Policy and Practice: A Case Study of Gifted Education Policy Implementation

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In this case study, South Carolina's gifted education policy development, changes, and implementation are explored from three perspectives: policymakers, linkers, and adopters. Document review and individual and focus group interviews with policymakers, those who develop statute, regulation, and policy; linkers, district persons who implement policy; and adopters, school-based persons, comprised data sources. Research questions include how did general education reform create change in gifted education between 1984 and 2004? What were the primary influences? Locally, how was meaning made? General education reform produced a nonlinear process of gifted policy implementation, resources to develop gifted programs, and attention to equity and access issues. Primary change influences were leadership and political relationships. Required teacher endorsement created local impact. Need exists for curriculum policy development.

Education policy, in particular policy on educational reform, and how policy translates at the school and classroom level has been of interest to researchers (Cohen & Ball, 1990; Cohen & Hill, 2001; Spillane & Jennings, 1997). After all, the intent of policymakers is to change practice, so understanding policy impact at the local level informs. Gifted education policy research has primarily offered analysis of state and national policies (Brown, Avery, & VanTassel-Baska, 2003; Mitchell, 1994; Passow & Rudnitski, 1993; VanTassel-Baska, 2005). Examples in the literature can be found that explore gifted education policy as it relates to issues such as curriculum, equity, grouping, and school reform (Baker & Friedman-Nimz, 2004; Gallagher & Coleman, 1992; Gallagher, Coleman, & Nelson, 1995; Renzulli & Reis, 1991; Tomlinson & Callahan, 1992; VanTassel-Baska, 2003). In

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recent years, the National Association for Gifted Children (NAGC) has made state policy development and implementation a priority.

Gifted education, mandated in South Carolina (SC) with the passage of the Education Improvement Act (EIA) of 1984 has evolved over the past 22 years. In this case study, examination of the development and evolution of gifted education policy in SC and how policy has translated at the school and classroom levels is explored. Of interest are several questions. In what ways did the general education reform context push changes in gifted education during this time period? What were the primary influences as gifted education evolved during this 20-year period? How was meaning made of gifted education policy at the local level?

Background

A Nation at Risk (National Commission on Excellence in Education, 1983) brought national attention to U.S. public education and called for reform to raise standards and challenge in our schools. During this time of calls for public education reform, South Carolina, near the bottom in national public education quality ratings, found itself within a political climate ripe for change. The combination of the political climate following *A Nation at Risk* with strong leadership in the form of Governor Richard Riley, who later served as Secretary of Education in the Clinton administration, pushed SC into the education reform arena. The EIA was a primary impetus spurring SC's public education reform. Williams (1985), in *What Will the Penny Buy for South Carolina: Assessment of the South Carolina Education Improvement Act of 1984*, said the act

> provided the "legal basis" for six objectives: raising student achievement, improving services to special groups, improving services to educational personnel, improving school conditions for teaching and learning, intensifying community involvement in schools, and increasing public confidence in SC schools. (p. 1)

Business leaders, politicians, educators, and everyday citizens came together around the EIA as a means to improve the quality of public

education. This coalition of like-minded persons from diverse backgrounds made passage of this education reform bill possible, and the necessary funding for the bill came from adding a penny to the state sales tax. A Rand Corporation consultant (Rand Corporation is known for studies evaluating education reforms) noted that the EIA of 1984 was a model of how "comprehensive reform can be initiated in a single effort" (Williams, p. 2).

Gifted education was part of larger legislation focused on educational reform in SC (the EIA); gifted education was mandated in 59-29-170 of the South Carolina Code of Laws to provide for gifted and talented youth. Gifted education came under the goal of providing "services to special groups of students" (Williams, 1985, p. 1). By providing a special program for gifted youngsters, the expectations were improved student achievement and higher order thinking skills. A question reformers were curious about was, "Do special services to groups of children increase their academic learning levels over a three year period?" (Williams, 1985, p. 12). Regulation for the gifted education mandate was developed by the SC Board of Education in 1985 and amended the following year. This regulation, Regulation 43-220, revised in 1999 and most recently in 2004, requires school districts to plan for and provide the educational development of academically gifted students. The 2004 regulations specify parameters for programs, curriculum and instruction, identification, and teacher qualifications. For example, SC programs for academically gifted youngsters must offer curriculum and instruction that (1) exceeds state-adopted standards for all students, (2) requires program goals and performance indicators for students to demonstrate deep knowledge and complex skills, (3) matches the unique learning needs of gifted youngsters, and (4) uses acceleration as a platform for educational enrichment (Section II(A)(2) of Regulation 43-220). School districts must find their own ways to design programs that meet the intent of the regulations. Local educational agencies implement policies, adding their own interpretation of the policy intent.

Two documents developed by the SC Department of Education, the *SC Gifted and Talented Best Practices Manual* (2001) and the *Academically Gifted and Talented Curriculum and Instruction* (2004), provide school districts with further elaboration of how to address requirements for gifted students framed in SC Regulation 43-220.

SC Department of Education sponsored state and regional meetings offering technical assistance for school districts. The SC Consortium for Gifted and Talented Education, an affiliate of NAGC, sponsors an annual conference with national leaders in gifted education and workshops for teachers and administrators.

Purpose and Rationale

The statute, regulations, and other state policies have provided clarity and consistency about who is academically gifted in SC, what qualifications are required for the teachers of academically gifted youngsters, and program model designs that are educationally sound. An underlying issue in this case study is what has driven the evolution of policy, and a second issue is how statute and regulation have affected understanding and practice in schools and districts. Beyond implementation concerns (i.e., identifying gifted students, preparing teachers to teach them, and planning and providing programs where their abilities are developed) are other significant issues in this study.

In this standards-driven environment, how are programs designed to take academically gifted students, by definition those who exceed their age-level peers academically, beyond the standards? How are educators, under pressure to ensure that students meet grade-level standards, reconciling those demands with SC Regulation 43-220 (2004), which requires "standards [for gifted and talented] that exceed state-adopted standards for all students" (p. 3, Section II, A., 2.,(a))? Standards and the impact of the federal No Child Left Behind Act focus on bringing all students to a level of proficiency. Proficiency level is based on grade-level expectations for students, so the implication of meeting "proficiency" is that many of our brightest students are being denied the opportunity to learn at appropriate levels (Colangelo, Assouline, & Gross, 2004).

Providing for equity and excellence is another consideration in any discussion of policy (Baker & Friedman-Nimz, 2004; Passow & Rudnitski, 1993; Purcell, 1995). How has SC policy allowed access and opportunity for minority and low-income students' participation in gifted programs? In what ways are policies addressing underrepresentation? Are SC policies supporting teacher development

that enables talent identification and development for minority and low-income students?

The study's conceptual framework is shown in Figure 1 and is adapted from a study of educational innovation as found in Miles and Huberman (1994, p. 18). This conceptual framework is a visual representation of the "actors" studied in this case (i.e., the policymakers, the adopters, and the linkers). The "innovation" under examination is SC's gifted education policy on identification, curriculum and instruction, programs, and teachers that grew out of the EIA. The arrows on Figure 1 signify investigation of the processes and relationships among the "actors" as the "innovation" is implemented. The bottom of the figure, "translation at the school level and the classroom level" illustrates the intention to examine how context, characteristics, and behaviors of each group shape interpretation and implementation of the educational innovation, SC gifted education policy. The framework's elements provide the study's parameters (Miles & Huberman, 1994) and show the study's focus and units of analysis.

Method

Qualitative research design was the approach used in this investigation. As the conceptual framework indicates, an understanding of policy development and implementation is most effectively built through inquiry into perceptions, recollections, and personal views of those involved in a phenomenon. As the purpose was to produce a case study describing policy development and implementation over time in a specific context, qualitative method was the choice for examination. In-depth interviews, focus groups, and document review provided data sources for the case study. Document review of key SC legislation and reports from 1984 to 2004 enabled knowledge of gifted education policy development and evolution over time. Interviews and focus groups allowed for understanding of the context, group perspectives, and reasoning for evolving policies, as well as some understanding of their implementation from those at the district and school levels.

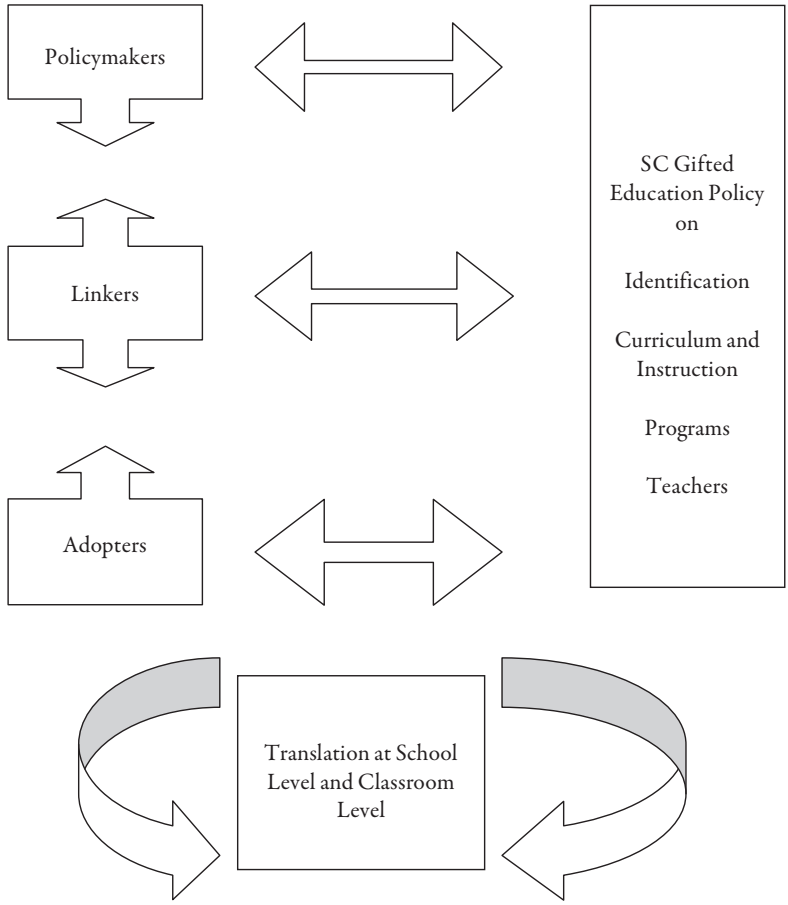

Figure 1. A framework for thinking about educational innovation: Significant groups and their impacts on South Carolina's gifted education policy.

Participants

Three distinct groups were identified as participants in the study: policymakers, linkers, and adopters (Miles & Huberman, 1994). Policymakers are defined as those in key state-level leadership positions who develop statutes, regulations, and policies. Persons in this sample were purposefully selected using a snowball sampling approach (Patton, 2002). Policymakers were identified through con-

versations with key individuals involved in the development of the EIA of 1984 and the regulations in gifted education that were passed in 1986. From these conversations, the researcher noted the persons named two or more times. Those individuals were identified as potential participants. From this list of potential participants, those persons available and willing were interviewed. Policymakers (n = 5) interviewed were a former governor's education advisor who was a key leader in the development of the EIA and later served as chair of an accountability committee that tracked the progress of the educational reform, a legislative aide for the Senate Education committee who chaired an early task force to establish the state criteria for identification of gifted students after the passage of the reform bill and who currently serves as executive director of a state-level education oversight committee, the state education department director of gifted education who was not involved in the early work in gifted education but was a critical force in major regulation revisions of the last 10 years, a district superintendent who worked in one of the three districts in SC that had a program for gifted education prior to the EIA, and a state education department associate who was part of the assessment unit and key in developing regulations after the statute (EIA) passed.

The linkers are defined as those in between policymakers and adopters who are responsible for policy implementation in school districts. Critical case sampling (Patton, 2002) was utilized with the linkers sample (i.e., the board of the state gifted education association was identified as an existing group of persons responsible for gifted education policy implementation in their districts). A focus group (n = 19) was conducted with the linkers, with four follow-up interviews as needed with individuals from the focus group for clarification. The linkers sample included SC college/university gifted education professors; gifted and talented (GT) coordinators from small, medium, and large SC districts; GT teachers; and associate superintendents for curriculum and instruction.

The third distinct group in this study is the adopters, defined as those responsible for translation of policies at the school and classroom levels. Adopters (n = 26) include gifted education coordinators, principals, teachers of gifted education, and regular education teachers in three school districts. The school districts were purpose-

Table 1

Study Participants (*N* = 50)

Participants	*n*	Individual Interview	Focus Group(s)/Number of Focus Groups
Policymakers	5	Yes	No
Linkers	19	Yes	Yes/1
Adopters	26	No	Yes /3

fully selected through discussion with the state coordinator for gifted education about which SC districts were perceived to have strong program implementation (i.e., districts with highly effective programs for academically gifted students). From a list of five SC districts, the list was narrowed to three districts willing to participate. The researcher worked with the district gifted coordinator to form focus groups composed of persons who were knowledgeable about their district's gifted program but also who were representative of the different educational roles (i.e., principals, teachers of general education and gifted, and the coordinator; see Table 1).

Sample size in this study was determined by the point of saturation (Maykut & Morehouse, 1994). Lincoln and Guba (1985) noted that the saturation point can be reached between 12 and 20 participants, while Douglas (1985) contended that 25 participants are necessary. Across the three subsamples in this study, a total number of 50 people were interviewed either individually or as part of a focus group. This total exceeds both saturation points cited by Lincoln and Guba and Douglas.

Instrumentation: Interview and Focus Group Protocol

Individual interviews with policymakers and linkers and focus group interviews with linkers and adopters were data sources for the case. Interview protocols and guides were used with specific questions designed to gain understanding. The interview guides used open-ended questions and a common core of questions with the three distinct groups in the sample to gain understanding based on perspective. Common topics included an historical perspective on

development of gifted education policy in SC since the EIA passed in 1984; knowledge of current state statutes, regulations, and policies and intentions; group perspective on major areas of policy change and drivers of that change; and local policy implementation. Probes were included to better understand the influence of standards on gifted education policy implementation and to provide insight into equity and excellence issues. Interview protocols and guides are available upon request.

Procedure: Data Collection

The data sources for this study were individual interviews, focus group interviews, and document review. Interviews were scheduled for 1- to 2-hour time blocks. The interviews were recorded as the researcher took notes. Before the interviews, the researcher explained the study's purpose and intent. Confidentiality of interviewees was assured. After the interviews, the researcher made notes about the interview, noting emergent ideas and insights to explore later. Interview notes were typed and tapes were transcribed for exact wording of quotes. These notes with quotations were used as the raw data.

The document review focused on documents from1984 to 2004. Documents reviewed include the EIA of 1984; EIA reports and newsletters from 1985 to 1992; Regulations for State-funded Gifted and Talented Programs, Section 59-29-170 of the EIA as amended in 1986; State Board of Education Gifted and Talented Regulation 43-220; the revision of R 43-220 passed in 2004; the *South Carolina Gifted and Talented Best Practices Manual* (South Carolina Department of Education, 2001); and the *Academically Gifted and Talented Curriculum and Instruction* resource guide (South Carolina Department of Education, 2004).

Data Analysis

Data analysis began with the conceptual framework as a guide. The labels of the framework established the "bins" for (a) roles of specific persons involved in policy development and/or implementation, (b) elements of policy on which the study focuses, and (c) how the roles and/or elements combine and are translated at the school and class-

room levels. As data were collected, themes were identified through a reductive, contrast/comparative process and triangulation (Miles & Huberman, 1994).

For each interview, the raw data and the typed notes were placed in a chart template, separated, or "chunked," into words/responses that matched a particular question as a way to begin discerning meaning. Each set of interview notes was coded by subsample and number. For example, PI#5 is coded for policymaker interview five. Analysis began at the "actor" level: policymakers, linkers, and adopters. For example, the policymaker interview templates were read and reread through a constant/comparative process, until common themes across those interviews were identified. The next step was data reduction, where the researcher developed a themes template of the common themes within the perspective and supporting data in the form of explanation and quotes from interviews. The same process was used with the linker and the adopter interviews.

Results

Pertinent results of the document review are reported first as a context for understanding each group's perspective. Next, themes within each perspective (i.e., policymakers, linkers, and adopters) based on each group's context, characteristics, and behaviors (Miles & Huberman, 1994) are presented.

Document Review

The EIA of 1984 was the beginning of formal policy development in gifted education in SC. Policy areas of focus in the document review are identification, curriculum, instruction and service models, teacher development, planning, reporting, and funding. Changes in policy areas during the 20-year period of this case are tracked.

Identification. Identification of gifted students, according to the 1985–1986 state regulation, was based on a weighted profile with intelligence/aptitude, academic achievement, and student performance data such as grades and nomination checklist scores as the

criteria for eligibility. Included in the identification policy was a provision for trial placement of underachieving gifted students who demonstrated high potential but low performance. Because underrepresentation of minority and low-income gifted students is an issue in SC, the identification regulations were revised in 1999 to include a broadened definition of giftedness and multistep screening. Identification criteria included three distinct dimensions: reasoning abilities as evidenced on aptitude tests, high academic achievement as evidenced on national or statewide tests, and intellectual/academic performance as demonstrated by grades or performance-task assessment. In early 2000, performance-based measures, known as Project STAR (Student Task Assessments and Rubrics), were added to the state gifted testing as an additional measure to find underrepresented gifted students. After tracking identification data based on the 1999 regulation changes, some fine-tuning of the three dimensions for identification occurred in 2004.

Curriculum, Instruction, and Program Models. In the 1984 EIA legislation, descriptions of service models and programs for gifted students lacked elaboration. For example, the act provided a broad, general description of differentiated curriculum for gifted learners without details that further explained specifics. Acceptable service delivery models (i.e., resource centers, itinerant teachers, self-contained classes, and Advanced Placement classes) were specified but not defined. A 1999 revision (R 43-220) provided more elaboration on curriculum, instruction, and assessment for gifted learners, and called for support services for gifted students. R 43-220 (1999) indicated the following,

> To provide curriculum, instruction, and assessment that maximize the potential of the identified students, educational programs for academically gifted and talented students must reflect . . . content, process, and product standards that exceed the state adopted standards for all students. . . . (p. 3, Section II, A., 2., (a))

By 2004, approved service models for gifted programs had narrowed to special schools, special classes, and resource/pull-out, and the max-

imum class size had increased from 20 to 25 for the special school and classes models, and from 15 to 20 for the resource/pullout model.

Teacher Development. When the EIA passed in 1984, teachers of the gifted had no requirement other than to be certified at the grade level and/or the subject area in which they were teaching. A 1999 task force on teacher certification led to required endorsement in gifted education comprised of 6 graduate hours. Add-on certification was established at that time but was not required. The *South Carolina Gifted and Talented Best Practices Manual* (South Carolina Department of Education) was available by 2001, and this document offered districts guidance in policy implementation and research-based practice. Regulations in 2004 raised the bar for teacher development by requiring districts to plan and provide appropriate professional development in gifted education on an annual basis.

Planning and Reporting. Changes in planning and reporting have been recent. Beginning in 2005, SC school districts must develop a 3-year plan for gifted education and assess their progress each year. To track progress in serving underrepresented groups, reporting of referred and eligible students by race must occur. To provide standards-based accountability data, districts are required to analyze, summarize, and report gifted student performance data.

Funding. The 1984 EIA based funding on the number of gifted students identified and served. Because the number of identified gifted students quickly exceeded available monies, an amendment establishing priorities for serving identified students was passed the following year. Each year, the SC General Assembly appropriates EIA funds to support academic and artistic programs for gifted students. The SC Department of Education then allocates monies to districts based on the reported number of gifted students identified and served the previous school year. The funding formula for academic gifted programs is .30 times the student base cost. However, gifted education is not fully funded. The SC Department of Education reports that for fiscal year 2006, districts received 52% of the required funding, or approximately $356 actual per pupil funding. This percentage is at the lowest level since 1999. The number of gifted students served has

steadily increased, and the amount of funding has not. Most of these monies pay teacher salaries and fringe benefits, with little remaining for program development and support. In Fiscal Year 2003–2004, more than $25 million was allocated from the EIA for gifted education (Monrad, 2005).

The document review illustrates the evolution of SC gifted education policy through (a) a broadened definition of giftedness and a multistep screening process, (b) an elaboration of differentiated curricula and instruction for gifted learners, (c) a narrowing of effective gifted program models based on current research, (d) the requirement of teacher endorsement and annual professional development provided by districts, (e) systematic planning and assessment of program effectiveness, (f) the reporting of student demographics and performance, and (g) funding that could not keep pace with numbers of students identified. This review of changes over the past 20 years provides the context for the qualitative results below.

Policymakers

Policymaker responses are mostly drawn from recollections during the period of the mid- 1980s when the reform legislation was in development and early implementation stages. Interviews with policymakers (n = 5) revealed several themes (see Table 2).

Leadership. Political leadership with moral purpose, "doing the right thing at the right time," was a reason for the success of the EIA legislation that included a mandate for SC gifted education programs. Policymakers noted that support and resources to push the reform forward were in place under the leadership of the governor and the SC superintendent of education. That leadership combined with the necessary resources created ". . . a moral force. We put our money where our mouth was and provided the support and resources to make improvements. Much happened quickly, and the result was much improvement."

Policy Development. Policy development entailed putting together a framework of broad, general ideas. A specific set of regulations grew out of the policy framework. "What activity was done in [gifted]

Table 2

Policymakers: Themes

Themes
• Leadership: Political leadership had the moral purpose of "doing the right thing" for all.
• Policy Development 1. Big picture: A collaboration of business persons, legislators, and educators developed a working document of broad and general "big picture" ideas. 2. Specifics: Experts were relied upon to provide specifics for implementation.
• Purpose and Impact: The purpose was to improve public education for all students.
• Equity 1. A force: Equity for all provided the impetus to include gifted learners. 2. Definition: A focus on underrepresentation led to a broader, inclusive definition.
• Standards and accountability 1. Accountability: The issue of what should happen in programs came with this reform. 2. Standards-based: Curriculum and instruction moved from isolated enrichment to more integrated programs concentrated on core academic areas.
• Views on current gifted education policy 1. Institutionalized: Gifted education is now essential to the core operation of schools. 2. Access: Changes in identification protocol have enhanced access for minority and nontraditional gifted students. 3. Evaluation: Program evaluation and student outcomes need more attention. 4. Coordination: Local coordination for gifted education must be addressed.

programs was not specified in the original regulations beyond differentiation and a match with gifted and talented students' learning styles," a policymaker related. A "Blue Ribbon" committee made up of businessmen, legislators, and educators developed the big picture, using discussion and collaboration as a means to build agreement

on the critical elements of the EIA of 1984. Later, state department of education personnel and other education experts developed the detail needed for implementation. A second policymaker stated, "The EIA was a working document, not cast in stone. The Blue Ribbon Committee relied on experts to flesh out ideas." Another concurred, "With the academic gifted and talented piece [of the EIA], there were no legislative goals. The statute was vague, general, and not specific in terms of goals. School districts set up models [for gifted education] best suited for them."

Purpose and Impact. Almost all of the policymakers agreed that the EIA of 1984 included gifted education because the state educational reform was intended to meet needs of students at both ends of the spectrum, as well as those in the middle. The prevailing belief was that the ". . . EIA should create action for all students. . . . In that context of going beyond poor, struggling students, gifted and talented and Advanced Placement were the next steps [in SC]." Many feared that, without significant reform, public schools would continue to lose students who could afford other educational options. One policymaker stated,

> . . . in South Carolina, the more advantaged parents were leaving the school system . . . because the education system was so poor. A critical question was would improvement target students from the bottom up, or all? It ended up that both the bottom and the higher performing students were targeted [with the EIA].

Because the purpose of the EIA was to improve the quality of SC public education, "EIA developers saw the need to go beyond the minimum, to offer innovation and new things in public education."

Equity. Policymakers saw equity as a driving force in the inclusion of gifted education as part of the reform mandate. Early in the policy development discussions, the issue of identification and selection, the question of who the gifted students were and how they are found, came up. One policymaker recalled,

> During one of the [Blue Ribbon] committee meetings, we were engaged in a discussion about how to define gifted and talented. The debate centered around the IQ definition, and the issue was raised that it [the IQ definition] would not be representative of the total population.

Discussion of minority representation in gifted programs led to the development of a broader, more inclusive definition of giftedness that extended the IQ-based notion of giftedness. Prior to the passage of the EIA in 1984, most SC gifted programs used a narrow definition. A policymaker noted, "I learned quickly that I had been wrong [about the IQ-based definition of giftedness]. The broader definition that was created was better than the more narrow (*sic*) one. That created a broader base of support for gifted [education in SC]."

Standards and Accountability. When the SC education system improved its delivery of basic education as a result of the EIA, the state reform focus shifted to the development of standards during the 1990s. When asked about whether standards help or hinder the education of gifted students, a policymaker noted that SC has "received external accolades for the rigor of our standards." A different policymaker described the second wave of educational reform when he said,

> The larger educational environment [in SC] was focused on accountability, frameworks, and curriculum standards. There was a need to tie GT back to the standards. In the 1999 regulations, more was defined about what should happen in GT programs relative to curriculum and instruction. . . . Most programs were enrichment and NOT connected to the regular curriculum—they were isolated and not integrated. The state began to provide resources to support the new [1999 gifted education] regulations and, at the same time, more national, research-based curriculum for GT was becoming available.

At that time, the state was working with the Center for Gifted Education at the College of William and Mary, piloting curriculum the Center was developing through a Javits grant.

In contrast, another stated that the accountability and standards movement has caused some "unintentional damages." First is ". . . a de-emphasis on the whole social/emotional piece caused by the over-fixation on test scores." Further, this policymaker stated that standards cause educators to focus so much on skills ". . . [we have] created a system where really bright kids' needs are not met." Another policymaker noted that the development of curriculum standards has provided more definition relative to curriculum and instruction for gifted learners, "The question was and is how do we build content that is academic and content-based and combine that with the processes and products suited for the gifted learner?"

Current Policy Effectiveness. Overall, policymakers viewed gifted education as effective in SC and discussed strengths and weaknesses in current policy. One policymaker stated,

> Gifted and talented is working well in the policy sense, i.e., gifted and talented programs [in SC] have become institutionalized. Prior to the EIA, gifted education was not essential to the core operation of schools. We no longer have that conversation. . . . We are very fortunate because of that.

The identification policy has evolved with changes over the past 20 years, and policymakers said that those changes have resulted in identification of more minority, nontraditional gifted students. Policy weaknesses noted by this sample were lack of attention to student outcomes and program evaluation, as well as no requirement in state policy for a local gifted education coordinator.

Linkers

The linkers group (n = 19) offered historical perspective on early development and implementation of gifted education in SC combined with knowledge of current policy and its implementation (see Table 3 for themes).

Driving Forces. Some forces driving gifted education policy development named by this group were strong leadership; equity and access issues; a statewide, external evaluation; and federal support through

Table 3

Linkers: Themes

Themes
• Driving forces for development of gifted education in SC 1. Strong leadership: Political leaders worked collaboratively with a core of school district leaders. 2. Equity and access issues: Minority underrepresentation pushed search for solutions. 3. Statewide external evaluation: Recommendations moved policy forward in key areas. 4. Federal support through Javits grants: Funding enabled research on nontraditional gifted learners and additional teacher development.
• Major policy areas of concern 1. Identification: A more diverse gifted population requires additional program development. 2. Funding: The gifted population has increased, and the level of funding has decreased.
• Policy strengths and weaknesses Strengths: State regulation serves as the "backbone" for gifted education. Weaknesses: 1. Program models and curriculum need more elaboration to ensure differentiation. 2. Lack of general education teacher knowledge of gifted education is an issue. 3. Endorsement for teachers in gifted education is a minimum requirement.

Javits grants. During the 1980s when the EIA was passed, linkers recollected that the governor and the state superintendent of education were progifted education. Their support was instrumental in policy development that mandated gifted education. That support coupled with funding from the EIA's additional $.01 tax increase made policy implementation possible. Linkers noted that key state legislators have been strong advocates for gifted education over the past 20 years. These supportive political leaders worked collaboratively with a strong core of school district-based gifted education leaders. Linkers stated this collaborative work with the legislature has been a key influence in policy development. For example, several task forces studied the issue of underrepresentation of minority gifted students.

This task-force work eventually led to significant changes in the SC identification regulations that have resulted in stronger identification practices.

This core of district leaders formed a regional consortium in the 1980s and provided leadership and development both in their districts and within the state. After the passage of the EIA in 1984, this core formed a statewide organization and cosponsored the first state conference for gifted education in 1985. Linkers noted that this district-based leadership core has remained strong over the years and continues to collaborate with state political leadership. Development of the *South Carolina Gifted and Talented Best Practices Manual* and the *Academically Gifted and Talented Curriculum and Instruction* resource guide illustrate how linkers and policymakers have worked collaboratively to improve implementation. These documents have "provided a valuable resource for districts and developed a common language around gifted education in [SC]."

Equity and access in terms of minority representation in gifted programs was a consideration prior to the EIA's passage and continues to be of concern with the linkers. Linkers remembered the Office of Civil Rights' (OCR) review of SC's gifted education programs in the 1990s. A linker acknowledged,

> The OCR was called in by a concerned citizen to investigate the equity of opportunity for participation of minority students in gifted programs. The OCR review ultimately led to census testing [of second grade students for gifted education screening], improved and required communication with all in the community [on the gifted education screening process], and revision of criteria for eligibility [for gifted program placement].

The linkers' focus group members said that although the OCR review was painful, positive changes resulted. Greater access to the screening and identification helped with the issue of underrepresentation.

Linkers recollected a statewide external evaluation of SC's gifted programs in the early 1990s as a key influence for policy change. The evaluation, described as "a change force which helped to move the state forward," was critical of the wide use of the pull-out enrichment model and the lack of record-keeping in gifted education programs.

Changes in reporting and record-keeping requirements for districts' gifted programs resulted. Linkers said that the evaluation strengthened the SC gifted education consortium's relationship with the Center for Gifted Education at the College of William and Mary as state leaders sought national expertise in the state of the art gifted education models and curriculum. Teacher endorsement in gifted education became a requirement by 1999.

A final change force in gifted education policy development linkers offered was the research on nontraditional gifted learners and teacher development in gifted education conducted statewide through Javits funding from the U.S. Office of Education in 2000. Development of performance assessment instruments as a means to identify more low-income and minority gifted students, research on those nontraditional students, and teacher development in gifted education resulted.

Policy Areas of Concern. Linkers' discussion touched on all gifted education policy areas, but two areas were of primary concern: identification and funding. Identification and selection practices have changed from district-based criteria for selecting gifted youngsters (prior to the EIA's passage) to state-based criteria for selection used across SC to determine eligibility. In SC, funding is connected to identification, and linkers observed that "over the past 20 years, funding has decreased while the gifted population has increased." Their view is that, as a state, SC includes more diverse gifted learners now, but state funding for local program development has not kept pace with needs.

Policy Strengths and Weaknesses. The linkers perceived gifted education policies and regulations as strong. One linker stated, "The regulations have provided the backbone [for gifted education]. Having the policy we do is positive." Policy areas in need of development were program models, connection to regular education, curriculum, and teacher development. When discussing gifted education program models that are content- and standards-based, one linker raised questions: "Are we truly exceeding [the state content] standards or just ability grouping? It is difficult to interface the [SC] gifted education goals into a content program that is standards-based. Are we

doing it right?" About the connection to regular education, linkers observed that SC's gifted educators are

> . . . just now beginning to have conversations about development for regular classroom teachers where gifted students spend the majority of their time. We need to put more teeth in training ALL teachers who work with gifted and talented. [Regular education teachers] teach the bulk of the academic time, and many have no clue of what they should be doing with gifted.

Linkers agreed that the curriculum policies for gifted education need further elaboration. Statements from the focus group such as, "We need a stronger statement about curriculum" and "What do the regulations mean by 'meeting and exceeding standards'. . . This needs to be explained," illustrate their perspective. Questions related to the need for curriculum policy development included, "Why are many bright kids not achieving? Why are scores on [the SC achievement test] not at the advanced and proficient levels [for our gifted students]?" Those in the focus group agreed that district-level leadership consistency is critical and sees full-time program coordination at the local level as essential. "Gifted programs are getting little attention when the coordinator is wearing so many hats," a linker noted. Teacher development, the required endorsement of 6 graduate hours, ". . . just scratches the surface and does not guarantee that the teacher is well-equipped to teach gifted."

Adopters

Some in the adopters sample had an historical perspective, but their comments generally focused more on policy implementation than development. Two themes were identified in focus group interviews with the gifted education coordinators, principals, gifted education teachers, and regular education teachers in the school districts included in the sample ($n = 26$; see Table 4).

Impact on Local Policy. Across all adopter focus groups, the teacher endorsement and coursework required by the state were seen as positive. An adopter stated, "I thought I knew everything before I took

Table 4

Adopters: Themes

Themes
• State policy impact on local policy 1. Teacher development: Endorsement requirements and training opportunities resulted in classroom practice changes. 2. Identification: Procedure changes include more diverse gifted students. 3. Standards and accountability: Curriculum alignment for gifted education with state standards shifted programming from enrichment to content-based.
• Policy strengths and weaknesses *Strengths* 1. Teacher development: Endorsement and development support are positive. 2. Access: Improved access for underrepresented gifted students (i.e., African American and low-income) is beneficial. 3. Programming: Increased rigor, challenge, and acceleration are productive for students. *Weaknesses* 1. Time: Time to implement needed curricular changes is a challenge. 2. Content versus process: Program delivery focus on content has resulted in less value for process. 3. Broader understanding: Building understanding of gifted students and their learning needs among general educators might be addressed through policy.

GT courses and taught gifted. Those [teacher endorsement] requirements led to more awareness of what I did not know [about gifted students]." Another said, "There has been much support from the state for the William and Mary curriculum. That support has been beneficial. They have provided extensive training." One adopter reported, "The district has been encouraging all teachers to become endorsed [in gifted education]. You see much more of 'gifted strategies' in regular classes now."

A second area of state policy, identification, has had local impact. Adopter focus groups observed changes in identification have improved access and equity for minority students. "The whole test-

ing area has changed over the years; it has blossomed," an adopter commented. "The OCR investigation [during the 1990s] made an impact. It has impacted the participation and identification of African American students." An adopter linked the changes in identification to the need for changes in curriculum and instruction:

> Now we are looking at [gifted students] who have spatial strengths, verbal strengths, others. The gifted class is much more diverse. That has led to changes in curriculum and sometimes the supports, such as [a need for] remediation. This is different in that the early 'gifted child' had both high reading and math abilities.

She was referring to gifted students who were identified using the weighted profile, the first identification process used by SC.

"Another change has been alignment with curriculum frameworks and standards," an adopter stated. Adopters noted the state and national focus on standards-based curriculum and instruction and the more recent changes in curriculum and program models for gifted education. They reported a shift from one-day-a-week enrichment pull-out programs with an affective emphasis and major field studies to site-based programs with a strong content emphasis.

Strengths and Weaknesses. Policy strengths reported were teacher development support and required teacher endorsement. Other strengths discussed by adopters were the improved access for gifted African American students and the view that acceleration, rigor, and challenge for gifted youngsters is on the increase. As illustration, one adopter said "[Middle school] Honors [classes] are allowing those students identified as gifted in math to have more access to higher, more advanced math courses. [These advanced courses] provide talent development for nonidentified [students gifted in] math."

Adopters perceived communication among stakeholders and changes resulting from a focus on standards-based instruction as areas of concern. Communication (i.e., how to build understanding among general educators of who the gifted student is and expectations relative to gifted student achievement) was a general concern adopters believed might be addressed through policy. Time to implement district changes in curriculum has been difficult. "Time is a big

challenge to get these procedures implemented. An example is the revision and redesign of sixth-, seventh-, and eighth-grade math in one year." Related to curriculum changes are program delivery model changes.

> Will the changes in service delivery for [our] eighth grade [e.g., 'gifted' social studies and math classes] make us lose something valuable? I hope that we do not lose that cross-fertilization and those rich discussions when gifted classes become more content driven and less process driven.

Discussion

Three questions guided the study. What does this case tell us about how SC's reform of general education affected gifted education between 1984 and 2004? What were the major influences on the evolution of gifted education policy during this time period? How has gifted education policy (i.e., statutes and regulations) impacted what happens in schools and districts?

General Education Reform and Gifted Education

The two reform movements during the time period of the case study were (a) the 1980s EIA that focused on basic skills and (b) the 1990s standards' movement centered around accountability and standards-based curriculum, instruction, and assessment. When asked about what drove SC's general education reform agenda of the 1980s, a policymaker said,

> The feeling was that we wanted to help poor kids, but we also needed to stretch the top kids—the GT kids. We wanted to look at new ways to identify and to reach more poor and Black GT kids. The business leaders [involved in development of the EIA] looked at the population of all students more analytically and systematically by grade and by achievement level. [This group of businessmen] felt the EIA should create action for all of those students, the low-achieving pre-

> school child as well as the high-achieving high school youngster. The point was that it [the EIA] would impact positively most or all kids. It [the EIA] was pushed forward by the momentum created by the buy-in and ownership of many groups because of the broad focus on all kids.

The comprehensive nature of the EIA, as reflected through goals to improve achievement, focus on special needs groups of students, and enhance the school environment, afforded a multipronged approach for reform. As a basic skills movement, it was interesting that part of this general education reform was the mandate for gifted education. The early attention to identification and service for minority gifted students is noteworthy. Later, the national education agenda's spotlight on standards and the changes in the state education policy produced the outcome of a closer connection between general education and gifted education. A policymaker explained,

> [In the 1990s], the larger educational environment was now focused on accountability frameworks, then curriculum standards. There was a need to tie GT back to the standards. As [gifted education] regulations were revised, more definition was provided relative to curriculum and instruction for gifted.

The same policymaker noted, "I keep an eye on other big state policies that may impact gifted education or connect with GT." Instead of a separate entity, gifted education is becoming more connected to general education through standards. Not clear from the data is whether the pressure to meet grade-level standards is creating a ceiling for gifted learners. Comments from both linkers and adopters indicate that tracking the outcomes is critical to be certain that gifted students are moving beyond standards.

An aspect not explored deeply in this study is the contribution gifted education made to general education in SC during this time of reform. Tomlinson and Callahan (1992) pointed out many contributions of the field, including philosophical and pedagogical ones. In this case, there was evidence that a broadened view of intelligence had taken root in many interviewed. Linker and adopter focus groups spoke about the wide utilization in regular classrooms of differentiation.

The process of general to specific policy development, beginning with broad ideas and relying on experts to flesh out the ideas for implementation, was evident in this case. The stages of policy implementation outlined by Gallagher and Coleman (1992)—development, approval, then application—were nonlinear in this case. Approval of gifted education as a concept came before the development. Implementation was occurring at the same time development was underway. The "innovation" under study (i.e., SC gifted education policy that grew out of the EIA) started out with vague characteristics that lacked clarity. At the time of the EIA, the feeling among policymakers was that districts knew what was best at the local level. Over time, clear and definite regulations on who the gifted are in SC (identification), how programs for gifted students must be administered, and who should teach these youngsters have evolved. One linker stated,

> We consciously created a "state" system. South Carolina had lots of transient children. We wanted children to be gifted even if they moved to another school district. . . . I believe the state identification is the thread that holds the mandate firm. Other states have lost their funding for gifted education, but we have been able to keep it because we have some agreement on who the gifted are.

The decision on policymakers' part to have some nonnegotiables has been positive.

General education reform has made resources available for gifted education. During the 20-year period studied in the case, funding for gifted education has increased nearly each year, but the numbers of identified gifted have also increased. The EIA added a penny to the sales tax, so the reformers' intention to provide funding for the innovations was present. Significant resources have been provided by SC, and a result has been the institutionalization of gifted education. As one policymaker stated, "There has been a philosophical shift. Gifted education was an add-on in 1978, but it is essential today. It is not a privilege, but a right; it is not the cherry on the cake, but the cake." Lack of sufficient funding to offer high-quality programming is a concern voiced by linkers; so, although gifted education is part of

the core and funding has been constant, the funding is not viewed as sufficient by some.

VanTassel-Baska (2005) outlined applicable principles of educational policy. As a way to address need, policy sets the standard for how schools and districts tackle needs and the resources allocated to address them (p. 3). This principle is evidenced in identification as the primary focus early in SC policy development. What the substance of the innovation was to be (i.e., curriculum, instruction, and student outcomes) was and remains the least well-developed characteristic of SC gifted education policy. Gallagher (2004) suggested that gifted educators are not asking the right questions as policy develops. He said we are not asking, "Do we have the necessary tools to do our job well? If the tools are not there (e.g., curriculum differentiation, personnel preparation), can we create them, and can we convince public decision makers to help us create them?" (p. xxiii). As gifted programs became established in SC, a shift to more explicit guidelines about curriculum, instruction, and program models occurred. In addition, the perceived need for teacher development led to required teacher endorsement in gifted education and state resources targeting opportunities for teacher learning.

Spillane and Thompson (1997) pointed out that reformers who shape policy need to think about what they call "local capacity"—that is, the human, financial, and social resources necessary to make the reform happen. This attention to building local capacity applies to why the changes in SC's gifted education have slowly developed over the past 20 years. When increased human and financial resources, partly supported by a Javits grant in 2000, focused on teacher development, the changes flowed more quickly. The knowledge and understanding of who gifted learners are and what teachers do differently with them have grown tremendously from the additional infusion of resources.

Primary Influences

Major influences on the evolution of SC's gifted education policy between 1984 and 2004 appear to be leadership and the drive for improvement in public education. The push for general education reform through the EIA and the standards movement contributed

to the changes in SC gifted education policy. The case underlines the importance of leadership at different levels in developing comprehensive policy. Examples of the critical nature of leadership range from the governor, state superintendent, and key state legislators; to the hard work, planning, and development provided by state department gifted education directors; to the advocacy and capacity building of local gifted education coordinators; to the local implementation by teachers and building level administrators. Strong political support led to the mandate and allocation of resources for the education of gifted youngsters. The state department's technical assistance and monitoring coupled with the active leadership from district-based educators seeking out best practice in the field strongly influenced policy development in SC. Teachers' and principals' participation in development opportunities and curriculum revision has impacted local practice. Leadership at these different levels has pushed SC's gifted education forward, resulting in improved identification of underrepresented gifted students and in a stronger connection to regular education.

Highly effective mechanisms and systems that ensure opportunities for SC gifted learners are a state director of gifted education and a strong, organized core of district leaders working in tandem with political leaders (VanTassel-Baska, 2005, p. 3). Across perspectives in the study, leadership was a strength. The role of leadership raises questions. What mechanisms are in place to grow future leaders? What is the system that needs to be in place for this leadership to continue to push gifted education forward? A concern noted is that there is no policy requiring a district-level gifted education coordinator. As district personnel are called upon to do more varied jobs, the local leadership appears to be suffering from the "too much to do, too little time" syndrome.

Interviews indicated that the "actors" in this case study—the policymakers, the adopters, and the linkers—interacted in directions displayed in the conceptual framework. Relationships between the policymakers and the linkers in this case were collaborative and ongoing and strengthened the leadership impact. "[The state department gifted education director] worked actively with legislative groups and gifted education district coordinators to shape the regulations," a linker noted. Those relationships resulted in the develop-

ment of clear regulations that have served bright students well. The collaborative work over time of policymakers and linkers to shape an identification and selection process that included underrepresented gifted students exemplifies the relationship between the two groups. "[A district gifted education coordinator] was very active in leading and advocating for minority representation [in gifted programs]." The data provide evidence policies have addressed access and opportunity for underrepresented gifted youngsters. Less clear is the degree to which policies supporting teacher development have impacted the curriculum, instruction, and support services for gifted minority and low-income students. The attention to funding and continued provision of state resources for gifted education program implementation demonstrates outcomes of strong collaboration between policymakers and linkers.

Local Meaning

How has gifted education policy translated at the school and the classroom levels? Interviews across the distinct groups in the sample indicate the required teacher development, 6 hours in gifted education, has positively impacted teachers' understanding about whom the gifted are and how to teach them. More teacher development in gifted education clearly is key to higher quality curriculum and instruction for the diverse population of SC's gifted students. Linkers and adopters believe that administrators need a better understanding of gifted education. An adopter stated, "We [gifted educators] are bridging to regular education now. We are part of the [regular education] team, no longer just working with one another." School districts are beginning to provide staff development for all teachers on differentiation, strengthening all teachers' knowledge of how to address varied needs of students.

The adopters and policymakers in this case were not directly connected, so similar collaborative relationships evidenced between the linkers and policymakers were not found. Adopters' lack of connection to policymakers appeared to contribute to deficient understanding of changes in gifted education policies over time. For example, the shift to standards and accountability for gifted educators and the demand that gifted programs connect to regular education was diffi-

cult for some at the school and classroom levels to understand. Some equated "different curriculum," where gifted learners study different topics not addressed in general education, with "differentiated curriculum," where learning begins with standards and combines enrichment and acceleration to challenge gifted learners. Several adopters viewed the broadened definition of giftedness and the inclusion of more diverse gifted students as a watering down of their programs. An adopter stated, "… On the identification piece, teachers have concerns about the [gifted] identification. . . . They do not understand it." The lack of understanding in areas by some adopters indicates the need for a strengthened relationship with both policymakers and linkers. Renzulli and Reis (1991) noted system-wide educational improvement can discourage local initiative and imagination. Linkers could strengthen understanding by helping adopters see a bigger picture. Linkers and policymakers can provide adopters the opportunity to learn about and understand how policy is developed. Policymakers can provide adopters opportunities for input to shape policy development, taking that local imagination into account.

In their research on education reform, Spillane and Thompson (1997) talked about the capacity of the districts to "to craft and carry out policies that support more challenging instruction . . ." (p. 185). Local gifted education policy development has been more concerned with make-up work missed and withdrawal rather than acceleration options for gifted students. In a case study, Spillane (1996) noted that state and local policies may differ when it comes to instruction. He argued that since the 1980s back-to-basics movement, policy focus has shifted away from school districts to the state as the power broker in policy implementation. The implication is that state policies on gifted education curriculum and instruction must be explicit enough for district-level translation into classroom practice.

Brown et al. (2003) found in a gifted policy analysis study of five states that identification policy is strong but the category of "program/curriculum/service provisions" (p. 123) needs strengthening. A recommendation of their study is for "states [to] consider crafting specific regulations for what constitutes an appropriate program for the gifted, with special attention to counseling and guidance services as well as differentiated curriculum" (p. 123). They suggest that policy include specifics on grouping arrangements, contact time, and dif-

ferentiation methods. Their findings are consistent with linkers' and adopters' comments in interviews that more specifics and additional details are needed in curriculum and instruction policy. Brown et al. pointed out the need for supplemental policies such as "alignment of gifted education curriculum to state standards of learning so that districts can see how gifted education extends yet goes through the standards" (p.125) and options for acceleration. These recommendations, too, are consistent with the findings in this case.

Conclusion

As a case study, the results are not generalizable. What are the lessons that might inform us from this specific, particular state context? First, time, resources, and attentive leaders are fundamental to strong policy. After 20 years in SC policy, the work continues. Advocacy and political relationships have benefited SC's gifted students. Tracking results to make policy changes as needed in a responsive way is fundamental. In a field as young as gifted education, following current research and making changes as the knowledge base develops is vital. One policymaker noted that many state policy changes and regulations are tied to the growing research base in gifted education. He advocates for the use of evidence and results to move the state program forward. Asking what is needed and creating the tools to address needs is central to the growth cycle.

Any state context cannot be separated from the national context. The reform movements of the 1980s and 1990s were embedded in American education and affected most, if not all, states. General education changes can create positive reform in gifted education when equity is a consideration (i.e., the recognition exists that diverse learners need differing policies that allow the opportunity to learn at levels commensurate with their special needs and abilities). Paying attention to general education policy and teasing out implications for gifted education is another lesson from this case. Tomlinson and Callahan (1992) challenged gifted educators to work closely with general education, share expertise, and keep an open dialogue on needed change for "all kinds of learners, including the highly able" (p. 187).

Brown et al. (2003) found that SC has solid policy, including the mandate and funding for gifted education. This foundation of a strong policy is basic in comprehensive gifted program development and services (Brown et al., 2003). Strategic planning and consistent efforts over time are necessary in building the fundamental policy.

Finally, how can adopters become more integral to policy development? Interesting was the adopters' view that SC policymakers shaped specifics. That view was ill-informed, as the reality was broad-strokes planning with details left to experts—in this case, the linkers. Knowledge of how policy develops would be a powerful tool for local educators.

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