NC AIG PROGRAM STANDARDS

Resource Guide

Standard 1: Identification

Public Schools of North Carolina
State Board of Education
Department of Public Instruction

February 2016

Developed collaboratively with NC AIG Coordinators from across the state and the North Carolina Department of Public Instruction

OVERVIEW & PURPOSE OF THE IDENTIFICATION RESOURCE GUIDE

In 1996, new legislation for gifted education was passed in our state – Article 9B, Academically or Intellectually Gifted Students [N.C.G.S. § 115C-150.5-.8 (Article 9B)]. While Article 9B provides a state definition of giftedness, there is not a uniform set of criteria for local districts to use in identifying gifted students. Instead, across the state, we are able to honor local flexibility and control as we strive to develop identification criteria which are responsive to the LEA demographics, as well as the traditionally under-represented populations of gifted in the local context.

To that end, during the 2014-15 school year, AIG Coordinators across the state engaged in a series of "Identification Think Tank" sessions. Those sessions examined the issues and concerns that coordinators face in trying to develop and implement local policies in the area of student identification. As a means of tying together the research and lessons learned over the course of this experience, and to support school districts in the development of local criteria, leaders from across the state have come together with the NC Department of Public Instruction (NCDPI) staff to produce a guide to help clarify identification criteria, elaborate on best practices in testing students, and better understand decision making around the placement of children in gifted programs. The staff at NCDPI would like to thank those district coordinators who rendered their support and expertise in the development of this Identification Resource Guide.

While there is no "magic bullet" or single "right way" to identify gifted students, this guide has been developed to support the following:

- Guide district coordinators and teams in thinking deeply about how to effectively identify gifted learners.
- Sharing and implementation of research-based best practices regarding identification across the state.
- Promote better understanding of the processes and thinking that lead to the ultimate goal of identification: to recognize potential and respond appropriately to ensure the optimal growth and development of the child.

Following the charge set forth in the legislation that guides gifted programming (Article 9B), this guide is broken into three sections:

- Resource and Policy Development
- Pre-identification processes: Screening and Referral
- Identification practices

Each section contains a review of best practices, an overview of critical vocabulary or policy needed to better understand the process, and reflection questions to support districts in assessing current practice and considering new ideas.

RESOURCE & POLICY DEVELOPMENT

This section of the Identification Resource Guide, houses the major resources that directly impact a district's development of effective identification policy. The goal for districts is to examine each of the resources in this section and then respond to the accompanying reflection questions. The reflection questions are designed for districts to use when assessing their current practices around, developing effective policy in, and making plans to move forward with "best practices" in the area of gifted identification. The resources reviewed in this section are as follows:

- Article 9B: The North Carolina definition of giftedness, the State Board of Education responsibilities, Local plans, and Review of Disagreements.
- Standard 1 – Student identification (from the NC AIG Program Standards)

Close Review of the Legislation – [N.C.G.S. § 115C-150.5-.8 (Article 9B)]

> **Part A: N.C.G.S. § 115C – 150.5. Academically or Intellectually Gifted students.**
> **Legislative Language:**
> *The General Assembly believes the public schools should challenge all students to aim for academic excellence and that academically or intellectually gifted (AIG) students perform or show the potential to perform at substantially high levels of accomplishment when compared with others of their age, experiences or environment. Academically or intellectually gifted students exhibit high performance capability in intellectual areas, specific academic fields, or in both the intellectual areas and specific academic fields. Academically or intellectually gifted students require differentiated educational services beyond those ordinarily provided by the regular educational program. Outstanding abilities are present in students from all cultural groups, across all economic strata, and in all areas of human endeavor.*

Unpacking the Legislation:
What are the various components of the state definition to be particularly mindful of?

- Public schools should challenge ALL students to aim for academic excellence
    - Introductory statement within the legislation provides a challenge for all LEAs

- AIG students **perform**
    - Perform = shows high achievement in academic pursuits

- AIG students **show the potentia**l to perform
    - Potential = latent ability; existing but not yet developed or actualized, existing as potential, student has the possibility to perform

- AIG students exhibit **substantially high levels of accomplishment**
    - Substantially high level of accomplishment = quantitative and/or qualitative measure(s) that represent above average achievement

- When compared with others of **their age, experience, or environment**
    - Highlights attention the critical nature and unique context of the local learning environment

- Students exhibit high performance capability in **intellectual areas, specific academic fields or both**
    - recognize that giftedness can manifest itself in EITHER area OR both areas; it is not required to be an "AND" instead can be an either or
    - intellectual areas = cognitive processing and reasoning abilities in scholarly areas of study outside of the regular academic programming of schools
    - specific academic fields = those within the regular academic programming
    - or both = can be academic fields AND intellectual areas

- Require **differentiated educational services** beyond those **ordinarily provided by the regular educational program.**
    - differentiated educational services = something that is "different" than the standard educational services provided to the student
        - differentiation can happen by changing the content, process, or product
        - assessment data is utilized to make differentiation decisions
    - ordinarily provided by the regular educational program = the taught curriculum, as defined by the local district, or the way in which the district approaches or implements the standard course of study

- Abilities present in students from **all cultural groups, economic strata, and areas of human endeavor**
    - cultural groups = The various groups of people distinguished one from another by the sum of attitudes, customs, and beliefs related to culture
    - economic strata = how social classes are stratified, along economic lines
    - human endeavor = all things that humans (students) attempt to do

Reflection questions for districts to consider:

How can districts keep these ideas at the forefront of the discussion when developing identification policy and recommending changes to identification practice and policy?

- Read the policy and/or the definition frequently as the standard is revised to realize the ideals of the legislation.
- Make the legislation available to district Advisory Board and other stakeholders.
- Make vocabulary consistent throughout the plan revision to ensure common understanding of all components of identification process.
- Examine how different parts of the definition would impact the district's identification criteria and programming.

Part B: N.C.G.S. § 115C-150.6. State Board of Education responsibilities.

Legislative Language:
In order to implement this Article, the State Board of Education shall:
(1) Develop and disseminate guidelines for developing local plans under G.S. 115C-150.7(a). These guidelines should address identification procedures, differentiated curriculum, integrated services, staff development, program evaluation methods, and any other information the State Board considers necessary or appropriate.
(2) Provide ongoing technical assistance to the local school administrative units in the development, implementation, and evaluation of their local plans under G.S. 115C-150.7. (1996, 2nd Ex. Sess., c. 18, s. 18.24(f).)

Unpacking the legislation:

In reviewing the State Board of Education responsibilities, districts can be assured of the following:

- NCDPI staff will develop guidelines for developing local plans, through the use of the NC AIG Program Standards.
- NCDPI staff will continue to clarify the standards and ensure districts have resources to fully understand the standards and develop local plans.
- NCDPI will provide technical assistance in a variety of ways to support districts in the development, monitoring, and evaluation of local plans.

Reflection questions for districts to consider:

What would district personnel share with the NCDPI staff about the types of technical assistance support needed to support local plan efforts?

What resources or support materials would be helpful in understanding the standards and plan development process?

As districts consider carefully the implementation and evaluation of local AIG plans, what types of support are needed to complete these processes?

Public Schools of North Carolina
State Board of Education
Department of Public Instruction

Part C: N.C.G.S. § 115C-150.7. Local Plans.

Legislative Language:
(a) Each local board of education shall develop a local plan designed to identify and establish a procedure for providing appropriate educational services to each academically or intellectually gifted student. The board shall include parents, the school community, representatives of the community, and others in the development of this plan. The plan may be developed by or in conjunction with other committees.
(b) Each plan shall include the following components:
(1) Screening, identification, and placement procedures that allow for the identification of specific educational needs and for the assignment of academically or intellectually gifted students to appropriate services.
(2) A clear statement of the program to be offered that includes different types of services provided in a variety of settings to meet the diversity of identified academically or intellectually gifted students.
(3) Measurable objectives for the various services that align with core curriculum and a method to evaluate the plan and the services offered. The evaluation shall focus on improved student performance.
(4) Professional development clearly matched to the goals and objectives of the plan, the needs of the staff providing services to academically or intellectually gifted students, the services offered, and the curricular modifications.
(5) A plan to involve the school community, parents, and representatives of the local community in the ongoing implementation of the local plan, monitoring of the local plan, and integration of educational services for academically or intellectually gifted students into the total school program. This should include a public information component.
(6) The name and role description of the person responsible for implementation of the plan.
(7) A procedure to resolve disagreements between parents or guardians and the local school administrative unit when a child is not identified as an academically or intellectually gifted student or concerning the appropriateness of services offered to the academically or intellectually gifted student.
(8) Any other information the local board considers necessary or appropriate to implement this Article or to improve the educational performance of academically or intellectually gifted students.
(c) Upon its approval of the plan developed under this section, the local board shall submit the plan to the State Board of Education for its review and comments. The local board shall consider the comments it receives from the State Board before it implements the plan.
(d) A plan shall remain in effect for no more than three years; however, the local board may amend the plan as often as it considers necessary or appropriate. Any changes to a plan shall be submitted to the State Board of Education for its review and comments. The local board shall consider the State Board's comments before it implements the changes. (1996, 2nd Ex. Sess., c. 18, s. 18.24(f).)

Unpacking the legislation:

In keeping with the legislative requirements set forth, districts must then determine how the following tasks will be accomplished:

- Work together with parents, the school community, representatives of the community, and others to develop a local plan. (a)
- Develop screening, referral, and placement procedures that allow for the identification of AIG students and assignment of these students to appropriate services. (b1)
- Outline efforts to develop services and settings to meet the diversity of identified AIG students. (b2)
- Define the measures of success for and then evaluate the local AIG plan and services offered; keeping the performance of students in mind. (b3)
- Provide professional development regarding identification, services offered, and curricular modifications to meet the needs of staff serving AIG students and meet the objectives of your local AIG plan. (b4)
- Involve the stakeholders in implementing and then monitoring the effectiveness of your local AIG plan. (b5)
- Appoint a person responsible for implementation of the plan and provide a job description for this individual. (b6)
- Develop a grievance process. (b7)
- Attend to the needs of the local unit to fully implement Article 9B and to improve the educational performance of AIG students. (b8)
- Develop process for reviewing the State Board of Education (SBE)/ North Carolina Department of Public Instruction (NCDPI) comments and feedback before implementing new plan. (c)
- Ensure that if changes are made to the plan once submitted to SBE/NCDPI, the changes are approved by the Local Board of Education (LBE) and re-submitted to the State Board of Education/ NC Department of Public Instruction for feedback and the LBE considers the feedback before implementing the new changes. (d)

Reflection questions for districts to consider:

1. When considering the components of Article 9B, what areas of strength emerge for the district?
2. In contrast, what areas need the most targeted attention and how will the district address these needs?
3. How will the district provide professional development that is targeted and meaningful and lead towards student placements that are more representative of the diversity found in the district?
4. How will the district define measures of success to evaluate the local plan?
5. What mechanism or structure is in place to ensure the LBE receives and reviews the plan feedback from SBE/ NCDPI before the plan is implemented?

Public Schools of North Carolina
State Board of Education
Department of Public Instruction

Part D: N.C.G.S. § 115C-150.8. Review of Disagreements.

Legislative Language:

In the event that the procedure developed under G.S. 115C-150.7(b7) fails to resolve a disagreement, the parent or guardian may file a petition for a contested case hearing under Article 3 of Chapter 150B of the General Statutes. The scope of review shall be limited to (i) whether the local school administrative unit improperly failed to identify the child as an academically or intellectually gifted student, or (ii) whether the local plan developed under G.S. 115C-150.7 has been implemented appropriately with regard to the child. Following the hearing, the administrative law judge shall make a decision that contains findings of fact and conclusions of law. Notwithstanding the provisions of Chapter 150B of the General Statutes, the decision of the administrative law judge becomes final, is binding on the parties, and is not subject to further review under Article 4 of Chapter 150B of the General Statutes. (1996, 2nd Ex. Sess., c. 18, s. 18.24(f).)

Unpacking the Legislation:

The legislation here clearly outlines a procedure for resolving disagreements when the local policy is not successful and the family chooses to follow this route. Critical to this procedure is an examination of the following:

* How did the local district improperly fail to identify the student as gifted? (i)
* How did the local unit appropriately implement the local plan with regards to the individual child in question? (ii)

Reflection questions for districts to consider:

1. How is the policy designed to ensure that the needs of the students are the primary consideration in the process and that those needs are met?
2. How does the district inform parents about the grievance procedures? Of parent rights?
3. How does your district periodically cross reference student identification and service delivery data to ensure the following:
   a. Consistency in identification practices across the district is aligned with the identification policy in your plan?
   b. There is a healthy match between the demonstrated needs of the student with the services provided to him or her?
4. When the Review of Disagreements policy for the district does not resolve the disagreement, how are all stakeholders advised about potential next steps and prepared for the process?
5. How does the district continue to evaluate the question of improperly failing to identify a student as gifted?
6. How does the district ensure that the local plan is followed when considering a case in question?

Close Review of Standard 1 (Student identification)

The North Carolina AIG Program Standards (State Board of Education Policy GCS – U – 000) provide a statewide framework for quality and comprehensive AIG programs and services, while honoring local context and flexibility. In addition, the standards serve as a vehicle for conveying expectations for local AIG programs and articulating best practices for local AIG programs. We further utilize the standards to guide the development, revision, and monitoring of local AIG programs. Therefore, effective identification policy development must also include a review of the expectations and goals found within standard one.

The clarifying descriptions below, taken from the unpacking documents, clearly explain what is meant by each of the practices within the standard, and the implementation ideas are examples of best practices and strategies currently in use by districts across the state. This information can also be found in an isolated document "Unpacking Standard 1" document on the NC AIG Program wiki site.

Standard 1: Student Identification

The LEA's student identification procedures for AIG are clear, equitable, and comprehensive and lead towards appropriate educational services.

a) Articulates and disseminates the procedures for AIG student identification, including screening, referral, and identification processes for all grade levels to school personnel, parents/families, students, and the community-at-large.	
Clarifying Description	Communicate procedures for AIG student identification for the district K-12. Outline procedures for screening, referral and identification processes. Share process with all stakeholders in a variety of modes/ formats.
Implementation ideas	Make procedures available in different media formats (including electronic, written, and verbal means) utilizing technology where appropriate and applicable. o Share process on home call alert systems. o Host open interest meetings at district and school levels K-12. o Advertise procedures in various public settings, including community locations. o Create brochures and quick reference guides for parent/community referrals. Consider including quotes from

current AIG students about the impact of AIG service in the brochure.
- o Integrate distribution of program and placement information for stakeholder groups all throughout the year at events such as Kindergarten registration, open houses, and/or in conjunction with other school and district wide informational nights (curriculum nights, etc.). Also distribute information with existing transition to the district/ new family packets and in new student registration materials.
- o Provide FAQ's section on the district website with screening, nomination and identification information in English and other native languages, as needed.
- o Write an article for school or district wide newsletter that describes screening and identification procedures for AIG. Put newsletter on main website.
- o Produce an AIG Newsletter that details current identification information. Provide copies of the newsletter at open house and other district wide events.

Translate information into needed languages for community.
- o Translate ALL distributed materials, into student's native language (based on community needs)
- o Work with translator during ESL Parent Meetings AND/OR other established parent gatherings or meetings to distribute materials regarding AIG (in native language).

Conduct parent and community training – ongoing and substantial (not distributing flyers, but focus on providing training and development)
- o Organize Parent information and/or training sessions for the delivery of information to parents & the community to help understand eligibility and the spectrum of AIG services

Conduct Staff Training
- o AIG Refresher Training for each school at the beginning of the year to ensure everyone understands the process for screening and identification
- o Develop and utilize a "standardized presentation" or video (i.e., Power Point, Prezi, other presentation format) outlining the screening, referral, and identification processes EACH year to teachers and other stakeholders across the district. Post on the school and/or district website. Alternatively, consider all relevant audiences, and tailor the presentation for each audience.

Identification Resource Guide
February 2016

	Other Ideas o AIG specialists submit revised yearly plans for their schools. The plans address several goals including the goal to implement identification procedures that are clear, equitable and comprehensive and lead towards appropriate educational services. (Rockingham)
b) States and employs multiple criteria for student identification. These criteria incorporate measures that reveal student aptitude, student achievement, or potential to achieve in order to develop a comprehensive profile for each student. These measures include both non-traditional and traditional measures that are based on current theory and research.	
Clarifying Description	Define what it means in your district to be academically gifted, intellectually gifted, and both academically and intellectually gifted. Clearly define your LEA's identification criteria for each of the gifted designations you utilize, including: o Academically Gifted o Intellectually Gifted o Academically and Intellectually Gifted o Any other designations PowerSchool currently includes four (4) designations to support your identification practices, with a fifth designation becoming available for your use in July 2016. They are as follows: Academically Gifted in Reading – AR Academically Gifted in Math – AM Academically Gifted – AG Intellectually Gifted – IG Academically and Intellectually Gifted – AI *effective summer 2016* Gather data to build a body of evidence/ comprehensive learner profile to best understand a child's abilities and potential.
Implementation ideas	Ensure that you are focused on multiple ways to see a child's strengths versus multiple hoops or barriers for identification. At a minimum, gather qualitative and quantitative evidence that include a student's achievement, aptitude, and potential to achieve. o Gather data across multiple criteria to determine if a child needs differentiated services for AIG.

Identification Resource Guide
February 2016

o Consider using off-grade level assessments and nationally normed assessments to best understand a student's profile.
o Create an opportunity to use innovative and unique evidence to show a child's needs by allowing supporting qualitative evidence, such as the use of an artifact. (Nash/Rocky Mount)
o Use typical as well as atypical standardized evidence, such as behavior checklists, observation tools and portfolios to build a body of evidence.
o Consider using student interviews as a part of identification, as well as, digital portfolios of student work.

Develop multiple pathways for student identification.
o Consider using a pathway to identify IG that is different than what you currently use to identify AG students – depending on your district's definition of giftedness.
o Consider using local norms (your local context – district and school wide data) to help understand and address student needs (Guilford) AND
o Consider the "Portfolio" option as an additional pathway for qualification. Eligibility is determined when a student demonstrates a need for service by performing above grade level peers within the context of the students learning environment. (Guilford)

Examine your identification criteria to ensure it is fair and equitable for all student populations.

With regards to identification practice:
o No one criterion should exclude a child from AIG identification.
o Any single criterion, if superior, may indicate a need for gifted identification and services.
o Gather a body of evidence to determine needs and match services to meet student need.
o Address the identification of students across the K-12 continuum. Even if you have no mass identification process for grades K-2 and/or 9-12, ensure that there is a means for identification at these grade spans as well when needed.

Public Schools of North Carolina
State Board of Education
Department of Public Instruction

c) Ensures AIG screening, referral, and identification procedures respond to traditionally under-represented populations of the gifted and are responsive to LEA demographics. These populations include students who are culturally/ethnically diverse, economically disadvantaged, English language learners, highly gifted, and twice-exceptional.	
Clarifying Description	Clearly state how the identification procedures in your LEA intentionally responds to your demographics.
Implementation ideas	Provide multiple pathways for identification; however, do not create an alternate pathway that is limited to only certain populations. Intentionally communicate with sub-groups (and underrepresented populations) information regarding screening, referral and identification. Analyze data for these sub-groups to inform procedures. o Monitor and analyze sub-group data to understand LEA demographics. o Partner with EC, ELL, Title 1, and other groups to best recognize and serve students. Screening & Referral: o Provide professional development to expand understanding of giftedness and tackle misperceptions. o Consider using assessments in native languages. o Create identification procedures that do not limit access to AIG identification services to certain populations. o Consider and review available district and statewide assessment data to ensure equitable access. For example: The testing coordinator provides a list of the top 20% of student scores from across the district on standardized achievement tests for screening. (Ashe) o Develop a comprehensive program to nurture and develop the potential of K-2 students to respond to all students, including diverse and underrepresented populations.
d) Implements screening, referral, and identification processes consistently within the LEA.	
Clarifying Description	Develop practices to monitor all screening, referral and identification processes to make sure they are the same across the LEA.

Identification Resource Guide
February 2016

Public Schools of North Carolina
State Board of Education
Department of Public Instruction

Implementation ideas	Develop clear and comprehensive guidelines for identification procedures.
	o Provide tools for schools to identify students (flowcharts, checklists, etc.).
	o Put plans in place to monitor student identification procedures.
	o Put procedures in place to consistently evaluate students who have participated in your focused K-3 programming.
	Provide consistent professional development for all school level identification committees/teams on identification procedures.
	o AIG Coordinator (or Lead Specialist) attend district principals meetings and share AIG identification information
	o Provide training modules for all certified staff members for consistency in referrals
	Create a system for documentation compliance and completion.
	o Create a procedure for maintaining documentation for all students in the AIG process, including those who are referred but not identified.
	o Develop a process for internal auditing of AIG school records. For example, using "Screening Notebooks" to document the screening process, and review with buddy teachers to ensure consistency in district placement and criteria. (Union)

e) Maintains documentation that explains the identification process and service options for individual AIG students, which is reviewed annually with parents/families.

Clarifying Description	Establish paperwork that is consistent across the LEA and clearly communicates a student's AIG identification procedures and the outcomes for students.
	Establish a Differentiated Education Plan (DEP), K-12, or other documentation which explains how the identification matches the service options for an individual AIG student.
	Ensure that documentation is reviewed annually with parents and families.

Identification Resource Guide
February 2016

Implementation ideas	Create documentation for all critical aspects of your identification process.
	o Develop a paper or electronic file to maintain an individual student's AIG documentation.
	o Utilize features in PowerSchool to create a DEP for students (using program identification information report).
	o Maintain documentation at a school site and/or central location.
	o Provide families/parents with copies of all documentation and meet annually to review. Include signatures of all associated parties.
	o Keep documentation for at least 3-5 years after high school graduation.
	o Create an online system that is shared across the LEA and with families.
	Consider how to utilize documentation of student participation and performance over the course of the year(s):
	o Students in grades 3-12 submit exemplary work samples in their area of identification for student portfolios that document performance and participation in AIG service. (Cumberland)
	o The high school AIG Specialist (Lead Specialist) reviews progress of identified high school students with school counselors every report card period and/or conferences with students regarding performance and course selection on an annual basis.

Reflection questions for districts to consider:

1. How is the identification process communicated with stakeholders?
2. As a district, think deeply about the ultimate goal in considering identification criteria:
    a. Why identify students?
    b. Who is the district looking for and/or want to serve?
    c. Does the current criteria indicate that the district is looking only for the "perfect child?"
    d. Does a review of local data indicate that the identification criteria meets the needs of advanced learners?
    e. Is there a process in place for evaluating the current identification criteria?
3. How does the district ensure that students who are culturally/ethnically diverse, economically disadvantaged, ELL's, highly gifted and/or 2E, have equitable opportunities to be recognized as gifted?
4. How does the plan allow for the identification of students at multiple points along the K-12 continuum consistently across the district?
5. How does the district recommend or consider identify students for talent development programming?
6. Are there students that were missed using the district's identification model?
    a. What data is reviewed to determine which students are missing from programming?
    b. What are the reflective practices in place to determine why the students are missed?
7. What professional development is in place for stakeholders involved in the identification process?
8. In what ways will the district serve the identified students?
9. How does the district articulate the ways in which services offered match the identification criteria?
10. How does the district document the identification process and services provided to students?

SCREENING + REFERRAL = PRE-IDENTIFICATION

This section of the guide will examine questions that refer specifically to the screening and referral processes. The goal for districts will be to consider the guidance in each of the following areas and then respond to the reflection questions at the end of the section.

- Overview of the screening and referral processes
- Review of best practices from NC districts
- Considerations for each grade span with relation to screening and referral processes
- Considerations regarding underrepresented populations
- A review of common challenges that districts face in implementing best practices with screening and referral process, and some potential solutions to support your efforts
- Reflection questions for a district to consider in the pre-identification process

PART A: Overview

As an underlying foundation, ensure that the district begins with the understanding that the screening and referral processes are available for students at all points along the K-12 continuum.

The goal of the screening process is to gather information and build a body of evidence to examine for students who will be considered for AIG services. Through the screening process, a comprehensive learner profile will be developed and later evaluated to determine if a student has needs beyond what is provided in the regular classroom.

There may be multiple layers of gathering evidence involved in the screening process. The screening process includes the use of research-based tools and criteria that indicate, at a minimum, the potential for achievement (the likelihood a student will excel in the performance of a certain skill), aptitude (an inclination to excel in the performance of a certain skill), achievement (a demonstrated high performance in relation to standards and benchmarks), and/or demonstrated gifted behaviors.

The goal of the referral process is to ensure there is a mechanism for finding additional students who might not have been highlighted in the screening process.

Best practices for referral and screening at the K-12 level reflects a plan for capturing students who demonstrate a need for more challenging curriculum than what is provided by the regular education classroom through use and analysis of diagnostic assessments, observational tools, anecdotal evidence, student portfolios, etc.

As data is gathered keep in mind the notion of the different categories of giftedness. In North Carolina, students are identified as either academically or intellectually gifted or both academically and intellectually gifted.

Current categories of giftedness:

- **IG:** Intellectually Gifted - Most LEAs are defining Intellectually Gifted as students who have demonstrated high intellectual capacity, but have not yet demonstrated high academic performance.
- **AG:** Academically Gifted - Most LEAs are defining Academically Gifted as students who have demonstrated high academic performance.   This performance can be designated in a specific academic field (such as reading or math or in a combination of areas – like reading and math).
- **AIG:** Academically and Intellectually Gifted - Most LEAs are defining Academically and Intellectually Gifted as students who are demonstrating high intellectual capacity and high academic performance.

Evidence in the screening process includes quantitative and qualitative data.

Quantitative Data:
- Available achievement scores (examples include EOG, EOC, NCFE, BOG, Explore, PLAN, ACT, and other nationally /state normed achievement scores)
- Available aptitude scores (some common aptitude tests include CogAT, NNAT, and OLSAT)
- Data collected through a sweep screen, the intentional consideration of every student at selected grade level(s) by reviewing existing data and/or administering a grade level assessment to gather further information)
- Historical trend of high classroom achievement/performance

Qualitative Data:
- Anecdotal evidence (specific examples to support referral)
- Observational data focused on gifted behaviors, including teacher pleasing and non-pleasing behaviors.
- Portfolio (examples of student work to support referral)

An independent referral for the screening process may also be initiated by:
- Student (self-nomination)
- Peer
- Teacher
- Parent
- Administration/Faculty/Staff
- Community Member (Boy/Girl Scout Leader, afterschool tutor, Boy's/Girl's Club Leader, extracurricular teacher, coach, or other mentor)

Identification in PowerSchool:
To support your efforts to identify gifted learners, PowerSchool is programmed to allow for the following designations for gifted students:
IG (intellectually gifted)
AR (academically gifted – in reading)
AM (academically gifted – in math)
AG (academically gifted)
*AI – the new designation in PowerSchool will allow districts to designate a student as BOTH intellectually AND academically gifted. *(Effective July 2016)*

Identification Resource Guide
February 2016

Part B: Best practices from districts

- Accept referrals all year long

- Establish large testing windows, but are responsive when individual needs arise

- Provide multiple screening opportunities at multiple points along the K-12 continuum

- Include teacher and behavior checklists that are research based for correlation and reliability

- Collaborate with the other department(s) to share assessment and observational information to refer students who may be twice-exceptional or English language learners

- Consider those students who have quickly tested out of ESL

- Consider providing non-verbal testing opportunities

- Develop formal documentation for students/teachers/parents to use when making independent referrals

- Inform parents prior to sweep screening as to the purpose of test, how data will be used by all teachers, and address the specific logistics of the testing window

- Obtain parent/guardian permission before administering additional individual testing

- Consider non-teacher pleasing behaviors when looking at screening and/or referrals, understanding that not all gifted students have behaviors that manifest in positive ways

- Consult EC department for clarification about providing testing accommodations and modifications during sweep screens

- Educate all staff members on gifted behaviors both teacher pleasing and non-teacher pleasing, and the districts' identification process

- Consider differences in local school demographics and environments when educating staff members on gifted behaviors

Part C: Considerations for each grade span

*As a reminder, AIG referral, screening, and identification is mandatory by NC law in grades K-12.

ALL grades K-12
- Work with staff to better understand characteristics of giftedness, including non-teacher pleasing behaviors.
- Intentionally create varied learning environments, to ensure that many ways exist to see a student's strengths and best thinking.
- Consider the use of off-grade level assessments as appropriate.

Kindergarten - Second Grade
- Intentionally review all available data for K-2 students for evidence of need (some examples of data: mClass (TRC, DIBELS), K-2 state math assessments, local baseline and benchmark assessments).
- Purposefully consider students who have been served through your district's talent development programming or efforts to cultivate potential.
- Develop a clear relationship between AIG Identification and single-subject, grade acceleration, and early admission to Kindergarten.

Grades 3 - 5
- Consider the administration of a grade level sweep screening opportunity.
- Intentionally review all available data for 3-5 students for evidence of need (some additional examples of data: mClass (TRC, DIBELS), local baseline and benchmark assessments, Science EOG).
- Purposefully review data for students who exhibit high participation in, and/or contributions to enriching extra-curricular activities.
- Develop a clear relationship between single-subject or grade acceleration and AIG Identification.

Grades 6 - 8
- Intentionally review all available data for 6-8 students (historical EOG data, EVAAS, local baseline and benchmark assessments).
- Purposefully review data for students who exhibit high interest in, participation in, and/or contributions to enriching extra-curricular activities.
- Consider additional sweep screen and/or intentional review to identify students who have demonstrated a need at this time.
- Develop a clear relationship between single-subject or grade acceleration and AIG Identification.
- Purposefully review students who have been successful in atypical learning environments, such as virtual learning, dual-enrollment, CDM.
- Encourage students to consider his or her own needs and self-refer for programming.

Identification Resource Guide
February 2016

Public Schools of North Carolina
State Board of Education
Department of Public Instruction

Grades 9 - 12
- Purposefully review students who have been successful in atypical learning environments, such as virtual learning, dual-enrollment, CDM.
- Intentionally review data for students who exhibit high interest, participation in, and/or contributions to extra-curricular and service learning activities.
- Intentionally review all available data for 9-12 students (including AP/IB and other college-readiness measures, historical EOG/EOC/NCFE data, EVAAS, local baseline and benchmark assessments, ACT Suite).
- Encourage students to consider his or her own needs and self-refer for programming.

PART D: Factors to consider when developing policy around under-represented populations

To combat disproportionality in gifted education, consider the following practices for ALL populations:

1. Provide opportunities for teacher education to help combat common misperceptions of gifted learners and to support the ability to look at students with a strength mindset.
2. Use a variety of means to gather data to see a students' strengths and to better understand his or her needs.
3. Consider the social and emotional barriers that might limit our views of a student's talent.

Underserved populations (including ethnically/ culturally diverse, economically disadvantaged, highly gifted, twice exceptional, and English language learners)

Ethnically/Culturally Diverse:
- Aim for all measures to be culturally fair and unbiased (nondiscriminatory assessment).
- Acknowledge that gifted behaviors may be manifested differently than traditionally accepted/expected behaviors.

English Language Learners
- Systematically include in screening process and then intentionally follow through the initial years within ELL support.
- Consider the use of tools that are non-English language based, including tools in the students' native language or those which provide a non-verbal measure.
- Ensure adequate communication with ELL families.
- Work closely with ELL students in your talent development program.

Economically Disadvantaged
- Provide teacher education to combat misconceptions of giftedness and encourage viewing students with an "at potential" lens.
- Acknowledge that students may not have the experiential background that allows them to be successful on some identification measures.
- Intentionally include in early and ongoing efforts to cultivate potential through talent development opportunities.
- Create learning environments that are varied and encompass many access points to provide many opportunities that allow students to show strengths in a variety of areas.

Highly Gifted
- Consider specific pathways to capture highly gifted so that their specific needs are acknowledged and can be addressed instructionally, including the opportunities for integrating acceleration as the need is demonstrated.
- Recognize that the highly gifted students may fall into any of the identification areas (IG, AG, AM, AR, AI).

Twice Exceptional
- Provide opportunities for students to be identified in a single area to acknowledge the dual exceptionality.
- Consider that the child's disability may mask his/her ability or vice versa.
- Work with the exceptional children's team and other staff to fully understand and meet the needs of the twice exceptional student which may be revealed through various assessment tools.

PART E: What are solutions to common barriers and challenges that a district might face?

Q: How does the district help teachers and other staff understand gifted characteristics which in turn leads to more inclusive and informed referrals?

Provide ongoing professional development and dialogue with teachers and other staff. This might include "mini workshops", critical conversations with individuals and/or collaborative planning teams (like PLC's), use of scenarios at faculty meetings to highlight characteristics of the atypical gifted learner, formal gifted education coursework, and other opportunities.

Q: How can the district ensure a thorough and consistent screening opportunity, even with budget challenges?

Make efforts to understand and know the district's budget – finding out what fund sources are available for use with gifted programming efforts. Develop a healthy relationship with the district's Finance Officer to better understand budget implications. Work with other departments to look at existing data available at district level that would not incur more costs, including data that would have been collected for the Multiple Tiered System of Support (MTSS) process. These data might include EOG, EOC, BOG, Benchmarks, PSAT, Aspire, PLAN, ACT, SAT, and mClass. If considering external assessments, when possible, consider local scoring and use school personnel for screeners and other testing. Finally, partner with other departments to allocate funds for external testing (sweep screening) and more importantly, support those departments in helping others understand why it is so important to collect evidence and how this data will benefit the student, thus ensuring widespread understanding and use of the data available.

Q: When is the optimal time to administer a grade-level or universal screening assessment?

Consider the district service model, and other processes that might dictate screening and identification windows, etc. In addition, work with district accountability division/ area to understand NC testing laws, policies and procedures. Finally, be aware of various accommodations of students (IEP, 504, LEP).

Q: Is it good practice to employ universal screeners to ensure that ALL students are looked at during at least one point in time?

YES. Many districts do administer universal screening opportunities in upper elementary school, beginning with 3rd grade. Have conversation with your district leadership team to consider at least one grade level opportunity and talk with other special areas who may benefit from the screening. (Example: EC, ESL, Title I and others)

Q: Should parent requests result in automatic testing?

Not necessarily. However, a parent referral might naturally begin a referral process to gather necessary data to make a decision about the need for further evidence. To support district efforts, ensure that parents are well informed about the local identification processes to ensure better stakeholder understanding. Also recognize that a parent request may indicate a need for close review of available data to make an informed testing decision.

Q: How can the district take into consideration the impact of the screening process on finding giftedness in the underrepresented populations?

Within the LEA's local plan, develop clear processes and protocols to comprehensively address finding the academic and/or intellectual gifts of all populations. Ensure that the plan includes a variety of learning environments that allow student multiple opportunities to show his or her strengths. Additionally, provide learning experiences that enrich, extend, and accelerate the NC Standard Course of Study to intentionally nurture and support the development of a student's academic or intellectual giftedness. Consider carefully the role of professional development for staff involved in the identification process to support their comprehensive understanding of gifted characteristics.

Identification Resource Guide
February 2016

Part F: Reflection questions for a district to consider:

Districts are encouraged to consider screening as an ongoing process of intentionally looking for the academic and intellectual gifts and strengths within every child. Therefore, in considering the screening process, keep in mind that screening is not synonymous with particular grade level sweep screening only; instead, the screening process happens ongoing throughout the entire K-12 spectrum. Districts are also encouraged to identify the sources of qualitative and quantitative data available to review to better understanding of the comprehensive needs of each individual learner. Use the questions below to assess current practice and determine how to improve both practice and policy with regards to the pre-identification processes of screening and referral.

1. Does the district have multiple opportunities for screening to occur across the K-12 continuum?

2. Has the district implemented a particular grade level for "sweep screening?" If so, when does this occur?

3. How does the district plan clearly articulate the screening and referral processes?

4. Does the district require a specific number of mandatory criteria that may limit placements?

5. How is the district screening process inclusive, casting a wide net?

6. How does the district's screening and referral process allow a child who shows a need for differentiated services the opportunity to be seen?

7. What is the district doing to promote the talent development of students from traditionally underrepresented populations?

8. How is the district promoting talent development for all students in primary grades?

9. How does the district ensure that underrepresented populations are being fairly and equitably considered?

Public Schools of North Carolina
State Board of Education
Department of Public Instruction

IDENTIFICATION of Academically or Intellectually Gifted Students

In this final section of the guide, districts will consider questions that refer specifically to the identification process. With Article 9B leading gifted programming in North Carolina, school districts are fortunate to be able to develop screening, referral and identification processes that best meet their own local needs and context. This flexibility ensures that each district is able to ultimately better identify and serve students who have advanced learning needs in their local schools, based on their local needs. The goal for districts will be to examine the guidance and then apply the information to their local context for each of the following areas:

- Overview of identification
- Best practices in identification practices as seen in NC districts
- Considerations for the identification of intellectually gifted (IG) students
- A review of common challenges that districts face in implementing best practices with screening and referral process, and some potential solutions to support your efforts

Part A: Overview

Goal of identification process:
- To examine/ evaluate the body of evidence (gathered during the screening and referral process) to determine if the student qualifies for AIG identification and services.

Purpose of the identification process:
- To ensure that students with advanced learning needs are identified and served.

Key Reminders:

- Districts should ensure that no single criteria excludes a child from identification and services; however, eligibility may be determined through a single exceptional criterion.

- Districts should ensure that within the body of evidence that is gathered, students from every population, including across all cultural groups and all economic strata, be given the opportunity to demonstrate his or her ability through a multiple criteria approach.

Part B: Best practices in Identification

During initial planning steps, districts need to determine each of the following:

1. What data will be collected at each grade level or grade span?

2. What will be the eligibility criteria the district utilizes to identify giftedness (academic and intellectual)?

3. Who will analyze the comprehensive learning profile to determine if the data indicates a need for gifted services?

4. Will the review of student data be a school based or a district level committee/ team decision?

5. How will the district ensure that the identification process is consistently implemented across the district at all grade levels or grade spans?

6. How will information about the identification process be shared with parents?

7. At what points will district personnel obtain appropriate parent permission for conducting assessments, beyond those required for the initial screening process, and for providing services to students?

8. How will the steps in the identification process be formally documented?

After the initial planning, districts further consider how to accomplish the following tasks:

- Match the services that will be offered to the identification data for the student by developing programming options that match the demonstrated need(s) highlighted in the data collection process.

- Periodically review student performance data for identified students to ensure appropriate services are offered.
    - Keep in mind that as new evidence becomes available, the student identification may change and identification in a new area may be added.
    - In other cases, where students are no longer performing at substantially high levels, districts are strongly encouraged to find ways to flexibly serve the student according to his or her current demonstrated needs as opposed to the practice of "de-gifting students."

- Use local norms when appropriate, as the local data provides a frame of reference for a particular student's score in relation to other students within the same local learning environment.
  - Delineate identification so differentiation needs are evident (highly gifted are acknowledged in schools where there are many children who meet eligibility criteria).
  - Consider using local and/or school norms to support identification for students when in the school there is a low percentage of the population identified.

- Identify the unique sources of data that are available to support identification decisions for primary aged students.

- Consider establishing a process to evaluate students who have been admitted to kindergarten early for gifted services.

- Analyze data from other early grades advanced programs and services, including grade or subject acceleration.

- Ensure consistent timeline and processes for gathering and analyzing data across the district.

Part C: Considerations for the identification of Intellectually Gifted (IG) students

As an initial step, when developing criteria, policy, and programming for intellectually gifted students, districts are encouraged to clearly define Intellectually Gifted (IG) in a way that honors local context.

Many districts define IG students as students who may perform in the superior range on aptitude or non-verbal components of assessments with little evidence of achievement or academic performance. This definition recognizes that not all intellectually gifted students are going to display gifted characteristics in an "achievement-based" way. In instances where IG is defined in this way, the district often chooses not to include criteria related to achievement as an indicator of giftedness needed for eligibility.

As you develop your districts' definition of and criteria for Intellectually Gifted (IG), carefully consider the services that will be available. To optimally develop the potential of IG students, possible ideas for services might include:
   o   Engagement in a rich and challenging curriculum, like project based learning, problem based learning, interest-based exploration and independent study opportunities
   o   Providing support structures to address the factors/circumstances which inhibit transfer of intellect into academic performance
   o   Raising awareness of the social and emotional factors that may inhibit successful academic performance
   o   Employing strategies to develop and explore leadership development and/or personal and academic organizational support. These strategies might be similar to AVID strategies and programming options.

PART D: What are the potential challenges that a district might face?

Q: How does a district ensure that they are creating an effective and comprehensive identification policy?

A comprehensive identification policy takes the following into consideration:
- Evaluate your identification data, including sub group analysis, to determine how the district is meeting the needs of the top students.
- Ensure that the district's eligibility criteria includes one possible measure for each indicator of giftedness (i.e., achievement, aptitude, potential to achieve, and other demonstrated gifted behaviors).
- Utilize additional pieces of evidence to support a student nomination, rather than negatively impact the student.
- Ensure that behavior and teacher checklists are research based for correlation studies and reliability. Utilize these tools at multiple entry points, rather than using one in a particular grade for the students' entire educational career.
- Ensure that evidence collected reflects the holistic needs of the student – and will therefore assist your identification team in making a match with service delivery.

Q: How can our district ensure that our identification system does not create multiple hoops?

In developing a system that collects data to create a comprehensive data profile, and helps to understand a student's individual needs and strengths, the district asks the following questions:
- Are there multiple pieces of evidence that asses the same indicator of giftedness?
- Which indicators of giftedness will the district collect evidence on?
- How many criteria are needed to qualify for gifted services?
- Which philosophy will the district use when evaluating multiple criteria?
  - If the district uses the "and" philosophy, looking for evidence in aptitude and achievement and teacher ratings on observed gifted characteristics, as well as other measures, the pool of potential candidates will be limited.
  - By contrast, when the district uses an "or" philosophy, looking for evidence in some of the indicators but not in all indicators, the pool of potential candidates will be expanded.
  - When using the mean scores, averaging various scores from the various indicators of giftedness, the pool of potential candidates is larger than when using the "and" philosophy, but smaller than when using the "or" philosophy.

Q: How does a district ensure that the identification process is implemented consistently across a district?

Ensure that district leadership provides the following for school and/or district based identification teams:
- Resources and materials to ensure that identification decisions align with district AIG Plan.

- Training which targets how to communicate with parents and families about identification decisions and complete appropriate documentation.
- Opportunities to participate in internal identification audit(s) to review screening and identification data to ensure that students would have been identified consistently across the district.

Q: How does a district ensure that student identification leads to meaningful and intentional service delivery options?

Periodically, those providing leadership for gifted programs participate in the following practices:
- Evaluate data to develop a deep understanding of the comprehensive needs of the student and then determine service options that will match these needs.
- Evaluate the type of services that students will receive and use this understanding to guide and impact identification criteria.
- Document the services provided for the student in the students' differentiated education plan (DEP).
- Challenge the district to be creative in offering new programming options to meet student needs, using both traditional and non-traditional methods (consider flexible grouping options, piloting research-based strategies, include virtual education options, utilizing various content acceleration options).

Q: How can a district support parents in understanding the identification process?

The AIG Coordinator, in conjunction with district AIG leadership might consider the following strategies:
- Offer annual parent meetings that provide an overview of the identification process (example: offer a "Gifted 101" course for parents).
- Post information on the school and/or district website.
- Share information about process through other written communication forms (might include newsletters or other published articles).
- Expect teachers to be active partners in the search for discovering talent in students; using an at-potential lens to view students' strengths.

Q: How does a district develop a quality identification system? Where do we start?

Bring together your AIG Team and take time to reflect on the current status of your district. Gather and analyze three critical data sets:

1. Local assessment data. At what level do your most advanced students typically appear? Where is the level that typically indicates students needing differentiated services on various assessments? Local norms will help guide your criteria development.
2. Profiles of students currently identified. Which students do you already identify and serve that you want to make sure you to continue to identify and serve? Validate what works.

Public Schools of North Carolina
State Board of Education
Department of Public Instruction

3. Profiles of students that were not identified, but should have been. Which student did that teacher know was gifted but did not qualify? Which student did a teacher not bring forward because she knew the student would not qualify, even though the student needed something different? What causes the district to miss these students? A specific criterion, a service option, perception? Have teachers think back and openly share about these students. This data set will push your district to think differently.

After considering each of these data sets independently, triangulate the data and think about how they are inter-related. Through this process, it will become clearer what changes the district needs to make to improve its identification criteria.

Identification Resource Guide
February 2016