) in the archival data, it was assumed that both case districts applied systems thinking strategies when creating their respective programs. Two themes emerged from the data that may provide evidence that a systems thinking approach was initially used.

Theme 1: District decision making supports the district plan. In 2016, District A had a strategic planning conference that included approximately 40 stakeholders including administrators, teachers, school board members, and community members. These members were able to share dialogue about their beliefs and then discuss how they fit into the shared vision. The strategic plan that was created by these committee members is currently in effect through 2019. K. A. Drive [pseudonym] stated that questions were asked, such as, "Can you live with that? Can you live with this document? Can you live with this decision?" These questions were used during the planning meeting to determine if the goals that the team was setting fit in with the district's vision.

A shared vision supports systems thinking because it is through this sharing that change can take place (Senge, 1990). Equally, K. A. Drive shared that when the district needs to make a decision or wants to try something new, they always go back to those

same questions to see how the new initiative will fit with their strategic plan. This team dynamic supports that a systems thinking approach is currently being used and may have been used in the past.

In District B, a similar set of questions is used to ensure that every decision supports the shared vision of the district. F. B. Short [pseudonym] stated that the district has an improvement plan and the vision for the district is driven by that plan. When determining any type of change or shift in the way they do things, the following question guides their thinking: "What is it going to look like, sound like and feel like and is it still in line with the district vision?" R. B. Hill [pseudonym] contributed to the discussion about the shared vision of the district by stating that in December of 2015, the district's strategic planning leadership team "got together a huge group, and it was everybody who had interest in the district succeeding." The people involved in this meeting were administrators, parents, teachers, students, important political figures, and the mayor. This shared vision and team dynamic demonstrate that a systems thinking approach is being used to determine how decisions affect the overall organization.

F. B. Short, a newer administrator in District B, answered the first interview question about the planning process used by the district by stating that, "A lot of the programs that have been offered are just more historical programs…they've been around for a long time." This response provides confirmation that a priority was given to the existence of the gifted program years ago, a priority or belief that Owens and Valesky (2011) stated is necessary to the human social system of education.

The gifted program in District B was already in existence before J. B. Long [pseudonym], the most senior administrator, began working there. Originally, the program was established as a pull out program that was difficult to sustain financially. She expressed that each time there is a change in administration, an explanation is given on how certain programs are to be sustained, due to the way they were originally designed. Additionally, J. B. Long said that she has created flow charts so that the administrators can see how each part fits together. Once the newer administrators understand the vision, the structure of the programs remains unchanged.

Theme 2: Student eligibility for participation in gifted programs supports the district vision. Additional evidence specific to the district gifted programs that supports the systems-thinking theme of team learning and shared vision is seen in the way that both case districts define giftedness and the eligibility of students. When considering identifying students as gifted, students need to be performing in the top 5% on assessments (IAGC, 2016). However, in communities that have a higher population of low-income students, research has shown that there are less students that meet this requirement (Ford, 2014b). When this occurs, districts may evaluate the eligibility requirements of their programs and make changes in order to meet the needs of its students. Owens and Valesky (2011) call this evaluation a homeostatic mechanism. This mechanism is where organizations examine program requirements and make possible adaptations based on the decision making process and the changes within the environment (Owens & Valesky, 2011).

In District A, V. A. Brown [pseudonym] was on the strategic planning committee and helped transform the enrichment program over the years. She explained that the district uses the term *enrichment* versus *gifted* to describe the program because, "The definition of gifted is so high up there that maybe if you're lucky you have a couple [students] in the whole district." Additionally, she stated that, "We call ourselves gifted because we're referring to the highest achievers in our district from whatever percentage of high achievers we want to take." This response is an example of how a systems thinking framework takes the reality of a situation and creates change (Zmuda et al., 2004).

P. A. Chair [pseudonym], supported V. A. Brown's statement by stating that the district's program is not truly gifted because they take students whose performance on the STAR assessment is at the 90th percentile and higher which is lower than the state's recommended 95th percentile. According to V. A. Brown, "In the next couple years, it's [enrichment program] going to be looked at and reevaluated." Organizations that use systems thinking are constantly reexamining and evaluating the structure and function of each facet of their organization to ensure that the system is effective (Owens & Valesky, 2011).

There are 122 students currently in the gifted program in District A, 61 boys and 61 girls. V.A. Brown stated that having an equal gender split has not happened in years. The ethnic demographics of the students in grades 2-8 that are in the gifted program are depicted in Table 8.

Table 8

Gifted Student Ethnicity Grades 2-8

School district	Hispanic %	African American %	White %	Indian/Island Pacific	Other %
District A	27.0	31.0	34.4	4.1	2.0

At one time, District A used achievement scores from assessments like ISAT and AIMS web to determine student placement in the enrichment program. When a new director took over, there was a shift from using those assessments to just using the STAR assessment data. P. A. Chair stated that the use of the STAR data is something that is research based and mathematically sound. Occasionally, if V. A. Brown is considering a student who is on the edge of being accepted into the program, she will consider the student's grades and teacher recommendation. She also elicits the help of the school psychologist when a student does not have the assessment scores but does have the intelligence. Additionally, V. A. Brown stated that, "over the past 12 years and including this year, we've been extremely lucky that there is a natural break in the scores that shows me where to draw the line".

District B is a large district with multiple program offerings. R. B. Hill explained that each of their K-3 buildings has either a science, computer, fine arts, math or dual language magnet in their building. The magnet programs are a separate offering from the gifted program. All students in Grade 2 are assessed to determine eligibility for the gifted program, which begins in Grade 3.

J. B. Long explained that there is a lengthy process that is used when screening students to determine their eligibility for placement in the district's gifted program. The

initial screening assessment used is the NNAT, also known as the Naglieri. This is a nonverbal abilities test to check for student reasoning. Table 9 shows the student ethnic demographics that performed in the top 75th percentile after the initial assessment.

Table 9

Student Ethnicity after the NNAT Assessment

School district	Hispanic %	African American %	White %	Multi-Racial %
District B	44.9	18.4	34.7	2.0

Additional assessments used are the CogAT and an IQ test. Parents and teachers fill out a questionnaire asking about the student's school ability, creativeness and personal behaviors. The responses from the questionnaire and the scores from the assessments are put into a four-point matrix system to determine eligibility for the gifted program. Similar to V. A. Brown in District A, J. B. Long stated that over the years, there has always been a natural break in the scores where the best performing students stand out above the rest.

Summary. The administrators from both case districts were asked identical questions from the interview protocols to help answer the first research question: How is systems thinking used to create a gifted program in a high ethnic-minority, low-income school district within the elementary grades? The themes that emerged from the data that answers the first research question come from the district's decision-making process and the eligibility requirements of students for participation. The administrator responses provide evidence that systems thinking is currently a driving force that guides these organizations. Specifically, the systems thinking components that were evident

throughout the interviews and archival data were a shared vision amongst the members of the district and a team learning mentality on how to best meet the needs of their exceptional students. Neither district isolates one area of the organization from the other but rather treats it as a whole functioning unit. To prove that the programs were created based on this principal way of systems thinking is difficult but based on the data, one could presume that it was used in the past. The findings for Research Question 2 focused on the implementation of gifted programs.

Research Question 2

Research Question 2 asked: How is systems thinking used to implement a gifted program in a high ethnic-minority, low-income school district within the elementary grades? In both districts, the students are given an assessment(s) to determine if they possess the qualifications to enter the respective programs. Once identified as gifted or in need of enrichment, the students are placed into the respective program. Only one theme emerged out of the data to support that the organizations are using a systems thinking approach. District leaders expressed that it is through commitment and collaboration for a common purpose that they are meeting the needs of their exceptional learners, therefore, truly exemplifying a systems thinking approach. Additionally, evidence exits in the NAGC (2010) standard 5.2.1 from the programming checklist, which calls for districts to collaboratively plan, develop, and implement services. Archival evidence from District A specifically states that the enrichment of gifted children be a priority as written in their strategic plan (Appendix F), and the gifted compact for students and parents (Appendix K) in District B is proof that the district has met the NAGC standard.

In the narrative below, the two components of personal mastery and mental models are expressed through the participant's responses. There is a belief system amongst the district members that enriching an exceptional student's education is important.

Theme 1: Organization members work together with commitment and collaboration for a common purpose of meeting the needs of its exceptional learners. In District A, the enrichment program services students in Grades 2 through 8. The students are pulled out of class for an hour of instruction from a gifted teacher two times per week. Second and third grade students and fourth and fifth grade students are combined for their sessions with the gifted teacher. The junior high grades of sixth, seventh and eighth are held as individual classes. To gain an understanding of how the district provides services to students, I asked if students can be identified in only reading or math, V. A. Brown said, "Well, in this program, it's a combination because they have to be across the board. The reason is because we don't have the manpower."

When discussing the curriculum used for the implementation of the enrichment program, V. A. Brown stated that she does not repeat anything that the students do in the classroom because "you can't very well take second and third grade curriculum and combine it." Her belief is that "if you run your gifted program right, you're going to present problems and opportunities for them [students] on a daily living basis." This belief along with her use of working in groups provides evidence of personal mastery because the thought process behind her program decisions is based on how the system itself works and her personal stake in the system. Whitehead, Scherer, and Smith (2015) considered this a form of metathinking, where learning takes place while thinking and our

actions are driven based on the outcome of our thinking. Equally, Senge (1990) called this act of taking what we want and applying those wants within our current reality a "creative tension". Therefore, being able to balance the creative tension is a demonstration of personal mastery (Senge, 1990).

District B has a more complex program structure. Students are placed into classrooms based on their test scores and at a capacity of 28 students. The district has a mixed-grade gifted program, a grade-level gifted program, and a regular general education program. The top 14 students from third and fourth grade are combined and taught at an accelerated pace and curriculum in the mixed-gifted program. The next group of 28 students is placed into the grade-level gifted classroom. The remaining students are placed into a regular, general education setting. In addition to the academically gifted classrooms, the district offers a magnet program for general education students who have an aptitude towards the fine arts, science, math, or technology.

When asked if measures were taken to increase the number of minority students in the gifted program, J. B. Long stated that "No. We do offer, to all students, a program called PETS, which is Primary Education Thinking Skills." This is a special program that goes into each second-grade classroom once a month to do more "out of the box" thinking things. For a period of 3 years, the district discontinued the PETS program and there was a decrease in student scores on the Naglieri assessment and the CogAT. Once the program was reinstated, the scores started to rise. J. B. Long attributes this to "the creative and critical thinking skills" that are encouraged. She stated that "it's not just

focused for minority students, it's for all students". This is evidence of the systems thinking component of mental models because there was recognition of the long-term affect this previous decision had on the organization (Senge, 1990).

Working together for a common goal is an example of an interdependent relationship, which is a part of a systems thinking approach (DuFour, 2009). To increase the relationship between the school and families, students in the gifted program and in the magnet program are given a contract (Appendix N) that is signed by the parents and students professing their commitment to the program. This document is an outline of expectations that the organization has for students and parents. It is a collaborative agreement that demonstrates personal mastery, mental models, and the participants' belief in the learning organization.

Summary. The one-on-one interviews asked the administrators a series of questions to answer the second research question: How is systems thinking used to implement a gifted program in a high ethnic-minority, low-income school district within the elementary grades? The theme that emerged from the data to support that a systems thinking framework is in use is commitment and collaboration. This commitment and collaboration are evident through the system thinking components of personal mastery and mental models. The administrations in both districts have created organizational structures that support the gifted students. In both districts, it is this commitment to ensuring that the exceptional performing students receive services that personal mastery is evident. Likewise, it is from the interviews that we see the mental models of the administrators emerge. In District A and District B, the administrators believe that the

gifted program is essential to the success of the students. The findings for Research Question 3 focused on the sustainability of gifted programs.

Research Question 3

The third research question asked: How is systems thinking used to sustain a gifted program in a high ethnic-minority, low-income school district within the elementary grades? Based on the data analysis, I determined that the structure and leadership of the district and the budgetary considerations support the gifted programs. Additionally, through the interviews and a review of the archival documents, it was noted that the districts met NAGC (2010) standard 5.4.1, which calls for appropriate and sufficient funding of gifted programs; and standard 5.6.1, which ensures that all policies are in place to sustain gifted programs. District A included a clause in their mission statement establishing that they use effective resources and demonstrate fiscal responsibility (Appendix E), and the strategic plan for District B lists a multi-tiered support system that ensures the appropriate resources are available (Appendix I). Both of these documents supported that the districts are upholding the standards of the NAGC (2010).

When the hierarchy within an organization finds value in their programs, sustaining the program becomes a priority. The organizational culture adds to the commitment of the district vision, a value that is indicative of a systems thinking style. A secondary support in sustaining educational programs comes in the form of funding. Each case district has a method of determining the structure and allocation of funds to support its programs. The sustainability of an organization is reliant on the vision and

culture and values supported by the organization. Senge (1990) wrote, "Vision paints the picture of what we want to create. Systems thinking reveals how we have created what we currently have" (p.214). Both districts have a vision that provides a framework for the need they perceive. Applying systems thinking shows how the vision has been translated into a working model.

Theme 1: Structure and leadership in place provide sustainability of programs based on the culture and values supported by the organization. District A offers an enrichment program above and beyond the regular school curriculum, and V. A. Brown has the autonomy to choose what projects to incorporate. Each year, V. A. Brown polls the students to see where their interests lie. The gifted students have participated in stock market competitions, applied the principles of knitting for a community project, and attended the Hands on Technology Conference (HOT) to present projects in robotics. These enrichment opportunities not only give students a chance to expand their knowledge, but they provide them with recognition outside of the school building.

During the 2016-2017 school year, V. A. Brown started a parent program to create more involvement. P. A. Chair said that this initiative is "to bring them [parents] in to understanding what the program is and to make it better." When asked how the district measures the success of the gifted program, P. A. Chair stated, "The amount of parent involvement is showing that this is a successful program." Creating this shared vision with stakeholders is systems thinking. Owens and Valesky (2011) concluded that the involvement from others adds to the culture of the organization and the culture is made up of the values and beliefs of the organization members.

Districts adopt mission and belief statements to communicate their pedagogy to students, faculty, and community stakeholders. Senge (1990) wrote that a "vision is not a solution to a problem" (p. 199) and if leaders are going to be effective there needs to be shared values (Haines, 2000). District A has a mission statement with supporting belief statements. Two of those beliefs are to "forge a strong partnership with parents and community stakeholders" and to ensure that "our resources are utilized in an effective and fiscally responsible manner." These statements as reflected in the archival documents are evidence that the district holds values that are focused on the commitment and success of the organization.

Every decision made in District B is based on the vision of the district. The vision is to "be recognized as being progressive, innovative and creative. We work together to build ONE community with strong partnerships. We are ONE district committed to increasing student achievement. We have ONE vision of producing globally productive citizens. We do this for the diverse needs of ALL children." Senge (1990) wrote that if there is no consistency between the values and the vision of the district, then there will be failure when initiating buy in from organization members. Consequently, without buy in from organization members, the systems thinking components of team learning and shared vision are absent.

District B does not have a separate gifted curriculum. There is an expectation of the teacher to "step it up" and differentiate if a student has mastered a skill by requiring that the student demonstrate their knowledge in other capacities, like projects. F. B. Short added that, "It almost is kind of an RtI framework in a way. So you have these

high performing kids, so what are you going to do with them? How is the district meeting their needs; and so, this is a way to meet their needs?" This is an example of the leadership placing value on the top performing students and meeting their diverse needs.

The program structure in District B looks toward the future of the students. The students in kindergarten through fifth grade focus on college and career readiness. Each grade has a human services, culture, or natural resources strand of standards that is emphasized. Once the students enter the junior high years, they begin to explore career pathways. When discussing the sustainability of the gifted program and how the district is assured of students' mastery of grade level material, F. B. Short responded by stating, "it's just kind of what the district does, we really look at students. We don't really look at student learning results or student learning on specific skills. We do pre-test and post-test and then look at the growth between." In looking for the growth, there is also an opportunity to look for any learning gaps.

Theme 2: Budgetary considerations are addressed through the allocated funds to support the gifted program. In District A, M. A. Price [Pseudonym] explained that 97% of the budgeted line item for the gifted education program covers the salary and benefits of the gifted resource teacher, and there is an annual budget of $800 for materials. Monies that are needed above that amount have to go before the board of education for approval. P. A. Chair supported this statement by saying, "that if there were something that needed to be done to the budget [for the gifted program], the district would find somewhere because, they're committed." An example of the Board's

commitment to the program needs was apparent when V. A. Brown initiated a robotics program and the school board agreed to fund the $12,000.00 project.

When the question was asked about supporting the gifted program in the future despite the Illinois budget crisis, M. A. Price said, “believe it or not, for us we’ve actually benefited from the state because of our poverty.” Illinois legislators weighted the budget for poverty districts more heavily than in years past; therefore, providing a one year fix. The future is uncertain financially, but M. A. Price did add that the district has never deficit spent and a balanced budget is presented to the school board.

In an evaluation of how monies were being spent in District B, F. B. Short and R. B. Hill analyzed the different instructional programs and realized that they needed a better way to function. R. B. Hill stated that “everything was kind of operating in silos; like, the gifted people will spend their money on the gifted without thinking of the district vision.” This was the same for the other departments; each was acting like its own entity. Using more of a systems thinking approach, they were able to change the way the district operated as a whole.

One way the district changed their approach to meet program needs was to look at the district from more of a global perspective. District B does not look at its programs in terms of program offerings but in terms of 28 student seats per classroom, which is their target number. R. B. Hill said, “As long as we fill the class to capacity, then there’s no additional cost for having teachers, because we would have had to have a teacher teach them somewhere else…our gifted classes are filled to capacity, so there’s really no additional expense for teachers.” This thought process is evidence that the organization

uses systems thinking to look at the entire system as one operating unit and disburse funds according to their needs.

Summary. Haines (2000) stated that the thing that differentiates one organization from another is the leadership. Leaders that have shared values and vision encourage systems thinking, as evidenced by the findings. Equally, the culture of an organization is important to determining what is important, what is believed and how to accomplish the goals set (Owens & Valesky, 2011), which is most closely related to the system thinking components of personal mastery and mental models. It is not the resources or monetary considerations that sustain a program, but the belief that gifted students and their needs matter. Administrators from both case districts were asked similar questions to answer Research Question 3: How is systems thinking used to sustain a gifted program in a high ethnic-minority, low-income district within the elementary grades? Through the interviews and review of the archival data, it was determined that the monetary considerations are just one facet of all that goes into sustaining educational programs. It is the value instilled by the organization through team learning and the shared vision of its members that contributes to the sustainability of the program.

Additional Data

The National Association for Gifted Children (NAGC) provides a list of standards regarding the education of gifted students. Standard 5: Programming contains the standards set forth by the NAGC specifically for gifted programs (Appendix O). Table 10 is a representation of the areas that were evident in each case district based on responses acquired during the interviews. Specifically, in both districts, standard 5.3.1

supported Research Question 1 in a quest to understand planning for special programs, and standard 5.2.1 supported Research Question 2 in order to understand planning for and implementing services for special and general programs, and standards 5.4.1 and 5.6.1 supported Research Question 3 through the sustainability of programs. As I read through the Vision and Mission statements (Appendix E, and H) and used the NAGC checklist (Appendix O) for each district, I found them to be helpful in supporting the conclusions that were drawn from the interview process. Specifically, it was the systems thinking components of team learning, shared vision, personal mastery and mental models that drove the focus of the district's decision making. The gifted education compact for parents and students (Appendix K), the gifted education identification rating forms for parents (Appendix L) and teachers (Appendix M) supported Research Question 2 and the implementation of programs in District B. In District A, the program is funded as a whole. While in District B, the administrators do not determine need based on programs but on student enrollment. I was unable to determine if Standard 5.1.1 and 5.7.1 were in use in each case district.

Table 10

Standard 5: Programming Evidence Based Practices

	District A	District B
5.1.1. Educators regularly use multiple alternative approaches to accelerate learning.		
5.1.2. Educators regularly use enrichment options to extend and deepen learning opportunities within and outside of the school setting.	x	x

(table continued)

	District A	District B
5.1.3. Educators regularly use multiple forms of grouping, including clusters, resource rooms, special classes, or special schools.	x	x
5.1.5. Educators regularly use current technologies, including online learning options and assistive technologies to enhance access to high-level programming.	x	x
5.1.6. Administrators demonstrate support for gifted programs through equitable allocation of resources and demonstrated willingness to ensure that learners with gifts and talents receive appropriate educational services.	x	x
5.3.1. Educators regularly engage families and community members for planning, programming, evaluating, and advocating.	x	x
5.4.1. Administrators track expenditures at the school level to verify appropriate and sufficient funding for gifted programming and services.	x	x
5.6.1. Educators create policies and procedures to guide and sustain all components of the program, including assessment, identification, acceleration practices, and grouping practices, that is built on an evidence-based foundation in gifted education.	x	x
5.7.1. Educators provide professional guidance and counseling for individual student strengths, interests, and values.		

Summary

The problem addressed in the local setting was the lack of a gifted program in a high minority low-income school district in Illinois. The guiding research questions were centered on the conceptual framework of how a systems thinking approach is used to create, implement and sustain gifted programs in high minority low-income school districts. A multi-site case study was the qualitative design method used for this investigation.

To collect the data, one-on-one interviews with administrators from two case districts were conducted to answer the research questions. Additional data were gathered

through archival documents. The data were analyzed and coded to develop themes. Triangulation of the data occurred through member checking and peer debriefing to ensure accuracy of the case and that the results were plausible.

The data analysis of the interviews and archival documents revealed that there is no one model to follow when creating, implementing, and sustaining gifted programs. The four components of systems thinking that were evident in the themes that emerged to answer the research questions were: (1) team learning, (2) shared vision, (3) personal mastery, and (4) mental models. Evidence of systems thinking is provided by the following themes: (a) district decision making supports the district plan, (b) student eligibility for participation in gifted programs supports the district vision, (c) organization members work together with commitment and collaboration for a common purpose of meeting the needs of its exceptional learners, (d) structure and leadership in place provide sustainability of programs based on the culture and values supported by the organization, and (e) budgetary considerations are addressed through the allocated funds to support the gifted program. These themes that developed from the data provided support of how an organization uses systems thinking to guide their decisions.

Section 3 is a discussion of the project derived from the data, a white paper of recommendations for district leaders to use when creating, implementing and sustaining education programs. The paper will set forth the ideas of examining the structure of the organization, the strategic planning, belief system of the organization, and the budgeting process. Section 4 includes the implications for social change, recommendations for

future research, and my reflections and conclusions as the researcher for this study. The project developed as a result of this study is located in Appendix A.

Section 3: The Project

Some researchers support the idea that gifted students be afforded an education to meet their learning abilities (Gardner, 1983; NAGC, 2013; Zubrzycki, 2014). The purpose of this study was to examine how leaders of school districts with similar demographics to the district lacking a gifted program create, implement, and sustain gifted programs. Offering enrichment opportunities to gifted populations is a priority for many school districts in the United States (Davidson Institute, 2017). However, there are no mandates in Illinois to identify students as gifted or provide services (Davidson Institute, 2017). In the upcoming sections, I will provide a description of the goals and rationale for selecting the white paper project. Additionally, a literature review is provided for the areas of the white paper genre, organizational structures, strategic planning, belief systems, and budgeting. The white paper project will present a summary of the findings and recommendations to administrators and school board members through an executive summary and PowerPoint presentation. The PowerPoint presentation will help present the key findings from the executive summary in a visually suitable manner to my audience.

Description and Goals

The white paper project presents published research in the areas of organizational structures, strategic planning, belief systems, and budgeting. The presentation of the white paper will be part of an effort to provide high minority low-income school districts with recommendations on how to create, implement, and sustain gifted programs. Specifically, the focus is not on a specific model to follow in implementing gifted

programs, but rather the values, collaboration of members, and systems approach needed to sustain such programs. The goal of the project is to use the findings from the data analysis to provide a solution in the form of recommendations to school districts without gifted programs, with the understanding that there is no one model to follow when providing students with educational opportunities that match their academic need.

Interviews were conducted with six administrators and one gifted education teacher from two case districts for the purpose of understanding how school districts create, implement, and sustain gifted programs. Additionally, archival data was collected and reviewed. The responses to the interview questions led to a determination that the districts value their top performing students and make their educational needs a priority. The procedures that the case districts have in place for the identification and education of gifted students were supported from the collected archival data. The presentation of the white paper will provide school districts with the opportunity to understand how the organizational structure of a district and the strategic planning process work within a systems thinking framework to meet the needs of students.

Rationale

Initially, white papers were used to provide technical support to people with a lack of background knowledge on a given subject. It is an appropriate genre to use in a professional setting because it allows for a tailored presentation of ideas to a certain audience for a specific purpose (Willerton, 2012). The white paper gives a concise overview of a problem, and then offers a solution to solve the problem based on recommendations that are grounded in research (Young Adult Library Services

Association [YALSA], 2007). I chose a white paper (see Appendix A) as the genre for this project based on the findings from Section 2. Following the interviews, archival data collection, and data analysis, the need for a white paper materialized because high minority low-income students are not being identified as gifted, nor are they receiving instruction to meet their needs. As a result, recommendations for a solution are proposed in the white paper.

In the white paper, I focused on providing information to district leaders about creating, implementing, and sustaining programs. The proposed solutions and recommendations came from the data analysis and revealed that it is through the vision of the organization and the organizational structure that programs are created. The implementation of programs is done through strategic planning and collaboration, and sustaining programs is done through belief systems and budgeting process.

Review of the Literature

This review of the literature is focused on the white paper genre and the contents for the white paper project. The information presented in the white paper is based on the findings from the interviews conducted in the study and archival data. The areas of focus for this review are: The white paper genre and why it is appropriate to present the recommendations regarding the problem, how the structure of an organization impacts decision making, collaboration amongst members, strategic planning, belief systems, and budgetary considerations. The literature review was developed using the following search engines: EBSCOHost, Dissertation database, ProQuest Central and Google Scholar. I specifically used the following search criteria: *White paper*, *organizational*

structures, *strategic planning in education*, *school budgets*, *belief systems*, and *mission and vision in education*. Every effort was made to include peer-reviewed journal articles published within the past 5 years.

White Paper

White papers were initially intended to mandate government policies (Willerton, 2012). The planning guide and strategy review are two types of typical white paper applications (King, 2006). Both applications deal with the implementation of something new or a change in an organization (Stelzner, 2007). Engeldinger (2016) listed four types of white papers that are commonly used. The first is the problem-solution white paper, where the purpose is to inform and educate an audience regarding a problem and offer solutions. The second white paper style is called the product comparison and it weighs the pros and cons of the solution. It is an objective option when trying to make an informed decision. The product description white paper is the third style presented, and is most often used when new products are launched. The last is the numbered list. Although this style of white paper is condensed, it still is objective and presents information that is data driven. White papers are a tool used to make it easier for organizations to make decisions (YALA, 2007).

Cole (2016) stated that poor planning is the cause for many white papers to fail in their objectives. To keep a white paper from failing, Habegger and Rumminger (as cited in Graham, 2017) said to focus on a target audience, teach about the problem, and then present the solution to the problem in a manner that matches the organization's agenda. I intend to present the lack of gifted programs as a problem in an Illinois school district.

Recommendations on how to make changes within the organization to create, implement, and sustain gifted programs are made through a white paper. Based on the findings from the study and in order to initiate a change, it is important to consider the organizational structure of the school district, use strategic planning, instill a belief system that focuses on collaboration, and use budgeting practices that are appropriate to the district mission and vision. To achieve this goal, a discussion of research related to each of these topics is presented, beginning with organizational structure.

Organizational structure. In business and public education, there is a combination of functional and divisional organizational structures (Douglass, 2012; Rappa, 2016). Functional structures are used when there are multiple departments in an organization, and there is a chain of command that must be followed. Nordmeyer (n.d.) wrote that this type of structure is time consuming and impedes decision-making. Divisional structures, while they may have departments, have more autonomy to make decisions (Rappa, 2016; Watterston & Caldwell, 2011), which often results in more efficient and effective planning.

Lunenburg (2012) and Watterston and Caldwell (2011) asserted that organizations should use some form of decentralization to distribute responsibility and ownership within the organization. To decentralize is to give some authority back to members in the organization. Three types of decentralization are: (a) vertical decentralization-which is a shared distribution of authority; (b) horizontal decentralization is the inclusion of non-administrative personnel; and, (c) selective decentralization which only relinquishes power to certain members (Lunenburg, 2012). Regardless of the type of decentralization

chosen, members outside of the chain-of-command in an organization have some authority in the decision-making process. This decentralization ties directly to a systems thinking approach. It is the constant collaboration between members that a shared vision and team learning produces a foundation of the overall structure, as evidenced by the findings from the study.

Public education tends to use a form of professional bureaucracy (Lunenburg, 2012) as a part of its structure, where teachers are mandated to follow curriculum and standards set forth by the district, but in most cases, still have the autonomy to deliver the material in a manner they see fit. District A demonstrated this autonomy in its gifted program design by allowing the gifted resource teacher and students to choose the focus areas of study. District B did this, as well, with the way it funds the gifted program. Additionally, as part of this bureaucracy, it is important that the learning community includes shared responsibility and vision between and among the stakeholders (King & Bouchard, 2011). Stakeholders in Districts A and B reported understanding the vision and sharing the responsibility to create a learning community that supports its gifted population. Douglas (2012) and King and Bouchard (2011) recommended a hybrid of divisional and functional organization styles as well as some form of bureaucracy for organizations to use when changing their structure. The instructional component of a district is just as important as the administrative component and without a concise program alignment, there would be limited success (King and Bouchard, 2011; Shaked & Schechter, 2016).

Organizational change is a process that is difficult to implement without a clear purpose (Douglas, 2012). It requires collaboration, communication, and alignment with district goals and stakeholders to elicit an organizational transformation (Abudi, 2016; Childress et al., 2006). Collaboration is defined as all teachers, students and parents working closely together to improve student learning (Heck & Hallinger, 2010). Inger (1993) stated that when teachers collaborate there is no longer the thought process that what one teacher is doing in his or her classroom is an isolated event. A new organizational pattern emerges and teachers become better prepared (Inger, 1993). It is as these relationships evolve, greater teaching and respect can emerge (Inger, 1993; Iordanidis, Tsakiridou, & Sagiadinou, 2014).

Aitken (2009) proposed a collaborative model to improve learning where leadership is a shared effort that is distributed amongst all stakeholders. To work collaboratively requires strong leadership skills. Ethical values, social skills and strategic planning are the necessary foundational platforms that build strong relationships. Equally, DeBruyn et al. (2012) stated that the ability to problem solve towards positive solutions, reflect on all things that impact learning, develop a common language to avoid confusion, to instill trust and always challenge the assumptions of peers are just five additional elements needed to create an effective collaborative team. Leaders who focus on collaboration need to consider the cause and effect of their meetings. Reeves (2009) stated that every meeting have measurable actions that are clearly defined. The leaders in District B, when making decisions for their organization, question their environment by

asking what it "should look like, sound like, and act like." Likewise, leaders in District A ask the question, "Can we live with this decision?"

Without program alignment and concrete planning, reform efforts will continue to be a superficial attempt at closing the achievement gap (King & Bouchard, 2011). The organizational structure of a school district can have just as equal an impact on student achievement as the teachers in the classroom (Childress et al., 2006; King & Bouchard, 2011; Watterston & Caldwell, 2011). However, often times, districts have a plan on paper with poor implementation (Childress et al., 2006). Creating and implementing a strategic plan may be the solution.

Strategic planning. Strategic planning is a process that explores the motivation, objectives and outcomes of an entire organization, not just a desired program (Lins, n.d; Marx, 2006; Wagner, 2008). Having a strategic plan ensures that all stakeholders are aware of the mission and direction of the organization (Mittenthal, 2002). Typically, a strategic plan is written at regular intervals and followed with little interruption. Some researchers posit that a strategic plan and the continuation of programs should remain living documents that are continuously updated to meet the needs of the changing environment (James, 2012; Lins, n.d.; Wu, 2013). District A and B from the study have a strategic plan in place. District A operates on 3-year plan, and District B has a plan that was created in 2015 and is still in effect. Marx (2006) expressed a need to be flexible and open to the idea of trying to improve and perfect the craft of teaching and learning through strategic planning.

With so many types of strategic planning models available, there is no right or wrong method to choose. However, before trying to implement a model of this type it is important to think objectively about the data gathered, broadly about the bigger picture and how to achieve the desired result (James, 2012; Lins, n.d.). Organizations that are dealing with specific issues and have little resources to pull from tend to choose the issues-based model (Veyrat, 2015). When an organization needs to make sure that the resources are in line with the mission statement, it might choose to initiate the alignment model (Veyrat, 2015). Regardless of the model chosen, there is a need to prioritize the wants into attainable goals (James, 2012).

Strategic planning models evolve from an attempt to understand why certain activities should be conducted; and once the plan is implemented, the questions of who, where, when and how these activities are conducted is addressed (Lins, n.d.). One major component that researchers agree upon being incorporated into strategic planning is stakeholder involvement (James, 2012; Lins, n.d.; Mintzberg, 1994; Wagner, 2008). McKenzie (2005) wrote that is it important to periodically do an internal and external scan of the strategic plan to assess the strengths and weaknesses. Leaders should complete an analysis of strengths, weaknesses, opportunities and threats (SWOT) that face the organization (Frue, 2017). In doing this exercise, opportunities exist to look at what is going well and what needs to be changed, as well as areas that are within the organization's control to change. All members should be utilized during strategic planning to provide input into the bigger picture while building teamwork (James, 2012). Mintzberg (1994) believed that unless new categories are created during strategic

planning instead of rearranged, it is difficult to implement real change within an organization. Creating change starts with the belief system of its members.

Belief systems. There is a difference between management and leadership. Managers maintain an existing system and leaders lead by example and validate the vision and mission of an organization (Stein, 2016). School leaders that have a transformational leadership style share a common belief system of doing what is best for their schools (Leithwood, 2007) and an organizational timeline regarding when those beliefs and goals can be achieved (Allen, Grigsby, & Peters, 2015). Beliefs are driven from our assumptions, and are framed by the interpretations and interactions experienced (Founder et al., 2016). Leithwood and McCullough (2016) depicted nine characteristics of leadership that make school districts successful. One of the first traits listed is to share the mission, vision and goals of the organization. Equally, in a study conducted by Murphy and Torre (2015), effective schools and effective leaders focus on the vision, mission and goals when trying to implement school improvement. The findings from the data analysis in this study showed that the belief system in each case district was the foundational platform for the organization.

A mission statement is a term that is often used as a synonym for vision but each has its own meaning. Letizia (2017) wrote that the mission is the reason for the organizations' existence; the vision is the questioning of to whom and for what purpose. It is imperative that the mission and vision be clearly articulated by the school leaders to avoid any misinterpretation from organization members (Gurley, Peters, Collins, & Fifolt, 2015). The values of an organization are supported by its initiatives (Calder,

2014), and it is the initiatives that are put into place based on the goals (Murphy & Torre, 2015). Creating and fostering a school's mission, vision and goals is a task that requires collaboration and team-member buy in (McKenzie, 2005).

Goal statements explicitly state what is expected and to what degree (Gurley, Peters, Collins, & Fifolt, 2015). With the development of many school improvement initiatives, many districts are following the SMART format to outline goals that are: Strategic, Measurable, Attainable, Results-oriented, and Time-bound (O'Neill, 2000). According to Jan O'Neill (2000), smart goals are a means to assess if programs and practices are effective. Goals should be realistic, yet challenging; and as each goal is met, new attainable goals should be set. Much like setting a goal, working within a budget requires consideration of receivables and expenditures.

Budgeting. Regardless of the organizational structure or strategic planning model that a company uses, all companies need to make sure they have the necessary resources to implement or sustain any changes (James, 2012). In one prioritization exercise, staff members were asked to make three piles, a 50% pile, a 75% pile and a never pile. Then, each member of the team was asked to write down which programs they could do without if they were to lose 50% and 75% of their funding. The never pile was the one that held the programs that the company would never stop doing. This exercise made it easier for stakeholders to focus their priorities and match desired outcomes with the financial resources (James, 2012).

Every year, school districts adopt a budget for the fiscal year. This budget may sometimes be divided into several areas to represent multiple funds. More often than not,

these funds have mandates on how the money must be spent (Banning-Lover, 2016; Weston, 1989). When reviewing budget records, it is important to understand the way the budget is organized (Banning-Lover, 2016). Without this organizational knowledge, assumptions could be made based off of misinterpreted information, and monies that are earmarked for specific programs could become misused. Monies that have specifications on how they are to be spent are called devolved funds (Banning-Lover, 2016). Because there is no one way for a district to keep records of their accounts, it can be difficult to fully understand what is being purchased with the monies or how programs are funded (Weston, 1989).

In Zero-Based Budgeting (ZBB), an analysis of program needs drives the line item funds allocation. Essentially, all monies that make up the budget need to match the monies going out down to a balance of zero. This method potentially can provide the process necessary to budget for a sustainable gifted program despite monetary concerns in the identified district. One myth that is associated with using a zero-based approach is the need to start from zero, when in actuality it is a systematic process that creates cost management opportunities (Callaghan, Hawke & Mignerey, 2014).

Similarly, incremental budgeting is a process that looks at previous spending practices in addition to future expectations. Using a process like incremental budgeting removes the stigma that one program has more value than another (Ibrahim & Proctor, 1992) because there are four steps that consider all of the data before adjusting the budget. It appears to be a logical choice for school districts when trying to allocate funds for the retention or addition of school programs (Ogden, 1978) since using only ZBB

would be challenging due to the volatility of unfunded and underfunded government mandates (Brooks-Young, 2007).

Using the previous budget as a base model to compare needs and wants is a common method for budget analysis (Ibrahim & Proctor, 1992; Lioukas & Chambers, 1981). However, there have been cases where districts have had to bring their budget balance to zero (Perkins-Weston, 1989). Combining ZBB and incremental budgeting practices along with the systems thinking and organizational structure of a school district inclusive of the strategic planning process creates the conceptual framework that supports the proposed study by using a structured planning process when looking at program needs and funds allocation.

Summary of the Review

This literature review addressed the white paper genre and the content of the white paper, specifically, organization structures, strategic planning, budget practices, and belief systems. I created a white paper to present solutions and recommendations to the problem. A white paper allowed for information to be presented for a specific need (Engeldinger, 2016). The literature review formed the foundation for the white paper. It summarized the findings from the project study and provided a foundation to present information to all stakeholders and other individuals with an interest in gifted education.

Organizational structure was addressed in the literature review as a way to provide insight into the ways that leadership can be distributed and aligned with program goals amongst its members (King & Bouchard, 2011). Strategic planning was addressed to present a way for organizations to include all stakeholders in the decision making

process (Senge, 1990). By incorporating belief systems, a clear picture of the mission, vision, and goals of an organization are expressed. Finally, the budgeting practices of organizations are included to add to the understanding of possible ways gifted programs can be sustained. In the upcoming section, I address the project implementation process along with any resources needed and potential barriers.

Project Description

District leaders from the school district without a gifted program are aware of my research and my intent to share my findings. Once my dissertation is approved, I will request a meeting with the Superintendent and Assistant Superintendents to submit my white paper. A PowerPoint presentation will also be used to present the findings in order to facilitate a discussion and understanding. The goal of the white paper and the PowerPoint presentation is to provide recommendations on how the district could make organizational changes to create, implement, and sustain gifted program initiatives. After the presentation to the administrators, I am hopeful that they would provide feedback that would allow me to tailor my presentation to the school board.

Potential Resources and Existing Supports

In order to write the white paper, I used the Walden Library and Google as resources to understand the components and purpose of white papers. Resources that would need to be utilized during the presentation would be a laptop computer, projector and copies of the white paper document to be distributed to all administrators and school board members. Existing supports could come from teachers and administrators who believe that gifted students deserve to be identified and serviced. This support could

come in the form of dissemination of documents and moral support at the presentation to the school board.

Potential Barriers

Potential barriers that I can foresee are the refusal from administrators and or the school board to meet with me to review my findings. However, if I am able to present to my audience, there is a possibility that the recommendations in the white paper are disregarded. Another potential barrier would lie in the justification of need. If the district were to agree to screen students for gifted education, the data might show that there are not a significant number of students that qualify as gifted to warrant having a gifted program. Equally, even if there are enough students that are identified as gifted, the district may not want to invest the time and/or money into creating and implementing a gifted program.

Proposal for Implementation and Timetable

Once the dissertation has been approved by Walden University, I will request an appointment to deliver the white paper to the Superintendent and Assistant Superintendents and present my findings. At this meeting, I will use a PowerPoint presentation to make recommendations to the school district administrators on how to create, implement and sustain a gifted program. If the administrators approve of the recommendations, I will then ask to be added to the agenda for the next school board meeting. The PowerPoint presentation to the school board will be customized for my audience in order to be respectful of the school board's time. I will rely on the feedback

from the Superintendent to ensure that I am only including the components he feels are important to present.

Roles and Responsibilities of Student and Others

I will be responsible for copying the white paper and distributing it to the intended recipients. I will ask the district secretary to add my presentation to the school board agenda, but I will need to rely on he Superintendent's willingness to comply. In order to present the study, I will need the support of the technology department to ensure that the projector and presentation materials are in working order. I will be the presenter, and it will be my responsibility to answer all questions that may arise from the research findings or my recommendations. If the district agrees with my findings and allows my research to be shared, I may be asked to help facilitate the implementation of the recommendations.

Project Evaluation

The white paper project for this study consists of recommendations for creating, implementing, and sustaining gifted programs based on the findings from the current study. The goal of the white paper project is to present administrators with recommendations based on the findings from the data. Those recommendations include examining: (a) organizational change, (b) strategic planning, (c), belief systems that revolve around the mission and vision of an organization, and (d) the budgeting process. I plan on using a formative evaluation process in the form of a Likert scale and questionnaire (Appendix P) to gather feedback from the Superintendent and Assistant Superintendents. The evaluation will provide me with constructive feedback about the

project and the areas that need improvement or clarification (Stull, Varnum, Ducette, Schiller & Bernacki, 2011).

Implications Including Social Change

Local Community

This project addressed the needs of the community due to the lack of gifted programs available to students in the district. High achieving students are not given the option to receive enrichment opportunities as part of their daily curriculum. Having students recognized for their scholarly achievements may invoke social change by creating a positive stigma for the district and the community. Teaching to a students' ability increases the critical thinking skills to be more productive citizens. Additionally, by offering these types of learning opportunities, a pathway that leads to further education is opened. Gifted children that are not stimulated may become stagnant; therefore, creating a loss for the community (Subotnik, Olszewski-Kubilius, & Worrell, (2011).

Far-Reaching

This study has the potential to impact schools across the United States and globally because there is little research in the area of creating, implementing, and sustaining gifted programs specifically. The findings from these data revealed that there is no singular model to follow when implementing programs, which means that districts are able to tailor their programs to meet their needs. The recommendations in the white paper are ones that could expand intervention programs, as well, by getting districts to focus on the individual needs of the high performing students in addition to the low

performing students and thereby creating social change. The white paper also includes information for creating a change within an organization to focus on the vision and the collaboration of its members to strategically plan for the future.

Conclusion

In this section, I discussed the white paper project that includes suggestions for districts on how to create, implement, and sustain gifted programs. The rationale for my research, a review of the literature, implementation procedures, the evaluation of the project, and implications for social change were addressed. The literature review in section 3 was the result of the findings from the data analysis and provides a framework for the white paper. Recommendations in the white paper include: (a) organizational structure, (b) strategic planning, (c) belief systems, and (d) budgeting practices that meet the district's need. Section 4 includes my reflections regarding the white paper and myself as a scholar. Additionally, I will include the strengths and limitations of the white paper and recommendations for future research.

Section 4: Reflections and Conclusions

The problem addressed in this study was the lack of an official gifted program in a high ethnic-minority, low-income school district in Illinois. Programs were not available to enrich the academics of high-achieving students. The purpose of this study was to examine how leaders of school districts with similar demographics to the district lacking a gifted program create, implement, and sustain gifted programs. I used the findings from the study to create a white paper of recommendations (see Appendix A) for administrators and school board members in an effort to address the local problem.

Systems thinking was the conceptual framework that guided this study. Four components of systems thinking were evident in the themes, specifically: (a) team learning, (b) shared vision, (c) personal mastery, and (d) mental models. The findings from the study revealed that it was through the commitment and collaboration of district employees that a shared vision was achieved. Collaboration between and amongst educators in the case school districts was at the root of all findings.

In this final section of the project study, I include the strengths and limitations of the white paper project. The goal of the white paper project was to provide district leaders with recommendations on how to create, implement, and sustain gifted programs in elementary school districts. I discuss my reflections about myself as a scholar, researcher, and project developer. The upcoming sections also provide information on the potential impact for social change, as well as the implications, applications, and directions for future research.

Project Strengths and Limitations

This project examined the gifted program structure in two case districts. Out of the interviews and archival data, themes emerged that led to the white paper project. The project provides recommendations regarding the implementation of gifted programs in districts with similar demographics to the case districts. A strength of the white paper is that it presents the recommendations as deriving from the findings of the current study. The reader can see that the recommendations are clearly connected to the findings and the conceptual framework of systems thinking. For example, collaboration, an essential component of systems thinking, is rooted in all the findings as well as the recommendations. A second strength is that the white paper is written in a manner that is suitable to the audience of administrators and board members. Not only are the findings effectively connected to the recommendations, but a model that can be followed by districts is also presented.

Another strength of the project is that it adds to the body of research about gifted programs. There was very little research available that specifically targeted the creation, implementation, and sustainability of gifted programs. Through the study, I found that the two case districts had organizational structures that promoted gifted programs. Members of the organization were included in the decision making process and the districts were committed to sustaining current practices. In the white paper, I recommend for leaders to examine their organizational structures to create a common vision.

The school district identified in the local problem may be able to use the recommendations to improve program offerings. The white paper was written, however,

based on the interviews and archival data collected and analyzed from only two school districts, therefore creating a limitation of the study. Additionally, all school districts may not agree that having a gifted program is important, thus minimizing the applicability of the study in every setting. One way to remediate the limitations would be to broaden the study to include more cases, allowing for a study of the organizational structure of more school districts.

Recommendations for Alternative Approaches

The problem addressed in the study was the lack of a gifted program in an Illinois school district. The problem could have been approached differently by changing the study design from a qualitative case study to a mixed methods approach. Although the interviews provided some rich narrative from districts with gifted programs, adding a quantitative measure in the form of an anonymous survey would provide valuable numerical data. Surveys could be administered to parents, students, and teachers to gain insight into their perceptions about gifted program offerings. A study using this methodology would not address the research questions in this study, but could provide valuable data regarding stakeholder needs.

An additional approach for the project study could be a goal-based evaluation plan. Specifically, research would need to be done in the case districts to determine the effectiveness of the gifted program implementation. Since each case district has a different way of implementing its gifted program, student assessment data could be compared to validate gifted practices. However, the outcome of an evaluation plan

would not address the broad understanding needed to use a systems thinking approach when creating, implementing, and sustaining programs.

Scholarship, Project Development, and Leadership and Change

During this research process, I found that I had a lot to learn. Although I had completed all the coursework and did quite well, I found that at times I struggled to apply what I learned to my own project study. In my classes, scenarios were often provided, but developing everything from the initial stage still came as a challenge. I discovered a lot about my own writing style as well. I tend to write informally and had to be reminded to use scholarly language. There were struggles with appropriate phrasing and transitions that matched the level of expectation.

Conducting this study has taught me about sources and finding information that is creditable. Finding research related to both minority students and gifted programs was a challenge. At first, I did numerous key word searches through various databases, which ultimately would send me in the wrong direction. It was not until I began reviewing the reference lists of some of the more viable works, that I started narrowing down key researchers and ideas. I had to review many articles and studies to validate my work.

Meeting with the participants to collect data was a comfortable process. I was easily able to establish a rapport with each participant through small talk. Additionally, I found that we had a lot in common from working in similar districts. However, the data analysis was more challenging than I anticipated. First, I underestimated the amount of time it would take to transcribe the interviews. Once all the interviews were transcribed, I began to highlight areas of text that were common amongst the participant responses.

This process began my categorizing of information into themes that addressed each research question. Additionally, I analyzed the collected archival documents in an effort to support the findings.

Once all the data had been analyzed, I began to write the findings, and develop the categories for the second literature review. Aligning the findings and the project study for this second literature review was easier because of the methods I learned during the first review on how to narrow my focus. At the same time, organizing my literature review allowed me the opportunity to develop the recommendations for the white paper project.

Project Development and Evaluation

Before beginning this doctoral study, I had some background in providing professional development opportunities for teachers in the area of reading and fluency, but nothing of this magnitude. I learned that developing a project is not an easy task and requires critical thinking skills. It is a time commitment unlike anything I have done. I found myself reviewing many articles in order to create the white paper, ensuring that what I was trying to say was accurate and understandable.

In thinking about the organization of the white paper, I searched the Internet and reviewed several examples. I realized that there were many formats to choose from, and the one to use would be dependent upon my audience. I decided to use a format that included graphics and charts to make it more concise and appealing for the administrators and board members. I chose to focus on the problem, the findings, and the

recommendations for creating collaborative environments in order to implement and sustain gifted programs.

Learning how to gather and organize the content for the white paper was not easy, as I did not want to provide information that was insulting to my audience, nor too shallow that a clear picture was not presented. I practiced presenting the white paper to a colleague who provided feedback when necessary. To evaluate the effectiveness of the white paper, I will use a formative evaluation (see Appendix P) to gain feedback from district leaders. The feedback will assist me with any changes to my recommendations, and may determine if a gifted program is something to consider creating. Creating this project and evaluation has given me a deeper understanding of project development that I can apply to my current role as a reading specialist when providing professional development opportunities in the future.

Leadership and Change

I have been in the teaching profession for the past 17 years and have learned a lot about leadership and change. Most important is my role as a leader. For 10 years, I was on the leadership team for my school building, and recently served on the district leadership team. I led various PLC meetings, participated in professional development opportunities, and served as the union president for a two-year period. Being a leader is not new territory, but each year brings new challenges. In my role as a reading specialist, I collaborated with teachers in all subject areas and grade levels, and helped change staff members' ways of thinking about teaching and learning.

I have always been a proponent of change, especially if it is for the betterment of the education of students. I have learned that while I embrace change, it is a difficult concept for many. I believe that my leadership style is transformational and situational. Having a hybrid of styles allows me the opportunity to develop my skills by encouraging others. Leaders share the mission and vision of the organization and mentor staff to create change.

Analysis of Self as Scholar

During my efforts to achieve this doctoral degree, I questioned my purpose and intent. At times, I overestimated my abilities and myself but always persevered. I read numerous articles and books in an effort to further my thinking and understanding. Undertaking this study taught me about time management, and every task that I completed prepared me to think critically about education. I am able to think about the changes that I would like to see, and now have the ability to identify a problem and work towards a solution.

I found that my focus on gifted education comes from a desire to see change within my current setting. Through my research, I discovered that gifted education is a priority in many states and districts, and there is no one-way to implement a program. I learned that being a scholar requires perseverance and the ability to work through a problem toward a solution.

Writing the white paper for this project taught me a lot about my thought process and myself. I became acutely aware of my strengths and limitations. My initial direction was clear and focused on creating recommendations based on the analysis of practices by

school districts that already had what I determined to be a successful plan in place. Conducting this study opened my eyes to areas of the education profession that I would like to change. I believe that this doctoral process equipped me with the knowledge to confidently share my beliefs about gifted education programs. Even though this is a small study, it adds to the body of minority, gifted education research.

Analysis of Self as Practitioner

As a practitioner, I have always set high expectations for my students and myself. For the first seven years of my teaching career, I taught Jr. High reading. I focused on project-based learning to instill the values of working through situations to develop an end result. I wanted my students to learn to be self-motivated and engaged in their learning process. I found this to be satisfying but did not understand why all teachers were not doing the same thing during their reading instruction. This led to a pursuit of a Masters degree in reading.

I became a Reading Specialist in 2007, and spent the first few years of that role working as a literacy coach to model lessons for teachers. It is during that period that I realized I am a perpetual student, always trying to learn and apply new knowledge that I can share with my colleagues. It is with that knowledge that I decided to pursue this doctoral degree. Through my studies at Walden, I added to my knowledge of how to be an effective leader, as well as to the ways to think critically about making decisions. Going forward, I intend to use the skills that I learned through my studies at Walden to be a proponent of change.

Analysis of Self as Project Developer

I have written countless papers for my classes over the course of my educational career and none have been as intimidating as the white paper for this project study. I overestimated my ability to complete this task, as well as underestimated the time it would take. I wrote many drafts of my prospectus, my proposal and now the final study, including the white paper. Initially, I found myself procrastinating with the white paper because it was intimidating. Since I am new to project development, I questioned whether or not I was enough of an expert to make recommendations that would seem credible.

Creating this project allowed me the opportunity to provide recommendations that are grounded in research. I read several white papers looking to understand the format and content needed to make a worthy contribution to the area of gifted education. I applied my knowledge of my professional setting and what would be needed to potentially implement a program for gifted students.

Reflection on the Importance of the Work

This study revealed that the beliefs of an organization are the driving force behind achieving set goals. The shared vision and mission of all members comes from a willingness to collaborate. From the beginning, I felt this study was a vital addition to the area of gifted education. As I progressed through the data collection and analysis, my thoughts were validated because there is a group of children that could benefit from program initiatives that address their needs.

Through this process, I found that there could be no assumptions. The research has to be grounded in the data and findings. When I was trying to complete the first literature review, someone asked me if it was possible that the district identified in the problem didn't see the need to prioritize gifted education. At the time, my answer was an emphatic no, that it was due to lack of funding that a gifted program did not exist. However, after completing the study, I would say that it is not a matter of funding, but the shared belief system of its members. By sharing the findings from this study with district leaders, my hope is that a strategic planning process is used to collaborate and develop a district mission and goals that includes the identification and education of gifted students.

Implications, Applications, and Directions for Future Research

When I first began my studies with Walden University, I realized very quickly that I would need to understand social change and what it meant to have an impact on social change. I feel that this project's potential impact for social change will be significant to districts with high minority populations who are not meeting the needs of advanced learners. The findings in this study indicate that a clear mission and vision of an organization, along with a belief system built upon collaboration is key to program offerings. Implementing gifted programs in high-minority, low-income school districts is social change, and it is a change that has the potential to impact future generations of gifted minorities.

By implementing gifted programs, social change is possible because it would support teachers meeting the needs of all students. In a traditional classroom, students of all ability levels are in the same setting, often making it difficult for teachers to meet the

needs of advanced learners to the same degree as struggling learners. With a program designed just for gifted students, the achievement scores for those students may increase, therefore increasing secondary and post-secondary opportunities for those students.

This study adds to the body of research on gifted education. The district central to this study, as well as other districts with high-minority, low-income students, could use the findings from this study to make changes to the way it develops and implements programs. The project study addressed the local problem and addressed possible solutions. The recommendations in the white paper were to use strategic planning to create a vision and mission for the organization.

More research needs to be done in the area of implementing gifted education programs. Being able to provide a model for other districts to follow would be beneficial as there are limited resources and research available to elementary districts. In high school, students that perform above expectation are typically offered honors or advanced placement options. This study focused on elementary programs specifically, but researchers could extend the study to examine the level of giftedness of minority groups in an elementary setting in order to increase those enrolled in advanced courses in high school. By extending this study to include gifted student performance data, a greater impact may be made on other districts with similar demographics to enhance their program offerings.

Conclusion

This section focused on my reflections of creating the white paper project, my view of myself as a scholar, practitioner and project developer, as well as the impact the

study will have on social change. Appendix A contains the white paper that was completed as a result of this study. The white paper is based on research-based practices that are used in organizations. Since the beginning of this project study, my goal has been to understand how to offer minority students in low-income school districts gifted opportunities. The recommendations in the white paper could assist the local district and other school districts with creating and implementing such programs.

During my doctoral journey, I became a scholar. I have learned to think critically about a problem and work toward a solution. My understanding and views about the research and writing process are more developed. I want to be a proponent of social change for areas that are lacking empirical data. In thinking about this study and future studies, additional recommendations for future research should include analyzing minority student performance data.

Senge's (1990) five disciplines of systems thinking was the conceptual framework that guided this study. Organizations that understand how each area of the organization affects another area use the systems thinking components of: (a) personal mastery, (b) shared vision, (c) team learning, and (d) mental models (Senge, 1999). Conversations that develop with the vision and mission of the organization in mind can create change. Also, it is through the collaborative conversations used in strategic planning sessions that the direction of an organization is developed.

There is no model to follow when creating, implementing and sustaining gifted programs. The case districts from this study each approached the education of its gifted children differently, but with the same end in mind. It was through the interviews that the

same beliefs, commitment, and vision were shared. The white paper project and its recommendations derived from this small study offer a possible foundation for districts to use when beginning discussions for program initiatives.

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Appendix A: The White Paper

Implementing and Sustaining Gifted Programs in High Minority Low-income Schools

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Introduction

Exceptional students exist on two sides of a continuum. These can be low achieving students that often end up in the Response to Intervention (RtI) process or high achieving students that require enrichment opportunities in order to reach their potential (Heward, 2006). Both of these groups of students are considered exceptional because of their exceptional needs, and meeting the needs of these students is important to consider when creating programs. This white paper shows the elements that need to be in place to create, implement, and sustain gifted programs within elementary school districts.

Background

The elderly, underprivileged children, and the populations of ethnic minorities are most affected when governmental funding cuts occur (International Budget Partnership, 2016) often times forcing schools to condense their curriculums to meet the financial demands. The problem addressed in this study was the lack of a gifted program in one high-minority, low-income elementary school district in Illinois. In the local district with no gifted program, there is a traditional hierarchy of superintendent and assistant superintendents, business manager and building principals.

The local district is operating on a $3 million deficit, which has impeded program offerings and spending. In order to possibly fund a gifted program, the district would have to put in a request for proposal (RFP) to the state board of education, which is only available if there is money. RFPs are time consuming and in a district with a basic organizational structure, there is a lack personnel to complete such a request as well as a lack of understanding on the process of creating, implementing and sustaining a gifted

program. The IAGC standard for giftedness is for students who perform in the top 5% on local assessments in reading and math. Currently, the district has less than 1% of the population meeting this criterion.

Across the United States, there is a discrepancy in the identification and services provided to gifted students. States like Texas and Georgia designate millions to their gifted programs, while Illinois allocates no funds for gifted education specifically, and there are no mandates for the identification and/or services of gifted students (NAGC, 2013a). Discrepancies like these have led to leaders in states like California, Kentucky, and South Carolina initiating projects to improve the education of low-income, minority gifted students (Ford, 1996, Luvisi, 1994, Swanson, 1995).

The following three research questions were used to guide this study to gain an understanding of how district leaders use a systems thinking approach to create, implement, and sustain gifted programs in school districts of high ethnic-minority and low-income students. Those questions were:

1. How is systems thinking used to create a gifted program in a high ethnic-minority, low-income school district within the elementary grades?
2. How is systems thinking used to implement a gifted program in a high ethnic-minority, low-income school district within the elementary grades?
3. How is systems thinking used to sustain a gifted program in a high ethnic-minority, low-income school district within the elementary grades?

What Does Research Say?

Systems thinking is one of the five disciplines of learning organizations and it is the conceptual framework that guided this study (Senge, 1990). It is a method that is used to explain the interactions between different parts of a system. Schools are considered open systems (Betts, 1992) and are believed to be competent only when staff recognize that they are a part of a collective whole (Zmuda et al., 2004). Once a school team begins to recognize the deficits of their learning organization, changes can be made to improve the educational environment for students. Change will not occur immediately but with patience for the time required, tolerance for others' viewpoints, and the right resources, schools can become competent systems (Zmuda et al., 2004). Senge et al. (2000) recommended that school teams have continual conversations on how to improve the organization by suspending their own assumptions and embracing other viewpoints.

Ford (1996) wrote that school leaders need to be proactive in the ways they address the education of gifted, ethnically minority students. Leavitt (2007) stated that school district leaders need to accurately identify and provide appropriate opportunities for gifted students, train teachers on effective instructional strategies, increase parental support for GT programs, and design curriculum to meet student needs. One of the most pressing, yet least documented, problems associated with gifted education is the study of how school district leaders implement gifted programs and the success rate, in terms of student achievement, of the programs (VanTassel-Baska, 2013). The purpose of this study was to examine how leaders of school districts with similar demographics to the district lacking a gifted program create, implement, and sustain gifted programs.

Interviews were conducted in two case districts with administrators and a gifted education teacher.

Research Design

A collective instrumental multisite case study was conducted to answer the three research questions. This method was chosen because information needed to be gathered from participants that had the knowledge base to answer the interview questions. In total, I interviewed six administrators and 1 resource teacher. I used an interview protocol that was distributed to the participants ahead of time. Each interview was recorded to ensure accuracy, and then it was transcribed. Additionally, district financial documents and strategic plans were collected from the Internet. All data were analyzed separately and then together for a cross-case analysis.

Data Collection and Analysis

Data collection was done through one-on-one interviews and archival data. I interviewed six administrators and one gifted education teacher. An interview protocol was used to ensure that the research questions could be answered and that the questions being asked were consistent between the two case districts. The interview recordings were transcribed verbatim. Archival data was collected from the Internet and one participant. Following the data collection, I analyzed the data. Within case and cross case analysis was used (Merriam, 2009). To avoid bias and eliminate any personal thoughts from emerging during the analysis phase, I used bracketing.

Findings

Five themes emerged from the data analysis to answer the three research questions. Four systems thinking components were evident in the themes, specifically: (a) team learning, (b) shared vision, (c) personal mastery, and (d) mental models. The team learning concept provides an outlet for conversations to develop around what is best for the organization. A shared vision is based on the involvement of the organization's members and how those members see the organization taking shape based on their desired outcome. When individuals have personal mastery, they have a commitment to the organization. Mental models are an internal system, one that the individuals use to reflect on their own views about the world around them and how things work (Senge, 1990). The five themes are presented in Table 1, with discussion to follow.

Table 1

Themes by Research Question

Research Questions	Themes
1. How is systems thinking used to create a gifted program in a high ethnic minority, low-income school district within the elementary grades?	1. District decision making supports the district plan. 2. Student eligibility for participation in the gifted program supports the district vision.
2. How is systems thinking used to implement a gifted program in a high ethnic minority, low-income school district within the elementary grades?	1. Organization members work together with commitment and collaboration for a common purpose of meeting the needs of its exceptional learners.
3. How is systems thinking used to sustain a gifted program in a high ethnic minority, low-income school district within the elementary grades?	1. Structure and leadership in place provide sustainability of programs based on the culture and values supported by the organization. 2. Budgetary considerations are addressed through the allocated funds to support the gifted program.

Research Question 1

Research Question 1 was: How is systems thinking used to create a gifted program in a high ethnic-minority, low-income school district within the elementary grades? The administrator responses provided evidence that systems thinking is currently a driving force that guides these organizations. Specifically, the systems thinking components that were evident throughout the interviews and archival data were a shared vision amongst the members of the district and a team learning mentality on how to best meet the needs of their exceptional students. Based on the findings, the first theme was that the district decision making supports the district plan, and the second theme that emerged was that student eligibility for participation in gifted programs supports the district vision. Neither district isolates one area of the organization from the other but rather treats it as a whole functioning unit.

Research Question 2

Research Question 2 was: How is systems thinking used to implement a gifted program in a high ethnic-minority, low-income school district within the elementary grades? The theme that emerged from the data to support that a systems thinking framework is in use is that organization members work together with commitment and collaboration for a common purpose of meeting the needs of its exceptional learners. This commitment and collaboration are evident through the system thinking components of personal mastery and mental models. The administrations in both districts have created organizational structures that support the gifted students. In both case districts, it

is the commitment to ensuring that the exceptional performing students receive services that personal mastery is evident. Likewise, it is from the interviews that we see the mental models of the administrators emerge.

Research Question 3

Research Question 3 was: How is systems thinking used to sustain a gifted program in a high ethnic-minority, low-income school district within the elementary grades? Two themes emerged from the data. Theme 1 is that the structure and leadership in place provides sustainability of programs based on the culture and values supported by the organization, and the second theme is that budgetary considerations are addressed through the allocated funds to support the gifted program. Both districts have a vision that provides a framework for the need they perceive. Applying systems thinking shows how the vision has been translated into a working model. Leaders that have shared values and vision encourage systems thinking, as evidenced by the findings. Equally, the culture of an organization is important to determining what is important, what is believed and how to accomplish the goals set (Owens & Valesky, 2011), which is most closely related to the system thinking components of personal mastery and mental models. It is not the resources or monetary considerations that sustain a program, but the belief that gifted students and their needs matter.

When the hierarchy within an organization finds value in their programs, sustaining the program becomes a priority. Each case district has a method of determining the structure and allocation of funds to support its programs. Through the interviews and review of the archival data, it was determined that the monetary

considerations are just one facet of all that goes into sustaining educational programs. It is the value instilled by the organization through team learning and the shared vision of its members that contributes to the sustainability of the program.

Recommendations

The recommendations for this study were developed around the guiding research questions of how a systems thinking approach is used to create, implement and sustain gifted programs in high minority low-income school districts. Each recommendation is discussed separately and is based on the findings from the study. The findings suggest that districts have an organizational structure where school leaders can collaborate to strategically plan and develop a shared vision and belief system.

Create. In regards to creating a gifted program, three recommendations emerged from the findings of the study. The first recommendation is to examine the vision of the district. This is the basic component needed for a foundation upon which to make decisions. Members of the district should project what the future will look like, dream big, and create a plan for sharing the vision with the stakeholders (Fernandes, 2017). Stakeholders in Districts A and B reported understanding the vision and sharing the responsibility to create a learning community that supports its gifted population. Leaders who focus on collaboration need to consider the cause and effect of their meetings. The leaders in District B, when making decisions for their organization, question their environment by asking what it "should look like, sound like, and act like." Likewise, leaders in District A ask the question, "Can we live with this decision?"

The second recommendation is to look at the organizational structure of the district. Organizational change is a process that is difficult to implement without a clear purpose (Douglas, 2012). It requires collaboration, communication, and alignment with district goals and stakeholders to elicit an organizational transformation (Childress et al., 2006). District leaders need to create a sense of ownership amongst staff members, and think laterally (Dickerson, 2014). Lateral thinking in an organization is directly related to systems thinking. Members begin to understand their role and how it relates to the bigger picture.

Empowerment of organization members comes from autonomy (Dickerson, 2014). Public education tends to use a form of professional bureaucracy (Lunenburg, 2012) as a part of its structure, where teachers are mandated to follow curriculum and standards set forth by the district, but in most cases, still have the autonomy to deliver the material in a manner they see fit, which is a form of lateral thinking. District A demonstrated this autonomy in its gifted program design by allowing the gifted resource teacher and students to choose the focus areas of study. District B did this as well, with the way it funds the gifted program.

The third recommendation is to instill a collaborative environment. Collaboration is defined as all teachers, students and parents working closely together to improve student learning (Heck & Hallinger, 2010)). Inger (1993) stated that when teachers collaborate there is no longer the thought process that what one teacher is doing in his or her classroom is an isolated event. A new organizational pattern emerges and teachers become better prepared (Inger, 1993; Iondornidis, Tsakiridou, & Sagiadinou, 2014).

Aitken (2009) proposed a collaborative model to improve learning where leadership is a shared effort that is distributed amongst all stakeholders. To work collaboratively requires strong leadership skills, ethical values, social skills and strategic planning to build a strong foundational platform. The elements needed to create an effective, collaborative team are: the ability to problem solve towards positive solutions, reflect on all things that impact learning, develop a common language to avoid confusion, to instill trust, and always challenge the assumptions of peers (DeBruyn et. al, 2012).

Implement. In regards to implementing a gifted program, two recommendations emerged from the findings of the study. The first recommendation is to use strategic planning. Strategic planning is a process that explores the motivation, objectives and outcomes of an entire organization, not just a desired program (Lins, n.d; Marx, 2006; Wagner, 2008). It is a process that is done through collaboration. Leaders should complete an analysis of strengths, weaknesses, opportunities and threats (SWOT) that face the organization (Frue, 2017). In doing this exercise, opportunities exist to look at what is going well and what needs to be changed, as well as areas that are within the organization's control to change.

Leaders that focus on collaboration have an objective in mind and need to be flexible when working with others (Leithwood & Azah, 2017). There needs to be a clear definition of what a collaborative environment should look like, sound like, and act like while keeping in mind the cause and effect of their meetings (Stein, 2016). Typically, a strategic plan is written at regular intervals and followed with little interruption. Some researchers posit that a strategic plan and the continuation of programs should remain

living documents that are continuously updated to meet the needs of the changing environment (James, 2012; Lins, n.d.; Wu, 2013). District A and B from the study have a strategic plan in place. District A operates on 3-year plan, and District B has a plan that was created in 2015 and is still in effect.

With so many types of strategic planning models available, there is no right or wrong method to choose. However, before trying to implement a model of this type it is important to think objectively about the data gathered, broadly about the bigger picture and how to achieve the desired result (James, 2012; Lins, n.d.). Strategic planning models evolve from an attempt to understand why certain activities should be conducted; and once the plan is implemented, the questions of who, where, when and how these activities are conducted is addressed (Lins, n.d.). One major component that researchers agree upon being incorporated into strategic planning is stakeholder involvement (James, 2012; Lins, n.d.; Mintzberg, 1994; Wagner, 2008).

The second recommendation to implementing gifted programs is to collaborate. McKenzie (2005) wrote that is it important to periodically do an internal and external scan of the strategic plan to assess the strengths and weaknesses. All members should be utilized during strategic planning to provide input into the bigger picture while building teamwork (James, 2012). In District A and District B, school board members, teachers and students, along with members from the community were invited to be a part of the strategic planning process. Leaders in both districts felt it was important to hear multiple perspectives about the goals and vision of the districts. For the districts without gifted programs, the organizations would need to include more stakeholders when trying to

implement a strategic planning model to effectively assess program needs. Organizations that are dealing with specific issues and have little resources to pull from tend to choose the issues-based model. When an organization needs to make sure that the resources are in line with the mission statement, it might choose to initiate the alignment model.

Sustain. In regards to sustaining gifted programs, three recommendations emerged from the findings. The first recommendation is to instill a belief system. Beliefs are driven from our assumptions, and are framed by the interpretations and interactions experienced (Founder et al., 2016). It is purposeful and intentional (Mercurio, 2017). School leaders that have a transformational leadership style share a common belief system of doing what is best for their schools (Leithwood, 2007). It is important to clearly present the purpose and make sure that all members understand and believe, and to routinely share experiences with one another to foster connections (Mercurio, 2017).

Regardless of the organizational structure or strategic planning model that an organization uses, all organizations need to make sure they have the necessary resources to implement or sustain any changes (James, 2012). The second recommendation is for the district to practice a prioritization exercise where staff members make three piles, a 50% pile, a 75% pile and a never pile. Then, each member of the team would write down which programs they could do without if they were to lose 50% and 75% of their funding. The never pile would be one that held the programs that the district would never stop doing. In one study, this exercise made it easier for stakeholders to focus their priorities and match desired outcomes with the financial resources (James, 2012).

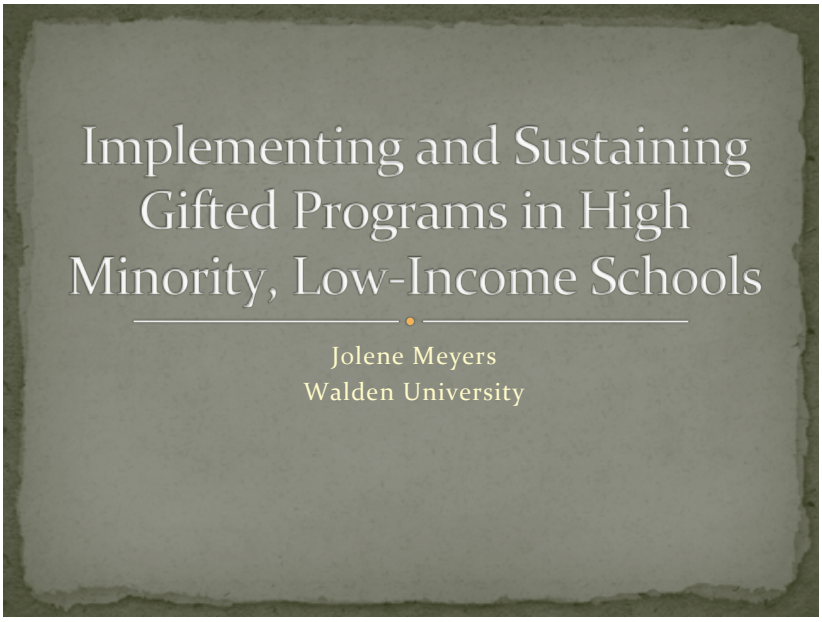
Leaders in District B conducted a similar exercise when they examined how monies were being spent for each of their programs. They went through each program and did a thumbs up if the program was one they wanted to keep, a flat hand if the program needed to be modified to better fit with the strategic plan, or a thumbs down if it was a program that needed to end.

The final recommendation to sustaining gifted programs is to continue collaborating with all stakeholders. One way to do this is to use SMART goals (O'Neill, 2000). That is goals that are: Strategic, Measurable, Attainable, Results-oriented, and Time-bound (O'Neill, 2000). Goals should be realistic, yet challenging; and as each goal is met, new attainable goals should be set. One of the goals that was set for the 2016 school year in District A was to get more parent involvement with the gifted program through monthly parent meetings. One purpose of the monthly meetings was to help parents understand gifted brain behavior. Ideas were presented to parents on how they could help their child, but the meeting was also a format for parents to express their expectations to the school leaders. The values of an organization are supported by its initiatives (Calder, 2014), and it is the initiatives that are put into place based on the goals (Murphy & Torre, 2015). Creating and fostering a school's mission, vision and goals is a task that requires collaboration and team-member buy in (McKenzie, 2005).

Conclusion

The purpose of this study was to examine how leaders of school districts with similar demographics to the district lacking a gifted program create, implement, and sustain gifted programs. The themes that emerged from the findings are all rooted in

collaboration and Senge's (1990) systems thinking theory. Examining and understanding the process of systems thinking and the role it can play in strategic planning facilitates discussions of improvement for the organization. The first set of recommendations emerged from the findings to support creating gifted programs. The recommendations were to examine the vision and the organizational structure of the district. When implementing gifted programs, the recommendation was to use a strategic planning method to collaborate and make decisions about what is best for the organization through a SWOT analysis. The final set of recommendations for sustaining gifted programs was to create a belief system, use prioritization exercises to make program decisions, and collaborate with all stakeholders by setting SMART goals (O'Neill, 2000). The impact of this study lies in the possibility to promote positive social change by creating the opportunity to identify gifted students, assess their needs, and ultimately support gifted programs in school districts that have high minority low-income populations. Supporting gifted students by meeting their learning needs will increase student performance in current and future classrooms. The next section includes the PowerPoint presentation for the stakeholders.


Implementing and Sustaining Gifted Programs in High Minority, Low-Income Schools
Jolene Meyers
Walden University

Introduction

- Exceptional students are on two sides of a continuum.
- Educators have implemented gifted education in a variety of ways.
- Individual states are able to decide what programs to fund and how much to allow
- The study examined how high-ethnic minority, low-income school districts create, implement and sustain gifted programs.

Research Questions

- How is systems thinking used to create a gifted program in a high ethnic-minority, low-income school district within the elementary grades?
- How is systems thinking used to implement a gifted program in a high ethnic-minority, low-income school district within the elementary grades?
- How is systems thinking used to sustain a gifted program in a high ethnic-minority, low-income school district within the elementary grades?

Definition of the Problem

- No gifted program in a local elementary school district.
- No strategic planning evident
- Traditional administrative hierarchy
- Lack of a systems thinking approach
- Financial stress
- Funding shortfalls

Conceptual Framework

- 5 Disciplines of learning organizations
  Personal Mastery, Mental Models, Shared Vision, Team Learning and Systems Thinking (Senge, 1999)
- Systems thinking to explain relationships between different parts (Mase, 2012; Senge et al., 2000)
- Change takes time and commitment (Zmuda et al., 2004)

Methodology

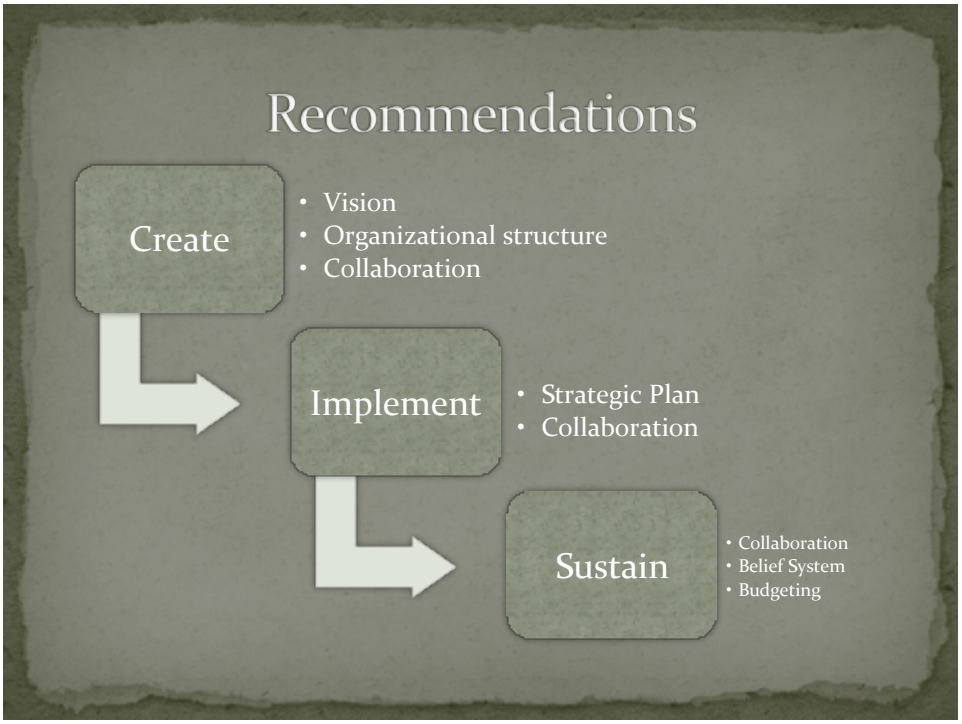
Qualitative Research Design

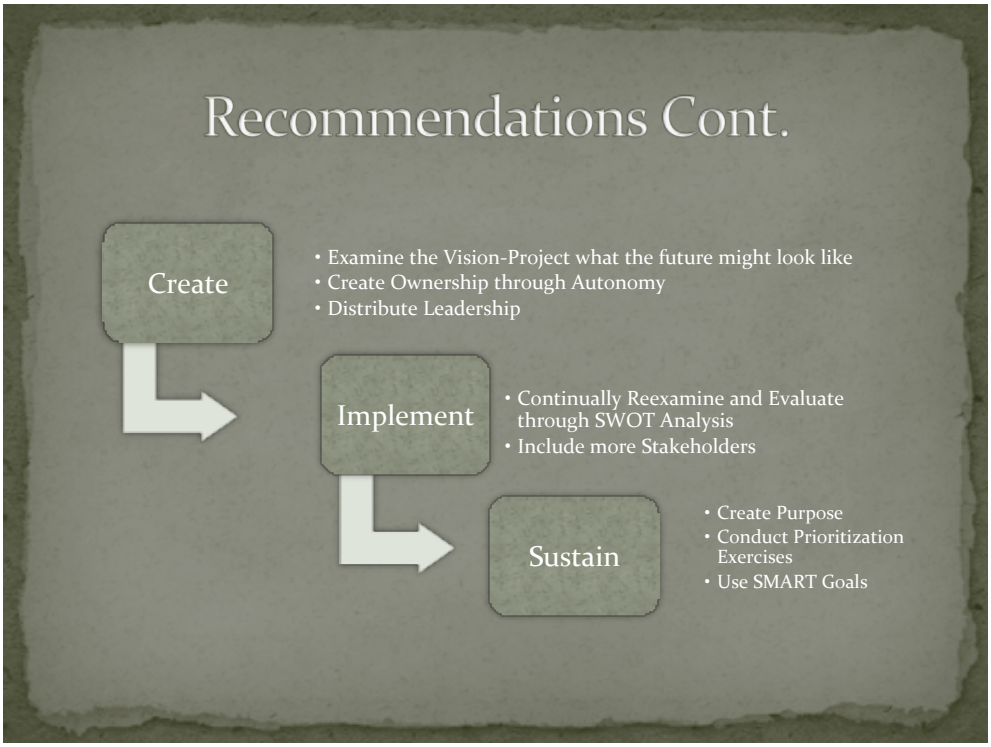
- Multisite collective, instrumental case study (Creswell, 2009)
- Conducted 7 one-on-one interviews
- Collected archival data
- Compiled and analyzed all data

The Findings

Themes by Research Question

Research Questions	Themes
1. How is systems thinking used to create a gifted program in a high ethnic minority, low-income school district within the elementary grades?	1. District decision making supports the district plan. 2. Student eligibility for participation in the gifted program supports the district vision.
2. How is systems thinking used to implement a gifted program in a high ethnic minority, low-income school district within the elementary grades?	1. Organization members work together with commitment and collaboration for a common purpose of meeting the needs of its exceptional learners.
3. How is systems thinking used to sustain a gifted program in a high ethnic minority, low-income school district within the elementary grades?	1. Structure and leadership in place provide sustainability of programs based on the culture and values supported by the organization. 2. Budgetary considerations are addressed through the allocated funds to support the gifted program.


Recommendations
Create
• Vision
• Organizational structure
• Collaboration
Implement
• Strategic Plan
• Collaboration
Sustain
• Collaboration
• Belief System
• Budgeting


Recommendations Cont.
Create
• Examine the Vision-Project what the future might look like
• Create Ownership through Autonomy
• Distribute Leadership
Implement
• Continually Reexamine and Evaluate through SWOT Analysis
• Include more Stakeholders
Sustain
• Create Purpose
• Conduct Prioritization Exercises
• Use SMART Goals

Conclusion

- The purpose of this study was to examine how leaders of school districts with demographics similar to the research setting create, implement, and sustain gifted programs.
- The vision, strategic planning, organizational structure and belief system of a district drives program decisions.
- Themes that emerged are all rooted in collaboration.

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Appendix B: Budget Interview Questions

Business Manager (District A) and
Director of Business Services (District B)

1. What is the process for annual budget development for special programs, such as the gifted program? Is there a difference for short term versus long term planning? Who, specifically, participates in this process?
2. Who determines how resources get allocated to the schools in the District and to what programs? Do the administrators have control over transferring money to other line items in the budget or does the school board determine the allotment of funds?
3. How has the budget crisis in Illinois legislature affected your budget in the past few years and more specifically, special programs? If the current conditions continue, how does the district plan to support gifted programs in the future?
4. From what sources do district revenues come, other than property taxes? What is the revenue source, specifically, that supports the gifted program? Are all available sources being used, including federal and state grant monies? If grants are used, how many years is the grant in effect? What are the eligibility requirements of the grant?
5. On what basis is revenue allocated to programs and campuses—per pupil, ADA (Average Daily Attendance), ADA (Average Daily Enrollment), Title I status, etc.? How, specifically, is revenue allocated to the gifted program?

6. Who is the budget manager for the gifted program budget? Is it managed at the district level or do individual campuses control their own expenditures? From what budget codes are the major expenditures? What percentage is allocated for personnel costs, supplies and materials, other?

Appendix C: Gifted Program Interview Questions

Support Programs Coordinator (District A)
Assistant Superintendent of Curriculum (District B)

1. What planning process is used when deciding what programs to offer in the school district? Who is involved in the decision-making process? Is there a difference for short term versus long term planning?
2. When did this district begin the gifted program? Did parents or local stakeholders have a part in the decision to create a gifted program? If not, how do you know that you are meeting the needs of the community?
3. What criteria were considered when establishing the gifted program? What was the process? Who was involved in the decision-making? What is the structure of the gifted program in your school district i.e., personnel, selection process, scope etc.?
4. How are gifted students identified? What are the steps taken to enroll students in gifted programs? Are there any special tests given to determine a student's achievement?
5. Who decides the curriculum, learning standards, topics, lessons and activities for students identified? How are students assured appropriate learning challenges if they have mastered grade level material?
6. How does the district fund the gifted program? Are there grants, federal monies or private sector contributions that help make sustainability possible? Who prioritizes the disbursement of funds for the program?

Appendix D: Gifted Program Interview Questions

Campus Program Administrator and Gifted Resource Teacher (District A)
Enrichment Programs (District B)

1. What is the make up of the student body enrolled in gifted programs? Do you notice a "majority" minority group represented? Are students considered gifted by other means besides achievement scores? If so, what are those alternate methods of identification?
2. How many students are currently in the gifted program? What measures are taken to increase the number of minority students in the gifted program?
3. What does the district consider to be characteristics of gifted and talented students? Can a student be identified as gifted in one area and placed into the program or are there a combination of criteria? Do you recognize gifted students as RtI candidates because of their special learning needs?
4. What is the role of the gifted students' parents and staff? Do parents and/or staff advocate on behalf of students to be identified as gifted? What is the process that an advocate would follow?
5. What favored strategies does the district use to support gifted students? How do you measure whether or not the program is meeting the student and community needs? What are the measurable goals of the program?
6. What types of activities are the students involved in that are identified as gifted? Are there extension activities that support the program outside of the school?

Appendix E: Mission and Belief Statements District A

[redacted]

Mission and Beliefs

Mission Statement

Cultivate the unique potential of each student by providing a challenging, supportive and inclusive environment

Belief Statements

The unique potential of each student is cultivated when:

- *A safe, secure and nurturing environment is provided for all*
- *Ethical decisions are made in the best interest of children*
- *A challenging curriculum is delivered through instructional practices that actively engage all children*
- *Our schools forge a strong partnership with parents and community stakeholders*
- *Our resources are utilized in an effective and fiscally responsible manner*

Appendix F: Strategic Plan 2016-2019 District A

[redacted]

2016-2019 Strategic Plan

Themes	2016-2017	2017-2018	2018-2019
Curriculum, Instruction, & Assessment	-Continually review and revise curriculum maps in all key subject areas; implement revisions -Begin work on common assessments in core subjects -Formally develop the PLC model for improvement of student achievement, including but not limited to: reviewing master schedules for maximum planning and instructional time, creating effective interventions and training for both team leaders and staff -Review current technology plan and realign it with the new strategic plan, including but not limited to: long term plan for hardware and software, 1:1 computing, integration in the classroom (accelerator for growth) and professional development -Continue to provide high quality full-day kindergarten	-Continually review and revise curriculum maps in all key subject areas; implement revisions -Begin work on common assessments in core subjects -Implement the recommendations of the PLC review -Implement year one of the new long-range technology plan -Review current implementation of STEM curriculum and seek ways to improve and expand -Continue to provide high quality full-day kindergarten	-Continually review and revise curriculum maps in all key subject areas; implement revisions -Begin work on common assessments in core subjects -Continue implementing the recommendations of the PLC review and analyze for effectiveness -Implement year two of the new long-range technology plan -Implement recommendations from the STEM curriculum study -Continue to provide high quality full-day kindergarten -Explore the option of a balanced school year schedule (year-round schooling)
Meeting the Unique Needs of Children	-Continue to provide high quality early childhood and full-day kindergarten programs -Form a committee to explore the feasibility of expanding the early childhood program to greater numbers of community children -Analyze the program design and service delivery model for both special education and enrichment/gifted education to enhance effectiveness, including but not limited to: explore and/or expand "push-in" model, stronger communication with parents about the programs, interventions and professional development	-Continue to provide high quality early childhood and full-day kindergarten programs -Review recommendations of the early childhood expansion committee, and if feasible, move forward with plans -Implement recommendations from the special education and enrichment/gifted analysis -Analyze the need for adding social workers in the district's staffing plan	-Continue to provide high quality early childhood and full-day kindergarten programs -If feasible, move forward with plans to expand the early childhood program -Implement recommendations from the special education and enrichment/gifted analysis and evaluate for effectiveness -If needed and feasible, employ additional social workers
Student Life	-Continue to provide a wide variety of extracurricular activities; seek ways to expand at elementary schools -Enhance the current summer school program with a balance of remedial and enrichment options -Create a representative student behavior/school climate committee to make recommendations for: student discipline policy/implementation, compliance with SB 100, and climate enhancement -Examine the current Social-Emotional Education curriculum in PreK-8, compare to State requirements and create a new coordinated program	-Continue to provide a wide variety of extracurricular activities; seek ways to expand at elementary schools -Continue to enhance the current summer school program with a balance of remedial and enrichment options -Implement recommendations from the student behavior/school climate committee -Implement the new PreK-8 Social-Emotional curriculum -Explore ideas to promote college and career awareness -Form a representative committee to research ways to improve the current student lunch program, including but not limited to cooking and preparing meals on site	-Continue to provide a wide variety of extracurricular activities; seek ways to expand at elementary schools -Continue to enhance the current summer school program -Continue to implement recommendations from the student behavior study and analyze for effectiveness -Continue to implement the new Social-Emotional Education program and assess its effectiveness -Implement recommendations to promote college and career awareness
Professional Development	-Develop a 3-year Professional Development Plan that aligns with the strategic plan, including but not limited to: new curriculum maps, PLC components, 1:1 technology and classroom tech integration, STEM, social-emotional curriculum, articulation between grade levels and teacher leader/trainer of trainer models	-Implement year one of the new long range professional development plan	-Implement year two of the new long range professional development plan
Community, Collaboration and Culture	-Form a representative committee to study the current before and after care program and make recommendations for improvement/expansion with strong community connections	-Implement the recommendations from the child care study -Establish a representative committee to research effective school-community communication/partnership systems, including but not limited to: the district web site, PTA and parent communications, social media, mentoring partnerships with the high school and learning celebrations	-Continue to implement the recommendations from the before and after care study; analyze for effectiveness -Implement recommendations from the communication and partnership committee
Finances and Facilities	-Develop a plan to finance and complete a renovation of Coolidge School -Continually and proactively monitor district finances, fund balances and budget to assure fiscal stability -Explore new revenue sources including but not limited to grants and business partnerships -Update the long-range facilities plan for all schools	-Finalize and begin implementing the plan to finance and complete a renovation of Coolidge School -Continually and proactively monitor district finances, fund balances and budget to assure fiscal stability -Explore new revenue sources including but not limited to grants and business partnerships -Update the long-range facilities plan for all schools	-Continue to implement the plan to finance and complete a renovation of Coolidge School -Continually and proactively monitor district finances, fund balances and budget to assure fiscal stability -Explore new revenue sources including but not limited to grants and business partnerships -Update the long-range facilities plan for all schools

Appendix G: Greatness Indicator and Consensus Recommendations

[redacted]

Greatness Indicator Consensus and Recommendations

Greatness Indicator	Options to Consider for Measurement
Student Academic Achievement	• Parcc • ISEL • STAR • KIDS survey • Common assessments
Recognition of students, staff, school and district	• Recognition log/profile • Honor roll and BUG awards • Teacher applications
High levels of satisfaction	• Conduct the district's satisfaction survey; rotate each year among staff, parents and students • Conduct State's 5 Essentials survey as mandated
Student Connectedness	• Track each student's participation in extracurricular activities, community service and other out of school activities • Monitor student attendance • Monitor student discipline activities
Home, school and community partnerships	• Track participation in parent/teacher conferences • Track attendance at school and parent organization events • Publicize any new school-business partnerships • Monitor connections with other local educational service providers • Monitor communications to parents and community
Success in high school and beyond	• Monitor key transition times- 6th grade and freshman year • Freshmen survey every year • Track student placement in advance courses in high school • Monitor high school student grades/honor roll • Track college attendance and career paths
Fiscal responsibility	• Balanced budget • Adequate reserves • Coolidge renovation completed • District facilities clean and safe

Appendix G: *continued*

Two additional Greatness Indicators to consider (not a consensus, but worthy of discussion):

Greatness Indicator	Options to Consider for Measurement
Leadership in Professional Development	• Track district professional development offerings • Monitor contacts from other districts to learn what District 158 is doing • Track development of teacher leaders and "train the trainer" cadres
Commitment and dedication to the profession	• Teacher attendance • Certifications/degrees • National Board Certification

Appendix H: Mission and Vision District B

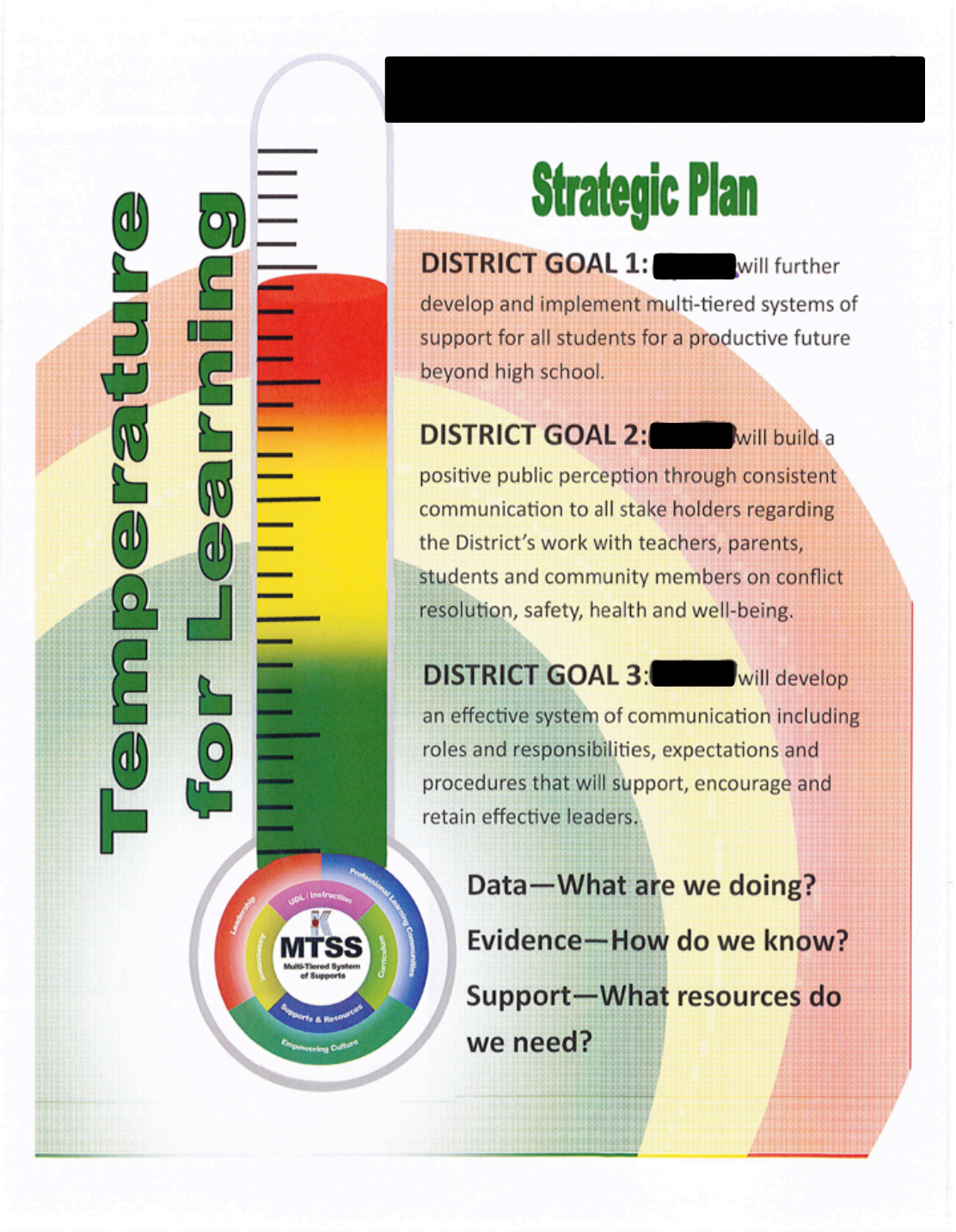
MISSION STATEMENT

[redacted] will celebrate the unique diversity our students possess while providing visionary educational opportunities.

VISION STATEMENT

[redacted] will be recognized as being progressive, innovative and creative. We work together to build ONE community with strong partnerships. We are ONE district committed to increasing student achievement. We have ONE vision of producing globally productive citizens. We do this for the diverse needs of ALL children.

Appendix I: Strategic Plan District B



Appendix J: Elementary Gifted Matrix

MAXIMUM MATRIX TOTALS

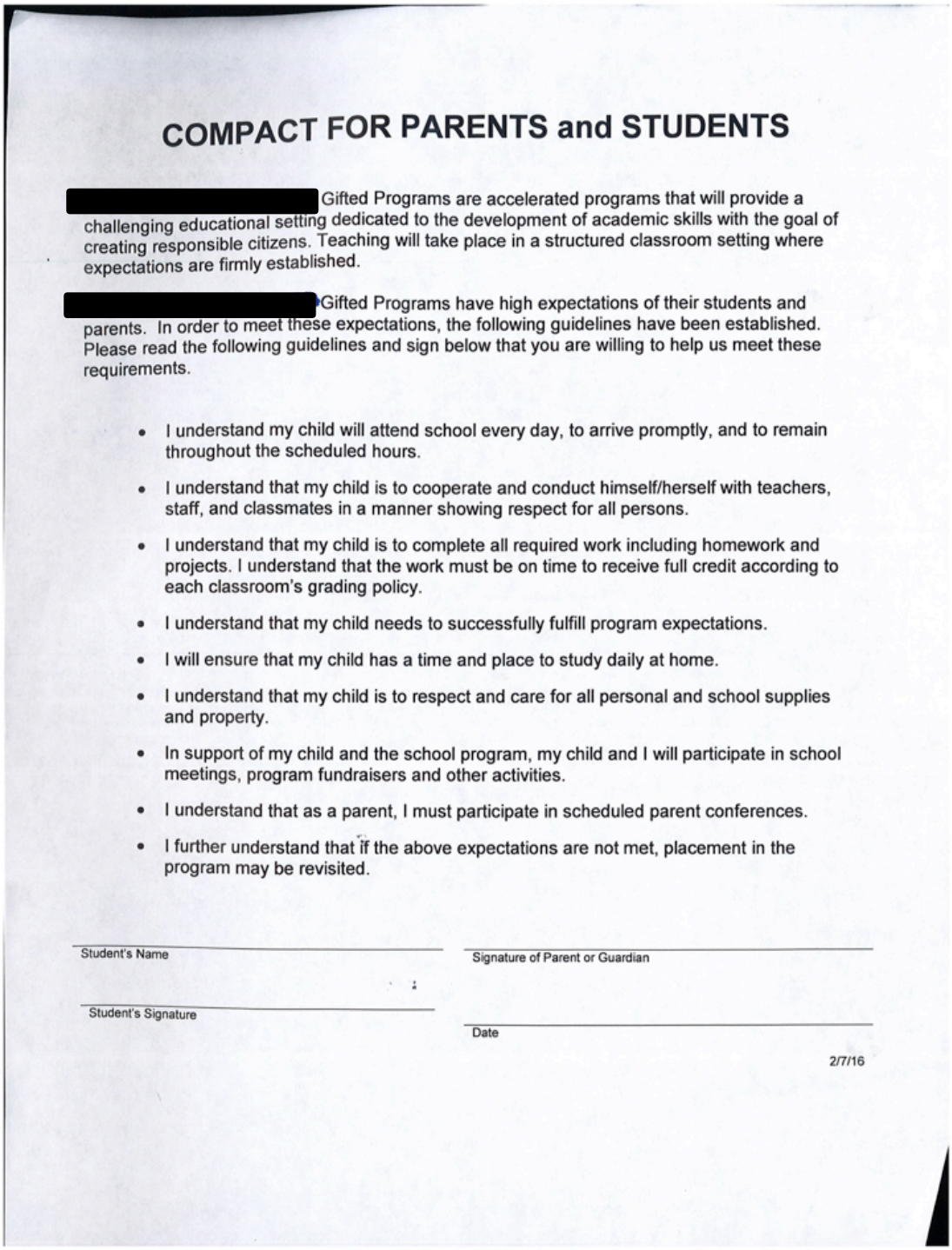
ELEMENTARY GIFTED MATRIX

	MAT score* *(Matrix Analogies Test)*	OLSAT *(IQ Score)*	CogAT- Verbal	CogAT- Quantitative	CogAT- Nonverbal	CogAT Composite	P/T Rate *(Parent/ Teacher Surveys)*	Matrix Total
Maximum point totals	99/9 *	150	294	255	285	278	960	**3458**

*not part of matrix score

edited 2005-06

Appendix K: Gifted Education Compact for Parents and Students



COMPACT FOR PARENTS and STUDENTS

[redacted] Gifted Programs are accelerated programs that will provide a challenging educational setting dedicated to the development of academic skills with the goal of creating responsible citizens. Teaching will take place in a structured classroom setting where expectations are firmly established.

[redacted] Gifted Programs have high expectations of their students and parents. In order to meet these expectations, the following guidelines have been established. Please read the following guidelines and sign below that you are willing to help us meet these requirements.

- I understand my child will attend school every day, to arrive promptly, and to remain throughout the scheduled hours.
- I understand that my child is to cooperate and conduct himself/herself with teachers, staff, and classmates in a manner showing respect for all persons.
- I understand that my child is to complete all required work including homework and projects. I understand that the work must be on time to receive full credit according to each classroom's grading policy.
- I understand that my child needs to successfully fulfill program expectations.
- I will ensure that my child has a time and place to study daily at home.
- I understand that my child is to respect and care for all personal and school supplies and property.
- In support of my child and the school program, my child and I will participate in school meetings, program fundraisers and other activities.
- I understand that as a parent, I must participate in scheduled parent conferences.
- I further understand that if the above expectations are not met, placement in the program may be revisited.

Student's Name

Signature of Parent or Guardian

Student's Signature

Date

2/7/16

Appendix L: Parent's Rating Form for Gifted Education Identification

[redacted]

PARENTS' RATING FORM for Gifted Education Identification

STUDENT _____ SCHOOL _____

TEACHER _____ GRADE _____

FORM FILLED IN BY:

(name)_____

Scale : 1 = Rarely 2 = Sometimes 3 = Often 4 = Almost always

SCHOOL ABILITY	1	2	3	4
1. Has a large vocabulary; expresses self well.				
2. Recognizes relationships among ideas and events.				
3. Puts ideas together in new and different ways.				
4. Recalls facts and information easily.				
5. Is easily bored by routine tasks or drill.				
6. Reads and comprehends early (ie. before Kdg.). Place 'X' after response.	No		Yes	

ORIGINALITY/CREATIVITY	1	2	3	4
1. Shows curiosity, imagination and originality.				
2. Asks many questions about a lot of topics.				
3. Elaborates or embellishes on ideas.				
4. Sees several different ways to solve problems.				
5. Enjoys difficult problems and complex ideas.				

PERSONAL BEHAVIORS	1	2	3	4
1. Assumes and completes responsibilities.				
2. Has a good sense of humor/ sarcastic.				
3. Is persistent, sticks to a task.				
4. Shows longer than average periods of concentration.				
5. Maintains a mature, positive attitude.				

(Over)

Appendix M: Gifted Education Rating Form for Teachers

[redacted]

STUDENT BEHAVIORAL RATING FORM
for Gifted Education Identification

STUDENT _____

SCHOOL _____TEACHER _____ GRADE _____

Scale : 1 = Seldom observed	2 = Observed occasionally
3 = Observed frequently	4 = Nearly always observed

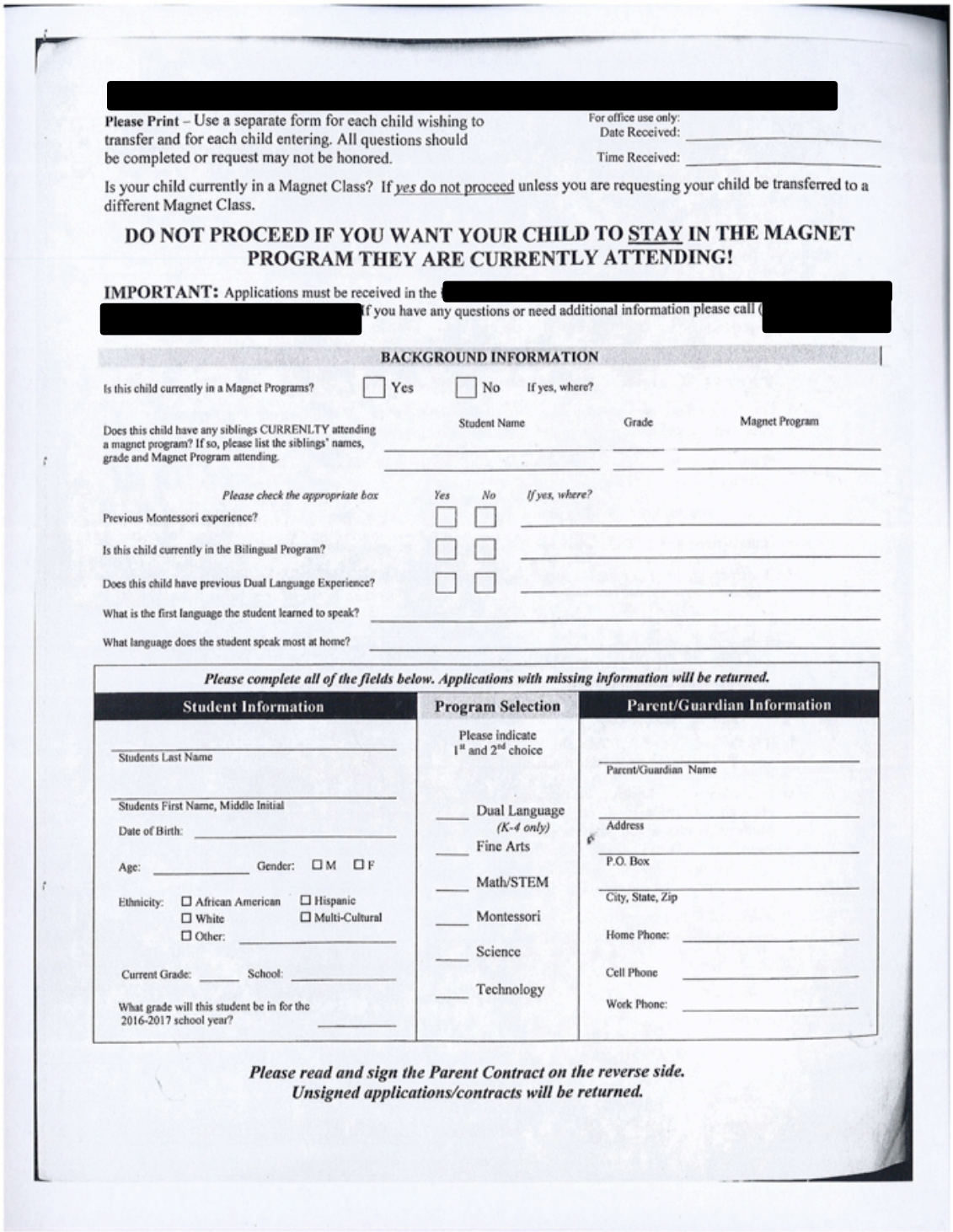
ACADEMIC ABILITY	1	2	3	4
1. Uses extensive vocabulary appropriately.				
2. Academic work is above current grade level.				
3. Likes to discuss many interests; widely read.				
4. Recognizes relationships among ideas and events.				
5. Transfers learning to new situations.				

ORIGINALITY/CREATIVITY	1	2	3	4
1. Elaborates or embellishes on ideas.				
2. Enjoys experimentation.				
3. Sees unique ways to solve problems.				
4. Is adventuresome.				
5. Enjoys the challenge of complex problems or ideas.				

TASK COMMITMENT	1	2	3	4
1. Shows ability to plan and organize activities.				
2. Maintains a mature, positive attitude.				
3. Assumes and completes responsibilities.				
4. Shows perseverance; gives of own time if interested.				
5. Shows longer than average periods of concentration.				

(over)

Appendix N: Magnet Program Enrollment and Contract for Parents



[redacted]

Please Print – Use a separate form for each child wishing to transfer and for each child entering. All questions should be completed or request may not be honored.

For office use only:
Date Received: _____
Time Received: _____

Is your child currently in a Magnet Class? If *yes* do not proceed unless you are requesting your child be transferred to a different Magnet Class.

DO NOT PROCEED IF YOU WANT YOUR CHILD TO STAY IN THE MAGNET PROGRAM THEY ARE CURRENTLY ATTENDING!

IMPORTANT: Applications must be received in the [redacted] If you have any questions or need additional information please call [redacted]

BACKGROUND INFORMATION

Is this child currently in a Magnet Programs? ☐ Yes ☐ No If yes, where?

Does this child have any siblings CURRENLTY attending a magnet program? If so, please list the siblings' names, grade and Magnet Program attending.

Student Name	Grade	Magnet Program

Please check the appropriate box	*Yes*	*No*	*If yes, where?*
Previous Montessori experience?	☐	☐	
Is this child currently in the Bilingual Program?	☐	☐	
Does this child have previous Dual Language Experience?	☐	☐	

What is the first language the student learned to speak? _____

What language does the student speak most at home? _____

Please complete all of the fields below. Applications with missing information will be returned.

Student Information

_____
Students Last Name

_____
Students First Name, Middle Initial

Date of Birth: _____

Age: _____ Gender: ☐ M ☐ F

Ethnicity: ☐ African American ☐ Hispanic ☐ White ☐ Multi-Cultural ☐ Other: _____

Current Grade: _____ School: _____

What grade will this student be in for the 2016-2017 school year? _____

Program Selection

Please indicate 1st and 2nd choice

___ Dual Language *(K-4 only)*
___ Fine Arts
___ Math/STEM
___ Montessori
___ Science
___ Technology

Parent/Guardian Information

_____
Parent/Guardian Name

_____
Address

_____
P.O. Box

_____
City, State, Zip

Home Phone: _____

Cell Phone _____

Work Phone: _____

Please read and sign the Parent Contract on the reverse side.
Unsigned applications/contracts will be returned.

Appendix N: *continued*

CONTRACT FOR PARENTS

[redacted] Magnet Programs are enrichment programs that will provide an educational setting dedicated to the development of academic skills and an introduction to the specific area of the magnet with the goal of creating responsible citizens. Teaching will take place in a structured classroom setting where expectations are firmly established.

[redacted] Magnet Programs have high expectations of their students and parents. In order to meet these expectations the following guidelines have been established. Please read the following guidelines and sign below that you are willing to help us meet the requirements of the schools.

1. I understand my child will attend school every day, will arrive promptly, and will remain throughout the scheduled hours.
2. I understand that my child is to cooperate and conduct himself/herself with teachers, staff, and classmates in a manner that shows respect for all persons.
3. I understand that my child is to complete all required work including homework. I understand that the work must be on time to receive full credit according to each classroom's grading policy.
4. I understand that my child needs to successfully fulfill curricular expectations specific to each magnet.
5. I will insure that my child has a time and place to study daily at home.
6. I understand that my child is to respect and care for all personal and school supplies and property.
7. I understand that as a parent, I must be supportive of my child and the school program by providing volunteer services (per family per year.) *A list of volunteer options to follow once magnet placement has taken place.*
8. I support of my child and the school program, my child and I will participate in school meetings and other activities. (i.e. Family Nights...science, math, computer, and Fine Arts Showcases/performances, etc.)
9. I understand that as a parent, I must attend two (2) scheduled parent conferences per year.
10. I further understand that if my child is removed from the program because of the above statements, my child may not re-enter that magnet program.
11. [redacted] is committed to offering the Dual Language Program in Kindergarten through sixth grade. By doing so, District 111 accomplishes the goal of continuing to develop the students' academic and linguistic skills in both languages. It is highly recommended that students remain in the Dual Language Program until they have finished sixth grade where they will become bilingual and bi-literate. I am stating my support and commitment for my son/daughter to have the opportunity to successfully participate in the Dual Language Program until sixth grade if selected.
12. I understand that completion and receipt of this application ensures that the student will be **considered** for selection to the [redacted] Magnet Programs but does **not** guarantee placement.

Student's Name (Please print)

Signature of Parent or Guardian

Date

1/7/11

Appendix O: Modified NAGC Standard 5: Programming Standards Checklist

Standard 5: Programming (NAGC, 2010)
Description: Educators are aware of empirical evidence regarding (a) the cognitive, creative, and affective development of learners with gifts and talents, and (b) programming that meets their concomitant needs. Educators use this expertise systematically and collaboratively to develop, implement, and effectively manage comprehensive services for students with a variety of gifts and talents to ensure specific student outcomes.

Evidence-Based Practices	**District A**	**District B**
5.1.1. Educators regularly use multiple alternative approaches to accelerate learning.		
5.1.2. Educators regularly use enrichment options to extend and deepen learning opportunities within and outside of the school setting.		
5.1.3. Educators regularly use multiple forms of grouping, including clusters, resource rooms, special classes, or special schools.		
5.1.5. Educators regularly use current technologies, including online learning options and assistive technologies to enhance access to high-level programming.		
5.1.6. Administrators demonstrate support for gifted programs through equitable allocation of resources and demonstrated willingness to ensure that learners with gifts and talents receive appropriate educational services.		
5.2.1. Educators in gifted, general, and special education programs, as well as those in specialized areas, collaboratively plan, develop, and implement services for learners with gifts and talents.		
5.3.1. Educators regularly engage families and community members for planning, programming, evaluating, and advocating.		
5.4.1. Administrators track expenditures at the school level to verify appropriate and sufficient funding for gifted programming and services.		
5.6.1. Educators create policies and procedures to guide and sustain all components of the program, including assessment, identification, acceleration practices, and grouping practices, that is built on an evidence-based foundation in gifted education.		
5.7.1. Educators provide professional guidance and counseling for individual student strengths, interests, and values.		

Appendix P: Formative Evaluation

1. How likely are you to consider discussing the possibility of creating a gifted program?

1	2	3	4	5
Not at All	Somewhat Likely	Neutral	Likely	More Likely

2. What information would you like to explore further? (check all that apply)

____ Methods of Identification
____ Funding
____Strategic Planning
____Needs Assessment
____Staff Qualifications
____Staff Professional Development
____Other

_____
_____
_____

From the list above, which topic would be your first priority and why?

3. Does your district have a strategic plan? If so, what themes or domains are targeted?

4. Have you conducted a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis in your district?

If yes, was it beneficial and when was the last time it was completed?

If no, would you like assistance in conducting an analysis in your district?

5. How has this presentation shaped your view of developing a gifted program?

1	2	3	4	5
Not at All	Somewhat Likely	Neutral	Likely	More Likely

Do you have any suggestions for improvement with this presentation?

_____
_____