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Gatekeepers for Gifted Social Studies: Case Studies of Middle School Teachers

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Gatekeepers for Gifted Social Studies: Case Studies of Middle School Teachers

by

Teresa M. Bergstrom

A dissertation submitted in partial fulfillment of the requirements for the degree of Doctor of Philosophy with a concentration in Social Science Education Department of Teaching and Learning College of Education University of South Florida

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Keywords: Curricular-Instructional Gatekeeping, Differentiation, Gifted Education, Middle Level Education, Social Studies Education

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DEDICATION

In dedication to my son, Michael Lazar:

You are the gatekeeper of your own life’s fulfillment. Tend it with joy and compassion, my love.
ACKNOWLEDGEMENTS

First and foremost, I would like to acknowledge my husband, Stephen, who supported me on this most dreamy endeavor. Thank you for providing me constant insight, tenacity, and encouragement. I love you to the moon and back. Great appreciation goes to my parents, Mike and Shelly Fox, my sister, Alicia, my in-laws, extended family, and friends who have always supported me with enduring strength, wisdom, and optimism. I am so honored to be the first in my family to pursue and graduate with a doctoral degree.

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Lastly, to my middle level students of years past and present: If you happen to stumble across this dissertation in your journeys of academic excellence, may I repeat what I have shared with you in our classroom. You can accomplish absolutely anything no matter how far-fetched and adventurous it may be. You don’t have to be perfect to obtain your dreams. Stumble and fall once in a while. Experience what it’s like to pick yourself back up, brush the insurmountable stress and pressure off your shoulders, and keep forging forward. Sometimes you need to know what it feels like to struggle in order to appreciate success. You are all hidden between the pages of this study, for you have taught me far more about education than I could ever have learned on my own. For that, I am eternally grateful that you continue to make such a positive impact on my life.
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Day two
Day three
Day four
Day five

Ms. Heisman
Day one
Day two
Day three
Day four
Day five

Mrs. Tango
Day one
Day two
Day three

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ABSTRACT

This is a multiple case study of the ways middle grades social studies teachers, as curricular-instructional gatekeepers, may make decisions to provide their gifted students with purposeful differentiated instruction. More specifically, this study explores what teachers believe they should do to instruct gifted students, in what ways teachers prepare and adapt curriculum and instruction for gifted students, and how instruction for gifted learners can take place in a middle school social studies classroom. Through semi-structured interviews, classroom observations, and supportive visual evidence, six middle grades (6-8) social studies teachers disclosed in what ways they differentiate their middle grades social studies curriculum and instruction for their gifted adolescent learners. Through Hatch’s (2002) Inductive Analysis model, findings were recorded and presented in the form of individual teacher observation and thematic cross-case analysis.

Findings suggest that middle grades social studies teachers take into consideration factors that influence their curricular-instructional beliefs, directly affecting the decisions they make in terms of curriculum selection, instructional delivery, and the methods of differentiation employed to meet the needs of their gifted students. Much of what teachers planned, prepared, and adapted was often influenced by the needs of their students, but also addressed mandates of their school and district agendas. This conflict between meeting the needs of both students and administration resulted in gatekeeping that often favored administration, while reducing the frequency of best practices for middle level gifted students in social studies classrooms.
Implications for the study include how teacher confidence, or the lack there of, effects instructional practices. Time constraints in middle level curriculum pacing and increased assessment also limited opportunities for rigorous, relevant, and differentiated social studies instruction for gifted students. Middle level social studies teachers of gifted call for clearer and more illustrative descriptions of what the academic ceiling for gifted social studies might look like in general. There are distinctive contrasts between models of differentiation and neighboring concepts of individualized and personalized learning. While in theory differentiation is meaningful, middle level social studies teachers find it difficult to implement methods of differentiation in their classroom with desired frequency. There is a distinctive bond between the fields of social studies, English Language Arts, and research skills. Middle level social studies teachers of gifted seek greater opportunities for meaningful professional development options. Lastly, there is a call among middle level social studies teachers for the inclusion of gifted initiatives in teacher education programs.

Topics that could be explored for future research include a continued effort to expound applicable gatekeeping practices, the provision of purposeful professional development and learning for teacher populations, continued application and practice of differentiation in the field of social studies education, increased inclusion of social studies in the elementary classroom, the awareness and servicing of gifted learners in the middle school social studies classroom, and the increased inclusion of gifted populations with undergraduate and graduate social studies education programs.
CHAPTER ONE
INTRODUCTION

Introduction

It is a common notion among my teaching colleagues that we teach the students we have, yet the students who enter a teacher’s classroom embody distinctive characteristics and individual needs. As Heacox (2012) suggests, every student requires different teaching strategies because they all process knowledge differently. Therefore, teachers should prepare and enact differentiated curricula and modify instruction to fit the academic needs of their students (Gregory & Chapman, 2012) and maximize their potential academic achievement (Heacox, 2012). This is a study of how teachers make curricular-instructional decisions pertaining to middle level social studies curriculum and instruction that services gifted students using various methods of differentiation.

To provide some context, I was certified by the Florida Department of Education in 2004 after I graduated with a Bachelor of Arts in History. Stepping into my first social studies classroom, I was well aware I wouldn’t be able to meet the needs of all my students at first. Nevertheless, I believed that I had my feet firmly planted, realizing that my practice as a beginning educator would be successful with continued experience and professional development. Soon after I initiated my career as a classroom teacher, I completed a Masters in Education in Curriculum and Instruction.

After five years of teaching middle school social studies within the public school system, I accepted a middle grades position teaching social studies to a self-contained
gifted student population. The school district required me to complete gifted education certification within two fiscal school years. Through the completion of this certification, my philosophy of education shifted. I realized that my newly acquired student population required different services and an intensified curriculum options in comparison to what I provided general education students in the past. I unintentionally neglected the academic and social-emotional needs of gifted students who were at one time assigned to my general education classroom during the first five years of my teaching career. With a renewed sense of responsibility, I believe I let those students down.

I quickly found that there was much left unsaid and unexplored in the empirical literature connecting the practical experiences teachers have with instructing gifted students in middle school social studies classrooms. How did other social studies teachers decide to meet the needs of their gifted student populations? How were lessons adapted to provide gifted students with rigor and relevance? What did this process look like in a social studies classroom? These questions eventually led me to this study, thereby launching greater inquiry into how middle level social studies teachers meet the individualized special needs of gifted populations within the context of utilizing purposeful curriculum and instructional practices.

**Background and Rationale**

There are distinctive bonds that make the study of middle level social studies for gifted learners special in comparison with other subject areas and grade levels. The social studies provide what Van Tassel-Baska and Stambaugh (2006) call the study of more than just dates, events, and people. “The social studies permeate all areas of the
curriculum” (p. 141). Social studies provide gifted students opportunities to identify and examine various facets of human nature (e.g., care, leadership, empathy, morality), which are usually intensified for gifted learners (Van Tassel-Baska & Stambaugh, 2006). The social studies disciplines address topics concerning constant societal challenge and triumph. Addressing such topics often touch on the challenges and triumphs of the human experience. Often referenced as our society’s upcoming leaders, it is important to address these topics with great care and compassion (Van Tassel-Baska & Stambaugh, 2006). It is this special bond that makes the study of gifted education and social studies education so special.

The intersection of middle level education and gifted education presents a uniqueness unlike those found in elementary or high school education programming. Many recent initiatives with gifted education have drawn greater attention to addressing the needs of middle level gifted learners. Within the context of this study, the majority of social studies teachers who held both a gifted endorsement and social studies certification were at the middle school level. Very few high school teachers with a social studies certification also completed a gifted endorsement. The same can be said for elementary gifted teachers who were gifted endorsed, but not certified in social studies education. With limited availability for participants, it was a natural fit to study gifted certified social studies teachers within a middle school setting.

Middle schools that were located within the region sampled for this study provided a vast array of special programming options for middle level gifted students. Special programming included several full-time gifted magnet programs, part-time gifted elective courses, a variety of accelerated/advanced coursework options, and other
magnets catering to specialized fields of learning (e.g., STEM, technology, fine and performing arts, Pre-IB programs). At the elementary level, full-time gifted services were limited to one school location and all other elementary school provided part-time services and/or feeder magnet programs. At the high school level, there was one school that offered a part-time gifted elective while other high school programs were magnet-oriented based on fields of study where gifted students could enroll in specialized and accelerated/advanced coursework (e.g., IB, STEM, engineering, fine and performing arts, Cambridge, culinary, veterinary, medical, architecture).

The responsibility to provide rigorous and relevant instruction for diverse student populations can be quite daunting for an educator. As a middle school social studies teacher, a classroom holds approximately 22 students in each of six separate class periods of 45-50 minutes on a given school day. Teachers are responsible for nurturing, intellectually challenging, and assessing each and every student’s capacity for learning. A one-size-fits-all curriculum will not provide all the gifted services necessary to ensure teachers have academically challenged every student to their true potential (Gregory & Chapman, 2012). Teachers should take into consideration that each student has a distinctive intellectual makeup: subject area preference (VanTassel-Baska, 2009), intellectual abilities (Renzulli, 1977), background knowledge (Singh, 2014), and habits of mind (Costa & Kallick, 2000; 2008). As Kaplan (2009) attests, a differentiated approach to curriculum development and instructional methods is an overwhelming task. If it is utilized consistently over time, differentiation can result in astounding academic growth (Kaplan, 2009).
For the purpose of this study, differentiation is a form of instruction that seeks to maximize individual student growth by recognizing that gifted students learn by interacting with curriculum in a variety of ways. In practice, differentiation is applied when teachers offer gifted students several different learning experiences based on the gifted student’s individual needs. These experiences can challenge gifted students of different intellectual and cognitive levels: by subject area, field of study, individual students’ interests, and students’ desired ways of learning or expressing themselves. It is important to note that while this study expected to disclose findings where some form of differentiation was utilized within the curricular-instructional decisions of teachers, this study did not expect to disclose that all teachers use differentiation as the only means to service their gifted students.

In recent years, there has been an increased call to provide purposeful curriculum and instruction for gifted students. Two concerns validate the necessity to promote and support differentiation: First, the perception that gifted children are able to make it successfully on their own; and secondly, the perception of student boredom or frustration related to the absence of academic challenges (Delisle, 2014; Galbraith & Delisle, 2015). Delisle (2014) and Fiedler, Lange, and Winebrenner (2002) argue the myth that gifted students will succeed without the benefit of specialized programs and curriculum. Neber, Finsterwald, and Urban (2001) also report evidence that high-achieving students make significant learning gains if they are provided appropriate instruction. In turn, this promotes their own academic growth based on their interests and strengths in specific subject areas. Galbraith and Delisle (2015) also heed this call for appropriate instruction through social and emotional support for gifted.
Boredom with general education curricula and frustration in failed goals or overreaching expectations are also frequent concerns voiced by scholars in the field of gifted education. Berkowitz and Hoppe (2009) suggest that a key component of boredom and frustration originates from the child’s lack of academic challenge in the classroom. Robinson and Shore (2006) report that gifted children who are bored due to the lack of educational services can also be linked to their parents’ anxiety about their children’s lack of productivity and academic achievement. Matthews and Foster (2009) and Hansen and Toso (2007) also address the issue of frustration, suggesting that children who are used to easy achievement may develop low levels of tolerance for challenging situations. Although academic achievement may come easily to some, gifted children handle difficult obstacles in a plethora of ways.

Furthermore, many stakeholders call for teachers to adapt and deliver services with various curricular-instructional methods. Educators must be highly qualified to teach diverse populations, including gifted students. According to Rogers (2007), middle school educators are unfamiliar with distinguishable traits for giftedness, unintentionally fail to identify unscreened gifted students, and struggle to meet the needs of gifted students because they lack essential professional development and preparation. This argument can also be made for beginning teachers of gifted students (Joffe, 2010). More specific to the setting of this study, when secondary social studies teachers are placed into classrooms with gifted students within a mixed-ability classroom, they often lack the social-behavioral and pedagogical knowledge to individualize learning for gifted populations in comparison to a certified educator of gifted students (Rogers, 2007; Shulman, 1986).
Currently, there are limited post-secondary courses and professional development for teachers who teach gifted students within heterogeneous classrooms (Fraser-Seeto, Howard, Woodcock, 2015). When a teacher begins to specifically teach students who are gifted, educators often are required to complete additional professional development opportunities to gain a form of gifted certification (Delisle, 2003). In the state of Florida, teachers of gifted classes are required to earn a 5-course gifted endorsement through classes offered from school districts or universities in partnership with the Florida Department of Education.

Unless scholars have an in-depth understanding of how instruction in social studies of the gifted unfolds, we have limited basis to suggest needs in curriculum and instruction. Research on both curriculum (e.g. McCutcheon, 1981; Stodolsky, 1988) and instruction (e.g. Brophy, 2001; Levstik, 2008) shows that a teacher’s beliefs toward society, education, classroom environment, and student population are all influential in shaping the curriculum that is provided to students. Teachers also interpret how the official curriculum (e.g., textbooks, curriculum pacing guides, and curricular-instructional standards) is reflective of standards of achievement mandated by the state for each grade level and content area. According to Ben-Peretz (1975), the official curriculum has the potential for many interpretations and uses. Based on a teacher’s frame of reference and decisions, the official curriculum transitions into operational curriculum, commonly known as the curriculum constructed and provided by the teacher in the classroom.

In connection with current practices and recognition of operational curriculum, social studies curricular-instructional models (e.g. Cohen, Lotan, & Whitcomb, 2009;
King, Newmann, & Carmichael, 2010; Sandling, 2011; Harris, 2015) have been developed to engage learners of all academic abilities to develop greater levels of complex thinking, reflection, and higher-order questioning, which can also be adapted to meet the needs of gifted populations. To accompany these social studies curricular-instructional models, recent social studies strategies implicitly identify and discuss intensified academics for advanced learners. These include collaborative unit development with teacher colleagues (Anderson & Cook, 2014), culturally responsive practices and multicultural education (Jones & Hébert, 2012), the utilization of independent study (Powers, 2008), ambitious teaching and thematic approaches (Grant, 2005; Libresco 2014), accessing geographic technology tools (Shaunessy & Page, 2006), and participating in service learning opportunities (Sheffield & Duplass, 2009).

**Statement of the Problem**

Brophy (2001) argues, “the relevance and value of particular methods and activities will vary with the nature of the students, instructional goals, and curricular content” (p.2). Teacher education textbooks and other supplemental education-based research focus on generic methods of instructional practices without consideration of subject matter or instructional goals for diverse populations. Generic methods could include a variety of: lecture, discussion, student products or projects, cooperative learning, and transmission vs. social construction of knowledge.

Carman (2013) suggests that gifted students require special consideration when teachers plan for and put into practice curriculum and instruction. In relation to the zones of gifted students’ proximal development (Vygotsky, 1978) and seminal works like Tolan...
(1997) and Tomlinson (1994), gifted learners have exceptional academic strengths, a cavernous intellectual curiosity, and require their teachers to craft specific goals to meet their specific educational needs (Carman, 2013). Teachers can attend to their students’ gifted goals through the inclusion of instructional activities that spur higher-order thinking (Williams, 2008), critical thinking (Lesh, 2011), problem solving (Ertmer et. al., 2009), classroom discussion (Hess, 2010), self-assessment and evaluation (Roberts & Inman, 2009), the analysis and interpretation of primary source documentation and artifacts (Barton & Levstik, 2010) the use of effective and innovative technologies (Sheffield, 2009), and simulations to spur critical thinking (Ertmer, et. al., 2009; Paul, 2005; VanTassel-Baska & Stambaugh, 2006), metacognition and reflective thought (Harris, 2015). These accompany a number of other successful methods that teachers can use to enrich and differentiate curriculum and instruction, which will be explored later in this study.

As mentioned in the rationale for this study, VanTassel-Baska and Stambaugh (2006) recognize that the social studies provide more than historical content knowledge and basic skills. Social studies instruction can promote and develop morals, values, and life skills for use in the real world, especially as leaders to forthcoming generations. Purposeful and individualized middle level social studies curriculum and instruction can explore greater opportunities for gifted student learning: most notably the social science disciplines like anthropology, philosophy, psychology, sociology, archaeology, world cultures, multicultural studies, globalization, service learning, and issues-based curriculum. Also included are the use of macro-concepts that connect to the development of morals and ethics (Tomlinson, 1998), connections to social-emotional characteristics
of giftedness (Rakow, 2005), and independent study (Renzulli, 1977); all of which will be explored in later in this study.

However, there is not much extant research regarding how teachers tend the curricular-instructional gate for gifted within social studies classrooms. Furthermore, we do not know how curricular-instructional gatekeeping influences how social studies teachers meet the needs of their gifted students. A theoretical literature exists regarding how teachers should modify curriculum and instruction for gifted students. However, the existing empirical literature rarely includes middle grades social studies settings and does not practically describe what that theory looks like in practice.

**Theoretical Framework**

In order to address how teachers serve gifted students in the middle grades social studies classroom, the role of the teacher as a curricular-instructional gatekeeper will be examined. Within this study, the term *gatekeeping* is derived from Thornton’s (1991) theoretical framework, where an educator takes on a primary structuring role in their social studies classroom and constructs curriculum that is provided in the classroom through chosen instructional practices. As a gatekeeper of curriculum and instruction, the teacher makes decisions concerning what content, sequence, and instructional strategies should be employed. By tending the gate, teachers organize and shape their students’ learning experiences.

According to Thornton (1991; 2005), curricular-instructional gatekeeping is inevitable. This decision-making process often implies that teachers consistently make both conscious decisions and unexamined assumptions and conventions (Thornton, 2014).
Furthermore, differentiation is inevitably part of what teachers consciously do when they tend the curricular-instructional gate. Teachers who attentively make decisions that differentiate curriculum and instruction advertently provide individualized learning for their students. Therefore, gatekeeping is what teachers are doing, why they are doing one thing rather than something else, and how enactment occurs within a classroom, while differentiation is a resultant individualized form of that curriculum which is experienced by one or more students.

**Purpose of the Study**

While not to seem too attached to the concepts of those that have directly influenced my own education and professional growth, I developed a strong awareness as a practicing teacher that I am largely in control of the curriculum and instruction of my own classroom. With this realization, I am now more selective and detail-oriented in the decisions I make regarding classroom curriculum and instruction. I am cognizant that what occurs in my classroom is greatly influenced by the quality of the curriculum and instructional methods I select and put into practice.

The choices I make as a gatekeeper directly affect thousands of students I’ve taught over the last ten years of my career. These students differ, ranging from those who need modifications and accommodations for learning disabilities, language barriers, and physical handicaps, to students who struggle with underachievement, perfectionism, overexcitabilities, and other sensitivities. Supported by Noddings (2005), the decisions teachers make in regard to curriculum and instruction are the very same choices that should empower students in their decision-making processes. According to Levstik and
Barton (2011), teachers should be held accountable for their professional learning, thereby increasing the knowledge base for making curricular and instructional decisions for their classroom and students.

However, there seems to be a lack of data revealing how teachers are practically making these curricular-instructional decisions. Among the countless other avenues in which scholars can begin to fill this void of the literature, there are no theoretical or practical research studies that directly focus how teachers make curricular-instructional decisions middle school social studies and individualize learning for gifted student populations. This study will begin to fill this void to illuminate the ways middle school social studies teachers may tend the curricular-instructional gate for their gifted students: More specifically, how teachers believe, prepare, adapt, and undertake differentiated curriculum and instruction.

Research Questions

Four central research questions guide this multiple case study focused on the curricular and instructional gatekeeping of middle level social studies teachers of gifted students:

1. What do middle school social studies teachers believe they should do to teach gifted students?
2. In what ways do middle school social studies teachers prepare and adapt curriculum for their gifted students?
3. In what ways do middle school social studies teachers prepare and adapt instruction for their gifted students?
4. What does instruction look like for gifted students in their middle school social studies classrooms?

Significance

This study will analyze how middle school social studies teachers plan for and instruct gifted students. As a result, there can be a continued effort to study the applicable practices of gatekeeping teachers within the fields of social studies education to provide effective professional development and extended learning opportunities for teacher populations. This study can also motivate research toward the following efforts: the continued study of purposeful professional development and learning opportunities for social studies and gifted teacher populations, continued application and practice of differentiation in the field of social studies and gifted education, the awareness and servicing of gifted learners in social studies classrooms, and increased acknowledgement of gifted populations within undergraduate and graduate social studies teacher education programs.

Assumptions

The following assumptions guide this study:

1. Teachers find ways of meeting the needs of gifted students by implementing strategies they feel are purposeful (gatekeeping).

2. There is no one-size-fits-all approach to meeting the needs of gifted students.

3. There is very little literature that illuminates how teachers meet the needs of gifted students in a middle school social studies classroom.
4. By identifying how middle school social studies teachers meet the needs of gifted students, other teachers will be better situated to utilize similar methods. This can also be said for the acknowledgement and advocacy for meeting the needs of all students in social studies classrooms.

**Operational Definition of Terms**

**Social Studies**

Stanley and Nelson (1994) define *social studies* as the study of all human enterprise over time and space, determined by importance, skill demand, significant values, and accommodations to population. While Stanley and Nelson craft a widely accepted generalization, the most commonly cited and comprehensive definition derives from the National Council for the Social Studies (2014):

the integrated study of the social sciences and humanities to promote civic competence. Within the school program, social studies provides coordinated, systematic study drawing upon such disciplines as anthropology, archaeology, economics, geography, history, law, philosophy, political science, psychology, religion, and sociology, as well as appropriate content from the humanities, mathematics, and natural sciences. The primary purpose of social studies is to help young people make informed and reasoned decisions for the public good as citizens of a culturally diverse, democratic society in an interdependent world (National Council for the Social Studies, 2014).
Adolescence

Tomlinson and Doubet (2006) define adolescence as a stage in childhood that develops according to a child’s timetable and unique biological makeup, environment, and opportunity. During this span of time, typically between eleven to eighteen years of age, adolescents develop long-term goals, are consumed with themselves, and are compelled to change the world (George & Alexander, 2003). During this time of transition from childhood to adulthood, adolescents deal with great havoc in their bodies, minds, and hearts. No other time besides infancy does life represent as much physical, emotional, and intellectual change (Tomlinson & Doubet, 2006). In connection with this study, the term early adolescence will be used to describe the age of students enrolled in middle school, between eleven to fourteen years of age (Lounsbury, 1991). This study will use the term early adolescence synonymously with the middle grades, middle level, or middle school. While junior high schools can represent a similar student clientele, junior high schools are not established in the state of Florida. Therefore, junior high schools will not be included in this study.

Giftedness

Definitions and descriptions of giftedness vary yet similarly encompass the same rationale and infrastructure. Theory and practice are moving toward ever-broadening definitions and amended labels (Carman, 2013; Erb, 1997). Many current gifted initiatives support Joseph Renzulli’s (1977; 1978) definition of giftedness. According to Renzulli, gifted behavior occurs when there is an interaction among three basic clusters of human traits: above-average general and/or specific abilities, high levels of task
commitment (motivation), and high levels of creativity. “Gifted and talented children are those who possess or are capable of developing this composite of traits and applying them to any potentially valuable area of human performance” (1978, p. 261). Gifted behaviors are found in certain people (not all people), at certain times (not all the time), and under certain circumstances (not all circumstances).

Furthermore, the National Association for Gifted Children (2012) defines: Gifted individuals are those who demonstrate outstanding levels of aptitude (defined as an exceptional ability to reason and learn) or competence (documented performance or achievement in top 10% or rarer) in one or more domains. Domains include any structured area of activity with its symbol system (e.g., mathematics, music, language) and/or set of sensorimotor skills (e.g., painting, dance, sports). (NAGC, 2012)

Regardless of the definition or description chosen, gifted students are those who possess academic aptitudes that far exceed what typically exist for their age group or grade level. In this context gifted can be used synonymously to describe the empirical term of academically talented.

**Homogeneous v. Heterogeneous.**

In relation to the term *giftedness*, there are two different settings where gifted students can receive educational services. *Homogeneous*, or inclusive, gifted settings refer to a self-contained classroom where gifted students of similar intelligence may be isolated or grouped separately from other student populations. *Heterogeneous* gifted
settings refer to the distribution of students among various classrooms based on age, not ability, to create a relatively even distribution of students of various intellectual abilities. Both of these terms will be used later in the study to describe various classroom environments.

**Differentiation**

Much like the term social studies and gifted education, *differentiation* can be interpreted in many ways. Renzulli (1977) indirectly describes the process of differentiating curriculum and instructional practices through the *Triad Enrichment Model*. He defines differentiation as the matching appropriately challenging curriculum and instruction with the student’s abilities and interests through a variety of instructional strategies and challenging curriculum (Renzulli, 1977). Similarly stated, Van Tassel-Baska and Stambaugh (2006) define differentiation as the “set of techniques that need to be matched to advanced curricula in order to be effective for advancing the learning of gifted students” (p. 80).

As described earlier in the chapter, differentiation is a form of instruction that seeks to maximize individual student growth by recognizing that gifted students learn by interacting with curriculum in a variety of ways. In practice, differentiation is applied when teachers offer gifted students several different learning experiences based on the gifted student’s individual needs. These experiences can challenge gifted students of different intellectual and cognitive levels: by topic, in response to students’ interests, and students’ desired ways of learning or expressing themselves.
Limitations

The following are characteristics of the study design that could impact the interpretation of the findings from the research. Participants within the study will come from a singular central county in Florida. Also, Donmoyer (1990) suggests that some degree of plausibility should result allowing other social studies educators to go beyond the information given. With that said, educators could generate interpretations and make inferences in order to construe meaning and relate to revealed experiences of their own (Donmoyer, 1990). However, differences in the types of training experienced by teachers in terms of content, methodology, and commitment will further strengthen or dilute that connection.

Conclusion

In conclusion, this multiple case study will disclosed ways that middle level social studies teachers make curricular-instructional decisions to differentiate the curriculum and instruction for gifted learners. By intersecting the fields of middle level, social studies, and gifted education, greater dialogue can guide these communities to recognize and unpack purposeful curriculum and meaningful instructional methods. The following chapter will be a review of the related literature intersecting many of the connections between middle level, social studies, and gifted education. Topics include adolescence and the development of middle grades education, nurturing needs of gifted students in the middle grades, academic gifted services in the middle grades, the continuity and change of middle level social studies, instructional standards for curriculum and instruction in social studies, and differentiation in middle grades social studies.
CHAPTER TWO

REVIEW OF LITERATURE

Introduction

This study is an examination of how middle grades social studies teachers tend the curricular-instructional gate for gifted students. To contextualize this study, the following topics are examined in the review of the extant literature: adolescence and the development of middle grades education, nurturing the needs of gifted in middle grades education, addressing academic needs of gifted in middle grades education, continuity and change of social studies, social studies middle grade standards for curriculum and instruction, and methods and models commonly found using differentiation in social studies.

Adolescence and the Development of Middle Grades Education

Adolescence is a culturally bound progression that launches human beings into a perplexing state of psychological, physical, anatomical, and physiological change. Lounsbury (1991) suggests that when psychologists coined the term adolescence in the 1930s, it was essentially organized to represent a stage that is commonly associated into three levels of development: early adolescence which commonly occurs between eleven to fourteen years of age, mid-adolescence from fourteen to eighteen years of age, and late adolescence from eighteen years and beyond. Each level of development represented different changes and continuities in a human’s intellectual and physical growth.
(Lounsbury, 1991). It is important to value the relationship between the evolution of early adolescence (most commonly associated with middle school-aged students) and the development of the current state of public education, more specifically the rationale for developing middle grades education. This section of the review of related literature will discuss how the junior high conceptual challenges led to the present-day middle school model. Furthermore, current educational reform associated with the current middle school model will be addressed.

Junior high schools evolved in the early twentieth century during a reorganization of elementary and high schools in the United States. Junior high schools were currently recognized as grades 7 through 9. In design, the junior high concept should have successfully bridged elementary and high school experiences. Scholars expressed concerns with the overall structure and lack of social-emotional support the model provided for its early adolescent students (Alexander & Williams, 1965). Four characteristics of junior high schools were in question and with that changes were proposed: special classes vs. heterogeneous classes and inclusion, values and character education vs. sticking to the basics, general education vs. curriculum differentiation, and core classes vs. exploratory experiences (Alexander, 1995).

Lounsbury (1991) states that servicing early adolescents became more prominent and widely accepted with the development of this junior high school model. By the 1930s, over 1900 junior high schools existed in the United States. A decade later, eight thousand junior high schools were accounted for, as a three-tier model of schooling (elementary, junior high, and high) became more of a norm to the American public (Lounsbury, 1991).
The junior high concept was established under the principle that the middle grades should be developmentally responsive institutions. Harbron and Williams-Boyd (2003) explained that junior high schools followed a philosophy of education with a specific spirit and deep theoretical roots, including a set of beliefs about the nature and needs of young adolescents, effective principles of learning, and a commitment to democratic ways of life. As junior high schools became a more prominent fixture of American society the state of middle schools fluctuated constantly, depending on agendas of influential stakeholders and the then-current events of American society.

In the mid-twentieth century, critics expressed concern that junior high students were unable to perform at targeted academic goals; junior highs were deemed as the weak link in American education early in their existence. According to Cuban (2012), critics questioned the foundational junior high concept, doubting common junior high practices and claiming that they were not purposeful. By the 1960s, critics argued that junior high model lacked a clear educational mission after adopting the teaching methods and discussion structures of their high school counterparts, thereby ignoring social-emotional curricular and instructional support for early adolescent student population (Cuban, 2012). Gatewood and Dilg (1975) called for developmental responsiveness as the driving force of contemporary middle grades reform beginning in the 1970s. By narrowing middle grades education, attention focused on academics and ignored addressing the social-emotional support of early adolescents (Gatewood & Dilg, 1975), while others believed that addressing students’ social-emotional needs were the most important responsibility to uphold. Beane (1990) implored reformers to consider that the middle grades needed an integrative curriculum; one that could explore enduring but elusive ideas like democracy,
human dignity, cultural diversity, and employ real-world applicable skills. Beane (1990) suggested that curricular themes and activities could emerge from concerns of the students rather than interests of the teacher or the manipulation of the subject areas.

While Beane (1990) called for the curriculum to break away from subject-area blocked timed core programs, center around thematic concepts, and pleaded for organizations and reformers to take a closer look at the special needs and interests of middle grade adolescents. Amid the call for middle level educational reform and in defense of the uniqueness of middle level education, the National Middle School Association (present-day Association of Middle Level Education) was founded in 1973, advocating for middle grades education (Beane, 1990).

The process of crafting the middle grades’ identity became very difficult, as few could define a middle school concept that was widely accepted and applied. Cuban (2009) suggested that junior highs were torn between providing the scaffolding and support for younger elementary learners, but yet were departmentally organized in a way that resembled much of the high school design and schedule. Student assessment results of the National Assessment of Educational Progress (NAEP) at various grade levels publically acknowledged that American schools were failing to uphold their standing in relationship to other developed global powers. Results claimed that middle grades were not making appropriate gains in comparison to their elementary sibling. Subject areas were further delineated, administration departmentalized by grade level, core curriculum was enacted and stratified so that special attention could be drawn to the subject areas of math, science, and the language arts. At times, subjects like social studies were placed on the educational backburner (McBride, Bergstrom, & Foran, 2013), yet also withstood
pressure from supporting other disciplines in regard to literacy and interdisciplinary study (Allen, 2005).

Government and corporate persuasion affected the overarching goals and objectives in current middle school reform. Several statements from organizations such as the Association for Middle Level Education’s (NMSA, 2010) publication of This We Believe, the Carnegie Corporation’s (Jackson & Davis, 2000) rival argument in Turning Points 2000, the Southern Regional Education Board’s (Wilcox & Angelis, 2008) publication of What Makes Middle Schools Work, and the National Association for Secondary School Principal’s (2006) position statement, titled Breaking Ranks in the Middle, all began to speak for and promote their own vision of what middle schools should exemplify. EdSource (Williams et. al., 2010) published Gaining Ground in Middle Grades and the Southern Regional Education Board (2002) published Academic Achievement in the Middle Grades to echo the call for, among others, increased state academic standards and narrowing the achievement gap in middle grades education.

Federal measures to increase student learning also influenced the state of the middle grades. No Child Left Behind (NCLB, 2001) and Race to the Top (USDOE, 2009) continued to place pressure all educational stakeholders: state departments of education, school districts, school administration and teachers. According to Lohman (2010), the rationale for federal education reform was to provide schools a structural plan to make gains in their students’ academic achievement based on standardized assessment scores and incentives for those who made annual yearly progress. Standardized assessment, teacher accountability, tense classroom evaluation, and the implementation of national curriculum standards were enacted and facilitated to maintain a constricting grip on how
teachers, school administration, district officials, and even state departments of education made decisions on the organization and implementation of these requests from politicians and corporate leaders. Even though the intent and purpose to regulate and monitor the progress of middle grades education was justified, Cuban (2012) argued that these restrictions suffocated the fundamental elements of middle grades education, which seemed most appealing and theoretically sound to teachers and students.

As a continued call for federally supported education reform, the Common Core State Standards Initiative (CCSSI, 2014) created national core standards for the subjects of mathematics and English language arts. It is important to note that the subject area of social studies supports the Common Core State Standards (CCSS) English Language Arts and literacy standards. The standards were created to “ensure that all students graduate from high school with the skills and knowledge necessary to succeed in college, career, and life, regardless of where they live” (CCSSI, 2014). The CCSS Initiative’s rationale is a renewed claim that academic progress has remained stagnant, American students have lost ground in comparison to their international peers, remedial college coursework is on the rise, and there exists an “uneven patchwork of academic standards” which vary on a national level that don’t necessarily coincide with common learning goals (CCSSI, 2014).

With the current state of middle grades education and focus towards academic achievement, the call for continued social and emotional support for early adolescents remains a prominent request. Tomlinson and Doubet (2006) argue that teachers and classroom should not only focus on academic achievement, but should also be responsive to nurturing the needs of all learners. They believe that young adolescents have many talents and abilities both evident and dormant. According to Tomlinson and Doubet
(2006) effective middle school teachers were responsible for crafting the learning environment, curriculum, and instruction to help each learner develop self-esteem and self-efficacy. Not only is there a call for quality instruction and challenging curriculum to help students maximize their potential, but teachers should also address diversity through flexible and informed instruction (Tomlinson & Doubet, 2006). To balance rigorous curriculum and relevant instruction, young adolescents still need to feel supported, scaffold throughout their learning goals, and ultimately stretched to their academic and socio-emotional potential (Tomlinson & Doubet, 2006).

Many others (e.g. Alexander & George, 1993; Rubin, 1990; Wilcox & Angelis, 2008; 2009) support this claim as a means to promote best practices in middle level education. Rubin (1990) also calls for middle schools to hold responsibility for facilitating programs that nurtured their students’ emotional and creative needs. Complimenting Rubin (1990), Wilcox and Angelis (2008; 2009) argue that middle schools should build a culture of success by consistently maintaining five common elements: trust and respectful relationships, students’ social and emotional well-being, teamwork, evidence-based decision making, and a shared vision of mission and goals. Alexander and George (1993) also develop similar cardinal principles of effective schools for adolescent success include, but are not limited to:

- providing emotional support and encouragement,
- providing opportunities for students to exercise appropriate autonomous control over certain aspects of their learning,
- support for the development of noncompetitive, nonjudgmental, and non-comparative ways,
• meaningful, rigorous, unfragmented and social approved curriculum, connected to the lives of students with expectations for success for all students,
• organizational and operational strategies that yield a sense of personal identity - a feeling of smallness even in large schools,
• particular support for growing number of students who need more than basic skills and services to be academically successful, and
• constructivist-style, active, social, experimental, classroom learning experiences.

These responsibilities, alongside Tomlinson and Doubet’s position, are acquiescent with current requests within the literature to meet the social-emotional and academic needs of gifted middle school students, which will be discussed in the next section. Furthermore, as we explore the change and continuity of gifted and social studies education later in the chapter, it is important to keep in mind that the development and current state of these fields (gifted and social studies) are not only compatible but have been influenced by the scope and sequence of middle grades reform.

Nurturing the Needs of Gifted Students in Middle Grades Education

As noted, middle grades and gifted are two fields that are not only compatible, but also quite parallel. In support of this claim, Swaim and Green (2006) state that practices recommended in both areas are comparable and help fulfill a common commitment to a quality education for young adolescents. In 2006, the National Association for Gifted Children (NAGC) and Association for Middle Level Education (AMLE) published a joint statement (NMSA & NAGC, 2004) stating that all stakeholders supporting middle level
learners should be fully aware of their population’s diversity and possess the skills necessary to address the full range of their population’s academic and emotional potential. Additionally, both organizations made a commitment to ensure that all middle school students learn in classrooms where equity and excellence are continuing goals for every learner (Schneider, 2008). This section of the related literature is devoted to the continuity and change of that very commitment; addressing the socio-emotional needs of gifted students in the middle school setting in support of academic excellence.

Gifted early adolescents develop as any typical early adolescent would. As many gifted scholars claim (Clark, 1997; Davidson, Davidson, & Vanderkam, 2004; Feldhusen, et. al., 1990; Renzulli & Reis, 1997; Winebrenner, 2001), gifted adolescents cultivate interpersonal relationships, physical security with their own changing bodies and evolving sexuality, individual and societal values, psychologically healthy self-esteem and character, and accumulative independence from and within their families.

As described by Renzulli and Reis (1997), gifted students are often noticeably more advanced than their peers in one or more academic areas and have a greater propensity to think deductively. They have an increased aptitude to observe their surroundings and to verbalize strong feelings, rather than merely act on them (Buescher, 1991). Their ability to make a deeper obligation to, or concentrate on, one activity often results in a narrow focus of independent or extracurricular studies based on their academic, artistic, or physical strengths (Rakow, 2005). Tomlinson (1999) argues that intelligence is multi-faceted. Therefore, the development of student potential is affected by the connection between what we learn and how we learn with our particular intelligences. Supported by Noddings (2008), Tomlinson and Imbeau (2010) argue that
learning should be meaningful, characterized by student interests and relevance and should tap into the learner’s feelings and experiences.

It is a common theory that gifted adolescents also have specific needs pertaining to their giftedness during early adolescence (Buescher & Higham, 2003; Cross, 2004; Rakow, 1989; Stradling & Saunders, 1993). According to Cross (2002), it is imperative to foster social-emotional needs in gifted populations throughout all stages of adolescence. More specific to middle school adolescence, gifted students often feel a negative social stigma and scarcity of appreciation for their unique aptitudes. Cross (2002) suggests they may withdraw from academic progress in order to be more accepted. As an example, Delisle and Galbraith (2002) argue that gifted girls particularly “dumb down” their educational abilities to gain attention, whilst Ford (1996) argues this can also be true for gifted males and minorities. Gifted populations can also underachieve due to perfectionist tendencies and in rebuttal to lofty demands from parents, teachers, and administrators (Webb, Meckstroth, & Tolan, 1986; Winner, 1996).

Clark (2004) and Rakow (2005) both suggest that acceleration at the elementary school level could leave younger gifted students ill-prepared to handle social interactions with their peers due to variance of immaturity and the natural stages of puberty. Furthermore, Kaplan (1990) states that gifted students’ heightened sensitivities make them more likely to experience stress, even when everything may seem to be going well in the public eye. With that said, adolescents need role models, compassionate adults, and suitable intellectual stimulation to warrant growth (Rakow, 2007). The next section of the related literature will illuminate how society embraced this calling and how the academic needs of gifted students have been addressed over time.
Addressing the Academic Needs of Gifted Students in Middle Grades Education

As mentioned in the first section of the chapter, junior high schools were initially developed following World War I in 1918 as a response to overwhelming numbers of students enrolled in elementary and high schools, purposefully to prepare adolescent-aged students (eleven to fourteen years) for the demands and responsibilities of high school coursework. While junior high schools expanded, teachers from both the elementary and high school settings began moving into middle school instructional positions and lacked experience teaching either higher or lower grades. Williams-Boyd (2003) suggested that middle school educators required training to build cognitive awareness and successful pedagogical methodologies for the adolescent learner while also building awareness for the social-emotional needs of their early adolescent students.

While the development of structural gifted services did not develop until the twentieth century in the United States, the advocacy for gifted learners can be traced back through the ages. Kitano and Kirby (1986) state that the Greek philosopher, Plato, asserted that the academically talented innately inherited the ability to serve as our most intelligent, future leaders, and governing body. Yang (2004) stated that the Chinese philosopher, Confucius, advocated teaching students according to aptitude, not age. While these early connections to gifted are optimistic in nature, there is evidence to suggest that gifted individuals were also commonly labeled as “abnormal” in the nineteenth and early twentieth centuries, associating “gifted” with a negative connotation (Ellis, 1904; Jolly, 2005).

It wasn’t until Terman’s longitudinal study beginning in 1921, titled Genetic Studies of Genius, that giftedness was far from an abnormal stereotype. By disproving the
then-current belief that gifted individuals were not well-rounded, sickly, and socially inept, Terman (1925; Terman & Oden, 1947; 1959) concluded that gifted individuals were generally well-adjusted, social, and maintained their academic success. Wayne (2012) suggested that Terman’s work also led a pioneering effort to develop the predecessor to gifted screening measures. Definitions for giftedness began to describe how educators could meet the needs of this special student population. Mohr (1944) defined giftedness as someone who possessed and cultivated an above average reading ability, good memory, and breadth of interests. According to Mohr (1944), gifted individuals were observed as curious, alert, and self-directed. But alongside these observations, Mohr (1944) stated that the gifted needed guidance cultivating study habits, supportive materials to stimulate thinking, challenging academic writing, and additional time for individual study.

The field of gifted education continued to evolve in the mid-twentieth century. Organizations were founded, like the National Association for Gifted Children in 1954, spurring dialogue and advocacy for gifted youth. This was especially so after the Soviet Union’s launch of Sputnik in the late 1950s. In reaction to Sputnik, the United States legislatively funded programs that propelled gifted education into the spotlight of public education initiatives. The National Defense Education Act (1958) passed the first large-scale federal effort to advocate for gifted education. More specifically, this post-Sputnik legislation expanded the programming options for gifted students, thereby producing and promoting growth in fields like the sciences, mathematics, and technology in response to the call for global influence and space aviation.
In the 1970s, support for the conversation to define giftedness and expand the accessibility of gifted services continued. Marland (1972) crafted the first formal definition of giftedness to include academic and intellectual talent, in addition to leadership, visual and performing arts, creativity, productive thinking, and psychomotor abilities. In 1974, the Office of the Gifted and Talented was officially included within the United States Office of Education. Lastly, the Education for all Handicapped Children Act (1975) established a federal mandate to serve dual exceptional students, who have a disability and are gifted.

The 1980s brought modifications by administrative progressives, a group of education reformers consisting of business leaders, university presidents, and professionals, to influence reform in public education. Administrative progressives, coined by David Tyack (1974), shared a core belief that effective management could bring about progressive education and social reform through a corporate model of decision-making and accountability. Rousmaniere (1997) explained the progressives aimed to protect schools from political forces by remodeling public education based on a scientific business model, thereby making it possible to pin down responsibility for the decline in academic achievement in public schools. In support of this claim, A Nation At Risk (1983) reported that America’s brightest students were unable to score high enough to compete with their international counterparts. Within this report, policies and practices were recommended, promoting appropriate curriculum and raising academic standards for gifted learners. A decade later the United States Department of Education issued a report titled National Excellence: The Case for Developing America’s Talent (O’Connell Ross, 1993). This report described how gifted students need special services for two
reasons: the regular curriculum is not challenging enough and many gifted students have already mastered said curriculum (Gentry, 2006). Theaker et al. (2011) confirmed that gifted education lost ground while an emphasis was placed on remediation without the support of purposeful enrichment and acceleration for gifted populations. However, Kaplan (2004) suggested that educational practices found in gifted programs has the potential to increase purposeful student learning and could move students well beyond proficiency.

An instructional identity for gifted education is evolving simultaneously with the adoption of federal and state-based education standards. Tomlinson (1996) suggested that, “curriculum and instruction for gifted learners will be uniquely appropriate for those learners when teaching and learning are at a level of transformation, abstractness, complexity, multi-faceted-ness, mental leap, open-mindedness, problem ambiguity, independence, or pace suited for advanced learning capacity” (p. 173).

Within No Child Left Behind (NCLB, 2002), the Javits Gifted and Talented Students Education Act was reauthorized from its original state in 1988, expanding competitive statewide grants and modifying the definition of gifted and talented to include:

students, children, or youth who give evidence of high achievement capability in areas such as intellectual, creative, artistic, or leadership capacity, or in specific academic fields, and who need services and activities not ordinarily provided by the school in order to fully develop those capabilities (NCLB, 2002).
Colangelo, Assouline, and Gross (2004) published a national research-based report titled, *A Nation Deceived: How Schools Hold Back America’s Brightest Students*. Colangelo, Assouline, and Gross (2004) argue that without the use of acceleration in curriculum, some gifted student would not encounter adequate curricular rigor. Acceleration can be achieved through subject skipping, double promotion, by taking advanced classes along with regular ones, or by early college admission. In response, there are some concerns with acceleration in regards to the students’ academic growth in relationship to their social maturity (e.g. Swiatek & Luplowski-Shoplik, 2003). Several meta-analyses studies support the use of academic acceleration as long as the social-emotional state of the gifted child is not at risk (e.g. Kulik & Kulik, 1984; 2004; Robinson, 2004). Guidelines have been proposed for acceleration, as it has been difficult to put structure into practice due to mandated curricular levels imposed by school district policies and state mandated curricular frameworks (Feldhusen, Proctor, & Black, 2002).

As a means to provide an example of state-mandated frameworks in connection with this study, the Florida Department of Education (FLDOE), in collaboration with the Florida Association for the Gifted (FLAG) and scholars in the field of gifted education, responding to the call for state-based legislation by developing *Florida’s Frameworks for K-12 Gifted Learners*. The primary purpose of the frameworks is to provide guidelines, which support a challenging and rigorous curriculum that enhances the *Florida Sunshine State Standards*...[which] interrelate and reinforce curriculum, instruction, and assessment to help define academic excellence in programs for gifted learners (FLDOE & FLAG, 2007).

These guidelines combined the importance of curriculum, instructional delivery,
and multiple assessments as a means of instruction planning, bringing focus to relevant
learning for students (Daggett, 2005). The Florida Gifted Frameworks (2007) provide
opportunities for gifted students to pursue topics of study in greater depth or to a greater
level of rigor and relevance, tackle a wider range of authentic and compound academic
tasks that necessitate studying the real world, progress through activities at a faster rates
of completion, and develop a sense of self and the opportunities that the world has to
offer. These experiences can be addressed utilizing a differentiated pedagogy that may
include the modification of content, process, product, and the learning environment (e.g.
Rayneri, Gerber, & Wiley, 2006; Roberts & Inman, 2009; Tomlinson, 1999; VanTassel-
Baska, 2011).

There are seven general student outcomes that embody the Florida Gifted
Frameworks rationale: By graduation, the student identified as gifted will be able to:

• critically examine the complexity of knowledge: the location, definition, and
  organization of a variety of fields of knowledge;
• create, adapt, and assess multifaceted questions in a variety of fields and
disciplines.;
• conduct thoughtful research and exploration in multiple fields of study;
• think creatively and critically to identify and solve real-world problems;
• assume leadership and participatory roles in both gifted and heterogeneous
  group learning situations;
• set and achieve personal, academic, and career goals; and
• develop and deliver a variety of authentic products and performances that
demonstrate understanding in multiple fields and disciplines (FLDOE &
The Florida Gifted Frameworks are also consistent with the *National Gifted Education Standards*, published by the National Association for Gifted Children in 2003, which was revised in 2013. These standards call for increased teacher preparation programs, as well as knowledge and skill standards for gifted education. Within the document, six specific standards are expected in gifted programming. These standards include:

- **Learning and development** - self-understanding, awareness of needs, cognitive and affective growth;
- **Assessment** - identification, learning process and outcomes, and evaluation of programming;
- **Curriculum planning and instruction** - curriculum planning, talent development, instructional strategies, culturally relevant curriculum, and resources;
- **Learning environments** - personal competence, social competence, leadership, cultural competence, and communication competence;
- **Programming** - variety of programming, coordinated services, collaboration, resources, comprehensiveness, policies and procedures, and career pathways; and
- **Professional development** - talent development, socio-emotional development, lifelong learning, and ethics (NAGC, 2013).

Many of these standards run parallel to standards addressed in the field of social studies, as explored in later sections of this chapter.
Most recently, Common Core State Standards (CCSSI, 2014) claim much of the limelight in terms of educational reform. Organizations such as the National Association for Gifted Children replied in response to the national call for Common Core State Standards. In collaboration with the National Association for Gifted Children, Hughes, Kettler, Shaunessy-Dedrick, and VanTassel-Baska (2014) reflected upon the role of Common Core in support of gifted learners appropriately in the content areas of math and English Language Arts and literacy. While Common Core does not require any special differentiation for the gifted, it is critical to examine how differentiation is illuminated for gifted learners within the context of a new set of standards. One argument posed by Hughes et al. (2014), is that although Common Core is sound, it does not sufficiently accommodate the needs of gifted learners. There is a need to enrich the standards through open-ended opportunities, multiple pathways, complex-thinking applications, real-world connections, and problem-solving contexts (Hughes, et al., 2014). As new standardized assessments drive instructional processes for teachers, the differentiation of performance-based measures and portfolio techniques should align with high-level learning outcomes. Lastly, Hughes et al. (2014) suggest the new standards is a positive movement for education in general, though we should be mindful to appropriately differentiate for gifted learners, based on their individual needs and in all areas of academia.

With that said, it is also important to highlight what kinds of gifted services currently exist for gifted students. Bain, Bliss, Choate, and Sager (2007) explain that there are several forms for delivering gifted services, yet they conveniently organize the variety of services into four categories: (a) ability grouping, (b) pullout programs, (c) cooperative learning, and (d) academic acceleration. In defense of ability grouping, many
scholars (Feldhusen 1989; Feldhusen and Moon, 1992; Fiedler, Lange, & Winebrenner, 2002; Kulik & Kulik, 1984) have agreed that children who are gifted can benefit from self-contained grouping among the disciplines, which are carefully connected with their academic strengths. Pull-out programs in elementary grades and gifted electives in middle school grades are also a highly utilized method of delivering services to gifted students to provide part-time homogeneous grouping. Several studies have also shown impressive results in the growth of self-esteem and academic learning gains (Callahan, et. al., 2015; Vogl & Preckel, 2014).

In addition to ability grouping and pullout programs, cooperative learning and academic acceleration are also influential methods for servicing gifted student populations (Brown & Stambaugh, 2014; Missett, et. al., 2014). Some scholars suggest (Coleman & Gallagher, 1995; Thorkildsen, 1994) that heterogeneous cooperative learning has provided a potentially feasible answer to school reform issues centered on social equity and academic excellence. Neber, Finsterwald, and Urban (2001) confirm that heterogeneous groups were an effective method of instruction for student populations that are diverse and include gifted students. Perceived by their peers as friendly and natural leaders, Kenny, Archambault, and Hallmark (1995) and Smith, Johnson, and Johnson (1982) agree that higher learning occurred between both gifted and non-gifted participants during times where cooperative learning was utilized in a heterogeneously grouped classroom environment. This does not go without saying that there are criticisms toward heterogeneous grouping. Evidence also suggests that students who are homogeneously grouped show stronger learning gains in comparison to their
heterogeneously grouped peers (Boor-Klip, Cillessen, & van Hell, 2014; Callahan, et. al., 2015; Matthews & Dai, 2014; Plucker & Callahan, 2014).

Parental stakeholders argue that the core curriculum or national initiatives will not fully address the needs for advocacy and attention to servicing gifted youth (Bailey, 2013; Erb, 2001). Screening for gifted students has become more common in the elementary grade levels, as local and national organizations, such as the National Association for Gifted Children, propose greater accountability for state departments of education to acknowledge and service gifted youth (Ford, 2006). With the increased population of gifted youth being identified, subject-specific magnet schools have gained much attention as they provide gifted adolescents the opportunity to focus on areas of their gifted strengths and interests.

As the selected setting of this study, special programming within central Florida public middle schools includes, but is not limited to Science, Technology, Engineering, and Mathematics (STEM) magnets, Visual and Performing Arts conservatories, and International Baccalaureate (IB) preparatory programs. Homogeneous gifted magnet programs at the elementary, middle, and high school levels have expanded, central Florida school districts are identifying the need for increased options for accelerated and advanced coursework beyond the elementary grades with an assortment of middle school gifted magnet programs (Klimis & VanTassel-Baska, 2013). Teachers in programs like those aforementioned were invited to participate in this study.
Continuity and Change of Social Studies in Middle Grades Education

According to Ross (2001) and Stanley and Nelson (1994) the fundamental content of social studies education is the study of human enterprise across time and space, determined by importance, skill demand, significant values, and accommodations to population. However, social studies education has endured an ideological battle determined to clarify the nature and purpose of its official curriculum (Ross, 2001), more specifically standards versus customization (Cuban, 2012). The official curriculum, defined by Ben-Peretz (1975) as the curriculum devised by authorities outside classrooms to be implemented by those within the classroom, has withstood multiple periods of contention and reconsideration throughout the twentieth century.

With that said, the purpose of this section within the related literature is two-fold. First, social studies is the subject-specific content area within this study and the examination of its continuity and change will likely support what findings this study will illuminate how middle school social studies teachers tend the curricular-instructional gate. Secondly, many connections can be made between social studies and the previous sections relating to middle grades and gifted education reform.

Social studies emerged as a subject within the official secondary education curriculum as part of the proclamation by the National Education Association’s (NEA) Committee of Ten, which reorganized secondary education and forced social education into the limelight of elementary and secondary education initiatives. As stated (NEA, 1894), academic history and civic duty were essential to student goals for learning, thus social studies.
It is important to note that while social studies evolved, much of how the social studies curriculum was organized by the Committee of Ten can still be seen in K-12 schools today. The expanding communities model (Hanna, 1937; 1965) maintains the orientations of elementary scholarship from grades Kindergarten through the third grade. Beginning in fourth grade, connections exist between community and national topics of Civics and United States history. Middle grades make connections between the national community by focusing on global perspectives, geography, civics, and continuations with United States history. Lastly, in the high school grades continue to articulate the disciplines of various histories, government, and economics that was introduced in elementary and middle grades. Other social science disciplines (e.g., sociology, psychology, philosophy, political science, anthropology, humanities) are often introduced at the high school level.

During the earliest days of social studies education, its central purpose remained continuous all the while much change influenced the expansion and evolution of social studies education. Bobbitt (1922) explained that social studies objectives changed based on the needs of the people at any given time. Accompanying the Committee of Ten’s inclusion of social studies as a core discipline, the Deweyan Era (1910-1920s) focused on social education, which depended less on social studies selection and more on how it was taught in connection with the application of skill and how that skill was performed. John Dewey (1916) described curriculum as an experience where teachers and students are in the center of the curriculum. Dewey (1916) articulated the importance of how students conceptualized and deepened their understanding of social studies concepts, specifically
due to its overlapping influence on promoting civic duty, the emergence and growth of global interdependence, and the continued prosperity of democracy.

In the 1930s, social science topics concentrated on history and citizenship education. Snedden (1932; 1935) contended that social studies, as social sciences, were largely irrelevant and unjustified by the demands of contemporary life. As a result, Snedden (1935) called for functional civic education, favoring the likes of sociology, economics, and current events. In opposition, Krug and Anderson (1944) argued that the supreme task of social education was to build effective human relationships among diverse individuals; maximizing growth for students based on understanding attitudes, values, and abilities needed for social competency in a democracy.

In the decades that followed, the United States experienced a great deal of social change and post-war prosperity. An era of New Social Studies (1950-1970s) shifted previous instructional processes and redesigned pedagogical practices within social studies education. A central tenet of the New Social Studies was an approach to inquiry: engaging in processes of hypothesis, creation, prediction, judgment, experimentation, debate, critique, and investigation through the use of sophisticated questioning. Among the call for greater inclusion of inquiry learning, Bloom’s Taxonomy (Bloom et. al.,1956), ignited the implementation and constant connection of higher-order thinking to the facilitation of questions, discussion, comprehension, and assessment. Howley, Howley, and Pendarvis (1986) also advocated intuitive learning experiences, inductive teaching environments, thus promoting independent study and the acknowledgement of various learning styles.
Spurring a trend in higher-order thinking, a redesign of curriculum emerged with Taba’s (1962) emphasis on cognitive process and strategy, as well as Bruner’s (1960) *Process of Education*. According to Crocco and Davis (2003), Hilda Taba focused on the importance of the pedagogical process. To spur greater and deeper modes of understanding one’s content and discover central ideas or generalizations of key concepts, a teacher needed to rely on the development of their students’ cognitive processes, such as problem solving, decision-making, metacognition, and critical thinking skills. Bruner (1960) advocated what he coined as *Discovery Learning*, which if implemented successfully by teacher facilitators, would motivate students to authentically take charge of their learning. Fenton (1967) also supported open-ended instruction, allowing students to deepen their knowledge through intellectual activity and thereby to increase their understanding of topics relevant to the curriculum. Bruner (1960) also believed that one could design curricular content to teach structure within a particular discipline. With the understanding and integration of concepts, disciplines could be greatly intertwined (Bruner, 1960).

The National Council for Social Studies also advocated the preparation of young people to be humane, rational, participating citizens in a world that was becoming increasingly interdependent. The responsibilities of social studies education would also embrace rational analysis, decision-making for political, social, and economic life, basic history and social scientific knowledge, and the understanding of human dignity and values expressed within the Constitution and Bill of Rights (National Council for the Social Studies, 2014).
However, increased perceptions that the United States fell behind after the launch of Sputnik in the late 1950s amplified calls for rigorous academic excellence (Thornton, 2008). Developed in the 1980s and strengthened during the latter part of the twentieth century, the Basic Skills Movement relied on several studies suggesting that the American Education system failed miserably at maintaining dominance in respect to other developed world powers. College preparation pushed for the intellectually driven while as Curtis (1977) suggested, other students found themselves as employable law-abiding members of society and embraced vocational tracks. Governmental sway and privatized corporate supported for national standards and core curriculum made it difficult for the New Social Studies to thrive. A one-size-fits-all approach to standardized assessment multiplied from state to state as a means to increase student learning, thereby increasing the American standing among other developed countries.

When asked to describe how the Basic Skills Movement influenced social studies education, Ross (2001) argued that support for educational reform from industry and private foundations, as well as the federal government, has produced a more capitalistic, less educator-oriented and ultimately less democratic network of curriculum policy makers. Howley, Howley, and Pendarvis (1986) suggested that this movement brought content standards and limited the perspective of social studies as a core discipline. In connection, the Education Consolidation and Improvement Act of 1981 developed through the influence of the federal government. Some scholars (e.g. Cornbleth, 2010) argued that conservative, reactionary political forces became stumbling blocks for transformative change for the field of social studies. According to Cornbleth (2010),
change remained superficial, and one thing was left constant: the teacher was in charge of the classroom.

A variety of best practices promoted a collective response to growing concerns that the United States fell short of meeting their goals for high student achievement. Herlihy and Herlihy (1980) found that mainstreaming in social studies could be significant in the development of student learning if done effectively in a heterogeneous setting. Herlihy and Herlihy (1980) defined mainstreaming as the attitudinal or value-oriented position that allows the teacher to examine each child within a collective setting and provide an appropriate way to develop, expand, and refine the students intellectual, social, and emotional skills. Herlihy and Herlihy (1980) described what social studies teachers could do to meet the needs of their students within a mainstreamed classroom. They called for teachers to observe student behaviors, set realistic expectations concerning student performance, and communicate expectations clearly and firmly. This also included setting realistic and achievable objectives, the administration of continuous assessment, and the observation of student response when given instruction. Herlihy and Herlihy (1980) also suggested that teachers provide alternative methods of obtaining information, help students increase self-confidence, maintain good behavior management, and compare student performance levels. Teachers were asked to match the learning styles of their students to strategies that best met the needs of their classroom population, creating individualized instruction within small group settings (Herlihy & Herlihy, 1980). Metz (1978) argued that no matter how effective mainstreaming was for lower and average intellectual ability students, it did not meet the needs of all students.
Simultaneously, other pedagogical initiatives continued to spur the call for individualized and purposeful learning. Bett’s (1985) Autonomous Learner Model called for the independent development of skills and activities for students and organized as such based on their aptitude. Horowitz and O’Brien (1986) and Maker (1986) both requested that teachers utilize various instructional approaches and pedagogical paradigms, depending on the needs of their students. These various ideas concerned how teachers could increase student learning through the individualization of curriculum and instruction inspired scholars like Kaplan to coin the term *differentiation* as a method in which curriculum and instruction could be purposefully adapted to meet the needs of specific student populations (Kaplan, 1986). Tomlinson (1999), like many other gifted scholars (e.g. Renzulli, Kaplan, VanTassel-Baska), advocated for teachers to utilize differentiation with gifted student populations. Differentiation, as used by social studies teachers for gifted learners, will be explored in greater depth in the following section of this chapter.

Social studies education continues to feel the effects of state-based and federal education reform through the recent decades. While there isn’t a completely unified definition of what social studies education should look like, the call for purposeful student learning continues to resonate with many stakeholders within the field of social studies education. Widely accepted within the field of social studies education, Crabtree’s (1983) four domains of social studies include knowledge, participatory skills, rational analysis and decision-making values. Furthermore, Crabtree (1983) attests that competence and commitment rests on the attitudes one holds toward themselves, others, and their political system, for the “common good.” While the scope and sequence of what
social studies education can provide is broad in scope and sequence, Levstik (1996) suggests that some decisions must be made to determine what universal content is most suitable for the scarce time available for social studies curriculum. Ford (2003) argues that a one-size-fits-all curriculum limits instructional time and narrows the scope of what is included in the curriculum, often limiting shared knowledge. The scope and sequence of middle school social studies will be explored in the following section of this chapter.

Reflective of current sentiment within the social studies communities concerning purposeful instructional practices, Jenness (1990) suggests that it is not just the curriculum that makes learning meaningful. As there are different aptitudes for different children, Crabtree (1983) and Eisner (1982) both state that social studies educators should respect individual differences to capitalize on how individual students most effectively learn. Beyer (2008) and Jenness (1990) emphasizes that teachers should determine how to provide their students with opportunities to engage in higher-order thinking, as a means to engage in purposeful learning. Doing so likely builds communities of thought and teach students that they have the ability and obligation to engage in a kind of critical analysis (Beyer, 2008; Jenness, 1990). Libresco (2014) insists that while teachers should be knowledgeable of their curriculum, they should be more knowledgeable of their students. Furthermore, Libresco (2014) suggests that teachers remain flexible and embrace change as it occurs.

To accompany the call for purposeful curriculum and instruction, there is an adjacent call concerning the role of the teacher. Ross (2001) argues that teacher should be attentive when considering the continuing curriculum. He calls for teachers to create a meaningful understanding of the way the world is and how one might act to transform the
world. According to Jenness (1990), teachers still argue whether students should be led and/or guided through reflective and analytical inquiry or whether logic of discovery-guided learning within a special field or framework of curriculum should take prominence in the classroom. Merryfield (2008) advocates for the awareness of global issues and multicultural connectedness when teachers plan for purposeful instruction of a diverse population. Rather than determining a right or wrong answer to the dilemma of what type of instruction works best, utilizing a combination of purposeful instructional strategies is a viable way to provide students of various learning styles engaging instruction (Jung & Bergstrom, 2011).

In addition to the application of various forms of instructional methods, Thornton (2008) emphasizes the importance for teachers to consider utilizing opportunities for student choice. Taking this into consideration, the teacher should consider how their diverse population of students would learn most effectively. Barton and Levstik (2013) suggest a diverse population of students brings a diverse array of aptitude; therefore student choice is associated with the increased motivation for students to learn. Noddings (2008) also promotes the use of student choice, as it enhances how inclusive curriculum can be and offers young people valuable experience in making decisions for themselves and society.

**Curricular-Instructional Standards for Middle Grades Social Studies**

While there is no agreed upon definition for what social studies education should look like, a popular aim of social studies education is citizenship education and civic competence. By making these aims central, “the knowledge, intellectual processes, and
democratic dispositions required of students to be active and engaged participants in public life” (National Council for the Social Studies, 2014) supports the applications of inquiry processes, collaboration, decision-making, and problem-solving skills within the social studies classroom. These skills connect to what others (e.g. Ross, 2001) suggest are central purposes of social studies education: socialization to society norms, transmissions of facts, concepts, and generalizations from academic discourse, and promotion of critical and reflective thinking.

While current instructional methods overlap the social studies disciplines, the sequence in which students learn the disciplines of social studies education differs from state to state. As it specifically applies to this study, the Florida Department of Education (2012) revised state standards for social studies education. Three diverse disciplines are employed within the middle grades social studies curriculum standards: Ancient Civilizations, Civics, and United States History. As part of the sixth grade Ancient Civilizations curriculum (FLDOE, 2008), there are eight units of study pertaining to world history prior to 1400: an introduction to basic geography skills and historical thinking, the study of ancient Sumer and Mesopotamia, ancient Egypt and the near east, ancient India, ancient China, ancient Meso and South America, ancient Greece, and ancient Rome. The following year in seventh grade Civics, students focus on the fundamentals of American citizenship, foundations of American government, an overview of the United States and the federal government, the organization and functions of state and local government, elections, political parties and pressure groups, the United States economy, and global affairs and United States foreign policy (FLDOE, 2008). Lastly, eighth grade students enrolled in United States history focus on the colonization
and development of European colonies, the American revolutionary war, the foundation and development of self-government, westward expansion of the United States and the concept of manifest destiny, era of social and cultural reform during the antebellum period, and the development, conflict, and lasting effects of the American Civil War (FLDOE, 2008).

The standards employed through the state of Florida coincide with the current National Curriculum Standards for Social Studies, published by the National Council for Social Studies (2010). The interrelated ten themes of social studies curriculum address overall curriculum design and comprehensive student learning expectations, while state standards provide a range of specific content through the accomplishment of student-learning expectations (National Council for the Social Studies, 2010). The ten themes are a set of principles for which content can be selected and organized to build a purposeful social studies curriculum for grades ranging from Pre-K through twelfth grade. The ten themes include culture; time, continuity and change; people places, and environments; individual development and identity; individuals, groups, and institutions; power, authority, and governance; production, distribution, and consumption; science, technology, and society; global connections; and civic ideals and practices (National Council for the Social Studies, 2010).

While the National Council for the Social Studies (NCSS) Curriculum Standards address overarching themes in connection with content-specific state standards, the Common Core State Standards (CCSSI, 2014) are connected to social studies through skill-based instructional practices. Specifically titled “Grades 6-12 Literacy in History/Social Studies,” the Common Core State Standards supports the advocacy of
literacy within the social studies classroom, focusing on key ideas and details, craft and structure, the integration of knowledge and ideas, and range of reading and level of text complexity.

In connection to key ideas and details, students are asked to cite textual evidence, determine central ideas, or identify key steps to a text’s description in order to support the analysis of primary and secondary sources. In relation to craft and structure, students are asked to determine the meaning of words and phrases, describe how texts present information, and identify text that reveals an author’s point of view or purpose as it pertains to social studies topics. In regards to the integration of knowledge and ideas, students are asked to integrate visual information, distinguish fact and opinion, and analyze the relationship of various primary and secondary sources as it pertains to social studies topics. Lastly, the range of reading and level of text complexity expects students to read and comprehend social studies texts independently and proficiently.

Common Core writing standards also exist in connection to writing arguments focused on discipline-specific content. Students are asked to produce writing informative and explanatory texts, produce clear and coherent writing, and develop and strengthen writing using approaches geared toward organization and revision. Also, students are asked to utilize technology to produce and publish writing, conduct short research projects to answer academic-based questions, gather relevant information from multiple print and digital sources, draw evidence from informational texts, and write routinely over extended amounts of time. While these standards are geared toward grades six through eight, the Common Core State Standards Institute (2014) notes that narrative skills continue to grow in these grades and that conclusively students should be able to
incorporate narrative accounts into their analyses of historically important individuals or events.

In response to the Common Core State Standards (2014), National Council for the Social Studies (NCSS) published the *College, Career, and Civic Life (C3) Framework for Social Studies State Standards* (National Council for the Social Studies, 2013). They claim that as the Common Core State Standards have “redesigned the nature and delivery of content knowledge to prepare students for college and career, so does the C3 Framework, which also has the unique distinction of preparing students for civic life” (National Council for the Social Studies, 2013, p.vii) The C3 Framework is guided by the following principles:

- Social studies prepare students for college, careers, and civic life;
- The heart of social studies is inquiry;
- Social studies actively include interdisciplinary applications, integration of the arts, as well as the humanities;
- Since social studies are composed of deep and enduring understandings of concepts and skills from its disciplines, these actions prepare students for democratic decision-making;
- Lastly, social studies should explicitly connect with the Common Core State Standards for English Language Arts and Literacy in History/Social Studies.

Intended for state and local school districts, teachers, and curriculum writers to strengthen their social studies programs, the C3 Framework seeks to “spark curiosity, guide instruction, deepen investigations, acquire rigorous content, and enable students to apply knowledge and ideas in real world settings so that they can become active and
engaged citizens in the 21st century” (National Council for the Social Studies, 2013, p. viii). While it does not specifically call for differentiated standards for gifted populations in social studies classrooms, it promotes the idea that students need to “inquire, investigate, and communicate the results of their work by taking informed action and practicing the habits of civic life needed for the 21st century” (National Council for the Social Studies, 2013, p. x).

**Differentiating Social Studies Curriculum and Instruction for Middle Grades**

In reaction to the concept of mainstreaming (e.g. Herlihy & Herlihy, 1980; Metz, 1994), partnered by the rise of standardized testing and federal curriculum and instructional standards (e.g. NCLB, 2002; USDOE, 2009), the most recent concept of differentiation evolved as a means to customize curriculum and instruction based on the aptitude of a student. According to Sousa and Tomlinson (2011), teachers realized that their students possessed a broad range of abilities, languages, cultures that required diverse instruction within the same classroom. With that said, social studies teachers must acknowledge several essential challenges, as noted by Tomlinson (1999), to effectively reach out to students who span the spectrum of learning readiness, personal interests, and culturally shaped ways of seeing and speaking of the world and experiences in that world. As a result, Tomlinson et al. (2003) believed that differentiated classrooms feel right to students who learn in different ways, at different paces, and who bring to school various talents and interests. These class norms work better for a full range model more so than one-size-fits-all classroom models (Reis, Kaplan, Tomlinson, Callahan, & Cooper, 1998).
While most commonly associated with academic achievement, it is important to note that the differentiation of curriculum and instruction also nurtures the needs of middle school students in terms of social-emotional development. According to Tomlinson (2002), advanced learners needed the support and guidance of teachers to develop study and coping skills, develop a sense of self-efficacy, and cope with perfectionism, laziness, and overwhelming expectations for success. In response, Tomlinson (2001) suggests that teachers set important goals, clearly articulate instruction, work for learning-in-context, plan teaching and learning through many modalities, and share that you believe in your students. Differentiation benefits the whole student. While this study expects to disclose findings where some form of differentiation is utilized within the curricular-instructional decisions teachers make to service their gifted students, this study does not expect to disclose that all teachers use differentiation as the only means to service their gifted students. With that in mind, this section of the review of related literature is devoted to the most recent rise in methods of differentiation, particularly pertaining to models that support middle grades social studies curriculum and instruction.

The call to customize curriculum and instruction forged forward with the development of various models of differentiation (e.g. Kaplan, 2009; Tomlinson, 1999; VanTassel-Baska, 2011) that teachers could use to assist while making decisions, as curricular-instructional gatekeepers (Thornton, 2005), for their diverse student population. As the first of the three models, Kaplan (2009) defines differentiation as a constantly evolving method of customized instruction, where variables influence the evolution of the
definition that include the general education demands, analysis of gifted achievement, concerns for validation, and new definitions of giftedness.

According to Kaplan (2009), differentiation is a layered approach focused on the learners’ needs, interests, and abilities, content and skills of subject-specific topics, pedagogy that can effectively teach the content and skills, and the setting or grouping of students and how they interact with the content. Derived from concerns for gifted populations, Kaplan (2009) visualizes how differentiation exists within the curriculum through the use a layered approach (see Figure 1). Among these layers include various forms of customized instruction. The organizing element of theme and generalizations are related to the overarching themes or macro-concepts related to subject-specific disciplines, also found in related models of differentiation (e.g. Van Tassel-Baska, 2011). Individualization is strikingly similar with methods of student-centered learning, independent study, and discovery learning (Bruner, 1960; Land & Hannafin, 2000; Yilmaz, 2008). Classical instruction is commonly associated with topics based on the humanities, historical conflicts, and the impact and significance of such topics to current events. Conclusively, Kaplan (2009) believes that teachers could modify one, some, or all areas in which differentiation can occur, all depending on the nature of the core curriculum
Unlike Kaplan, Van Tassel-Baska (2011) concretely defines differentiation, or the Integrated Curriculum Model, more so than her counterparts. According to Van Tassel-Baska (2011), in order to differentiate curriculum for the gifted, teachers must move to a higher level of expectation in respect to the content, process, and concept demands. The purpose of developing their model of differentiation was to make higher-level curricula available, focus on depth and complexity rather than advancement, and provide teachers with a choice of instructional strategies and selection of materials (Van Tassel-Baska & Stambaugh, 2006). Van Tassel-Baska defines differentiation as the process of customizing all levels of the curricular-instructional design, as opposed to Kaplan’s (2009) model for differentiation. Included with Van Tassel-Baska’s model are projected goals, outcomes, activities, projects, strategies, materials, and assessments based on six tenets of differentiation: acceleration, complexity, depth, challenge, creativity, and abstractedness (Van Tassel-Baska & Stambaugh, 2006; Van Tassel-Baska, 2011).

Figure 1. Kaplan’s (2009) Layered Approach to Differentiation.
First, as a means of acceleration, pacing should be adjusted and pre-assessments should measure prior knowledge, thereby affecting learning goals and outcomes. Secondly, as a means of developing complexity, teachers should produce higher levels of learning through the use of higher-order thinking skills, additional variables, multiple resources, and pose difficult questions. The third tenet, as a means to create depth, teachers should include authentic research, develop a product of worth, apply a concept in multiple ways, collect data from various sources, and present data through acceptable media to make research more meaningful and multidimensional. The fourth tenet, as a means to challenge students, teachers should utilize more advanced resources, provide sophisticated content, make interdisciplinary connections, and promote reasoning that produces conclusive thought. The fifth tenet, as a means to spur creativity, teachers should emphasize oral and written presentation to real-world audiences, include rigorous content represented through products that allow for advanced learning, and provide students with choice of medium, substantive idea, and mode of delivery. The last tenet, in order to support abstractedness, teachers should focus conceptual thinking within and across disciplines. For examples, macro-concepts such as change, interdependence, systems, and patterns could help students form generalizations and move away from more concrete applications.

Using the Integrated Curriculum Model to differentiate the curriculum and instruction, according to Van Tassel-Baska (2011), educators can contribute to the talent development process in connection with extra curricular content-based opportunities, strong knowledge base in the content area, cultivate a classroom environment that
encourages exploration and in-depth learning in content, and support social-emotional development.

Congruent with Van Tassel-Baska and Kaplan, Tomlinson (1999; 2001) believes that there is no singular formula for differentiation. Instead, teachers should carefully fashion instruction around essential concepts, principles, and skills of a specific subject area. In addition, advanced learners should grapple with important complexities rather than mundane bookwork (Tomlinson, 1999; 2001). Furthermore, Tomlinson (1999; 2001) describes differentiation as a teacher’s response to student needs guided by principles of differentiation such as respectful tasks, flexible grouping, and ongoing assessment and adjustment. As referenced earlier and in connection with Thornton’s (2005) concept of curricular-instructional gatekeeping, Tomlinson (1999; 2001) suggests that teachers can differentiate by modifying the content, process, product, or environment according to student readiness, interests, and learning profiles, through a range of instruction and managements strategies.

According to Tomlinson (1999; 2001), teachers who differentiate should be clear about what matters within the content, understands and appreciates student differences, assesses and instructs inseparably, and adjusts content, process, and products based on their student population. Teachers also participate in crafting purposeful instruction for students, collaborate in learning alongside their students, are flexible, and sets goals for maximum growth in individual success.

Tomlinson’s model for differentiation is the most commonly known for subject-specific application. Tomlinson has worked collaboratively with and inspired other scholars to provide teachers with in-depth exploration into the many avenues in which
differentiation can benefit their students through practical application (Tomlinson & Imbeau, 2010), cognitive psychology and neuroscience (Sousa & Tomlinson, 2011), practical methods of curriculum design and lesson planning (Tomlinson & McTighe, 2006), application within the mixed-ability classroom (Tomlinson, 2001), and forms of assessment (Roberts & Inman, 2009). Van Tassel-Baska’s (2011) Integrated Curriculum Model can be tailored to middle level content area classroom settings for gifted students. Many of the participants in this study were familiar with the Integrated Curriculum Model and worked with Van Tassel-Baska in professional development session specifically tailored for the gifted magnet programs. With that said, this study will utilize both Tomlinson’s model of differentiation and Van Tassel-Baska’s (2011) Integrated Curriculum Model through the data collection and analysis processes.

While these models for differentiation lay a foundation for how teachers can apply individualized student learning to their curricular and instructional practices, professional development and continued teacher education can also provide teachers opportunities to embrace, practice, and apply methods of differentiation. Furthermore, middle school social studies teachers can seek post-secondary education and teacher certification to specialize in teaching gifted populations.

Conclusion

In conclusion, middle school social studies teachers can greatly impact the quality of pedagogy by determining what and how curriculum and instruction should be prepared and enacted for their gifted students. Both are interrelated, dependent on one another, and influential to the success of student learning. As Tomlinson (1999) states, “the curriculum
is essential; it is the heartbeat of teaching. But instruction is important too. It’s the central nervous system of the classroom. Without the heart, there is no life, but without the nervous system there is no function” (p.11).

There is a special relationship between curriculum and instruction. Accompanying the heartbeat and nerves of curricular-instructional gatekeeping also includes how students individually digest knowledge. Through various methods of differentiation, teachers make learning malleable for students and thereby bring nourishment to the whole classroom. With that said, it is my intent to illuminate this phenomena: how middle grades social studies teachers, as curricular-instructional gatekeepers, believe they should prepare and meet the needs of their gifted students through various methods of differentiation. The next chapter of this dissertation will explicitly address the rationale, methods, and procedures of data collection, analysis, and presentation for this multiple case study.
CHAPTER THREE

METHODOLOGY

Purpose

The purpose of this study was to illuminate the ways middle school social studies teachers may tend the curricular-instructional gate for their gifted students. More specifically this multiple case study examines the ways teachers believe, prepare, adapt, and undertake differentiated curriculum and instruction. There is a lack of data revealing how teachers are modifying the curriculum and instruction specifically for gifted students within middle school social studies classroom settings. Specifically, there are no theoretical or practical research studies that directly focus how teachers, as curricular and instructional gatekeepers, differentiate middle school social studies curriculum and instruction, in order to individualize learning for gifted student populations.

Research Questions

Four central research questions guided this multiple case study on the curricular and instructional gatekeeping of social studies teachers of gifted students:

1. What do middle school social studies teachers believe they should do to teach gifted students?
2. In what ways do middle school social studies teachers prepare and adapt curriculum for their gifted students?
3. In what ways do middle school social studies teachers prepare and adapt
instruction for their gifted students?

4. What does instruction look like for gifted students in their middle school social studies classrooms?

**Rationale and Procedures for a Qualitative Multiple Case Study**

The method engaged in the accomplishment of this study follows Thornton’s (1991) recommendation that “the operational detail of case studies can be more helpful than more confidently generalizable virtue of quantitative analysis” (p. 247). Qualitative research is built upon the principles of what Creswell (2002) describes as the lives of individuals, who describe experiences related to the topic at hand. Patton (2002) depicts qualitative research as a multimethod, comprising an interpretive naturalistic approach to its subject matter. Qualitative researchers study within their natural settings, attempting to make sense of or interpret phenomena in terms of the meanings people bring to them (Denzin & Lincoln, 1994). Creswell (1998) explains, “qualitative research is complex, involving fieldwork for prolonged periods of time, collecting words and pictures, analyzing this information inductively while focusing on participant’s views, and writing about the process using expressive and persuasive language” (p. 15).

Through this process, the researcher was able to build a complex and holistic picture, where words were analyzed, informant reports were descriptive, and a natural setting was set as the scene of data collection. This study was designed to describe a collection of teacher gatekeeping experiences within a middle grade social studies classroom, specifically to how they differentiate curriculum and instruction for gifted student populations.
According to Merriam (2009), a multiple case study is a number of first-person accounts and lived experiences that are recorded, coded, and reported to provide in-depth, rich data collection based on the best practices concerning a contemporary phenomenon in depth within its real-life context. Yin (2008) suggests that a multiple case study “has a distinct advantage… when a ‘how’ or ‘why’ question is being asked about a contemporary set of events over which the investigator has little or no control” (p.8).

Rationale and Procedures for Data Collection

Two research sources were used to acquire data in this multiple case study: semi-structured interviews with teacher participants and classroom observations of teacher participants. Semi-structured interviews allowed for the participants to thoroughly identify and describe their beliefs, previous experiences concerning curricular-instructional gatekeeping, plans for instruction during scheduled classroom observations, and reflections based on their classroom observations. Classroom observations allowed for participants to showcase in what ways they differentiate in middle level social studies classes for gifted students. In support of these data methods, the collection of available visual evidence gave participants the opportunity to share what they considered evidence of their curricular-instructional gatekeeping for gifted students. Evidence (e.g., classroom photographs, teaching materials, samples of unidentified student work) provided support for data collected from semi-structured interviews and classroom observations, adding visual evidence to the findings of this study.

Within the following sections of this chapter, the sampling procedures, study settings and participants were selected through specific criteria, which strengthened the
data collection, analysis, and findings for this study.

**Description of the Study Settings**

This multiple case study was conducted with six middle school social studies teachers who reside and work in central Florida. Within the region available for this study, eleven teachers presented qualifications that fulfilled the sampling criteria. Out of the eleven possible participants, six middle grade social studies teachers volunteered and were supported by their school administration to participate in the study. Time to access and complete the data collection process was limited within the selected public school system and the availability of teacher participants who fulfilled the sampling criteria (see participant criteria list below) in relationship to scheduled assessments, holidays, and professional development trainings for teachers.

A gifted student population existed within the social studies class of each of the selected teacher participants. While some selected middle schools contained heterogeneously organized class populations for gifted learners, there were also middle schools designated as gifted magnet programs, which held homogeneously gifted class settings. Both populations participated in this study as part of purposeful sampling, thereby illuminating diversity in how teachers instructionally gate-kept for their gifted students.

Six teachers participated in this study from January 2015 to June 2015. The six participants were from three counties in the state of Florida: Seaside, Springside, and Pierside. All six participants taught at four school locations that were located within various incorporated communities as part of a larger region within central Florida. While
classroom observations were included in the methods of this study, there were some restrictions to school campus access based on the approval of school administration. Three of the four middle schools described below provided clearance for classroom observations. One school did not allow full classroom observations. Instead, participants from the restricted school site were able to provide other forms of data that illuminated the school culture, geographic area, student population, and classroom cultures within the school setting independently scheduled interviews off school campus. All other participants were able to provide access to classroom observations and completed the study as it was originally designed.

The following are descriptions of the school sites that are related to this study. This information originates from participant data or school and district programming and promotion materials.

**Gulfport Middle School.** Gulfport Middle School is a very ethnically diverse fundamental middle school in Seaside County. Gulfport Middle School follows the fundamental model where parents and students are held accountable through a signed agreement whereby they agree to clearly communicate, participate in volunteering efforts, and hold the student accountable for academic responsibilities.

All gifted classrooms are integrated within the halls of Gulfport Middle School, where half of the student population attends the general education fundamental program, and the other half are enrolled within the fundamental gifted magnet. Student populations are predominately middle-to-upper socio-economic status. There is a small gifted student population that attends the general education fundamental program and can enroll in a gifted elective class to fulfill part-time services. However, the majority of gifted students
that enroll within the gifted magnet are placed in homogeneously populated classrooms. The academic course load for the gifted magnet students is designed to provide comprehensive acceleration and challenge to the curriculum, while providing students opportunities to develop their creativity, complex thinking, and depth of understanding.

**Edgewater Middle School.** Edgewater Middle School is located in a suburban town within a larger city within Seaside County. Students attend one of two programs: a general education program or a gifted magnet program. There are also fundamental-type teaming options and an Academy of Technology to foster 21st century learning to students in both programs per technology elective coursework.

The gifted magnet is described as a school-within-a-school concept, facilitated very similarly to the gifted magnet at Gulfport Middle School. The academic course load for the gifted magnet students is designed identically like Gulfport Middle, to provide comprehensive acceleration and challenge to the curriculum, while providing students opportunities to develop their creativity, complex thinking, and depth of understanding. Gulfport and Edgewater Middle School gifted magnet programs are two of three gifted magnets for middle level education for Seaside County Schools.

Within the larger general education population at Edgewater Middle School, there are models built within the general education programs that are tailored to non-gifted students. The Advancement Via Individual Determination (AVID) and fundamental-type models were developed to homogeneously group general education students together into grade level teams. General education students within these programs vary in intellectual ability and achievement.
**Sunset Point Middle School.** Sunset Point Middle School is located in a small suburban town within an affluent area in Seaside County, which is a little higher in socio-economic status than other areas of the county. The Sunset Point Middle School is strongly supported by the community, its leaders, and local businesses.

Within the last few years the school saw a shift in student population. Students currently come from a variety of socio-economic levels, mainly low to middle class. Sunset Point Middle School does not have a district-supported gifted magnet, but created a Gifted and Talented team within the school to compete with neighboring gifted magnet middle schools. All the grade-level gifted and talented teams of teachers instruct mixed-ability student populations. Teams are combined of students who are state-identified gifted students, students who have talents and advanced academic ability who are not identified as gifted, and students whose parents have specifically requested their children be included on the specialized team. Teachers on the sixth and seventh grade teams are required to obtain a gifted endorsement, while eighth grade teachers are required to meet the specific qualifications to teach their accelerated curriculum in their subject areas, especially for high school level equivalent courses. Separate from the gifted and talented teaming, there is also a gifted elective available for students to enroll in part-time gifted education services.

**Keystone Middle School.** Keystone Middle School is located in a suburban area within a larger city located in Seaside County. As a newly developed and feeder-based engineering magnet, Keystone Middle School is currently located on the campus of its neighboring high school which has a successful engineering magnet. Keystone’s school campus is currently located in portables while the permanent campus is under
construction. The geographic area in which Keystone Middle School is located is an affluent and politically conservative community. There is also high parent involvement. Parents elect to provide their own transportation for their children and volunteer on a regular basis.

The magnet is structured on a 90-minute block schedule, which allows for the teachers to do more problem-based, hands-on type of learning. Out of seven periods, only one is a standard 47-minute class period so that the high school engineering magnet educators can be included within the middle school magnet program. All other classes meet every other day for a 90-minute block. Students are required to enroll in an engineering elective, which fosters fundamental skill sets with the engineering field, STEM learning, and frequent use of project-based curriculum.

Keystone Middle School is also a pilot school for the Marzano (2007) program based on his book *The Art and Science of Teaching*, which may expand district-wide during the following school year. The program includes pre- and post-assessments for all core classes, at all grade levels. The program also includes a teacher-created student achievement scale system that is implemented in the classrooms. Student achievement scores are then included in teacher evaluation methods used by the district to rate teacher effectiveness. In addition to students self-evaluating their learning, teachers can also use the scales as a means to differentiate the expectations for gifted student learning. Both participants from Keystone Middle School also believe that teacher buy-in to the program effectively leads to student buy-in. “Students seem to be very comfortable with [the Marzano Scales] now. What at first seemed time consuming for students and teachers to
include in classroom processes now seems natural. [Students] are even helping me create them this year, which is kind of fun” (Mrs. Tango, Interview, February 21, 2015).

**Participants**

Schwandt’s (2000; 2006) states that the social world encompasses meaning and that people respond to others through their interpretations of reality. The researcher and the participants are interactively linked, and together they construct, interpret, and refine meaning until consensus is achieved (Lincoln & Guba, 1985). Due to the complexity and diversity of how school districts provide academic support for gifted learners, a combination of purposeful snowball and criterion sampling was conducted through the guidance of district supervisors and middle and high school administrators.

Two groups of teacher participants contributed in this study: three teachers who taught a homogeneous, or inclusively gifted student population, and three teachers who taught a heterogeneous, or mixed-ability classroom that contained large gifted populations. Teacher participants were invited (see Appendix C) based on their teaching experience, grade level, and assigned subject area (Patton, 2002). The following criteria were used to determine whether a participant was eligible to take part in this study:

1. The participant should have completed (or is in the process of completing) a Florida Department of Education gifted endorsement, or equivalent. This is highly recommended and/or a requirement of teachers in the state of Florida, depending on the teacher’s classroom assignment.

2. The participant should provide either full or part-time services for their gifted students.
3. The participant is employed by a middle school within central Florida.
4. The participant will agree to volunteer to be interviewed for this research.
5. The participant will agree to volunteer to be observed in their classroom setting.
6. The participant will agree to provide written consent.

After these six participants were selected and the University and school system’s Institutional Review Board (IRB) process was complete, data collection consisted of two methods: semi-structured interviews with teacher participants and classroom observations of teachers’ curricular and instructional gatekeeping. The collection of visual evidence supported data collected by interviews and observations (Rubin & Rubin, 2005; Seidman, 1998). The methods and supportive evidence are described in greater detail later in this chapter.

Participants volunteered to take part in four one-hour interviews and one week of consecutive one-class period (45-90 minute) classroom observations. Approximately two to three additional hours were accounted for member-checking responsibilities of transcriptions and analyses. In total, this commitment equated to twelve to thirteen hours. Participants were compensated for their time with $20.00 in the form of gift cards for each completed semi-structured interview. There were no cases where participants withdrew from the study. During the interviews, the researcher elected to pay for all food and beverages. Other than travel costs, no other costs were incurred for participants. Interview settings were scheduled by the researcher at the convenience of participants in order to reduce the travel time and costs for participants.

It is important to note that one teacher participant contributed to a pilot of the
study, prior to the initiation of any other participant interaction. This ensured the assigned methods of data collection obtained sufficient information necessary to provide complete and purposeful answers to the research questions pertaining to this study. Based upon the information provided by the pilot participant, interview questions and classroom observation measures were reviewed to increase meaningful data collection.

**Description of the Participants**

The following is an individual case description of six teacher participants who gave consent to contribute in this multiple case study. All participants were certified teachers for the state of Florida and hold full-time teaching positions within the area of central Florida. Each participant completed or was in pursuit of completing a gifted endorsement, or its equivalent, from the Florida Department of Education (FLDOE). A gifted endorsement included the completion of five courses for a total of 300 hours concerning the nature and needs of gifted children, guidance services for gifted children, special populations of gifted, curriculum design for gifted populations, and creativity in gifted education. All participants provided part-time or full-time services for gifted students in a variety of special programs designed by their affiliate school district.

Due to restrictions in school access, as described above in this chapter and in chapter three, four of the six teacher participants were granted permission by their administrations to allow classroom observations to occur for the purpose of this study. Two participants were not permitted to have observations of their classroom setting. However, the interviews completed by said participants included questions that prompted conversation regarding their daily classroom practices and procedures, descriptions and
tone of their classroom environment, and the collection of supportive artifacts. They also provided a detailed sampling of unidentified student work, classroom photographs, and classroom materials that guided discussion as to how differentiated curriculum and instruction was planned, adapted, and enacted in a classroom setting containing gifted students. All other participants were able to provide access to classroom observations and completed the study as it was originally organized. The following summaries will provide a description of each teacher participant’s educational background and teaching assignments.

Mr. Gaines. Mr. Gaines was a resident and tenured middle grades educator with Seaside County. He held several degrees, including a Bachelor’s degree in history with a minor in secondary education and a Master of Education degree with a concentration in secondary social studies education. His first experiences as a certified teacher in a social studies classroom were in eleventh and twelfth grade American History and Economics courses at Central High School, located in central Florida. Soon after, his school was in search of a gifted coordinator, which motivated him to complete his FLDOE gifted endorsement (grades K-12) through the school district. While this gifted coordinator position took him away from teaching in an inclusively populated gifted classroom, he was the liaison for all gifted students and communicated regularly with staff, faculty, and their parental guardians to ensure their gifted needs were met at Central High. Nevertheless, many of his counseled students were also enrolled in his social studies classes.

After three years of teaching at Central High School, Mr. Gaines accepted a position at Gulfport Middle School as an eighth grade Advanced United States History
teacher at their Gifted magnet. In addition to his teaching responsibilities, he provided leadership for his school and district as the sponsor of several social studies-based academic competitions and extracurricular activities.

**Ms. Lindy.** Ms. Lindy was a resident and tenured middle grades educator in Seaside County. She held a Bachelor’s degree in Applied Anthropology and was an avocational paleontologist. While serving as a remediation instructor for reading and math in the early years of her pre-certified teaching career, she was quickly intrigued by her interactions with gifted students. With a passion for social studies, she began to observe and ask advice from other teachers concerning the next steps in her education in order to be certified to teach. Whilst completing her accelerated education program, she interned for a gifted education teacher, which inspired her to pursue a gifted endorsement. Soon afterwards Ms. Lindy completed both an accelerated degree of education in social studies (grades 6-12) and a FLDOE gifted endorsement (grades K-12) through a university program.

Ms. Lindy began her teaching career teaching in a middle school elective program, where she was able to be creative, writing her own curriculum. Later in her career, she accepted a position at Gulfport Middle School, teaching the middle level gifted elective class for a number of years. With the conception and implementation of a series of gifted magnets by the school district, one of which was assigned to her school location, she accepted a teaching position for sixth grade gifted advanced academic elective class, called independent study, for its inaugural year. With these positions, she believed her background in social sciences and gifted education were a perfect fit for Gulfport’s special programming. After a number of years fulfilling the role as the magnet’s sixth
grade independent study teacher, she transferred to the magnet’s sixth grade Ancient Civilizations course, where she teaches currently.

**Mrs. Compton.** Mrs. Compton was a resident of Springside County and was a tenured middle grades educator with Seaside County. She held a bachelor’s degree in history and completed alternative certification in the field of social studies and a FLDOE K-12 gifted endorsement through the school district. She began her teaching career in Seaside County mid-year filling in for a position providing part-time services to gifted students through a gifted elective course at Edgewater Middle School. This elective course, at the time of her experience, focused on the study of the social sciences disciplines. After two years as a gifted elective teacher, her school district created a series of gifted magnet programs throughout the county, and Edgewater Middle School was chosen as one site for implementation. She accepted a teaching position as a sixth grade Ancient Civilizations teacher for the gifted magnet since its inauguration in 2008. The gifted magnet program at Edgewater Middle School echoes the gifted magnet program previously described for Gulfport Middle School.

**Ms. Heisman.** Ms. Heisman was a tenured middle grades educator in Seaside County. After completing her undergraduate degree in business, she began a career in the hospitality and sales industries. Shortly after pursuing these ventures, she decided to pursue graduate coursework in education. Once she gained her teaching credentials, she accepted a kindergarten teaching position at a private Catholic school in Springside County. After nearly a decade of teaching at the elementary level, she transferred to Sunset Point Middle School where she taught the gifted elective, mathematics, and computer science. It was during her teaching experiences at Sunset Point Middle School
when she earned her FLDOE gifted endorsement (grades K-12) through the school district.

Ms. Heisman taught within the sixth grade gifted and talented team and teaches general education sixth grade social studies and a video production elective course. The majority of her gifted and talented students who came from the Sunset Point area are white and upper-middle class. These students were drawn from neighboring affluent elementary schools. One elementary school in particular transferred the majority of their graduating gifted students to Sunset Point to continue their gifted services at the middle grades level.

**Mrs. Tango.** Mrs. Tango was a tenured middle grades educator of Seaside County. After completing an undergraduate degree in psychology with a minor in criminology, she pursued a Masters of Arts in Teaching in Social Studies. Her internship experiences led her to Meadow Springs Middle School, where she taught 8th grade US History.

Mrs. Tango began her teaching career at Indian Springs Middle School in Seaside County where she taught eighth-grade United States History at the advanced and general education levels. After a number of years at Indian Springs, she accepted her current teaching position at Keystone Middle School as a seventh grade Civics teacher. She was currently completing the last course, titled Creativity in Gifted Education, as part of the gifted endorsement through an online professional development program provided in collaboration between the Florida Department of Education and Seaside County Schools.

**Ms. Parker.** Ms. Parker was a resident of Pierside County and was a tenured middle grades educator with Seaside County. She earned an undergraduate degree in
Social Studies Education, with a minor in Language Arts Education. In addition to her preparation program, Ms. Parker also decided to extend her education by earning an extra endorsement in Middle Level Education, which provided her a firm foundation for her curricular and instructional practices.

Ms. Parker began her teaching career with a half-year assignment in Europe, teaching fourth grade. After returning to the United States, she began middle level education teaching at the seventh and eighth grade level. After catching up with an old friend who just moved to Florida, she was prompted to apply at his middle school, where she accepted a position teaching seventh grade geography and eighth grade Social Studies and Language Arts. With shifts in the school faculty and administration, she accepted a teaching position in the eighth grade teaching US History at the advanced and general education level. Recently, she transferred to Keystone Middle School, where she currently teaches sixth grade Ancient Civilizations.

Ms. Parker is currently in the process of completing graduate coursework at a nationally accredited Educational Leadership program in which specific courses could be considered equivalent to the requirements of a gifted endorsement in the state of Florida. She is a supporter of gifted populations and is dedicated to serving the needs of those with academic strengths in all areas of the social sciences and STEM disciplines.

**Semi-Structured Interviews**

Yin (2008) states, “one of the most important sources of [multiple] case study information is the interview” (p. 84). Due to the nature of the semi-structured interview, sets of core questions were utilized. Additional questions used might vary depending on
the conversation that developed with each participant. On-site determinations to adjust
the pace and length of the interview posed opportunities to prompt and probe more
detailed participant responses and build rapport with the participants (McCracken, 1988;
Seidman, 1998). Per participant approval, all interviews were recorded digitally for
accuracy and ease of transcription through the use of a personal digital recorder pre-
selected and tested by the researcher. All participants agreed to be recorded during the
interview process. Field notes were compiled at the time or immediately after each
interview (see Appendix F).

Four one-hour interviews with each participant were conducted throughout a four-
month period of time. Interviews were held at a location of the participants’ choice,
usually based on convenience and geographic proximity to their personal residence. A
few participants were comfortable with conducting the interviews within their classroom
during planning periods, prior to or after the school day. Data were collected to obtain
information regarding ideas and thoughts including the educator’s experience, teacher
education and professional development, and knowledge of current and innovative gifted
education initiatives. Topics of discussion also included teacher’s knowledge of
academically talented students’ social-emotional characteristics, planned instructional
methods for the period of observation, and how differentiation of curriculum and
instruction will/have been utilized in content, process, product, or environment (Tomlinson,
1999; 2001) or through tenets of the Integrated Curricular Model (Van Tassel-Baska,
2011).

The first interview was pre-observational, which highlighted the educator’s
background and experiences with gifted populations, prior use of differentiation in the
classroom, and purposeful insight into how the educator made decisions based on the curricular and instructional gatekeeping of his or her classroom. Thirteen questions were developed to encompass a variety of experience, opinion, feeling, knowledge, and background-based questions in order to support the semi-structured interview by collecting rich amounts of data (see Appendix A).

The second and third semi-structured interviews occurred a few days prior to and followed the scheduled classroom observation per the participant’s availability. These interviews gathered in-depth data regarding the planned instructional methods for the period of observation and how the curriculum and instructional methods transpired in the classroom under the direction and gatekeeping of the teacher participant. A series of six essential pre- and post-observation interview questions were developed to assist in reflecting on the classroom experiences of the teacher participant (see Appendix B), which were inspired by Tomlinson’s (1999) conceptual framework for subject-specific differentiation and VanTassel-Baska et. al.’s (2003) William and Mary Classroom Observation Scales for Teacher Observation, Part 2 - Revised. Each observation produced diverse results in terms of curriculum planning and delivery, differentiation, the use of problem-solving strategies, critical thinking strategies, creative thinking strategies, and research strategies. Additional probing questions were used to prompt in-depth and data-rich responses from teacher participants, depending on the conversations that took place. On-site determinations to adjust the pace and extend the length of the interview posed opportunities to probe more detailed participant responses and continue to build rapport with the participants (Seidman, 1998).

Lastly, a concluding reflective interview took place after all other interviews and
observations have been completed, transcribed, and triangulated through member-checking processes. Interview questions for the final interview were determined on the themes presented in the preliminary analysis of the data and served as a reflective measure for the participants’ lasting thoughts, opinions, and reflections of their experiences with gatekeeping and differentiation for gifted learners. As in all other instances, on-site determinations adjusted the pace and length of the interview. As previously stated, all interview communication were recorded digitally for accuracy and ease of transcription through the use of a digital recorder pre-selected and tested by the researcher, per participant approval. A professional transcriber was hired by the researcher to complete transcription of all interviews and classroom observations. Field notes were also be compiled at the time or immediately after each interview (see Appendix F).

As themes presented themselves during the process of data collection and analysis, especially given the wealth of theory behind gatekeeping and differentiation, it made sense to construct future interview questions according to the corresponding codes and themes. Any data that defied the determined codes was examined afterward and analyzed for new or emerging themes that added to existing theory (Saldana, 2013).

**Classroom Observations**

For the purposes of corroboration, this study included classroom observations of available teacher participants. Each participant invited the researcher to observe his or her classroom during the same class period for a total of five consecutive school days, unless alternative scheduling is implemented at the selected school site. However, the school
administrator for two of the study’s participants refused to allow the researcher access to their classrooms. Nonetheless, the other four participants provided the researcher complete access to classroom observations.

It is important to note that the purpose of this study was to observe the curricular and instructional decisions and applications of the teacher, not the students. Even though students were present during the observation process, students were not central to the process of collecting or analyzing data. While participating teachers were recorded within their classroom, student voices were not considered or transcribed in connection to any form of data collection.

There are several reasons for the selected length of time for classroom observations. First, given the time of access to the public school system and the availability of teacher participants who fulfill the sampling criteria (see participant criteria list), observations could only occur during specific weeks during the spring semester. Secondly, the participating school district mapped curricular units in weekly sections of study. In order to provide a well-rounded description of how gifted social studies instruction took place as a result of classroom observations, descriptions of the complete unit of study, from beginning to end, enriched and strengthened the results of the study.

Observations were scheduled based on the availability of the educators, but were completed within a week’s time during the 2015 spring semester. Observations occurred at different weeks during the time of data collection, with the exception of complying with the district’s standardized assessment schedule and remaining flexible in response to extended weekends and holidays. With the permission of the participant, observations
were recorded through a digital audio recording device located on a flat tabletop with close proximity of the participant. Field notes also documented the classroom events during or immediately following each observation (see Appendix G).

To accompany and strengthen the field notes and audio recording of observations as the guiding lens, VanTassel-Baska’s (2011) five aspects of differentiation were used as a means of triangulating data collection and solidifying convergence of the data during analysis. These include areas where curriculum and instruction were adapted in terms of acceleration, complexity, depth, challenge, and creativity. While it is not assumed that differentiation took place, these aspects of differentiation guided the researcher to determine how gifted needs were met and to what variety and degree were they applied within every classroom setting.

**Visual Evidence**

Visual evidence was collected from each teacher participant as a means for informational purposes to support data collected from participant interviews and classroom observations. Hatch (2002) states that visual evidence can be included in many qualitative research studies. Yin (2011) claims that supportive visual evidence is invaluable to a qualitative study for multiple reasons. First, they can assist the researcher in developing a stronger understanding of the content of the education occurring in the classroom. Second, they can provide important contextual information to complement other forms of data collection (Yin, 2011).

The selection of visual evidence was not pre-determined by the researcher, but was determined depending on the conversations that took place within the semi-
structured interviews, the availability of such visual evidence per participant approval, and what events unfolded during classroom observations. Visual evidence collected include: curriculum maps, supplemental texts, primary and secondary sources, graphic organizers, de-identified completed student work, photos of classroom environments without the presence of students, floor plans of seating arrangements, and other documents that brought greater clarity and comprehensiveness to the curricular and instructional decisions teacher participants made during the time of this study.

Eisner (1991) suggests that visual evidence provides unobtrusive measures or indirect surrogates for values, expectations, and behaviors that might be difficult to ascertain during interviews and observations. Guided by Eisner’s intent, this study collected supportive data as secondary instruments in the process of data collection, to illustrate study’s findings and individual or cross-case narratives (see Appendix H).

While the collection of visual evidence was originally intended for artifact analysis and coding, the availability of lesson plans, teaching materials, and other curricular items were limited depending on the school site. A series of classroom photographs of classroom environments, materials, accessible technologies, and unidentified student work were collected to use for visual evidence within the findings of this study.

**Rationale and Procedures for Data Analysis**

For the purposes of conducting analysis for this study, the researcher followed Hatch’s (2002) model for inductive analysis. Inductive coding allows a researcher to quickly find portions of interviews and field notes from observations, which refer to the
same concept, theme, or event or topical marker (Rubin & Rubin, 2005). According to Hatch’s (2002) model for inductive analysis, “Thinking proceeds from the specific to the general. Understandings are generated by starting with specific elements and finding connections among them” (p.161). Through this process, the hypotheses is tested, theory is then derived from contextualized phenomena, meaningful patterns are made across individual data, which then are later organized through more general explanatory statements.

Terminology widely used by Hatch (2002) to describe elements of the inductive analysis process includes domains, included terms, semantic relationships, and related theme. According to Hatch (2002), domains are defined as “categories that are understood by large numbers of people with common cultural understandings, that are developed within smaller groups within specialized interests of needs” (p.165). Domains can be represented by identifying what included terms, or codes, that are linked by a semantic relationship. Hatch (2002) describes an included term as a name of members or cover terms that connect semantically to represent a collective domain. By creating a domain, the researcher identifies categories that relate between included terms with specific semantic relationships in mind.

**Inductive Data Analysis**

Within Hatch’s (2002) model for inductive analysis, there are nine distinct steps that should guide the researcher through the analysis process (see Table 1). First, the researcher should read the data and identify frames of analysis, developing a sense of what is included in the data set. Through rereading, additional decision and questions are
posed, bringing new insights and concerns to the table. Hatch also recommends that this process begin while each set of data collection is in progress.

Second, the researcher should create domains, or categories, based on semantic relationships discovered within frames of analysis (Hatch, 2002). The domains created are key elements to this model for inductive analysis, as the exploration of particulars within the data lead the researcher to discover commonalities and links to other data. Domains can be represented through the use of terms or phrases that are representative of a semantic relationship. This is the beginning of the analytic process and as a result will hold multiple domains for each of the semantic relationships.

Table 1. Hatch’s (2002) Steps for Inductive Analysis (p. 162)

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<tr>
<td>1.</td>
<td>Read the data and identify frames of analysis</td>
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<td>2.</td>
<td>Create domains based on semantic relationships discovered within frames of analysis</td>
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<tr>
<td>3.</td>
<td>Identify salient domains, assign them a code, and put others aside</td>
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<td>4.</td>
<td>Reread data, refining salient domains and keeping a record of where relationships are found in the data</td>
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<tr>
<td>5.</td>
<td>Decide if your domains are supported by the data and search data for examples that do not fit with or run counter to the relationships in your domains</td>
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<tr>
<td>6.</td>
<td>Complete an analysis within domains</td>
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<tr>
<td>7.</td>
<td>Search for themes across domains</td>
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<tr>
<td>8.</td>
<td>Create a master outline expressing relationships within and among domains</td>
</tr>
<tr>
<td>9.</td>
<td>Select data excerpts to support the elements of your outline</td>
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Hatch (2002) describes the third step as the start of making preliminary judgments about what domains will and will not be important to the study. The researcher identifies salient domains, assigns them a code, and put others aside for future visitation. Once salient domains are identified, codes should be created to assist in organizing the domains. As a means to support and enrich this and future steps of the inductive analysis process, Atlas.ti software provided by the College of Education at the University of South Florida will be used to digitally code the data collected through interview and observation.
transcriptions, along with the uploading of supportive artifacts, for the emergence of concepts and themes. Reviewing transcription will also enable the researcher to reflect and think deeply about the codes and possible themes that develop through preliminary analysis measures.

Within steps four and five of Hatch’s (2002) model for inductive analysis, the researcher rereads data, refines salient domains, keeps record of where relationships are found within the data, and decides if the domains are supported by the data. Also, the researcher continues to search the data for examples that do not fit or run counter to the relationships within the selected domains. The domains, which have been hypothetical and tentative, are deductively evaluated to determine their quality and strength in relation to the study. Furthermore, Hatch (2002) suggests that the researcher is also obligated to search for disconfirming evidence.

Step six and seven of Hatch’s (2002) model for inductive analysis focuses on the completion of analysis within each domain and the location of themes across domains. In doing so, the researcher looks for complexity, richness, and depth, which later on provides greater discovery across domains that obtain similar qualities. Using an outline format, domains are organized in a way that promotes greater examination and analysis when looking at connections between several domains. Within the outline format, roman numerals are symbolic for the domain name and capital letters are assigned for each included term related to that domain. Supporting the related terms, subcategories can also be assigned through numerals.

Lastly, after the researcher completes an analysis within and across domains, Hatch (2002) suggests researchers create a master outline expressing relationships within
and among domains. Other visual models are also acceptable for illustrating the greater picture, depending on the researcher’s preference. The purpose of the master outline, or the equivalent of, would support the last step of selecting data excerpts to support elements of the master outline. Developing the outline would first lead the researcher naturally to the writing phase of presenting the findings and conclusions of research, while selecting excerpts would illuminate on the domains and themes within the process of inductive analysis.

**Credibility and Trustworthiness**

Creswell (2007) endorses the use of multiple verification measures to increase trustworthiness and validity. For example, triangulation is accomplished by comparing data across all participants in order to find similar results within the data. When research reveals similarities among the participants, validity increases. Field notes taken during the interviews and observations are additional steps that increase validity. Furthermore, member checks, defined as the inclusion of participants in the analysis and accuracy of their own declarations, promote validity. Member checks provided each participant the opportunity to review transcriptions of interviews and observations in order to make adjustments to their statements and explain or clarify intent or meaning.

In order to improve the validity of my research, all the aforementioned credibility measures were employed. The *Credibility Measures for Qualitative Research* developed by Bratlinger, Jimenez, Klingner, Pugach, and Richardson (2005) was used as a guide and checklist to ensure the credibility of this study (see Table 2).

Reliability is also examined by Creswell (2002) who supports the researcher to
engage in five strategies during data collection and analysis: maintaining detailed researcher notes; utilizing a quality recording device; transcribing all audio recordings; frequently reflect on the data collected to ensure accuracy and maintain the essence of the participants statements, while avoiding the injection of the researcher’s biases; and identify possible alternative meaning to the initial conclusion.

Table 2. Bratlinger, et al.’s (2005) Credibility Measures for Qualitative Research

<table>
<thead>
<tr>
<th>Credibility Measures</th>
<th>Conducted in Study</th>
</tr>
</thead>
<tbody>
<tr>
<td>Triangulation (examination from multiple perspectives)</td>
<td>Yes</td>
</tr>
<tr>
<td>Disconfirming evidence (after establishing themes, seek evidence inconsistent with those themes)</td>
<td>Yes</td>
</tr>
<tr>
<td>Researcher reflexivity (awareness of researcher/research relationship)</td>
<td>Yes</td>
</tr>
<tr>
<td>Member checks (participant review of data)</td>
<td>Yes</td>
</tr>
<tr>
<td>Collaborative work (multiple researchers)</td>
<td>No</td>
</tr>
<tr>
<td>External auditors (researchers uninvolved examine the process and product)</td>
<td>Yes</td>
</tr>
<tr>
<td>Peer debriefing (exposure to a disinterested peer)</td>
<td>Yes</td>
</tr>
<tr>
<td>Audit trail (methods and rationale clearly described)</td>
<td>Yes</td>
</tr>
<tr>
<td>Prolonged field engagement (observations over time)</td>
<td>No</td>
</tr>
<tr>
<td>Thick, detailed description (improves ability to draw conclusions)</td>
<td>Yes</td>
</tr>
<tr>
<td>Particularizability (rich descriptions to increase transferability)</td>
<td>No</td>
</tr>
</tbody>
</table>

**Transcription**

A professional transcriber completed transcription of all interview communication. The selected transcriber was responsible for handling all transcription in confidentiality. After transcription took place, the researcher reviewed the transcriptions compared to the original audio to enhance and confirm the accuracy of the transcriptions. Participants were allowed the opportunity to review each transcription for accuracy and discuss conflicting comprehension of the interviews and observations to increase validity and clarify interpretation of the data collected, as explained in the following section (Crocker & Algina, 2003).
Member Checking

Member checking took place with the teacher participants to strengthen the credibility and triangulation of the data analysis (Glesne & Pushkin, 1992). Once transcripts are available and verified by the researcher, copies of both the audio and transcription were delivered to all participants via email or through a hard paper copy, based on the requests of each participant. During member checks, participants were asked to validate the accuracy of their transcript and in some instances, they were able to inform the researcher of anything that should be included or clarified (Trainor & Graue, 2013).

Peer Review

After other forms of verification were complete, three peer reviewers assessed the collected data, codes, themes, and lasting results to increase the validity of the study. Peer reviewers were selected by the researcher to check and crosscheck results to prevent false findings (Hatch, 2002). Peer reviewers were selected based on their availability and expertise in the field of educational qualitative research. Feedback from the peer reviewers solidified thematic data results and posed additional avenues for further data analysis.

Researcher Field Notes

Field notes of semi-structured interviews (see Appendix F) and classroom observations (see Appendix G) were maintained to record participant responses, facial expressions, or other non-verbal gestures that could not be documented by audio-recording and/or artifact collection. These notes were taken during or immediately
following after each interview or observation. Specifically during the classroom observation, field notes were gathered in relationship to the events that unfolded within the classroom setting and how those events were supportive of the curriculum-instructional decisions made by teacher participants for their gifted students.

**Institutional Review Board**

This study was submitted for review and accepted by the University of South Florida’s Institutional Review Board (IRB). This study was also submitted for review and accepted by the participating school district’s Department of Assessment, Accountability, and Research (AAR). All federal guidelines regarding ethics and care for the participants were followed. The IRB and AAR granted expedited approval (see Appendices I and J). Additionally, the Collaborative Institutional Training Initiative (CITI) Human Research Curriculum Completion Report and Social and Behavioral Responsible Conduct of Research Curriculum Completion Report have been included as appendices (Appendices K and L).

**Confidentiality**

When completing a research study, ethical standards must be applied when dealing with participants. According to Neuman (2003), “the United States Federal Government has regulations and laws to protect research participants and their rights” (p. 129). Legal restrictions are found in rules and regulations issued by the U. S. Department of Health and Human Services Office for the Protection from Research Risks (USHHS, 2009). According to the U. S. Department of Health and Human Services Office, the
researcher should be responsible for following those regulations. For instance, researchers should not exploit participants or students for personal gain. Informed consent is required at the beginning of each participant’s participation, as per university and school district guidelines. All stakeholders must be provided privacy and confidentiality and the participants must not be coerced or humiliated in any way.

All Neuman’s (2003) principles were implemented in this study to protect the participants. The rights of the participants were respected and their identities were be disclosed. With that said, pseudonyms were used to protect the identity and anonymity of the teacher participants, school campuses, and school districts. Also suggested by Neuman (2003), the participants received a free copy of the study at their request. All materials will be stored in a secured file cabinet and kept for five years. At the end of the five-year term, the materials will be destroyed.

**Informed Consent**

The participants were cognizant of their rights to privacy, anonymity, and confidentiality (see Appendices D and E). Each participant signed a consent form (see Appendix E) before proceeding in any part of the study. By signing the form, the participant acknowledged that he or she understood the nature of the study, the potential risks as a participant, and the means by which his or her identity was kept confidential. Each participant’s identity was protected prior to, during, and after the data was collected. The data gathered will be kept for a minimum of five years under lock and key before being securely destroyed. The participants had the right to decide whether they desire to voluntarily participate in the study. Confidentiality protected the participants from any
physical harm that they may experience as a result of this study (see Appendices D and E). All information on each participant was kept in strict confidence. Participants were allowed to withdraw from the study at any time without penalty.

**Researcher Reflective Journal**

A detailed reflective journal was maintained to track the researcher’s personal decision-making, opinions, and contemplations about the research. The journal addressed topics beyond the impressions that are recorded during the data collection and analysis processes. Immediately after each interview and observation (within 24-48 hours), reflections were recorded based on the experiences and learnings of the researcher.

**Role of the Researcher**

In connection to the possible participants of this study, the researcher had a preceding association with them due to the collaborative work environment with either middle grades social studies education or gifted education; some more specifically with the planning and facilitation of academic competitions and/or enrollment in post-secondary coursework. Due to the nature of the relationships with these participating colleagues, the researcher witnessed first-hand their efforts to illuminate the very data the researcher collected during the time of this study. The long-term association the researcher developed with some of the participants in this study offered a distinctive opportunity for data collection.

Positively, the interviews and observations were casual, as the participants expressed comfort in trusting the researcher with their opinions and classroom
experiences. They were comfortable in providing examples that the researcher could immediately relate to and understand. It is important to note that if the researcher established a working relationship with a participant whom they have no prior acquaintance, many of their experiences and examples may have required extensive description and conversation in order to ascertain a basic comprehension of their experiences. Negatively, participants could have felt obligated to provide data that they believe the researcher was expecting to gather. Furthermore, the researcher’s personal biases might have manipulated the organic nature of the data collected. With that said, it was important to maintain an acute awareness for researcher roles and biases, making note of these experiences within the researcher’s reflective journal.

It is with this understanding that the researcher must state that in order to maintain high levels of trustworthiness to this study, they needed to immerse within the data, re-reading transcripts with the purpose to make sure that the voice portrayed is that of the participants and not the researcher. As stated prior to, the participants were asked to clarify any of the transcriptions in order to minimize misunderstandings.

**Conclusion**

Through the efforts of all stakeholders, the third chapter of this dissertation study revealed how data could be collected, analyzed, and presented to describe how curricular and instructional gatekeeping could provide purposeful instruction for gifted students within a middle grade social studies setting. Chapter four provides cross-case and individual narratives of participants along with an examination of the participant’s
lessons observed or collected through artifacts that they feel serve as examples for purposeful methods of teacher gatekeeping.
CHAPTER FOUR

FINDINGS

Introduction

This multiple case study examined how teachers tended the curricular-instructional gate for gifted students in their middle level social studies classrooms through semi-structured interviews, classroom observations, and the collection of available supportive artifacts. Teacher participants shared their beliefs, preparation methods, adaption methods, and implementation of purposeful curriculum and instruction for gifted students in middle level social studies classrooms. The findings of this study reflect comprehensive answers to four central research questions:

1. What do middle school social studies teachers believe they should do to instruct gifted students?
2. In what ways do middle school social studies teachers prepare and adapt curriculum for their gifted students?
3. In what ways do middle school social studies teachers prepare and adapt instruction for their gifted students?
4. What does instruction look like for gifted students in their middle school social studies classrooms?

Due to the quantity and variety of data collected in this multiple case study, the findings of this study are presented through cross-case and individual classroom observation.
narratives. As previously discussed in Chapter Three, pseudonyms were used for anonymity with all participants, school locations, and school districts.

Cross-Case Summaries of Findings

The findings of this study were organized and interpreted by the researcher, organized by each research question, and supported by excerpts from the data collected. Thematic findings related to research questions one, two, and three were discussed through cross-case summaries. Domain tables were included to support the inductive analysis process (Hatch, 2002) and to help visually describe the relationship between codes and themes. As defined in Chapter Three, Hatch (2002) describes domains as tables developed to illustrate connections between data codes and themes developed by the researcher. To accompany the description of each domain, there were numerous excerpt selections from the data that were used to describe the overall findings of the study. Specific excerpts were selected to speak for similar responses by participants.

Teachers’ Views of Giftedness

A description of participants’ understanding of giftedness was critical in support of the thematic analysis related to the research questions for this study. Describing giftedness provided insight into the purpose behind many of the curricular-instructional decisions participants employed during the preparation, adaption, and implementation processes of differentiated middle level social studies pedagogy for gifted students.

Much like the state’s definition provided in Chapter One, formalized definitions of giftedness focus on the measurement of intelligence in gifted youth. “I think students
are classified as gifted if their IQ is 130 or above” (Mrs. Heisman, Interview, February 11, 2015). Additionally, all participants described a variety of characteristics found with gifted adolescents that are not based on academic intellect. The domain code indicated a semantic relationship that conceptually broadens the definition for giftedness (see Table 3).

**Table 3: Domain regarding Participant Descriptions of Giftedness**

<table>
<thead>
<tr>
<th>Included Codes</th>
<th>Semantic Relationship</th>
<th>Related Theme</th>
</tr>
</thead>
<tbody>
<tr>
<td>Curiosity</td>
<td></td>
<td>General descriptions of gifted middle grades student</td>
</tr>
<tr>
<td>Perfectionistic</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quick absorption of concepts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Verbal articulation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Great intellectual capacity</td>
<td>Are characteristics of</td>
<td></td>
</tr>
<tr>
<td>Capable of high academic excellence</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Diverse academic strengths</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Artistic</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Creative</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Musical</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Athletic</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

They are highly curious. They're highly perfectionistic. They sometimes are intellectually curious about many things. They sometimes cannot decide what it is they want to study at that moment. They absorb information like sponges, and they make connections that are sometimes mind-boggling. They can be super creative. They can take pieces and rearrange them either intellectually with words or with actual physical objects and create new structures in a really quick manner…super quick. And then they can verbally tell you at great length what they’ve decided, or even then they can articulate in the future. (Ms. Lindy, Interview, February 13, 2015)
Furthermore, the participants were able to identify the importance of keeping in mind that gifted adolescents are teenagers. Participants believed that their students may have a high intellectual capacity, but that does not mean that they aren’t self-conscious and nervous, maybe more so, as other students. “I think one of the things with gifted students is that they have been told they are geniuses their whole life and that doesn’t mean that they necessarily all feel that way” (Mr. Gaines, Interview, February 1, 2015). Similar to other participant responses, Mr. Gaines mentioned that one of his main goals for his eighth graders was to help them get through adolescence without being embarrassed about their special characteristics and personalities.

Included in the description was participants’ focus on academic interests. Mrs. Angelo stated that “gifted students can be musically, artistically, athletically talented. They might not be geniuses, but they hold a special talent in a certain area that excels beyond others’ capabilities” (Mrs. Angelo, Interview, February 19, 2015). Mrs. Tango believed that gifted students could be academically gifted “or creatively gifted” (Mrs. Tango, Interview, February 21, 2015).

Research Question #1 - What do middle school social studies teachers believe they should do to teach gifted students?

The first research question of this multiple case study was devoted to the exploration of how middle school social studies teachers believe they should instruct gifted students. The results were organized to reflect a collective response based on domains that articulate teacher beliefs and experiences pertaining to how teachers made curricular-instructional decisions based on two factors: (a) teacher responsibilities in
connection with their school board employment and (b) their responsibilities to meet the needs of their gifted student populations. Included codes for these domains semantically related how participants contended with their efficacy as an educator, how they considered the academic and social-emotional needs of their gifted students, how they considered the programming options available from their school and district, and how they fostered an engaging classroom environment and classroom culture for their gifted students. These themes described the behind-the-scenes decisions participants made that later influenced how they approached the curriculum selection and instructional delivery of their classroom (see Table 4).

**Table 4:** Domains regarding Teacher Beliefs that Influence Decisions regarding Gifted Instruction

<table>
<thead>
<tr>
<th>Included Codes</th>
<th>Semantic Relationship</th>
<th>Related Theme</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional reflection</td>
<td>influence beliefs and decisions regarding…</td>
<td>Teacher planning and preparation methods for gifted students</td>
</tr>
<tr>
<td>Teacher personality</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teacher confidence</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professional development</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Balancing student and administrative needs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Monitoring student progress</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student self-efficacy and confidence</td>
<td>are factors teachers believe they should consider when meeting the…</td>
<td>Social and emotional needs of gifted students</td>
</tr>
<tr>
<td>Fostering character and human nature</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developing leadership skills</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student reflection</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academic down time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student recognition and incentives</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exploration of societal norms</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Addressing sensitive topics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Homogeneous teaming</td>
<td>are ways teachers believe they can consider when to utilize…</td>
<td>Available programming options to instruct gifted students</td>
</tr>
<tr>
<td>Teacher collaboration</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Elementary grade level collaboration</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meeting the needs of diverse gifted populations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Community partnerships</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academic competitions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Décor and lighting</td>
<td>are factors teachers believe they can consider when creating a…</td>
<td>Nurturing classroom environment and culture for their gifted students</td>
</tr>
<tr>
<td>Seating arrangements</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Music</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Display of student work</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Teacher planning and preparation.** The first domain for research question one relates to how participants correlated between the educational beliefs and curricular-instructional decisions they made for their gifted students based on their own professional reflections, self-efficacy, and in response to school and/or district initiatives. According to the first domain (see Table 4), a variety of codes were semantically related to the ways in which teacher beliefs influence how they plan and prepare to make curricular-instructional decisions for gifted students: Teachers reflected, acknowledged that teacher personality and confidence effect decisions, professionally developed their skills, balanced the requests of administration and the needs of their students, and monitored student progress.

*Professional reflection.* The initiation of curricular and instructional preparations for teacher participants frequently involved the act of reflection. Teachers made curricular-instructional decisions based on memories or notes recorded from the previous school year. Ms. Heisman stated “while it’s hard to employ new instructional methods, I figure out how I am going to put this into my classroom ways of work” (Mrs. Heisman, Interview, February 11, 2015). Mrs. Compton mentioned that she has developed ways to record her instructional reflections. “I always have notes on what I’m going to change for the next year, both on the manila folders and in the computer. My lesson plans have notes all over them” (Mrs. Compton, Interview, February 19, 2015).

Teacher reflections acted as an agent for honesty and transparency. As an example of a unified belief by all participants, Ms. Parker was asked to submit a reflective paper as part of an application for a district-wide award. She included her
candid reflections about her teaching experiences and curricular-instructional decision-making, which was frowned upon by her immediate supervisor.

I put something in there about like how I was about a week behind in the pacing guide, but I'm doing X, Y, and Z. My principal didn't want me to write that because she thought it looked bad, and I said to myself, I think it's more important that I'm being honest and reflective in recognizing that this is the reality of being a teacher and this is me. So it was interesting that was something I wasn't supposed to share. (Ms. Parker, Interview, March 30, 2015)

*Teacher personality.* Teacher participants believed their personalities influenced their beliefs, decisions, and practices as social studies teachers. Ms. Parker found great correlation between her personality and the effectiveness of her teaching and positive relationship with gifted students. “I think my own personality helped me grow as an educator. Creativeness is in every aspect of my life. It crosses over into my teaching and the things that I create for them” (Ms. Parker, Interview, March 30, 2015). Examples of how Ms. Parker’s creativity was evident when she explained the design of her instruction, during classroom observations where she found ways to connect the curriculum with student interests, and by giving students multiple opportunities to choose how they could create products that presented new knowledge.

Participants also suggested that their personality often builds a respected report with their students. Mrs. Compton attests that “I think I have an energetic personality where students can comfortably approach me. I try to engage in conversation individually with them. They knew I care about their well being” (Mrs. Compton, Interview, March
When asked about her one-on-one conversations with gifted students about the quality of their work products, Ms. Lindy stated:

I'm not saying that I'm not the touchy feely one. I say to them, ‘If I grade that DBQ, and it's really an F, you need to know it's an F. You need to not go off to high school without someone telling you the truth when it really counts. That’s my job to help you now before they really get you in high school.’ It's our job…not to just pussy foot around and give them whatever (Ms. Lindy, Interview, February 13, 2015).

Ms. Lindy believed that her gifted students found her approachable, trusting, honest and a taskmaster. Mrs. Gaines and Mrs. Tango practiced a similar approach. “My first priority is to model for my gifted students how to work hard for what you want, and then show them how they can have fun applying new knowledge when constructing creative products” (Mrs. Tango, Interview, March 10, 2015).

Teacher confidence. Teacher participants explicitly shared how they confidently make curricular-instructional decisions based on their gifted students’ needs. This can be seen within the preparation processes prior to classroom implantation and in-the-moment decisions while class is in session. When asked, all the participants believed that they are constantly making curricular-instructional decisions to best serve gifted student populations.

I feel very confident about the decisions I make as a teacher, and these decisions impact the quality of education for my students. I may change instruction because of timing. The students may need more time or the connections aren't being made. But at the end of the day, I don’t question
the methods or reasons why I may change the curriculum or instruction to best fit the needs of my gifted students. (Mrs. Compton, Interview, February 19, 2015)

Mr. Gaines gave a similar response, describing an example of how gifted student engagement might influence curricular-instructional decisions to adapt a prepared lesson plan. “Sometimes, you have a lesson that you are really excited with and about and it's just like pulling teeth. You have to adjust things that day and sometimes class by class, depending on a number of variables” (Mr. Gaines, Interview, February 1, 2015). Mr. Gaines explained that it is moments like these where he identifies most with his teacher confidence. “Teacher confidence is engaged when I’m pressured to make in-the-moment decisions for the betterment of my students. These times are where I feel most positively challenged. Looking back, I’ve gained so much from these experiences” (Mr. Gaines, Interview, March, 12, 2015).

Ms. Parker believed that much of her enthusiasm for history rubbed off on her students’ enthusiasm for learning history. “I believe that a huge reason why my students are excited about learning is because I am excited to share that knowledge. I wouldn’t be able to teach history the way I do if I wasn’t confident in my abilities” (Ms. Parker, Interview, March 30, 2015).

Professional development. Participants continually mentioned that their own professional development influenced the curricular-instructional decisions they made. It was important to all participants that they stay current with instructional strategies, teaching tools, and applied a variety of curriculum options. While discussing the current state of professional development specifically in the gifted and social studies departments,
participants identified the interdisciplinary connections both departments indirectly included within their training opportunities during the school year. There were no direct professional development options for social studies that were designed for teachers of gifted. Instead, Mr. Gaines, Ms. Lindy, Mrs. Compton, Ms. Heisman, Mrs. Tango, and Ms. Parker all enrolled in professional development that catered to the implementation of new or current district-related initiatives, such as the FLDOE Instructional Standards and Marzano (2007) pilot programming.

Mr. Gaines, Ms. Lindy, Mrs. Compton, and Ms. Heisman explained that much was lacking in provision of purposeful professional development for teachers of gifted students, in social studies education. Ms. Heisman shared that “I don’t think I’ve seen a gifted level social studies training available” (Ms. Heisman, Interview, March 18, 2015). Mrs. Compton stated that much of what she’s attended “supports social studies” but is intended for language arts-based training for gifted teachers (Mrs. Compton, Interview April 16, 2015). “We need to go to gifted trainings that are facilitated by professionals in the field to learn techniques appropriate for the gifted child, rather than how to teach remediation for reading comprehension” (Ms. Lindy, Interview, February 13, 2015).

Included in this call for greater options of gifted social studies professional development, “There should be some sort of cohort class with other social studies teachers or middle grade teachers on just trying to work up examples of this is what gifted classrooms should actually look like” (Mr. Gaines, Interview, February 1, 2015). All participants shared a desire to communicate with teaching colleagues from various special programs for gifted students. Opportunities were provided by the district for
social studies teachers of gifted to collaborate and share experiences, but time was limited to once or twice during a school year.

A similar message rang clear as Ms. Lindy described reasons why gifted social studies should be included as options for purposeful training. When describing the most recent training Ms. Lindy attended during a district-wide training day for teachers, she shared that couldn’t develop professionally if the only training she was asked to attend didn’t intellectually challenge and stimulate her interests. The training was not designed with social studies in mind, nor did it stimulate her educational interests. “Intellectually, we felt we could be heard and engaged at a level that was fulfilling and powerful and not mundane, repetitious, and superficial which is what most of our training is in the general education in-service options” (Ms. Lindy, Interview, February 13, 2015).

**Balancing district and student academic needs.** At the forefront of conversations with participants, teachers found that there was great conflict between their beliefs of how instruction would look for their gifted students versus how the district planned the coverage of curriculum standards and benchmarks. This conflict between breadth of curriculum coverage and student depth of understanding was enhanced this school year with the implementation of subject specific pacing guides, which supported the scheduling of standardized assessments that monitored gifted student progress throughout the school year.

[The Civics curriculum] is very heavily paced so I have to go quickly even if I don’t want to. Sometimes it's unrealistic how much I need to cover within a certain time period. To me I don’t feel good as a teacher moving on unless all my kids get it. (Mrs. Tango, Interview, March 10, 2015)
Ms. Heisman and Mrs. Tango were hesitant to veer away from the pacing guide. Mrs. Tango stated that “I feel like if I don’t stay with the pacing guide then my students won’t be ready for their test” (Mrs. Tango, Interview, February 21, 2015). “I’m very serious when I follow [the pacing guide] and I make sure to find a way to fit all of the curriculum in” (Mrs. Heisman, Interview, February 10, 2015).

Other participants (e.g., Ms. Lindy, Mrs. Compton, Ms. Parker) grappled with how they could loosely follow the pacing guide while still offering opportunities for greater discussion of complex topics, deeper understanding of key concepts, and the implementation of creative and challenging lesson plans. “When I try to interpret the pacing guide and the students still score low on standards I know I’ve covered with them, I just try to focus on how these miniscule details hardly matter to the bigger picture” (Ms. Parker, Interview, March 30, 2015). Mrs. Compton explained how she resisted with strictly following the new pacing guides. “The guide gives teachers a skeleton or framework that I use to guide instructional pacing, but it’s not the end all be all resource” (Mrs. Compton, Interview, April 16, 2015). Ms. Lindy found a similar approach. “I was forced to cut curriculum that I think is really valuable and creative…I had to adjust the pacing because of the midterm assessment. However, the assessment was flawed, so what does it really matter” (Ms. Lindy, Interview, April 2, 2015)?

Mr. Gaines was not concerned with the pacing guide and decided to “follow my instincts with how fast I should set the pace” (Mr. Gaines, Interview, March 12, 2015). At some school locations the pressure to maintain consistent with the pacing guide is greater than at others. “At my former school teachers are heavily monitored. All social studies
teachers have to be at the same place, all of them. There’s about four or five that teach the same subject area” (Ms. Parker, Interview, March 30, 2015).

In general, teacher participants believed that the implementation of pacing guides and district-wide student assessment monitoring affects their ability to prepare and adapt the curriculum and instruction to meet the needs of their gifted student population. Ms. Lindy explained while she doesn’t agree with the mandatory pacing, she remains compliant.

I’m still compliant, and there's going to be an EOC. So therefore, I have to try to get [students] through a certain portion of the curriculum by a certain time, which means at the end of the year, I’ll probably have a chunk of time to do something with, which is probably not the time of year that you want to start doing something and wildly creative because of the quality of the product is reduced. So even if I have them creating Roman houses or doing some really cool stuff with that, I'm going to get a lesser quality because they're done. (Ms. Lindy, Interview, March 19, 2015)

Monitoring student progress. The monitoring of student progress illustrated how teachers balanced the needs of their gifted students and the demands of the school district. Teacher participants believed that the amount of “progress monitoring” imposed by the district provided them fewer opportunities to develop and enact their own means to monitor student achievement. There was a collective concern among participants regarding the amount of time progress monitoring took away from the quality of classroom instruction and their gifted students’ depth of understanding regarding
curriculum concepts. Mrs. Tango explained how the constant testing limits the time to maximize curriculum coverage. “I’m strapped for time. I never have time to cover all the major topics of a unit before the pacing guide suggests a multiday review and scheduled unit assessment. That doesn’t include state standardized testing and end of course exams” (Mrs. Tango, Interview, February 21, 2015).

Mrs. Compton, Ms. Heisman, and Mrs. Tango utilized the data collected by the district in order to replace teacher-created progress monitoring efforts. “The assessment of progress monitoring is cumbersome, the data available for teachers is helpful in place of unit assessments. The data determines how my teaching will continue” (Mrs. Tango, Interview, March 10, 2015). Mr. Gaines, Ms. Lindy, Ms. Parker did not utilize the data from the district assessments due to teachers’ conflicts with “test question quality and the test’s overall effectiveness in addressing areas of student strengths and weaknesses” with curriculum standards (Ms. Lindy, Interview, April 2, 2015). In relation to how teacher participants might utilize the results of the progress monitoring, Ms. Parker shared her frustrations with the quality of the assessment and how she approached this conflict with her gifted students. Ms. Parker explained to her gifted students that they had yet to cover that curriculum, therefore they should not be disheartened that they didn’t know the answer to questions containing said curriculum standards (Ms. Parker, Interview, March 30, 2015).

**Social and emotional support for gifted students.** The second domain related to research question one described how participants believed middle school gifted students are not only seeking academic challenge in their studies, but were implicitly seeking support and guidance as they experienced adolescent development. Within this domain,
the codes recorded participant beliefs that were semantically related to meeting the needs of gifted students. This does not suggest that teachers of other populations would be notably different. However, these areas where participants discussed the social-emotional development of gifted students reflect and support current literature and research. Topics included nurturing self-efficacy and confidence, open-mindedness and tolerance, morality and humanity, and leadership qualities. Participants also shared topics concerning student reflection, academic down time, the exploration of societal norms, and coverage of sensitive topics.

_Student self-efficacy and confidence._ In support of gifted students’ social and emotional development, participants mentioned the importance of fostering student confidence. This required great attention and care by teachers to cultivate safe classroom environments and class rapport. Participants provided insight into the pressures gifted students contend with, including self-induced pressures and perfectionist tendencies, as well as parental pressures. “My gifted eighth graders seem to deep down have trouble with confidence and putting themselves out there” (Mr. Gaines, Interview, February 1, 2015).

All participants touched on the struggles gifted students have with underachievement, and how they attempt to provide supportive services (e.g. counseling, alleviating social-emotional handicaps, filling academic gaps) for gifted students who need guidance and encouragement. “Every year I have a small population of gifted students who are underachieving because of situational circumstances with home life, challenging curriculum, or social issues” (Ms. Heisman, Interview, February 11, 2015).
Ms. Lindy explained how her gifted students rarely struggle with underachievement because of the support of her school’s gifted magnet and homogeneous class setting. “They have a group of peers that understand and care for them, and they’re not going to leave that group of peers because of bad grades” (Ms. Lindy, Interview, February 13, 2015).

*Open-mindedness and tolerance.* One valuable connection participants made while discussing the social and emotional development of their gifted students was the connections between their social studies content, instructional practices, and the development of open-mindedness and tolerance. All participants, like Mrs. Tango, attempted to nurture a non-judgmental classroom environment for gifted students to openly express their opinions. “Through Civics we are teaching students how to appreciate humanity and open-mindedness on a variety of topics” (Mrs. Tango, Interview, February 21, 2015). Mr. Gaines explained, “I try to make it safe for them to express their opinions and create a non-judgmental environment” (Mr. Gaines, Interview, February 1, 2015).

Ms. Heisman revealed, “by modeling open-mindedness, I continually practice in front of my students how they too can be tolerant of diverse points of view” (Ms. Heisman, Interview, March 5, 2015). Mrs. Compton also shared how she discussed open-mindedness and tolerance regularly. She found that as she actively included opportunities to discuss concepts like open-mindedness and tolerance, the more frequently her students then initiated these conversations as the year progressed.

In the future they may meet certain groups and it's good to know how to interact if they have certain traditions or cultures, certain habits so as not
to offend one or to understand and not to kind of look strangely. And also to be more empathetic to one's needs of certain groups who may have been afflicted of some sort of past injustice. So again, I do think it makes and helps people become more open minded and worldlier. It can't do any wrong (Mrs. Compton, Interview, February 19, 2015).

More specifically in regards to the development of human qualities and character education, participants keyed in on the connection between social studies content and opportunities for gifted students to build confidence, verbal and creative expression, listening skills, and cultural acceptance.

Ms. Heisman mentioned the connection between the social studies content and character building. “...[The social studies curriculum] hopefully gets [students] thinking about the difference between right and wrong. There’s a whole other reason why we're here besides normal efforts, which is more important than anything else” (Ms. Heisman, Interview, February 11, 2015). Mrs. Tango presented similar thoughts on the topic. “I think they just see examples of themselves, if that makes sense. We teach the kids through social studies about qualities. You know, like the true leaders, problem solving, debate. I think that they like to do all these things” (Mrs. Tango, Interview, February 21, 2015).

**Developing leadership skills.** In connection with efforts to encourage open-mindedness, tolerance, understanding of human nature, and character education, teacher participants also believed that social studies content provides them opportunities to develop student leadership skills. Mrs. Compton found that her gifted students thrived in their leadership development when working in a small group setting or during...
collaborative activities. “When I provide students opportunities to collaborate and problem-solve as a team, I find that they put into practice social skills that cannot be tested to the same degree in other learning environments” (Mrs. Compton, Interview, April 16, 2015).

Ms. Parker attested to the fact that “developing leadership is not always an easy task” (Ms. Parker, Interview, March 30, 2015). She believed that some gifted students who display negative behaviors could be great candidates for leadership. “We have a gifted student on our team that I’ve been mentoring. Recently we’ve seen improvement in her behavior and work ethic when she was given leadership roles in classroom activities” (Ms. Parker, Interview, March 30, 2015).

Ms. Lindy shared an example of how gifted students grappled over voicing their concerns with complex problems. The struggle Ms. Lindy described below led to greater understanding and compassion for humanity. “I think a well-rounded person who learns from the past, hopefully has more compassionate views, looks at mistakes and is willing to move forward, using that compassion to change the world for better. That’s what I saw in this student” (Ms. Lindy, Interview, February 13, 2015).

In this example, the class began discussing a topic that was relevant to both the social studies content of her Ancient Civilizations class and recent events in that region of the world. The gifted student she referred to shared with the class heightened and passionate views on the topic of Plebeians and Patricians with the class. While the gifted student found great connections with this topic and the current event of the Arab Spring, many of the other students were not able to connect with him on the same level of
understanding. Ms. Lindy saw this as an opportunity to nurture his leadership skills while consoling him in the hallway.

I remember I had a student last year that was so engaged when we got into democracy in Greece. Our gifted kids are highly sensitive to political situations, and they make those connections, even from the ancient world to right now. We were talking about the social inequality in regards to Plebeians and Patricians and I had to take him out of the classroom because he was really upset about the inequality. His peers were not responding to him because they were put off by his anger and his emotion. … Once he was able to calm down, he was able to see how he could take his knowledge of current events and help other students gain greater connections, as long as he didn’t let his emotions get the best of him. (Ms. Lindy, Interview, February 13, 2015)

*Student reflection.* To support the social and emotional development of gifted students, participants believed that the utilization of reflection provided students an opportunity to monitor their understanding of the content and skills in a way that provided deeper insight into their emotional state-of-mind and interactions with their peers. Written student reflections create a narrative that is missing from surveys, rubrics, and other devices that numerically record student progress.

While some participants (e.g., Mr. Gaines, Ms. Lindy, Mrs. Compton, Ms. Heisman) used journaling topics or posed reflective questions to gifted students, other participants (e.g., Mr. Gaines, Ms. Lindy, Mrs. Tango, Ms. Parker) used analysis-based activities and opportunities for cross-unit connections to monitor gifted students. “I hear their
reflections when we make connections with other things we've learned. Students mention something that we've learned a week ago or even a month ago. They make connections more verbally than on paper” (Mrs. Compton, Interview, March 16, 2015). Ms. Heisman shared that she often will “conclude a unit with reflection activities to monitor student growth and the connection students make” using the overarching characteristics of civilizations (Heisman, Interview, March 18, 2015). Mr. Gaines utilized “writing assignments that creatively intersect American history content with student reflection” toward the end of a curricular unit (Mr. Gaines, Interview, March 12, 2015).

Mrs. Tango shared that she was required to follow a more scripted approach to covering their curriculum. Mrs. Tango explained how she implements student reflection when gifted students are reviewing unit content in preparation for progress monitoring standardized assessment. “The next class we review, discuss, and we talk about the [Marzano] scale again. They decide if that’s something that they learned or if they need to touch on it again with me” (Mrs. Tango, Interview, February 21, 2015). During this process, I witnessed how Mrs. Tango’s students individually looked over the benchmarks for the upcoming unit assessment, self-assessed their understanding of each specific concept, and evaluated whether or not they were prepared for the assessment on that knowledge or if it should be reviewed through small group or whole-class instructional review with the teacher. Within the official curriculum, this was noted as opportunities for student reflection.

*Academic down time.* Teacher participants were very concerned that their gifted students’ needs were in jeopardy with the increase in standardized assessment and state-regulated education reforms. On multiple occasions, participants voiced these concerns in
connection with the need to provide gifted students “down time” from the rigor and challenge of their academic studies. Mrs. Lindy explained, “They are not always challenged in my room, but that’s okay. They don’t always have to be challenged at the same amount of time…at the same level all the time” (Ms. Lindy, Interview, February 13, 2015). When asked why she believed as though her gifted students didn’t need to be challenged consistently, she replied that, “[The curriculum and instruction] needs to flow. There is a pace of intensity and a slower pace where they can just absorb. It’s unintentional; it’s just how I operate. As the intensity increases, they are focused toward the end product” (Ms. Lindy, Interview, February 13, 2015).

Mrs. Tango provided similar insight, especially regarding the decisions she made to provide her gifted students down time after the Florida Standards Assessment Writing Test. After testing was complete, her students were required to report to three other block-scheduled classes that school day. While her pacing guide instructed her to complete new concepts in Civics, she knew they had been sitting in a classroom testing from 9:30 in the morning ‘til noon, and she knew they’d be extremely tired and burned out. So she eliminated some of the pre-scripted curriculum and instruction that she argued weren’t necessary. Mrs. Tango knew she would fight a battle with student engagement all period (Mrs. Tango, Interview, March 10, 2015).

*Exploration of societal norms.* As Mr. Gaines attested, “Gifted adolescents begin to explore their world with a different lens, as they understand their position as part of our interdependent world”, their role in our national society, and they yearn for greater independence (Mr. Gaines, Interview, March 12, 2015). All participants believed that they provided gifted students comfortable classroom environments to develop their voice,
share their opinions and ideas, learn to listen and speak articulately to the norms of our society.

I think they’re starting to be more observant. Obviously with age they’re maturing…they’re a lot more aware of different things around them. They’re not so much in a bubble. In the school itself they witness things. They are maybe a little bit more interested in the news…dynamics amongst people. So, I think the things that happen are a little bit more relatable especially when…if they watch world news and see things that are happening today, it’s really applicable to what we’re learning because we can mention it and talk about it. Sometimes if there’s something that happens in the news or if there’s an article about a finding, we’ll talk about that and say, look today what just happened. How is this similar to what happened way back when so they can see these things that continuously occur? (Mrs. Compton, Interview, April 16, 2015)

As an example of how gifted students began to question the norms of our society, one gifted student in Mrs. Compton’s Ancient Civilization class questioned whether the distribution of power between the Roman hierarchical groups, the Plebeians and Patricians, was democratically fair. Mrs. Compton reflected how she observed her gifted students develop greater understanding of the topic and its connection to their world. “As they started to learn more a gifted student said, ‘would that be fair because they represented the most people?’ We talked about how that dynamic would that be reflective and fair. In turn that leads to further class discussion” (Mrs. Compton, Interview, April 16, 2015).
Mrs. Tango shared that her students questioned why Americans even questioned the legality of some of the Supreme Court cases (e.g., *Brown v. Board of Education*, *Plessy v. Ferguson*) in the first place. “Students would ask me why people had issues with some of what we see today as societal norms” (Mrs. Tango, Interview, March 10, 2015). It was obvious to these participants that their gifted students were developing a “broader understanding of how the world worked” (Ms. Heisman, Interview, March 18, 2015).

**Addressing sensitive topics.** Like Ms. Lindy’s student, mentioned previously concerning the development of leadership skills, gifted students have been found to experience heightened sensitivity to social issues (Cross, 2002). Participants collectively shared that while the social studies curriculum typically cover meaningful concepts that can spur powerful classroom discussions, doing so also might awaken sensitivities that gifted adolescents might not understand how to cope with such emotions. These topics could concern a number of sensitive topics, such as social injustices, genocide, environmental issues, political regimes and affiliations, etc.

Ms. Heisman and Ms. Parker discussed how they believed the concept of world religions was organized in the textbook and how they should cover these topics in their Ancient Civilizations class. Ms. Heisman, in her fifth year teaching Ancient Civilizations, shared her comfort in teaching world religion concepts and expressed her position. “I don't shy away from a religion either, which some teachers do. I tell students it's a really important part of studying civilizations. Religion reflects on how people are making choices that will affect them presently and in the afterlife” (Ms. Heisman, Interview, February 11, 2015).
However, Ms. Parker was hesitant in her first year teaching Ancient Civilizations when faced with the task of implementing discussion and coverage of world religions for multiple reasons. “I think world religions has made me the most uncomfortable because I don’t feel I’m not that knowledgeable and I’m working in a conservative community. I try to be very politically correct when we're studying these religiously sensitive topics” (Ms. Parker, Interview, March 30, 2015).

**Programming options.** The third domain for research question one indicated in what ways teachers believe that purposeful instruction are supported or neglected by the implementation of programming at the school and district level. These support systems played a role in how teachers implemented curriculum and instruction in their classroom settings. Within this domain, included codes semantically related to teachers views of how specific programming supported gifted populations at the middle school level. These programs included homogeneous gifted grouping within a school location as well as supportive elementary grade preparation for advanced middle level social studies curriculum and instruction. Other programming options in this section included meeting the academic needs of dually exceptional populations of gifted, and district social studies department and community partnerships that support authentic inquiry-based experiences and academic competitions for gifted students.

*Homogeneous teaming and teacher collaboration.* All participants were grouped with other teachers in a grade-level team at their school locations. Five of the six participants were 100% teamed, such that all their gifted students are enrolled in the same language arts, science, math, social studies, and required elective coursework. Three of the six participants (Mr. Gaines, Ms. Lindy, and Mrs. Compton) taught in a homogeneous,
or inclusive gifted setting, while the other three participants (Ms. Heisman, Mrs. Tango, and Ms. Parker) taught in a mixed ability setting. While Ms. Heisman taught in a mixed ability setting, her teaming concept was for both gifted and other academically talented student populations. Enrollment was open to students who were not screened as gifted.

All participants believed that teaming provided them additional opportunities to cover interdisciplinary topics with their gifted students, all the while working side-by-side with their team teaching partners. “I think the sixth grade team is extremely good at understanding the social emotional needs of our kids. It's really a good team” (Ms. Lindy, Interview, April 2, 2015). Teacher participants that worked at gifted magnet locations were teamed homogeneously with four other core curriculum teachers. Many of these teachers worked together as a cohesive group for years. They collaborated, conferenced, lesson planned, and supported each other “I think that really helps our group as a whole, our students, but also each other as a support” (Mrs. Compton, Interview, February 19, 2015).

Mrs. Compton continued to provide insight into the ways teaming benefited her ability to provide gifted students with purposeful curriculum and instruction through the collaboration she has with her teaching team:

I think everyone you work with is an inspiration in some way because everyone brings to the table something different. On my current team and past teams, we all have different qualities. Sometimes different teaching styles, but we each bring something different to the group and I think that's what I mean when I say you can learn from others. Seeing how different people, you know, exhibit their compassion, but also how they
may run a classroom, their experience in gifted needs, counseling, etc. I think that's what really is the biggest teaching tool, not necessarily going and attending a class. It's actually being in the moment that really kind of helps you understand. (Mrs. Compton, Interview, February 19, 2015)

Ms. Parker provided a similar response to Mrs. Compton’s previous testimony. “I think working with colleagues, especially those who reach the same students, is beneficial for our students. I was able to go to them, bounce ideas, and I think that was honestly more helpful than any professional development” (Ms. Parker, Interview, March 30, 2015).

Both Mrs. Tango and Ms. Parker described how her school initiated a school-wide engineering fair. This interdisciplinary project providing gifted students the opportunity to share knowledge with parents and the local community. “Teachers have to be collecting work and then the kids will show their parents something they’ve done in at least one of their classes. Every seventh grader has something that will be there” (Mrs. Tango, Interview, February 21, 2015). The engineering fair was a capstone event for the STEM Engineering magnet toward the end of the school year.

Elementary grade level collaboration. In recent years, the gifted and social studies education curriculum specialists at Seaside County requested elementary grade teachers to include and infuse various initiatives supporting social studies within their daily schedules. Based on participant responses, they shared that some elementary teachers found ways to implement those requests, while others struggle to make these requested changes. Middle school teachers began to see a difference, as there were some gifted students who transitioned to the sixth grade who were more prepared for social
studies content and instruction than others. “We have some elementary gifted teachers that are really jumping on board, teaching DBQs [document-based questions], and students coming from that particular school are very highly prepared. They are more highly prepared than our elementary gifted magnet students in mass” (Ms. Lindy, Interview, February 13, 2015).

Mr. Gaines, Ms. Lindy, Mrs. Compton, Ms. Heisman, and Ms. Parker shared that the utilization of Document-Based Questions, or DBQs, gained momentum in both the social studies and gifted departments. Once used only in high school social studies classrooms, primarily at within Advanced Placement (AP) coursework, the inclusion of DBQs trickled down into all high school and middle school level social studies classes to some degree. Ms. Parker shared that in recent years, “elementary gifted pull-out programs and higher-level elementary classrooms began to apply DBQ” curriculum that the district calls Mini-Qs (Ms. Parker, Interview, March 30, 2015).

While exposure to document-based questions has increased, Ms. Lindy stated that there is still a variation in skill level as gifted students become more acquainted with the process of completing this multifaceted task for document analysis, thesis development, and essay writing (Ms. Lindy, Interview, April 2, 2015). Gifted students seem challenged, regardless of previous experience with DBQs. These variables influenced the curricular-instructional decisions of their teachers. Mrs. Compton and Ms. Heisman shared how they observed that their gifted students had very different experiences with DBQs prior to enrolling in their class. Mrs. Compton hoped that “by the end of this school year, they’ll feel comfortable and confident when they have to write an essay on their own and will know what to do” (Mrs. Compton, Interview, March 16, 2015).
Participants believed that elementary gifted students were more prepared for middle level social studies classroom when their elementary teachers utilized DBQs in their classrooms. “I think the hardest thing is specifically with gifted kids. If they are in the elementary gifted pullout programming, they cover units like Greece, Rome, and Egypt. I think that's been my biggest struggle this year. How do I continue to challenge them” (Ms. Parker, Interview, March 30, 2015)? Due to the increase in gifted student preparedness, participants were motivated to make continued adjustments to the official curriculum to promote greater levels of acceleration, challenge, and depth in curriculum coverage for their gifted students.

While the increase of historical inquiry in elementary school was great news for all stakeholders, participants believed that elementary grade teachers can continue to increase the inclusion of basic social studies skills in their classrooms. Participants specifically called for greater application of non-fiction reading comprehension and map analysis skills. Mrs. Compton believed that no matter how experienced her sixth grade gifted students are with reading comprehension, she decides to lay the foundation for what active non-fiction reading and historical comprehension should look like through modeling and whole-class content reading.

Ms. Lindy and Ms. Parker both noticed gifted students lack experience in regard to map analysis skills. “They don’t know how to do latitude and longitude. I’ll tell you that right now” (Ms. Lindy, Interview, March 19, 2015). All of their incoming sixth grade students did not have much background experience with labeling, reading, or analyzing a geographic map in general. Both of these participants taught sixth grade Ancient Civilizations. This course was constructed around the study of world geography, world
religions, and significant historic events, and much of what they introduce with every unit was heavily influenced by geography.

I assumed that they knew more just with map skills, or they knew more. I didn’t think I’d have to teach the continents and the scaffold concept of city, state, country. So I think it would be helpful to connect to our feeder elementary and the gifted teacher; to know what units they’re doing or to know what degree. It will help everyone become better prepared. But there's not a lot of vertical discussions, I think, district wide. (Ms. Parker, Interview, March 30, 2015)

Meeting the needs of diverse populations. In addition to meeting the needs of gifted students, many of the teacher participants also differentiated their curriculum and instructional practices to meet the needs of gifted students who were dual exceptional, or twice exceptional. Dual exceptionalities in gifted education distinguish a student who is academically gifted and has been diagnosed with a physical disability. Mrs. Compton explained more about how she serves this diverse population. She explained in her interview that she fully “complies with the requested modifications and accommodations for gifted students who have exceptionalities or other needs” that may require a 504, such as additional time and small group assessment (Mrs. Compton, Interview, April 16, 2015). A 504 plan is a nationally mandated document that supports the modification or accommodations of curriculum and/or instruction for any student who needs special educational services to be academically successful (Beech, 2010). If extra accommodations are required, teachers consistently provide those services. Ms. Lindy mentioned that many times she’s observed “gifted student populations take it upon
themselves to appropriately assist dual exceptional students”; carrying materials, turning in assignments, assisting with small group tasks and movement around the classroom (Ms. Lindy, Interview, April 2, 2015). “It really becomes a team effort sometimes and our students know that it takes the support of a community to nurture positive learning experiences for everyone” (Mrs. Compton, Interview, March 16, 2015).

Mrs. Heisman accommodated for a gifted student who was hearing impaired in her classroom. She assigned him a specific seating arrangement that was located close to her front desk in the classroom. She also wore an amplifying microphone around her neck, which provided clearer instruction that her gifted student can hear from his seat location.

Ms. Parker discussed at length how she accommodated for a gifted student in her classroom that was not been diagnosed with Asperger’s syndrome, yet she identified that he had specific needs. “He has a brilliant mind and has challenges socializing with his peers. There are times where he's condescending to his peers and I am mentoring him to positively socialize with others his age” (Ms. Parker, Interview, March 30, 2015). In order to provide rigorous and relevant curriculum and instruction, she explained how she collaborated with this student on a “top-secret presentation” on the Peloponnesian Wars. He was assigned to present the topic to the class. Ms. Parker had to set parameters with the project as a means for him to remain focused, while giving him the freedom to research independently and generate a creative product.

*Community partnerships.* The social studies department for Seaside Public Schools and a regional fine arts museum that was proximal to the school district jointly developed curriculum and a field trip for all sixth grades students toward the end of the
school year. “This field trip provides students one-on-one experiences with tenured museum docents, who guide students through various exhibits of the museum that display authentic artifacts pertaining to the civilizations they study in the sixth grade curriculum” (Ms. Parker, Interview, March 30, 2015). Docents guided students to synthesize which characteristics of a civilization each artifact exemplified. Ms. Heisman attested that the experience “connects students with the overarching themes within the Ancient Civilizations curriculum” (Ms. Heisman, Interview, March 5, 2015). While the field trip was available for all sixth grade students, there were modifications provided by docents to enhance the experiences for gifted students per the teacher’s request (e.g., increase level of questioning, more student-centered).

Mrs. Compton shared how her educational beliefs influenced the decisions she made regarding how her gifted students analyzed primary source artifacts. Instead of using the museum’s pre-made curriculum to prepare her gifted students, she intended to provide opportunities in class regularly where gifted students analyzed artifacts pertaining to their units of study. She planned to regularly include the inclusion of overarching themes, such as the seven characteristics of a civilization, which was heavily imbedded in the curriculum standards and utilized by museum docents during the field trip experience.

While the museum’s curriculum provided supportive material, Mrs. Compton didn’t want her gifted students to over-prepare, thereby decreasing the level of engagement and intrigue for her students during their field trip to the museum. While accompanying her on the field trip, Mrs. Compton shared that she “wanted her students to see the artifacts for the first time at the museum, rather than studying them in class with
the pictures provided by the museum” (Mrs. Compton, Observation, March 25, 2015). By eliminating the inclusion of the curriculum developed by the museum, she knew that her students would have a more relevant and challenging experience with the museum artifacts.

**Academic competitions.** Community partnerships fostered academic competitions for gifted students. One example is National History Day, a theme-based academic competition that provided students the opportunity to research, design, and develop projects. “Students can create an exhibit board, a website, a performance or a documentary movie. Those can be either group or individual and then there's a ninth category which is a research paper which is alone” (Mr. Gaines, Interview, February 1, 2015). After projects were complete, they were evaluated by judges based on their historical quality, connection to theme, and clarity of presentation. While students from grades six through twelve could participate in National History Day, Seaside Public Schools required all sixth grade gifted magnet students and all eighth grade students enrolled in Advanced U.S. History to participate at the school-level of competition. The community partnerships were largely fostered at the next level, the district-level of competition.

Accompanied by a district-led coordinator, Seaside County developed relationships with several local universities that provided on-campus venues as a means to facilitate the NHD district-level competition. Community organizations and local families also donated special prizes and supplies for the event. “What the school district and community outreach provides our students is an experience of a lifetime. National
History Day allows students to become the experts of their historical topic of interest” (Ms. Parker, Interview, March 30, 2015).

**Classroom environment and culture.** The last domain for research question one relates to how teachers believed the environment and tone of their classroom setting was important as a means to support the preparation, adaption, and enactment of curriculum and instruction in classrooms for the gifted. Physical changes to the classroom influenced how teachers facilitated a lesson and how gifted students were engaged with a lesson. Included codes that semantically relate to the theme included how teacher participants believed that instruction was influenced by the modifications to the décor and lighting, seating arrangements, implantation of music and technology, and display of student work within their classrooms. While these findings illustrate participant classrooms, the appendix provides pictures of all teacher participants’ classroom environments, classroom materials/technologies, and unidentified student work that were referred to during participant interviews, and materials used during observed classroom instruction (see Appendices M, O, Q, S, U, and W).

**Décor and lighting.** Teacher participants believed that the décor and use of lighting within their classrooms influenced the enactment of curriculum and instruction. Ms. Lindy, Mrs. Compton, Ms. Heisman, Mrs. Tango, and Ms. Parker used color and content-based themes around their classrooms. Mr. Gaines, Mrs. Compton, and Ms. Parker chose to also display décor of their own interests. All of these efforts were purposeful and meaningful to participants in many ways, but commonly associated with cultivating a classroom environment that was “both comfortable for students and related to the social studies curriculum” (Mrs. Compton, Interview, April 16, 2015).
Mr. Gaines eighth grade classroom displayed pictures of presidents and historical artifacts on his bookshelves and old newspapers that illustrated significant events in American history hung on the walls (see Appendix M). Cardboard cutouts of current pop cultural characters stood in corners of the classroom. Mr. Gaines also deliberately chose to keep all the fluorescent lights off in his classroom, as he preferred the natural light of his windows that spanned the length of his classroom, which overlooked an open field.

Ms. Lindy’s sixth grade classroom was originally intended for a science classroom, built with cabinets, counter space, and lab tables (see Appendix O). To utilize these spaces to display a myriad of decorations, she chronologically organized each section of counter space to represent a timeline throughout their ancient civilizations curriculum, containing books, student work samples, posters, and artifacts. “It starts from fossils, rocks, and minerals of the earth along with posters for Pangaea. Then it goes all the way around in a very sequential order with maps and artwork and paintings, accompanying real objects until we get to the birth of Christ and Christianity” (Ms. Lindy, Interview, March 19, 2015). There was also a section of the classroom dedicated to Florida fossils and the Spanish Colonization period, supporting the eighth grade social studies curriculum. Ms. Lindy preferred having a science-type classroom because she individualizes instruction frequently with creativity and craft-based activities. Students were able to access supplies easily within the proximal drawer space, while the lower cabinets organized student portfolios.

Mrs. Compton focused her classroom décor of the display of replica artifacts, colorful bulletin boards, interchangeable seating arrangements, and the display of student work from current and previous school years (see Appendix Q). While the atmosphere
embodied a social studies setting, it was colorful and inviting. Ms. Heisman was more limited to the items that she could hang on her classroom walls because of administrative limits on decorations. However, she found ways to utilize the table top surfaces of her whiteboards, bookshelves, magnetic hooks and easels to display student work, posters, images of primary sources, and other colorful items (see Appendix S). Ms. Heisman also allowed much of the natural light illuminate her room because of the large windows looking out into the courtyard.

Mrs. Tango and Ms. Parker’s classrooms were held in portables, so the majority of their focus in decorating the classroom involved balancing out “all the brown, wood colored walls” (Mrs. Tango, Interview, February 21, 2015). Each of these participants taught a different social studies discipline, so while Mrs. Tango focused on displaying the patriotic colors of red, white, and blue for her Civics curriculum (see Appendix U), Ms. Parker utilized bright, vibrant colors in all areas of her classroom décor (see Appendix W).

*Seating arrangements.* All of the teacher participants frequently changed the seating arrangements within their classroom, to accompany the need for instruction or student-centered learning activities. During teacher-centered instruction, many of the participants (e.g., Mr. Gaines, Mrs. Compton, Ms. Heisman, Mrs. Tango, Ms. Parker) preferred their students sit in rows or islands of desks so that students could be proximal to the front of the classroom where instruction typically took place (see Appendices M, Q, S, U, and W). Other times when students were in the midst of an activity that required movement, desks were “formed into centers or stations” (Mrs. Compton, Interview, April 16, 2015). During moments where participants were facilitating a Socratic seminar or
class-wide debate, student desks were “moved to mimic a circle or courtroom setting” (Mrs. Tango, Interview, March 10, 2015). Ms. Lindy preferred to not use desks during class periods where students were “experiencing simulations or creating drama-based products” that required significant amounts of negative space (Ms. Lindy, Interview, February 13, 2015). Ms. Lindy described how she used movement of student desks to enhance instruction:

When we covered Egypt and the significance of the Nile River, I modified the tables in the shape of a boat, and we rowed down the river. Yeah! I move the tables around. I cover the tables when we use clay or when we do some kind of a messy painting activity. Sometimes we don’t use the tables…we move them out, and we use the open space. Maybe if I'm doing Mandala or something like Tai Chi…so, it’s fluid, but most of the time it's not; most of the time it's normal. But the student desks are definitely not stationary. (Ms. Lindy, Interview, February 13, 2015)

Music and technology. All the teacher participants included the use of music and available technologies in their classroom settings. Music was typically used to entice specific moods from students or cultural connections to curriculum. “While I played a specific piece of music, students were supposed to imagine that they were under the teachings of a particular philosophy. The teacher's demeanor changed based on what the music expressed. It’s a crowd favorite every year” (Mrs. Compton, Interview, February 19, 2015). Music was also used to exemplify the limitation of time for classroom transition or the completion of assignments. Mrs. Tango used music to help “organize transition between activities” (Mrs. Tango, Interview, March 10, 2015). Popular choices
in music were classical, jazz, or pop-inspired artists, such as Two Cellos, Piano Guys, or the Vitamin String Quartet. Ms. Parker described this type of music as “brain boosting” in nature. “It's a quiet, independent working environment. They know those expectations when I put the music on. They know they're working independently and I'm able to help as needed” (Mrs. Tango, Interview, February 21, 2015).

Access to available technologies varied in regard to the school location, but the all teacher participants had access to SMART Boards, laptop carts or stationary personal computers, iPods, iPads, LCD projectors, and document cameras. Students were able to access online textbooks, audio textbooks, digital representations of cartography, museum archives, and translated historical testimonies. While some teachers had to check out a laptop cart, iPad cart, or a collection of iPods (e.g., Mrs. Compton, Ms. Heisman, Mrs. Tango, and Ms. Parker), other teachers traveled with students to computer labs where laptops were permanently and securely housed (e.g., Mr. Gaines, Ms. Lindy, Mrs. Compton).

Teacher participants used SMART Boards that were both installed units and partnered with whiteboards that already existed in their classroom (e.g., Ms. Lindy, Mrs. Compton, Ms. Heisman). The utilization of this technology was both teacher and student friendly. Students were able to manipulate the technology during presentations, collaborative research, and for curriculum review. If participants did not have SMART Board technologies in their classroom, they instead had LCD projectors and document cameras that accompanied their teacher laptops (e.g., Mr. Gaines, Mrs. Tango, Ms. Parker).
Display student work. Teacher participants believed that student work increased the respect and ownership gifted students displayed for their classroom environments, influencing feelings of warmth, collaboration, and active learning experiences. Ms. Heisman stated “before state testing began, I displayed in the classroom our Chinese lanterns, student-made maps, and other reasoning models students completed in class” (Ms. Heisman, Interview, March 5, 2015). Ms. Lindy shared “I display the creative products my students make all around my classroom. They should feel as though they are a part of this space” (Ms. Lindy, Interview, March 19, 2015). All participants displayed various forms of student work and creative products within their classroom. This included project posters, National History Day projects, conceptual graphic organizers, models, collaborative word walls, thematic graffiti boards, and other creative and craft-based products. These products can be viewed within digital pictures of classrooms, as part of Appendices M, O, Q, S, U, and W.

Research Question #2 - In what ways do middle school social studies teachers prepare and adapt curriculum for their gifted students?

The second research question is devoted to how teachers prepare and adapt curriculum for their gifted students. The domains in support of research question two consist of: (a) factors considered when determining the appropriateness of curriculum for gifted learners, (b) options considered when determining the accessibility and preparation of curriculum for gifted learners, and (c) methods participants used to adapt curriculum for gifted learners. Codes that semantically related these themes include the importance of selecting curriculum that was academically appropriate, rigorous, flexible, and
accessible. Also codes comprised of a variety of district-selected texts, units specifically
crafted for gifted students, technology-based sources, and supplemental texts that offered
connections to interdisciplinary studies, current events, and the inclusion of geography
and multicultural topics (see Table 5).

Table 5: Domains regarding Preparation and Adaption of Curriculum

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<thead>
<tr>
<th>Included Codes</th>
<th>Semantic Relationship</th>
<th>Related Theme</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level of rigor</td>
<td>are factors considered when determining...</td>
<td>The appropriateness of textbook-based social studies curriculum for gifted students</td>
</tr>
<tr>
<td>Level of relevance</td>
<td></td>
<td></td>
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<tr>
<td>Purpose of textbook use</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gifted curriculum units</td>
<td></td>
<td>The accessibility and preparation of social studies curriculum for gifted students</td>
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<tr>
<td>Supplemental curriculum sources</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interdisciplinary curriculum</td>
<td></td>
<td></td>
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<tr>
<td>Current events</td>
<td>are options considered when determining...</td>
<td></td>
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<tr>
<td>Geography support</td>
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<tr>
<td>Academic competitions</td>
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<tr>
<td>Acceleration</td>
<td>are methods in which teachers...</td>
<td>Adapt curriculum for gifted students</td>
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<tr>
<td>Depth</td>
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<td>Consolidation</td>
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**Appropriateness of textbook-based curriculum for gifted students.** The first
domain for research question two describes in what ways participants believed
curriculum appropriateness influenced curriculum selection for their gifted students. The
appropriateness of curriculum concerned student reading ability, content depth and
coverage, the inclusion of relevant and multicultural topics (e.g. women, black, Hispanic,
indigenous, LGBT, and children), and content organization.

Some participants (e.g., Mrs. Compton, Ms. Heisman) were satisfied with the
district-selected textbook in terms of its reading difficulty level, content organization,
content depth and coverage. For example, Ms. Heisman agreed that the comprehension
questions and culminating activities that were partnered separately with the textbook
provided “appropriate support for the curriculum text” (Mrs. Heisman, Personal
Participants who taught the sixth grade Ancient Civilizations curriculum were focused more on initiating greater coverage of skill sets (e.g. note taking, non-fiction comprehension, critical thinking) rather than content absorption (Mrs. Compton, Personal Communication, March 24, 2015).

Mr. Gaines, Ms. Lindy, and Ms. Parker were unsatisfied with the district-adopted textbook because it was “selected to use with all students at a general grade level (Ms. Lindy, Interview, April 2, 2015). During the textbook selection process, Mr. Gaines shared that “differentiated curriculum for advanced level social studies classes was not adequately provided after the district selected a textbook that catered to lower level learners” (Mr. Gaines, Interview, March 12, 2015). In addition to the lack of differentiation for advanced level learners, Mr. Gaines, Ms. Lindy, and Ms. Parker also agreed that the textbooks adopted by their district focused more on breadth of curriculum coverage rather than in-depth content, but argued that the textbook condensed concepts and topics so much that they lost sight of promoting the use of multiple perspectives and inclusion of multicultural topics. As a result, teacher participants frequently used the textbook as a “foundational source and included supplemental text and materials” (e.g. historical books, primary and secondary sources, college-level podcasts, and artifacts) to make the content rigorous, accelerated, and intellectually appropriate for their gifted students (Ms. Parker, Interview, March 30, 2015).

I modify the curriculum constantly by going more in depth in the materials that they provide and the benchmarks they set. A lot of my students come in already with a significant amount of background knowledge and rather than rehash what they already know I try and go deeper into whatever it is
that we are talking about with history at that time. I have done that through the aforementioned use of scholarly essays and other materials that I supplement the rather poor textbook that I am provided with to give them more info. (Mr. Gaines, Interview, February 1, 2015)

Participants shared that the same could be said for the appropriateness of content questioning and activities associated with the textbook. Participants differentiated the content of the curriculum most frequently through modifications or the creation of new questions or activities to best fit the instructional needs of their gifted students. Instead of “…general fill-in-the-blank questions, I have my students critically question, develop their own opinions, and cite sources to justify their arguments. If I don’t challenge and accelerate the learning process, they would grow bored quickly with trivial content and assignments” (Mr. Gaines, Interview, February 1, 2015).

Mrs. Tango expressed concerns that her seventh grade curriculum was “dry and lacked appropriate levels of student engagement” (Mrs. Tango, Personal Communication, February 25, 2015). In combination with how condensed the pacing guide was for seventh grade Civics, Mrs. Tango believed there was very little time to differentiate the curriculum for gifted students; that the content was rigorous enough, but the instructional questioning and activities lacked the “intensity, relevance, and creativeness” for gifted students (Mrs. Tango, Personal Communication, February 25, 2015).

**Accessibility and preparation of curriculum for gifted students.** The next domain for research question two focused on the curricular-instructional decisions participants determined by the accessibility and preparation of the curriculum. Teacher participants utilized a variety of paperbound and digital resources to differentiate
coverage of the official 6-8 social studies Florida Department of Education standards and benchmarks. Among these resources were units specifically designed for gifted populations, supplemental, and interdisciplinary curriculum. Participants also shared that they provided students opportunities to connect current events, geography-based topics, and the infusion of academic competitions.

Gifted curriculum units. As previously mentioned, the gifted magnets implemented acceleration to the curriculum as a means to increase rigor and relevance for their gifted students, but also to increase challenge, depth, and complexity of the curriculum. Several gifted curriculum units were added to support this objective. Many of the curriculum units were from a collection published by the College of William and Mary (1998; 2011), authored by Dr. Joyce Van Tassel-Baska and supporting faculty. As a means to conceptually link the all subject area curricula of the gifted magnet programs, overarching concepts were assigned to specific grade levels. Sixth grade connected core content to the concept of change, seventh grade covered connections with the concept of systems, while eighth grade linked their curriculum to the concept of models. As teachers of these gifted magnets, Mr. Gaines, Ms. Lindy, and Mrs. Compton were familiar with these units because they either facilitated the curriculum within their social studies classrooms or provided supported curriculum coverage with other teacher colleagues within their gifted team.

Each College of William and Mary (CWM) curriculum unit infused an overarching concept within the focus of the unit. When selecting curriculum for the gifted magnets, there were specific units selected by the district curriculum specialist that supported social studies content, however selected these units for the Language Arts
classroom. For example, Mr. Gaines explained that in eighth grade Language Arts, a CWM curriculum unit supported the concept of change while covering the decade of the 1940’s in relationship to several historical-fiction and non-fiction novels and historical context of WWII, Japanese Internment Camps, and the Holocaust (Mr. Gaines, Personal Communication, April 1, 2015). As part of the CWM curriculum, there were several concept maps and structured cognitive strategies implemented to provide appropriate challenge and complexity. Paul’s Reasoning Model was one concept map that uniquely serves the social studies classroom more so than others (Van Tassel-Baska, 2011).

Organized as a spider-web based concept map, it focused on a concept or topic of great complexity and branched out to cover aspects of that concept: purpose/goal, point of view, assumptions, concepts/ideas, implications/consequences, inferences, and evidence/data.

While social studies teachers at the gifted magnets covered much of what the reasoning model included separately, they did not employ the use of the reasoning model as a whole. Mr. Gaines and Mrs. Compton both explained that “I don’t employ the reasoning model” (Mr. Gaines, Interview, March 12, 2015), but “I know it exists” (Mrs. Compton, Personal Communication, March 24, 2015). Participants believed that additional professional development with the reasoning model could provide teachers greater clarity and increased application in their classrooms. “I haven't had training for social studies specialized for gifted learners years since the conception of the gifted magnet program. I never got any follow-up on [Paul’s Reasoning Model]. I think I set it aside and forgot to implement it” (Ms. Lindy, Interview, April 2, 2015).

Other gifted curriculum selected by the school district provides gifted magnet teachers with interdisciplinary studies between social studies and language arts. Word
within a Word provided in-depth coverage of Greek and Latin word stems. Many of these word stems were reviewed and supported implicitly in the social studies classroom. “I feel that it’s a really good way to help them understand the foundations of social science. Like meso; middle. We cover Mesopotamia. I cover Mesoamerica. The science teacher is covering Mesolithic. Everything connects based on the word stem” (Ms. Lindy, Interview, March 19, 2015). Mrs. Compton found ways to include the word stems within her Ancient Civilizations curriculum. “My language arts teacher colleague for the gifted introduce the word stems, study them in great detail and then I support the use of these stems” (Mrs. Compton, Personal Communication, March 24, 2015). The interdisciplinary connections were natural for participants because “much of what my curriculum’s vocabulary directly correlates with the Word within a Word stems” (Compton, Personal Communication, March 24, 2015).

Supplemental and interdisciplinary curriculum. Participants utilized supplemental materials to present the official curriculum. While textbooks at the sixth and eighth grade level lacked rigor and relevance, participants disclosed how they used a plethora of supplemental materials. Teacher participants focused their conversation toward three types of supplemental curriculum: Document-based questions (DBQs), digital articles and archival databases, and technology-powered education programs.

Document-based Questions (DBQs) were actively sought out and implemented by the district for use in K-12 social studies classrooms. Developed by the DBQ Project (2015), the curriculum was organized in binders based on its content area and/or time period. All teacher participants implemented DBQs in various ways. Sometimes participants completed the DBQ per the teacher instructions on the curriculum, while
other times they utilized specific documents to complete a condensed activity devoted to document analysis. The ways in which DBQ’s were used in the classroom “depended on the topic, time constraint, and classroom dynamic” (Ms. Parker, Personal Communication, March 20, 2015). Ms. Heisman used one document from the Alexander The Great DBQ for her Ancient Civilizations class. “The textbook provided a very one-sided view of his leadership. I decided to use a document from the Alexander the Great DBQ to show multiple perspectives of his reign as emperor after I observed how the original lesson was progressing” (Ms. Heisman, Interview, March 18, 2015). Mrs. Compton and Ms. Parker shared that they guided students through the essay writing process, while Ms. Lindy and Ms. Heisman developed more creative and challenging products for students to show their understanding of the content. Decisions were dependent on the cognitive understanding of their gifted students in relationship to the task presented:

I've held their hands in going through document-based questions at the beginning of the year. But as we've completed DBQs, they haven’t necessarily wrote the entire essay, but I’ve guided them through the outlining process so they can express their point and how they would organize their writing. Now we're actually getting to the essay are students are critiquing their peer’s writing. Students now feel comfortable and confident when they have to write an essay on their own. (Mrs. Compton, Interview, March 16, 2015)

Mr. Gaines, Ms. Lindy, Mrs. Compton, and Ms. Parker used digital articles and archival databases to support the foundational text of the textbook in their class. These texts presented students with the work of historians and specialists in their field of study,
while the teacher created higher-order thinking questions to support the main concepts presented in the text. These participants specified that there were a number of resources were appropriate and meaningful to their curriculum. Mr. Gaines, Ms. Lindy, Mrs. Compton, and Ms. Parker shared in their interviews that they frequently accessed digitized archival resources like the Library of Congress (2015), National Archives and Digital Vaults (2015), Gilder Lehrman Institute of American History (2015), Stanford History Education Group’s Reading Like A Historian (2015), and the Museum of Florida History (2015). “Much of what the textbook provides is a watered-down or one-sided story. I always supplementing other resources to show multiple perspectives based on the accounts of women, children, minorities, and oppressed populations” (Ms. Lindy, Personal Communication, April 1, 2015).

Technology powered education programs, such as BrainPop (2015), Learn360 (2015), Empires (2015), John Green’s Crash Course in World History (2015), and Flocabulary (2015), provided teacher participants with the ability to present content in a more interactive way. Participants (e.g., Ms. Lindy, Ms. Heisman, Mrs. Tango, Ms. Parker) selected these programs because they were supported and purchased by the school district, were easily accessible, and provided teachers with opportunities to engage students in 21st century learning. Programs like BrainPop, Learn360, and Empires provided opportunities for students to watch videos, participate in content-based video gaming, and comprehension-based activities. Ms. Parker preferred technology-powered education programs like John Green’s Crash Course in World History and Flocabulary provide students access to engaging animated and simulation videos based on social
Current events. As introduced in the previous section, current events were utilized to promote greater discussion of connections with the social studies content. While the inclusion of current events were common in all social studies classrooms, participants of this study found that gifted students were able to discuss the connections at a deeper level. Therefore, providing gifted students the opportunity to discuss these complex connections deepened gifted students’ historical inquiry and articulation. “I often include political, social, and economic connections. Any time I can connect the ancient world to the modern world, it makes learning really powerful” (Ms. Lindy, Interview, February 13, 2015). While some teacher participants (e.g., Mr. Gaines, Ms. Lindy, Ms. Tango) used current events to gauge where their students were in relationship to greater understanding of the content, others (e.g., Mrs. Compton, Ms. Heisman, Ms. Parker) utilized Flocabulary’s Week in Rap to review the events of the week with their students, thus providing a technology-powered segue to class discussion. “It's a resource that my students are excited to use every week. The weekly videos provide students an opportunity to reflect on their world” (Ms. Parker, Interview, March 30, 2015). Mr. Gaines shared that the current events that he covers in his classroom are often in connection with the American history curriculum, National History Day project research, and personal interest to his students. “Earlier in the school year I would have to prompt discussion, but now [students] bring up current event topics to discuss in class. And the topics range in variety” (Mr. Gaines, Personal Communication, March 30, 2015).
Ms. Lindy, Mrs. Compton, Ms. Heisman, and Ms. Parker believed it was important for social studies teachers to implement and support geography education. While their curriculum was focused more so on the coverage of overarching connections between ancient civilizations, these participants believed that the 6th grade Ancient Civilizations textbook emphasized geography and world religions. They also discovered early in the school year that their gifted students did not have much prior knowledge when analyzing cartography. Preparing students to “identify, read, and analyze maps was one of the most challenging aspects for me” (Ms. Heisman, Personal Communication, March 20, 2015). While participants shared that a small population of gifted students were able to accurately analyze a map, the majority of incoming sixth grade gifted students had little to no knowledge of basic cartographic concepts. “Their map skills are severely lacking so the more visual that I can reinforce, the better (Ms. Parker, Interview, March 30, 2015). Topics that the 6th grade teacher participants believed students needed to review at the beginning of the year included latitude, longitude, directional coordinates, the international date line, time zones, and the identification of waterways, land, topography, and political boundaries.

Ms. Lindy, Mrs. Compton, Ms. Heisman, and Ms. Parker found basic geography skills an additional challenge to take on at first. Over the span of the school year participants observed that students were able to “see beyond the lines and boundaries outlined on a map and begin to read between the lines” (Ms. Lindy, Interview, March 19, 2015). These participants found that students were also able to pull information that connected to the ancient civilizations curriculum, and at times critically assess how geography impacted and significantly influenced historical events. “There are sections of
the textbook that show direct connections between the ancient civilizations and how geography impacted how those civilizations developed. The students begin to understand that later in the year” (Mrs. Compton, Interview, March 16, 2015). Mrs. Compton and the other 6th grade participants all explained that the History Alive! curriculum provided activities for students to actively engage throughout the process of learning new material such as songs, simulations, classroom field trips, and small group processing activities (Teachers’ Curriculum Institute, 2011a; 2011b). In classroom observations, participants either looked to these activities for inspiration in differentiating instruction for their gifted students or facilitated the TCI-designed instructional methods.

*Academic competitions.* Academic competitions were a carefully nurtured part of the middle level social studies classroom. Stemming from the district office, community partnerships were fostered to ensure that teachers and students were supported through various processes of implementing academic competitions into the sixth through eighth grade curricula. For example, Mr. Gaines and Mrs. Tango explained how seventh grade Civics students participated in Model UN, a district-wide simulation of a United Nations assembly. “This is a great opportunity for students to simulate the experience as a delegate of the United Nations in their classroom, and then take their knowledge to the district-wide simulation” that was held at a regional college within the county of Seaside (Mrs. Tango, Personal Communication, May 1, 2015).

Gathered from all the participants of this study, the social studies-based academic competition that seemed to reach gifted students more so than other academic competitions was National History Day (NHD). National History Day was an theme-based competition in where middle and high school students develop and present projects
based on nine categories: individual or group documentaries, individual or group exhibits, individual historical papers, individual or group performances, and individual or group websites. Seaside County students who attend sixth grade at any of the gifted magnets, as well as all eighth grade Advanced United States history students are required to participate in a school-based NHD fair. “Gifted students make up over half of the projects district-wide that compete at school-based history fairs”, but it is important to note that other eighth grade students who are enrolled in Advanced United States History are also required to participate in a school-based history fair (Ms. Parker, Personal Communication, March 13, 2015).

Teachers within the Seaside Public School District used National History Day as a semester-long project students complete which infuses a variety of research skills, presentation skills, and historical inquiry into daily practice. Mr. Gaines, Ms. Lindy, and Mrs. Compton mentored gifted students who were participating in National History Day during the 2014 competitive season. Participants facilitated many facets of this academic competition in their classroom on top of the district social studies curriculum. Mr. Gaines shared that teachers usually “break the project up into chunks over a span of time during the fall semester”, while the spring semester is busy with the competition and revision part of the project (Mr. Gaines, Personal Communication, March 1, 2015). During the fall semester, teachers covered a number of topics that relate to both National History Day and their social studies curriculum: differentiating between primary and secondary sources, citing and documenting information with MLA formatting, identifying and analyzing historical data, drawing conclusions, and the development and support of a thesis statement. Mr. Gaines preferred that his “students select a topic from the time
period of their class curriculum” (Mr. Gaines, Personal Communication, March 1, 2015). Mrs. Compton and Ms. Lindy preferred to “leave the topic selection process open for students to choose from all historical time periods” (Mrs. Compton, Personal Communication, February 25, 2015; Ms. Lindy, Interview, March 19, 2015). Teachers acted as mentors, providing students guidance throughout the time of project development and competition. “My students end up becoming experts in the field of their research, and many times, they teach me something new about history. That is the most meaningful part of this project” (Mr. Gaines, Interview, February 1, 2015).

**Adapting curriculum for gifted students.** Once participants made decisions based upon which curriculum was accessible and appropriate for their gifted students, participants explained how they contextually adapted curriculum from its original state by making necessary modifications in a myriad of ways. The third domain related to research question two describes in what ways participants adapted curriculum using three methods: acceleration, depth, and consolidation.

**Curriculum acceleration.** Participants who taught within the gifted magnet programs (e.g., Mr. Gaines, Ms. Lindy, Mrs. Compton) were provided supplemental curriculum units that were designed for an accelerated level of learning specifically for gifted students (see the section titled *Programming Options* presented earlier in the chapter). By selecting these curriculum units, the gifted curriculum specialist of Seaside County Schools addressed the needs of rigorous and relevant social studies curriculum for the gifted magnet schools. Participants were not as concerned with increasing the speed of an already-accelerated curriculum. Mr. Gaines stated “I keep in mind that these [students] are pretty advanced gifted middle schoolers, more in-depth, more challenging,
more acceleration that I would provide in a standard classroom” (Mr. Gaines, Interview, February 1, 2015). Mrs. Tango was satisfied with the level of acceleration the Civics curriculum provided her students. “I feel the text within the curriculum that you observed in my classroom is of a high level and covered the concepts in great detail. Many of my gifted students have explicitly shared that they constantly feel challenged when reading” (Mrs. Tango, Interview, March 10, 2015).

Participants estimated that acceleration would be an indicator of what is common for gifted middle grade social studies. Ms. Heisman mentioned “I definitely include more acceleration in my gifted curriculum in comparison with general education classes. When curriculum is accelerated I believe it also increases the complexity of what students are asked to do. They go hand in hand sometimes” (Ms. Heisman, Interview, February 11, 2015). Ms. Parker explained how acceleration was critical to engaging gifted students. “I feel the curriculum is already accelerated to a level that is challenging for my sixth grade gifted students. They aren’t providing me the signs that they need to cover the curriculum at a faster pace. They are absorbing the main concepts and are able to apply them to the activities in class” (Ms. Parker, Personal Communication, March 19, 2015).

Participants’ concerns stemmed from experiences with student behaviors that involved underperformance, perfectionism, and other anxiety-based challenges. Ms. Lindy was concerned when she described how she delicately balances acceleration for her gifted students. “Some kids may shut down and not perform; some of them are not able to reach the same level of acceleration as other. They might panic. So it’s my job to reassure them that even the most accelerated tasks are doable” (Ms. Lindy, Interview, February 13, 2015). Mrs. Tango also shared concerns with the amount of acceleration
within her Civics curriculum for her mixed-ability classroom setting where high achieving and gifted students coexist. “I try as much as I can to accelerate activities, but it’s hard for me to individualize learning for my gifted students separately from my other high achievers. It’s a work in progress” (Mrs. Tango, Interview, February 21, 2015).

**Curriculum depth.** All teacher participants said that the level of depth within curriculum coverage was most critical to developing greater student learning and understanding of key concepts and thematic connections across the social studies curriculum. Mrs. Compton stated “Challenge and depth would be my top priority. Digging a little deeper, making connections. It’s more than just learning standards, but actually connecting them is most important” (Mrs. Compton, Interview, February 19, 2015). Participants attempted to teach curriculum that presented in-depth content and high levels of questioning and analysis. In doing so they also reflected that these opportunities allowed them to be creative and free with their curricular-instructional decisions in preparation and enactment. Mr. Gaines reflected on how he began to explore how he could create activities that would exceed the level of depth the textbook instructional materials provided his students. “The Interactive Student Notebook activities are written at a pretty low level, so I started designing my own activities which forced my students to stick their nose in the text to glean and infer information in a scholarly way” (Mr. Gaines, Interview, March 12, 2015).

Counteracting this desire to modify the curriculum through the exploration of social studies topics at a richer level, participants shared their hesitance to consistently modify the depth of curriculum. Ms. Lindy was a proponent of academic down time for
her students. “Gifted students need to know what it feels like to relax within an academic setting. They can’t just be in the fifth gear 24-7” (Ms. Lindy, Interview, March 19, 2015).

As discussed in earlier the findings of research question one, participants also expressed the concern that curriculum maps and pacing guides were stressors stemming from the increasingly congested standardized assessment schedule for the school year. The more these district guides motivated participants to broaden curriculum coverage, the more participants believed they infrequently deepened curriculum coverage. As a result, all participants identified that by focusing more on breadth, rather than depth, of curriculum coverage counteracted best practices for gifted students. “Speeding through curriculum just for the sake of coverage does everyone a disservice. Social studies teachers nurture the students’ ability to reason and critically think. I can’t shovel massive amounts of curriculum on my students because of a upcoming test” (Ms. Lindy, Personal Communication, March 18, 2015).

**Curriculum consolidation.** Curriculum consolidation is the merging of curricular concepts to fit the time constraints and thematic parameters of a schedule or planned sequence of curriculum. While teachers consolidated curriculum more regularly, they believed that many of the creative and challenging activities they used to implement were eliminated from their instruction. Curriculum consolidation was easier for teacher participants to identify during the 2014 - 2015 school year, in reaction to the increased inclusion of district-wide standardized assessments and the Marzano (2007) pilot program distributed through various schools within the district. Mrs. Tango and Ms. Parker both shared their reactions to the pilot program at their middle school. “You are in a time crunch. There are so many deadlines for progress monitoring that I’m feeling the
pressure to only cover standards that are specifically listed on the curriculum map” (Ms. Parker, Personal Communication, March 30, 2015). Mrs. Tango elaborated on the challenges she faced with curriculum consolidation and the Civics curriculum.

The Civics curriculum is very heavily paced so I have to go quickly even if I don’t want to. Sometimes it's unrealistic how much I need to cover within a certain time period. With all the students grasping the material. It's kind of like oh we are moving on, we are moving on. To me I don’t feel good as a teacher moving on unless all my kids get it. I feel like if I don’t stay with the pacing guide then my students won’t be ready for their test. So it's very tough. (Mrs. Tango, Interview, February 21, 2015)

As mentioned in the previous quote, compacting was also used as a time management tool to monitor where their classes were in relationship to the district pacing guide and influenced their decision-making concerning how they were going to facilitate the curriculum. “From what I hear from teachers at other schools, this Marzano pilot program constricts the time teachers have to cover what they feel is important, and cover more at a quicker pace of what the state feels should be covered” (Mr. Gaines, Personal Communication, March 18, 2015).

Research Question #3 - In what ways do middle school social studies teachers prepare and adapt instruction for their gifted students?

Four domains were constructed around themes that emerged from research question three in connection to the preparation of instructional methods: (a) factors that determined the appropriateness of textbook-based instructional methods, (b) ways in
which teachers determined how they should prepare instructional methods, (c) ways in which teacher adapted instructional methods, and (d) options for teachers to determine how student products show evidence of student learning. Participants set high expectations for student learning through the preparation of complex and challenging instruction for their gifted students. Instructional differentiation also developed through the design and implementation of student learning products. Teachers believed that by differentiating the products students create to show learning (e.g. written, hands-on, technology-powered), students were provided opportunities to utilize both their social studies knowledge and their gifted strengths. Using both knowledge and giftedness in harmony allowed students reach their highest academic potential (see Table 6).

**Table 6: Domains regarding Preparation and Adaption of Instructional Methods**

<table>
<thead>
<tr>
<th>Included Codes</th>
<th>Semantic Relationship</th>
<th>Related Theme</th>
</tr>
</thead>
<tbody>
<tr>
<td>Availability of gifted options</td>
<td>are factors considered when determining…</td>
<td>The appropriateness of textbook-based instructional methods for gifted students</td>
</tr>
<tr>
<td>Considerations of diverse student population</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teacher-created modifications</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Setting high expectations for student academic success</td>
<td>Are ways in which teachers determine the…</td>
<td>Preparation of instructional methods for gifted students</td>
</tr>
<tr>
<td>Utilize scaffolded evaluative tools</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ability to make thematic connections (e.g., abstractedness)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Challenge</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complexity</td>
<td>Are methods in which teachers…</td>
<td>Adapt instructional methods for gifted students</td>
</tr>
<tr>
<td>Rigor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relevance</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Creativity</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Verbal-based products</td>
<td>Are options teachers consider when developing products that can show…</td>
<td>Evidence of student learning</td>
</tr>
<tr>
<td>Written-based products</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technology-powered products</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hands on learning</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Appropriateness of textbook-based instructional methods for gifted students.**

Within the first domain related to research question three, participants reported the same
concerns with textbook-based instructional methods, as they did with textbook curriculum: It was developmentally appropriate for the general education classroom. Therefore, it lacked any official modifications specifically for gifted student populations. “Typically that is the norm with textbooks, to engage and academically challenge lower and middle level student populations. I don’t think I’ve seen specific instructional recommendations for gifted students from any textbook curriculum” (Mrs. Tango, Interview, February 21, 2015).

Ms. Heisman believed that the instructional methods of the textbook met the academic needs of her gifted students within a mixed-ability classroom setting. Ms. Heisman shared that the critical thinking questions presented within the PowerPoint presentations provided by *History Alive!* (Teachers’ Curriculum Institute, 2011a) was appropriately developed to engage gifted and talented students in higher-order thinking and information analysis. Ms. Heisman stated that the activities presented within the *History Alive!* Interactive Student Notebook provided students with opportunities to develop creative and academically challenging products. However, Ms. Heisman shared that, “I don’t typically modify the curriculum, unless I feel there are constraints of classroom instructional time, limited or additional access to technology, and available supplemental curriculum materials” (Ms. Heisman, Interview, February 11, 2015).

Ms. Heisman’s optimistic assessment regarding the quality of instructional methods suggested by *History Alive!* was not shared by the majority of teacher participants. Mr. Gaines, Ms. Lindy, Mrs. Compton, and Ms. Parker shared concerns related to the quality of textbook-based instructional methods. “I never feel as though we are digging as deep as we could into some of the more interesting historical topics
concerning Ancient Civilizations history” (Ms. Parker, Personal Communication, March 16, 2015). These participants were apprehensive about following the pre-scripted instructional recommendations of the textbook-based curriculum because it lacked sufficient levels of complexity and higher-order thinking. “Every activity is either a watered-down simulation or arts and crafts activity where I just don’t get a feeling for depth and critical analysis” (Ms. Lindy, Personal Communication, April 2, 2015).

I temper my reliance on the textbook that I am provided. Again, we are given one textbook for every level of students and that means that essentially it is written for the lowest level of students. I use it some. I make up my own questions. I try and create as many higher-order judgment questions in terms of what they read but often I find myself giving them essays written by historians, other documents that I print out from a variety of sources depending on my available copy count at the time. (Mr. Gaines, Interview, February 1, 2015)

While there were opportunities for students to reflect and question, these moments were left underdeveloped in terms of relevance and purpose. Very little was scripted to connect students’ knowledge of the social studies content with current events.

The [textbook curriculum] would suggest students paint a cave painting or something like that for the Paleolithic. I don’t see what that does for them. That’s a creative thing…yeah…right. They get to paint, but it doesn’t do anything as in depth as what I do. … The differentiated activities I design have a contextual level that’s a lot deeper than mere painting. (Ms. Lindy, Interview, February 13, 2015)
Participants were generally confident in their abilities to deviate from the *History Alive!* instructional methods. For instance, instead of relying on the textbook curriculum’s “general fill-in-the-blank questions, I design instruction where my students critically question, develop their own opinions, and cite sources to justify their arguments. If I don’t challenge and accelerate the learning process, they would grow bored quickly with trivial content and assignments” (Mr. Gaines, Interview, March 12, 2015). These teacher-developed instructional methods will be explored later in the chapter.

**Preparation of instructional methods for gifted students.** The second domain related to research question three refers to the ways in which teachers determined how they prepared instructional methods to meet the needs of gifted students. All teacher participants indicated the instructional methods they employed provided opportunities for their gifted students to actively and critically think, question, spur creative products and solutions, and develop student-constructed conclusions and arguments based on the content, concepts, issues, and connections made within the curriculum. Among the topics teacher participants acknowledged in their interviews, the following were discussed in depth: how teachers set high expectations for learning and how teachers made thematic connections within and across social studies disciplines and grade levels.

*Setting high expectations.* While listening to teacher participants discuss the methods by which they made decisions based on instructional methods, fundamental responsibilities of a teacher were included in their feedback: to provide clear, supportive, instruction and hold students accountable for their learning.

I will set a high level of expectation, and then if they exceed it, I’ll give them extra credit. I utilized scaffolded rubrics [called DAP Tools] to
structure expectations. They struggled with it at first, and looking back I can say that every student overcame it, and it was obvious by them…they chose to overcome it. It’s very high level for an incoming sixth grader. But I am confident that they can meet that, but I give a lot of structure and support to do it; I don’t just leave them hanging out there. (Ms. Lindy, Interview, March 19, 2015)

By setting high expectations for both the quality of teacher instruction and quality of student learning, participants believed they were more confident and effective as a curriculum-instructional gatekeeper. “If my students see that I am putting my best work forward, they follow suit. If anyone strays, then the quality of that learning is disrupted. I’m at my strongest when I know my students are engaged in learning” (Mrs. Tango, Interview, March 10, 2015).

Mr. Gaines, Ms. Lindy, Ms. Compton, and Ms. Parker shared that they took time within their class periods to provide one-on-one assistance for gifted students as a means to differentiate expectations of assignments, motivate their gifted students to explore complex and challenging topics or tasks, and collaboratively reflect on the quality of their students’ work and creative products. “I usually take time to have a guided personal conversation [when students need guidance]… about 25 kids took advantage of [resubmitting assignments] this year, and their grades rose substantially. So, I set the bar high, and a certain portion actually met that more than I expected” (Ms. Lindy, Interview, March 19, 2015). Like Ms. Lindy, all other participants used one-on-one moments with their gifted students to set assignment parameters, provide frustrated or over-worked
students with guidance, and increased proximity to those students with underachieving tendencies.

*Scaffolded evaluative tools.* One tool employed by teachers within the gifted magnets were *Developing and Assessing Products* (DAP) tools that provided teachers scaffold rubrics for a variety of creative products. DAP tools were organized by product and then tiered in complexity, allowing teachers to differentiate within their gifted populations based on the depth and acceleration of individual student’s learning. In the following table, an example of a DAP tool designed in three tiers shows how a teacher could utilize this tool to differentiate for three different groups of gifted students (see Table 7). Using a Tier I rubric, the teacher will provide supportive questions that guide students toward creating a product, which in this case is a model. Moving up to Tier II or III, students are provided more rigorous expectations for the same product.

I prefer using the DAP tool because that lays it all out. It's not a question about what you're asking them to do. I will set that level of expectation. I laid out in a rubric form, or I’ll say, “I’m looking for exactly this. Five bullets.” … I set that level knowing full well that there’s going to be 30 to 40% that cannot meet that expectation. Then I'm going to allow them to redo it. (Ms. Lindy, Interview, March 19, 2015)

According to Roberts and Inman (2009), DAP Tool rubrics are designed for all classroom environments. However, the gifted department within the Seaside Public School District provides their gifted content area teachers in elementary and middle grades DAP professional development and resources to employ these methods of product evaluation in all gifted classrooms. While Ms. Lindy used the DAP tools as they appear
in the literature, Mrs. Compton and Mr. Gaines uses the DAP tools and adapts them to fit other products.

Table 7: An Example of DAP Tools used in Gifted Magnet Programs (Roberts & Inman, 2009)

<table>
<thead>
<tr>
<th>Criteria Categories</th>
<th>Tier I</th>
<th>Tier II</th>
<th>Tier III</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content</td>
<td>• Is the content correct and complete?</td>
<td>• Content in accurate.</td>
<td>• Content is accurate and thorough in detail.</td>
</tr>
<tr>
<td></td>
<td>• Has the content been thought about in a way that goes beyond a surface understanding?</td>
<td>• Content has depth and complexity of thought.</td>
<td>• Product shows complex understanding and manipulation of content.</td>
</tr>
<tr>
<td></td>
<td>• Is the content put together in such a way that people understand it?</td>
<td>• Content is organized.</td>
<td>• Product shows deep probing of content.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Organization is best suited to the product.</td>
</tr>
<tr>
<td>Presentation</td>
<td>• Does the model look like what it represents? Is it a clear representation?</td>
<td>• The model makes the viewers see the purpose (whether realistically or symbolically).</td>
<td>• The model employs a new idea in the representation.</td>
</tr>
<tr>
<td></td>
<td>• Does the construction make the model stable? Are the materials appropriate for the construction?</td>
<td>• The model is build to scale. The model is constructed with detail. Materials enhance the meaning of the model.</td>
<td>• The construction as to the detail and materials is unique to highlight the model’s purpose.</td>
</tr>
<tr>
<td></td>
<td>• Are the labels clear?</td>
<td>• Labels are clear and match the key.</td>
<td></td>
</tr>
<tr>
<td>Creativity</td>
<td>• Is the content seen in a new way?</td>
<td>• Individual insight is expressed in relation to the content.</td>
<td>• Individual insight is originally expressed in relation to the content.</td>
</tr>
<tr>
<td></td>
<td>• Is the presentation done in a new way?</td>
<td>• Individual spark is expressed in relation to the presentation.</td>
<td>• Individual spark is originally expressed in relation to the presentation.</td>
</tr>
<tr>
<td>Reflection</td>
<td>• What did you learn about the content as you completed this product?</td>
<td>• Reflection on the learning of the content through product development is apparent.</td>
<td>• Insightful reflection on the learning of the content through product development is expressed.</td>
</tr>
<tr>
<td></td>
<td>• What did you learn about yourself as a learner by creating this product?</td>
<td>• Reflection on what the student learned about self as a learner is apparent.</td>
<td>• Insightful reflection on what the student learned about self as a learner is expressed.</td>
</tr>
</tbody>
</table>

Thematic connections. Teacher participants believed that the connections made within and across the social studies disciplines provided them various opportunities to
deepen student understanding about patterns within the history-based curriculum. Van Tassel-Baska (2011) supports the use of thematic connections, or *abstractedness*, which is a tenet within the Integrated Curriculum Model for differentiation for gifted students. When participants shared experiences where they broadened the abstractedness of the curriculum, they believe students were able to connect prior knowledge, current events, and personal reflections. For example, Mrs. Tango believed by offering her students historical themes related to American history, her 7th grade students developed a deeper appreciation for the Civics content they were learning, especially during the coverage of important Supreme Court cases, the Bill of Rights and other Amendments to the United States Constitution, and different forms and systems of world governments. “Themes like leadership, civic duty, and historical bias always appear when we connect American historical events with the civics curriculum. Those themes are constantly discussed as we progress through the school year” (Mrs. Tango, Interview, March 10, 2015).

Mr. Gaines focused on pulling out moments within the eighteenth and nineteenth centuries of United States history to elaborate on social justice issues, especially as they pertained to the marginalization of native and African-enslaved populations. “Social justice topics are necessary. Students and I discuss cultural events that marginalize African and native populations prior to the civil war and later discuss African, immigrant, and native populations were oppressed after the failures of the Reconstruction era” (Mr. Gaines, Interview, March 12, 2015).

**Adapting instructional methods for gifted students.** The third domain related to research question three relates to the ways in which participants adapt instructional methods for gifted students. When teacher participants were asked as to how they
differentiated the instruction for their gifted students, all the participants shared that they were able to modify the level of challenge, complexity, and rigor.

*Challenge and complexity.* To promote the inclusion and frequency of challenge and complexity, teacher participants believed that it was necessary for students to brainstorm, critically think, answer and develop their own higher-order questions, and analyze primary and secondary sources. “When one of the central premises behind why I teach social studies is the examine the past in order to make the best choices for our future, how else would you want [students] to think in a classroom” (Mr. Gaines, Interview, March 12, 2015)?

Ways in which teachers challenged their gifted students included opportunities for infusing problem-solving strategies, higher-order questioning activities, application of research strategies, and student-led discussion or activities. Mrs. Compton believed her students varied in ability to critically think about complex topics. “Students rarely think critically in the elementary classroom. I find that same mentality in sixth grade. They just want the answers. So I have to break it down, give them the steps, and lead them through the progression sometimes” (Mrs. Compton, Interview, February 19, 2015). All of the participants expressed similar responses. “It is my obligation as a teacher to provide them opportunities to develop greater intellect. However, it is a process that does not happen over night. It’s a process that steadily grows throughout the year” (Mrs. Tango, Personal Communication, April 13, 2015).

An example of how teacher participants broke away from the pre-scripted instructional methods of their social studies curriculum in order to increase complexity, Ms. Parker developed a variation of the Socratic seminar through an activity called *Cast-
off (see Table 15). This activity guided students to develop listening and public speaking skills, through a debate-based approach. To initiate a class-wide discussion of a specific topic that required multiple perspectives and opinions, students followed a sequence of statement starters. First, the teacher provided an opinionated statement from the text, followed by selecting a student to “cast off” the discussion to. The class listened, processed, and determined whether they agreed or disagreed with the previous statement. Next, the selected student would share whether they agreed or disagreed with the statement and then explain why through information found in their curriculum, followed by casting-off to another student and the process would continue. “I found it helped my students develop a voice and process information. It also helped them develop and refute an argument” (Ms. Parker, Interview, March 30, 2015).

*Rigor and relevance.* Participants believed it was their responsibility to provide gifted students with purposeful learning experiences. There are several examples of this within the data. The following topics highlight the array of decisions teachers made to adapt instruction for their gifted students with rigor and relevance in mind. Popularly used to discuss best practices within gifted education training and professional development in Seaside County, teacher participants used the terms rigor and relevance regularly to distinguish curriculum and instructional methods that were designed, selected, and implemented for middle level gifted social studies classrooms.

Ms. Lindy, Mrs. Compton, Ms. Heisman, and Ms. Parker taught at the sixth grade level and facilitated activities where they modeled strategies and skill sets for their students. These participants believed it was important for students to visually observe teachers in action; modeling the ways in which students could process and examine
historical content. While sixth grade teachers relied on modeling basic historical thinking skills, Mr. Gaines was more focused on preparing their students for advanced and accelerated curriculum at the high school and collegiate education. Mr. Gaines utilized lecture, whole-class textbook reading, and the listening of iTunes University (iTunes U) podcasts. Supporting the content covered in these efforts, teachers modeled note-taking and listening skills with students.

There were opportunities for teachers to manage and facilitate a review or reteach important curricular concepts. Especially for Mrs. Tango and Ms. Parker, who were assigned to school locations where they piloted the Marzano-style (Marzano, 2007) pacing guide, the schedule carved out time for the review of major concepts prior to standardized testing. Mrs. Tango and Ms. Parker both utilized this opportunity to cover and deepen student understanding for complex and challenging concepts.

Mr. Gaines, Ms. Lindy, and Mrs. Compton provided purposeful instruction by infusing the fine arts, performing arts, and humanities when applicable. Many of the gifted students at gifted magnets pursued extracurricular activities and elective courses that connect to art, music, drama, and other forms of fine and performing arts. With this said, teachers found ways to connect their students’ interests in these areas when covering curriculum that might be best facilitated through more creative ventures. Some examples include the analysis of artifacts, playing culturally relevant music during times where students complete independent work, or facilitating small group or whole-class role-playing and simulation. “If there's a moment where I can make them really feel it whether it's with music, art, or painting where they can just stop, connect with the quiet self, then I try to do that” (Ms. Lindy, Interview, February 13, 2015).
Evidence of student learning. Following the selection and delivery of curriculum, the last domain related to research question three is how teacher participants believed that the creation and evaluation of student products. Participants believed these decisions were critical to show the effectiveness of teacher instruction and also provide substantiated evidence of student learning. Participants believed that the implementation of specific activities or strategies motivated students to remain actively engaged throughout the learning experience. Teachers utilized both pre-made and teacher-created products (e.g., document-based questions, National History Day projects, simulation, roleplaying, in-class debates and Socratic seminars, primary and secondary source analysis, websites, 3D models). Reflective and evaluative methods were also used by participants to determine if the products completed by gifted students increased content understanding and skill-based knowledge.

Creativity. Attention was given toward creativity when discussing how teacher participants adapted student products for gifted learners. Teachers wanted students to be able to take the new knowledge gathered from their in-depth and accelerated curriculum, use the skills that they developed through complex and challenging instructional methods, and apply those toward showing evidence of their learning. While many teacher participants found that this was the most freeing and flexible way they could differentiate the curriculum and instruction, they were very particular with the decisions they made in designing, teaching, and evaluating these products. As an example, Mrs. Compton wanted to provide her students the opportunity to be creative, all the while keeping in mind the academic strengths of her students:
I have students that are very academic and intellectual and like the very black or white sorts of things where you learn something, and you kind of absorb it; you think about it, but that’s it. And then I have students who really think outside the box. So I try to tailor to both sides with different activities. I have creative students who like to express themselves and who like maybe more artistic things where they have to design something and/or create or draw. So I try to make each activity use a little bit of each or each assignment. So they can kind of adapt to each different thing but also be familiar with it. So those students who don’t really practice their creativity or don’t like to be creative, they could at least try. (Mrs. Compton, Interview, March 16, 2015)

Teacher participants designed an array of products that students could explore throughout the school year. Rather than outlining each and every product, the following groups have been organized to better describe the types of products teachers differentiated for their gifted students to ensure that students’ intellectual strengths and academic interests were challenged while covering curriculum standards for their middle grades social studies classes. These assignments include a variety of verbal-based products, written-based products, technology-based products, and hands on learning. While these categories are divided, it is important to note that many of the examples described are hybrid products. For example, a small group simulation can provide students the opportunity to show evidence of learning through hands on application and verbal presentation of information.
Verbal-based products. Some teacher participants preferred to develop their students’ speaking abilities and social skills through the use of verbal-based products. As described earlier in the section, activities such as Cast-Off allowed students to listen, develop, defend, and publically share their opinions on a variety of social studies topics. It is products, such as Cast-Off or other Socratic seminar type activities that provide meaningful learning experiences for students and an informal way for teachers to assess student learning. Other examples of verbal-based products that teachers used in their gifted classrooms include class-wide debates, PowerPoint or Prezi presentations in the classroom, simulation, and historic roleplaying.

Written-based products. In another examples of how teacher are utilizing various products to measure student understanding, some teacher participants preferred writing-based products, such as RAFT activities, DBQ essays, or the development of written theses, conclusions, or arguments. Mr. Gaines referenced his use of RAFT activities as a way to gauge student learning. A RAFT is “a product where students put themselves in the role of somebody else and create a project from that person's perspective” (Mr. Gaines, Interview, February 1, 2015). After pausing to reflect on his description of RAFT writing, Mr. Gaines shared “we were learning about the transatlantic slave trade and I had the student perform the rap in class from the perspective of a slave ship captain. It was pretty intense.”

Document-based questions (DBQs), as described earlier in the chapter concerning supplemental curriculum, provide students the ability to organize and draft an essay based upon a historical question and document analysis. DBQ essays are widely used among the teacher participants of this study and frequently complete part, if not all, the
elements required within the instructions. The essay provides students opportunities to develop their opinion concerning the document-based question. Sometimes, teacher participants preferred students to split into teams and hold a class-wide debate. While this activity was verbal in nature, students were required to collaborate together, develop and draft their arguments on paper, and then present to the class in a debate forum.

*Technology-powered products.* Participants favored technology-powered products varying from PowerPoint and Prezi slideshows, to iMovie presentations, and Weebly websites. While access to technology was an issue for most participants, they were able to check out and utilize laptop carts or iPad carts so that their students had appropriate amounts of time to construct technology-powered products. Ms. Heisman utilized a program called Weebly that allowed her students to construct websites using a drag and drop style of website-creation software that was free to use through a teacher-monitored account. Students were able to follow the expectations of the assignment and design a creative product that promoted 21st century learning. Many of the other participants also required students to created products using technology in a creative way that could be printed. These include brochures, flyers, historic-simulated restaurant menus, and other small-scale reports.

*Hands-on learning.* Participants also preferred providing gifted students with kinesthetic-based products, where students worked with materials to produce three-dimensional models, two-dimensional products, and dramatic simulations or musical interpretations connected to the social studies curriculum.

Whenever I can do something creative rather than paper and pencil, I will.

I’d rather facilitate some type of dramatic-based product, or I guide
students in the creation of a three-dimensional map site out of clay. When we cover ancient China, we practice a little Tai Chi. (Ms. Lindy, Interview, February 13, 2015)

Skits provided students the ability to move around the classroom, interact in small groups, design and develop a presentation based on dramatics and public speaking skills. Mrs. Tango was able to differentiate at times from the pre-scripted Civics curriculum to facilitate a skit for her students concerning the different forms of government.

I found out early on my students love skits. They want to have the ability to make decisions and put their own spin on the topics we cover. I walked around and assisted them when needed. I give them appropriate time limits, they make the skit a little more creative and the kids still remember them months later. (Mrs. Tango, Interview, March 10, 2015)

When teaching ancient Egypt in her sixth grade Ancient Civilizations class, Ms. Lindy enjoys using simulation to help students experience an interpretation of a historical culture. “There’s one activity in the curriculum about a boat trip down the Nile. I create a rowing scenario with drumming and a rain stick for water. I elaborate it so much as I can and they really get into it” (Ms. Lindy, Interview, February 13, 2015).

While participants made purposeful curricular-instructional decisions during the preparation and adaption processes, it is important to note that there is a transition that occurs when that curriculum and instruction is enacted in the classroom setting. The next research question will explore and describe how instruction occurred in the classrooms of the participating teachers of this study, and by what and how teachers made curricular-instructional decisions to best fit the needs of their gifted students.
Individual Case Summaries of Classroom Observations

To answer the fourth research question for this study, individual case study narratives were used to describe and illustrate the events that unfolded for gifted students within their middle grade social studies classrooms. Within each narrative, the objective was to illuminate how teacher participants tended the curricular-instructional gate to facilitate student learning in their classrooms over the span, or equivalent of, one week of middle school. Each individual narrative is organized daily to encapsulate the decisions made by the gatekeeping teacher participant and describe the events of the classroom experience for students.

As noted, Mr. Gaines and Ms. Lindy were unable to participate in classroom observations. The school administrator for Gulfport Middle School declined any data collection on school campus. Therefore, their participation in this study was solely based on their off-campus interviews. Nonetheless, the researcher gained access to classroom observations with Mrs. Compton, Ms. Heisman, Mrs. Tango, and Ms. Parker.

Research Question #4 - What does instruction look like for gifted students in their middle school social studies classrooms?

The fourth research question focuses on how instruction occurs in a gifted social studies classroom. Different from its partnering research questions, this question concerned how instruction unfolded after the initial planning was complete, and furthermore how adaptation of curriculum and instruction occurred whether it was preparatory or within the classroom while instruction occurs.
Mrs. Compton. Mrs. Compton taught sixth grade Ancient Civilizations within an inclusive gifted magnet program. Classroom observations with Mrs. Compton were completed in two segments of time, separated from the district scheduled spring break period for students and faculty. During this period of observation, Mrs. Compton reviewed and administered a unit assessment regarding ancient Greece, facilitated a grade-level field trip to the regional fine arts museum to analyze primary source artifacts, and covered key topics focusing on the final unit of study regarding ancient Rome. Table 8 describes the objectives covered during the observations in Mrs. Compton’s class.

Table 8: Mrs. Compton’s Board Configuration

<table>
<thead>
<tr>
<th>Observation</th>
<th>Agenda</th>
<th>Essential Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Day One</strong></td>
<td></td>
<td><strong>What will I learn?</strong> How did ancient Greece contribute to the modern world? <strong>How will I learn it?</strong> Match descriptions of modern life to images of Greek achievement in language, literature, government, the arts, the sciences and sports. <strong>How will I use it?</strong> 1) Explain how Greek language, literature, and art influence the modern world. 2) Identify the Greek roots of American democracy. 3) Describe the achievements of important Greek figures in the arts, sciences, and social sciences. <strong>How will I know I’ve learned it?</strong> Evaluate the impact of Greek contributions on modern life.</td>
</tr>
<tr>
<td>March 23, 2015</td>
<td>Characteristics of a Civilization Geography/Government Review</td>
<td></td>
</tr>
<tr>
<td><strong>Day Two</strong></td>
<td></td>
<td><strong>What will I learn?</strong> How did ancient Greece contribute to the modern world? <strong>How will I learn it?</strong> Match descriptions of modern life to images of Greek achievement in language, literature, government, the arts, the sciences and sports. <strong>How will I use it?</strong> 1) Explain how Greek language, literature, and art influence the modern world. 2) Identify the Greek roots of American democracy. 3) Describe the achievements of important Greek figures in the arts, sciences, and social sciences. <strong>How will I know I’ve learned it?</strong> Evaluate the impact of Greek contributions on modern life.</td>
</tr>
<tr>
<td>March 24, 2015</td>
<td>Review of ancient Greece Museum Field Trip Information Bus and Group Assignment</td>
<td></td>
</tr>
<tr>
<td><strong>Day Three</strong></td>
<td></td>
<td>The board configuration was not available. Students and teacher were out of the classroom on a field trip to a regional fine arts museum.</td>
</tr>
<tr>
<td>March 25, 2015</td>
<td>Fine Arts Museum Field Trip</td>
<td></td>
</tr>
</tbody>
</table>
### Table 8 Continued: Mrs. Compton’s Board Configuration

<table>
<thead>
<tr>
<th>Observation</th>
<th>Agenda</th>
<th>Essential Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Day Four</strong></td>
<td>Patricians v. Plebeians</td>
<td><strong>What will I learn?</strong> What were the characteristics of the Roman Republic and how did they change over time? <strong>How will I learn it?</strong> Assume the roles of patricians and plebeians. <strong>How will I use it?</strong> 1) Describe the founding of the Roman Republic. 2) Compare and contrast the rights and powers of patricians and plebeians during various phases of the Roman Republic. 3) Describe how the government of the Roman Republic became more democratic over time. <strong>How will I know I learned it?</strong> Summarize the lasting significance of the ideas and organization of the Roman Republic.</td>
</tr>
<tr>
<td>April 13, 2015</td>
<td>Homework: Journaling Topic #25</td>
<td></td>
</tr>
<tr>
<td><strong>Day Five</strong></td>
<td>Patricians v. Plebeians</td>
<td><strong>What will I learn?</strong> What were the characteristics of the Roman Republic and how did they change over time? <strong>How will I learn it?</strong> Assume the roles of patricians and plebeians. <strong>How will I use it?</strong> 1) Describe the founding of the Roman Republic. 2) Compare and contrast the rights and powers of patricians and plebeians during various phases of the Roman Republic. 3) Describe how the government of the Roman Republic became more democratic over time. <strong>How will I know I learned it?</strong> Summarize the lasting significance of the ideas and organization of the Roman Republic.</td>
</tr>
<tr>
<td>April 14, 2015</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Day one.* During the first day of classroom observations, Mrs. Compton reviewed key concepts and topics related to the ancient Greece unit previously covered for four weeks of class time. After reviewing the seven characteristics of a civilization with her class, Mrs. Compton relates the characteristics to the Fine Arts Museum field trip they were going to take in a couple days, as a means to make connections within and across the units of their social studies curriculum.

The review of key concepts and topics began as students were instructed to have specific texts and completed assignments available on their desk. Through teacher-led instruction, students discussed the big ideas behind a number of topics: Greek geography, connections between geography and economic development, the rise of Greek democracy,
key terms related to early government, and notable leaders like King Phillip and Alexander the Great.

During the discussion of these concepts, Mrs. Compton reminded students of some of the class activities that supported the application of this new knowledge. One specifically related to the connections between geography and economic development of ancient Greece. In this activity, Mrs. Compton had separated the whole class into several small groups, where she assigned them a specific region of Greece. They were to investigate the major agricultural or industrial trades related to each region and present to the class a song. During her review of this activity, she started to sing the lyrics to one of the songs students created to the tune of *Row, Row, Row Your Boat*. “Sail sail sail your boat, down the Grecian bay. Trading goods to obtain food, from the colony” (Teachers’ Curriculum Institute, 2011a). The students replied with great interest and engagement when Mrs. Compton reminded them of these classroom experiences. Students showed excitement in recounting these memories in quiet conversation, but then the bell rang to end their class period, and after being dismissed they hummed the tune as they walked out the classroom door. Using music and rhyme were evidently effective methods that assisted Mrs. Compton’s gifted students in recalling prior knowledge.

*Day two.* Accompanying the first day of classroom observations, Mrs. Compton continued the review of major concepts and topics related to the ancient Greece unit, with the intention to facilitate a unit assessment prior to their spring break the following week. Prior to the review, Mrs. Compton devoted time in the class period to cover the logistics of the fine arts museum field trip, planned for the following school day. During this discussion she covered the expectations of behavior and museum etiquette, directions for
where they should report at the beginning and end of the school day, the daily schedule of activities, student bus and museum group assignments, and lunch arrangements.

Following the preparations for the field trip, Mrs. Compton transitioned instruction to the review of major concepts related to ancient Greece in preparation for a unit assessment scheduled for later in the week. Piggybacking off of her review the day prior, she reviewed the legacies of a collection of notable leaders of ancient Greek literature, history, and culture: Archimedes, Herodotus, Thucydides, Hippocrates, Pythagoras, Euclid, Hypatia, Aristarchus, Hipparchus, Ptolemy, and Aristotle. During this review, she expanded student understanding by connecting these Greek figures to other disciplines of the social studies, as well as mathematics, science, and literature.

Day three. On the third day of classroom observations, students had the opportunity to travel to the regional fine arts museum and take a tour of the facility with a museum docent, highlighting several areas in which artifacts were displayed that connected with the sixth grade Ancient Civilizations curriculum. This field trip was developed in collaboration between the fine arts museum and the Seaside school district.

Students were separated into small groups of six to eight students, while they accompanied the museum docent and a team teacher or parent chaperone. During this museum tour, students discussed in depth the visual and historical connections between the artifacts and the knowledge learned during their Ancient Civilizations classes. The docent played the role of a discussion facilitator, leading students to analyze the primary source individually and collaboratively.

The docent would ask students questions and really give them clues as to the answers. She wouldn’t lead them or prompt them. In my group, there
were students who were eagerly able to answer what she was asking. For instance, the characteristics of civilization were referenced before we went but there was no alluding to what they were the day of. So, the docent would introduce an artifact. ‘What sorts of characteristics do you see?’ Then she would say, ‘well, how does that show you that this is a characteristic?’ They were able to express what they were seeing the connection of, what on that artifact or what they were seeing on that piece of art that was referencing that. (Mrs. Compton, personal communication, March 26, 2015)

To support this verbal analysis with the docent, students completed a guidebook by writing responses, sketching interpretations of some of the artifacts, and conclusively reflecting about their experiences in the museum. The docents were trained to facilitate this special tour session through a series of questions that would prompt student thinking, engagement, and discussion. In reflection, Mrs. Compton believed that the field trip provided meaningful learning experiences for her gifted students.

The nice part about the field trip was that it was specific to what they’ve learned and provided my students meaningful learning experiences. They could apply what they know so far and what they are learning to what was being said. The docent that I accompanied was very good at incorporating the actual material that we’re learning and asking questions and expecting answers. She didn’t let them go. She really involved them (Mrs. Compton, Interview, April 16, 2015).
During the post-observation interview, Mrs. Compton disclosed that she needed to complete several logistic type objectives in her classroom during the days that followed the field trip. During this time, students attended school for two additional days prior to the spring break holiday. Students partook in a unit assessment on ancient Greece and concluded their study of Greece with a class period of exploring and celebrating Greek art, drama, and other visual media. Mrs. Compton insisted that the last two days of observations should be completed after the spring break holiday.

*Day four.* Following the spring break holiday, Mrs. Compton began the next unit of study focusing on ancient Rome. Prior to the classroom observations pertaining to this unit of study, Mrs. Compton already covered some of the key topics related to the development of ancient Rome, its geographic area, and Roman religion. Mrs. Compton initiated the class with a brief review of some of the topics previously mentioned. The facilitation of this review was through quiet discussion in a small group setting, followed by a whole-class discussion (see Appendix Y).

After the discussion subsided, Mrs. Compton introduced the next concept that students would learn about in their study of the development of Roman government. Mrs. Compton utilized the SMART Board and Elmo document camera to display a Roman mosaic tile from the textbook. After the students analyzed the mosaic tile for its description of Roman life as a tradesman, Mrs. Compton explained the activity students would participate in small groups. The students seated at the center table of her classroom would represent the social group, Patricians. The students located at the outer tables of her classroom would represent the social group, Plebeians. While Patricians were
instructed to make decisions based on a number of tasks, the Plebeians would be required to follow those directions and create a mosaic tile using construction paper and scissors.

To better illustrate the questions that Patricians had to answer, in order to give direction to the Plebeians is located in the following table (see Table 9). These decisions were based on the interests of Patricians, and did not involve any influence from fellow Plebeian student participants.

**Table 9: Mrs. Compton’s Patricians v. Plebeians Activity Questions**

<table>
<thead>
<tr>
<th>Question concerning Mosaic Tile</th>
<th>Patricians’ Answers and Revisions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Shall the mosaic have 5, 7, or 10 colors?</td>
<td>7</td>
</tr>
<tr>
<td>2. Which of these colors shall be included: black, brown, gray, blue, green, purple, red, orange, white, yellow, or pink?</td>
<td>Blue, green, purple, red, white, yellow, and pink</td>
</tr>
<tr>
<td>3. Shall the Plebeians cut out: 300, 450, or 600 tiles for the mosaic?</td>
<td>300</td>
</tr>
<tr>
<td>4. Shall the Plebeians have 5, 10, or 15 minutes to cut out tiles?</td>
<td>15</td>
</tr>
</tbody>
</table>

While Plebeians got right to work on this task, many frantic to the very end, Patricians were instructed to rotate around the room and monitor the students during this task. Mrs. Compton also rotated around the room to ensure all students were engaged in this simulation activity. Abruptly five minutes into the task, Mrs. Compton paused the class as a means to give Plebeians time to reflection their work. A few Plebeians spoke in concern to the working conditions and pressure from Patricians. The discussion lead to a compromise between Patricians and Plebeians to revise the answers to the initial questions of the activity (See Table 9). Students were instructed to continue with their work.

After another five minutes of work completed by the Plebeians, who were far from completing the task, Mrs. Compton paused the activity again and revealed that
Plebeians weren’t supposed to finish the mosaic tile; that the meaning of this activity was to simulate the compromise between the two social groups of ancient Rome, very much like a republican government manages decisions in our world today. Mrs. Compton then shifted instruction to the Ancient Civilization textbook from *History Alive!* (Teachers’ Curriculum Institute, 2011a), where students read and discussed a section devoted a comparison between the ancient Roman republic government and the current United States government. Students discussed how the simulation allowed them to make many connections between the duties of the Patrician senate and Plebeian citizenship.

*Day five.* After Mrs. Compton recalled with students their study of the Patricians and Plebeians, the development of the Roman Republic, and other key concepts related to earlier topics, she asked students to determine in their small group who would be a representative of their group during the class period. While students decided on their representative, Mrs. Compton turned on and accessed a SMART Board lesson where she designed an informal way to check for student understanding from various SMART Board activities and games. She utilized activities such as a timeline sort and a vortex categorization game.

Once Mrs. Compton was sure that her students understood the concepts covered from previous class periods, she transitioned to newer material from the *History Alive!* textbook (Teachers’ Curriculum Institute, 2011a). Through whole class reading and discussion, Mrs. Compton modeled for her students how she would construct Cornell notes based on the content covered in the text. During this process, some students had additional questions that led to opportunities for independent study. One question was in relationship to the current census figures comparing the total United States population
and total population of the collective majority and minority groups. While she facilitated the textbook reading and note-taking with the rest of the class, she allowed this student to determine the answers he sought, as a way to make connections between the dynamics of Patricians v. Plebeians and the majority and minority groups of the United States. During the rest of the class period, Mrs. Compton gradually released the modeling of Cornell note-taking to where students collaboratively constructed notes for the class, to the individual completion of note taking by students. Mrs. Compton said that this method would be used throughout the school year, as a means of preparing students for more accelerated and challenging social studies coursework during their seventh and eighth grade experiences at the gifted magnet.

Ms. Heisman. Ms. Heisman taught sixth grade Ancient Civilizations for gifted students that are teamed inclusively within a larger mixed-ability middle school. While she taught some general education classes, she was assigned to a gifted and talented team of Classroom observations with Ms. Heisman spanned over a period of five school days, separated by a extended weekend between the third and fourth scheduled observation day. On the day scheduled to initiate the observation period, Ms. Heisman was wrapping a unit on ancient Greece where her students presented collaborative websites that they published. This was followed by four observation days where Ms. Heisman facilitated an in-depth study concerning the legacy and influence of Alexander the Great. The table below illustrates the objectives and board configuration presented in her classroom during the time during the week (see Table 10).
Table 10: Ms. Heisman’s Board Configuration.

<table>
<thead>
<tr>
<th>Observations</th>
<th>Standard/Objective</th>
<th>Target</th>
<th>Planner</th>
<th>Bell Ringer Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Day One</strong></td>
<td>Summarize the important achievement and contributions of ancient Greek civilization (SS.6.W.3.5)</td>
<td>I will be able to summarize the major cultural achievements of Athens.</td>
<td>Interactive Student Notebook Chapter 29 due by end of website presentations.</td>
<td>No bell ringer activity.</td>
</tr>
<tr>
<td>March 11, 2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Day Two</strong></td>
<td>Determine the impact of key figures from ancient Greece (SS.6.W.3.6)</td>
<td>I will be able to determine the impact of Alexander the Great.</td>
<td>Vocabulary Cards 30; Interactive Student Notebook (ISN) pages 209-210</td>
<td>Complete preview activity in ISN page 209.</td>
</tr>
<tr>
<td>March 12, 2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Day Three</strong></td>
<td>Determine the impact of key figures from ancient Greece. (SS.6.W.3.6)</td>
<td>I will be able to determine the impact of Alexander the Great.</td>
<td>Interactive Student Notebook pages 211-212</td>
<td>Response #9 - How is the Peloponnesian War related to Macedonia’s expansion?</td>
</tr>
<tr>
<td>March 13, 2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Day Four</strong></td>
<td>Determine the impact of key figures from ancient Greece (SS.6.W.3.6)</td>
<td>I will be able to determine the impact of Alexander the Great.</td>
<td>Interactive Student Notebook page 213</td>
<td>Response #10 - What were the main features of Alexander the Great’s plan to achieve his goals?</td>
</tr>
<tr>
<td>March 17, 2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Day Five</strong></td>
<td>Determine the impact of key figures from ancient Greece. (SS.6.W.3.6)</td>
<td>I will be able to determine the impact of Alexander the Great.</td>
<td>Alexander Medallions due next class</td>
<td>Complete the top portion of the “My Progress” handout.</td>
</tr>
<tr>
<td>March 18, 2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Day one.* During the first day of observations, Ms. Heisman’s students were in the middle of presenting information gathered from their small-group constructed websites using the Weebly website creator program. These websites were design and organized in various topics that coincided with the students’ Interactive Student Notebook note-taking activity, as well as the Chapter 29 text of *History Alive!* (Teachers’ Curriculum Institute, 2011a). In order to construct the website, students were grouped into groups of three and were given specific roles (e.g. website administrator, writer, and researcher) to equally split up the responsibilities of the in-class project. After the completion of the assignment,
Ms. Heisman required her students to complete a rubric that evaluated both themselves and their peers.

There were four groups of website presentations during the class period, devoting their websites to the topics of ancient Greek sculpture, drama, philosophy, and the origins of Olympic Games. Using the SMART Board, students navigated through each page of their website to articulately share the information they gathered from their research to the rest of the class, who were recording the information in their History Alive! Interactive Student Notebooks (ISN). Along with the website, students created a basic bibliography and quoted from the textbook. Students were also required to create a poster that contained more visuals, conceptual maps, and detailed answers to support the information that should be recorded in the ISN. Students were able to creatively make their websites interactive for other students through the addition of comment sections, video clips, student-made quizzes, and works cited pages.

*Day two.* To conclude the presentations from the first day of observations, Ms. Heisman initiated the class period with the completion of a rubric that students complete as a means to self-evaluate their contributions to the website project, as well as the contributions of their group partners. During this time, Ms. Heisman was able to conference one-on-one with a couple of the students who needed additional assistance with assignment completion and make-up work.

Shortly after all the rubrics were submitted, Ms. Heisman reviewed the board configuration in her classroom to connect students with a new objective and learning target for the next few school days. Transitioning to the presentation of new material, Ms. Heisman used the SMART Board and a pre-made *History Alive!* PowerPoint presentation
on Chapter 30 that focused on the legacy and influence of Alexander the Great. While the teacher discusses this new topic, students are recording specific information within their History Alive! Interactive Student Notebooks (ISN). Periodically, students were asked to read aloud sections of the textbook or what was present on the SMART Board screen (see Appendix S). Ms. Heisman facilitated additional discussion and provided greater insight regarding the text. After the discussion led students to a convenient and natural break in the lesson, Ms. Heisman directed students to complete the last section of their ISN until the bell rang. Students quietly collaborated with a neighbor while they completed this assignment.

Day three. Supporting the curriculum covered in the previous class period, Ms. Heisman constructed a bell ringer activity that students were required to answer during the first few minutes of class that reviewed a major concept that contributed to the legacy and influence of Alexander the Great. Students were able to recall and contribute greater understanding to the overarching concept of Alexander’s legacy (see Appendix Z).

The class period transitions to focus on a map of Alexander the Great’s empire, which was located in the students’ ISN where they were instructed to label the regions and waterways included in part to his empire and sketch the route of travel for Alexander’s army. Ms. Heisman guided students through the completion of the map by using a series of comprehension questions to gauge student understanding. Following the map activity, students continued covering sections of Chapter 30 in the History Alive! textbook (Teachers’ Curriculum Institute, 2011) devoted to the legacy and influence of Alexander the Great. After each section of the text, Ms. Heisman instructed her students to complete the coinciding section of their ISN. These moments of student independent
work were monitored as Ms. Heisman rotated around the classroom and kept track of time using a stopwatch on the SMART Board.

After the class finished learning the key concepts of the chapter concerning Alexander the Great’s legacy, Ms. Heisman transitioned the students to a critical thinking activity that used several tools (e.g. tokens and a spectrum chart) to determine their opinions concerning how successful Alexander the Great was in terms of leadership (see Appendix S). Before the tools were used, she asked the students to individually consider the critical thinking question on the board (see Table 11). After students constructed their answer, they took a token from the table and placed it on the spectrum tool to show where they believed Alexander was between successful and unsuccessful in his attempts to unite the empire. After all students shared their opinion, Ms. Heisman instructed them to share their opinions with their table mates and determine where the group would place a token to represent the groups’ collaborative opinion regarding Alexander’s success. During this interactive moment in the class period, Ms. Heisman rotated around each table and discussed with each group how they could use the information from the text to help support their answers for the class discussion. One student from every table volunteered to share their group’s answer, giving specific evidence to support their claim. Shortly after the completion of the first critical thinking question, the class period ended.
Table 11: Ms. Heisman’s Critical Thinking Questions regarding Alexander the Great

<table>
<thead>
<tr>
<th>Critical Thinking Questions</th>
<th>Supporting Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A</strong></td>
<td></td>
</tr>
</tbody>
</table>
| Alexander planned to spread Greek culture and ideas to the people he had conquered. How successful was this part of his plan for uniting the empire? | 1. Why do you think Alexander insisted that government officials and soldiers speak only Greek? Was this a good or bad idea? Why?  
2. How do you think non-Greeks felt about Greeks when they saw Greek styles in the cities Alexander founded? Do you think it gave them more respect or less respect for the Greeks? Why? |
| **B**                       |                       |
| Alexander planned to adopt the cultural practices of the people he had conquered. How successful was this part of his plan for uniting the empire? | 1. Why do you think Alexander wore Persian-style clothing? Was this a good or bad idea? Why?  
2. Why do you think Alexander encourages marriage between Macedonians and Persians? Was this a good or bad idea? Why? |

Day four. The fourth day of observations began where the class left off with the critical thinking questions concerning Alexander the Great’s level of success as a leader. Using pre-made critical thinking questions (see Table 11) from the History Alive! text, Ms. Heisman called on specific students to read the textbook sections related to the second critical question (see Table 11) concerning how successful Alexander the Great was as a leader of his empire. Students individually constructed answers for the critical thinking question and placed their token on the spectrum tool as an indicator of their answer. This was also completed collaboratively as a group, with the mentorship of Ms. Heisman, and each table presented their answers to the class.

Following the last critical thinking question, student volunteers read aloud the last section of the textbook chapter that was devoted to the fall of Alexander’s empire. Ms. Heisman used this section to segue to an additional opportunity for students to analyze a primary source document that connected to the empire’s demise. Focusing on soldier exhaustion and Alexander’s death, Ms. Heisman wanted to find a way to provide students multiple perspectives of this historical topic. She believed that the textbook portrayed Alexander in only a positive light by failing to describe the impact his leadership had in...
negative ways. In doing so, she selected a document from a related document-based question (DBQ) that illustrated the capture of Tyre, a city that marked a pivotal turning point in Alexander’s career (see Appendix S). The document highlighted the crucifixion of thousands of Tyrean civilians, the economic strangulation of the city’s resources, and the long-term impact of Alexander’s victory. Ms. Heisman guided her students through the process of identifying that this document was a primary source. She also read the document out loud to the class while the students read along with her since it was more challenging in comparison to their textbook.

As a means to conclude the class period, Ms. Heisman posted three comprehension questions that spurred students to discuss the complex issues related to the document. These questions were:

1. How did Alexander feel about Tyre’s ability to hold him off for seven months? How do you know?
2. What did you learn about Alexander from his decision to crucify 2,000 men?
3. How can you use this document to argue that Alexander was successful or unsuccessful as a leader?

The bell rang before students could finish the questions. Ms. Heisman intended to begin class the following day by finishing this task with her students.

*Day five.* After students were settled in their assigned seats, Ms. Heisman initiated the class period by finishing the remaining comprehension questions from the previous class period. This was not only a means of recalling prior knowledge for students, but it opened up a brief conversation about multiple perspectives in describing historical events. Students were intrigued that the textbook presented more of a one-sided story, promoting
the biased viewpoint that Alexander made no mistakes during his reign as the Emperor and was a great leader.

To culminate the chapter unit and allow students the ability to show evidence of learning in a creative and crafty way, Ms. Heisman transitioned to the processing activity with the class. The students were instructed to create three medallions that illustrate and describe in detail the different ways Alexander planned to build and unite his empire. For each medallion, students were required to draw a simple illustration, give a corresponding title that emulates the meaning of the illustration (e.g. Alexander the Conqueror, Alexander the Religious, Alexander the Tyrant), a caption for each medallion that explains this part of Alexander’s plan to build and unite his empire (see Appendix S).

While students worked on designing and creating these medallions, Ms. Heisman played videos from “Horrible Histories” that connected with Alexander the Great’s legacy and later background music to help keep specific students focused during this activity. Ms. Heisman moved around the classroom, providing any clarifications to the text and instructions for this activity. With the class period ending soon after, she instructed students to take the medallions home over the weekend and submit the finished product during the next class period.

Mrs. Tango. Mrs. Tango taught seventh grade Civics within a mixed ability setting at an engineering magnet middle school. Classroom observations with Mrs. Tango were based on a block schedule, or 90-minute class period. A week’s worth of curriculum and instruction were consolidated into three class periods in the midst of the school-wide standardized testing season. Also included in the board configuration are the students’
Marzano Learning Scales (2007) that aligned with the expectations of the school district’s Marzano pilot program (see Table 12).

Table 12: Mrs. Tango’s Board Configuration

<table>
<thead>
<tr>
<th>Observations</th>
<th>Day One</th>
<th>Day Two</th>
<th>Day Three</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Essential Question</strong></td>
<td>What are the outcomes of select supreme court cases? Why are these cases significant?</td>
<td>What are the forms of government? How do they compare with each other?</td>
<td>How is power distributed in different systems of government?</td>
</tr>
<tr>
<td><strong>Learning Goal</strong></td>
<td>Students can recognize how several U.S. supreme court cases have had an impact on society.</td>
<td>Students can identify different forms of government, analyze scenarios describing forms of government, and apply their understanding of the forms of government.</td>
<td>Students can define and compare/contrast different systems of government.</td>
</tr>
<tr>
<td><strong>Vocabulary</strong></td>
<td>Judicial review, landmark</td>
<td>Direct democracy, representative democracy, socialism, communism, monarchy, oligarchy, autocracy</td>
<td>Federal, confederal, unitary, parliamentary government.</td>
</tr>
<tr>
<td><strong>Marzano Scales</strong></td>
<td>4 - I can take a position on which of the U.S. supreme court cases most impact today’s society. I can state what would have happened to our society of a U.S. supreme court case never happened. 3 - I can differentiate between the U.S. supreme court cases and how they have had an impact on society. 2 - I can describe the landmark U.S. supreme court cases. I can recognize the constitutional principles and/or rights in relation to the decisions. 1 - with help, I understand.</td>
<td>4 - I can argue which form of government is best in a modern, thriving society. 3 - I can predict a form of government based on a scenario. 2 - I can identify different forms of government based on its political philosophy or organizational structure. 1 - with help, I understand.</td>
<td>4 - I can invent a scenario for the various system of government. 3 - I can compare and contrast the organizational structures of systems of government. 2 - I can recognize examples of systems of government. I can define the key terms of this lesson. 1 - with help, I understand.</td>
</tr>
</tbody>
</table>

*Day one.* At the beginning of the first classroom observation, Mrs. Tango facilitated the last three of several student presentations on pivotal Supreme Court cases. The three observed were *Hazelwood v. Colemeyer, Bush v. Gore, and District of*
Columbia v. Heller. Each group (of 3 or 4 students) provided information that other students documented on a chart that provided opportunities for students to later compare and contrast between the court cases. Conclusive review questions were used to guide students to understand the impact and significance of these cases on a greater scale.

After the review questions were complete, the unit on the Supreme Court cases transitioned to a new unit of study regarding forms of government. Mrs. Tango began a brief discussion with her students on the definition of Anarchy, where student descriptions varied in imaginative visions or what the concept might look like, if it realistically developed. This led to a structured reading from iCivics curriculum that described nine different forms of government: Autocracy, Direct Democracy, Monarchy, Oligarchy, Representative Democracy, Communism, and Socialism (see Appendix U).

Using highlighters, students were instructed to mark the text where students believed a definition for each form of government existed. The markings were reviewed by the class before students were split into small groups to describe a specific form of government based on a written scenario Mrs. Tango provided the group. After the groups collaboratively determined which form of government their scenario described, they informally presented their findings to the class.

As a means to wrap up the 90-minute class period, Mrs. Tango instructed the students to finish filling out their handout in connection to the forms of government small group mark-the-text activity. She also let them know what the following class period would include: the creation of a skit based on a specific form of government that they will dramatize with an imaginative country. Specifically, students were instructed to brainstorm ideas for homework and come prepared to create their group skit in class. Mrs.
Tango provided students the last five minutes of the class period to collectively brainstorm with their group (see Appendix AA).

*Day two.* In anticipation of the dramatic skit that students were about to create, Mrs. Tango initiated the second classroom observation period by asking students to create an organizing concept map in their student binders. This concept map outlined the different forms of government for use during the small group skits. Mrs. Tango discussed with students the expectations for the skit and how the skits could improve since the last time students completed this type of activity. Once the students began constructing their skits, Mrs. Tango roamed from group to group, providing insight, feedback, and proximity to those groups who needed additional assistance. Students were able to access simple craft supplies to make props (e.g. construction paper, scotch tape, scissors, sting, markers, and pipe cleaners). With these supplies, students made hats, labels, table markers, and signs.

After the first forty minutes elapsed for group skit preparations, Mrs. Tango began to change the layout of the classroom to provide students their stage area in the front of the room. Six group performances took place, ranging from news channel interviews, voting booth scenes, and legislative hall debates. The audience was instructed to take their organizing concept map that they made the day prior and fill it out according to which skit represented which form of government. Students seemed to grasp concepts quickly and were finished within fifteen minutes. Noticing the quickness of students’ comprehension, Mrs. Tango instructed any students who finished early to begin working on organizing their student binders as she passed out graded work. This lasted until all students were finished with the concept map until the bell rang to dismiss the class.
Day three. Prior to the third class period observation, students partook in the Florida Standards Assessment for Writing. This assessment spanned more than a three-hour stretch of time at the beginning of the school day. The observation class period was the first of four that followed this assessment. Students entered the room exhausted, as Mrs. Tango described in her post-observation interview, and she decided quickly that she would adjust the lesson for the day to meet the needs of her students. By consolidating the lesson, while maintaining the integrity of the concepts covered, Mrs. Tango adapted the readings and comprehension questions so that her students would finish early and gain some time at the end of class to decompress from the hectic morning schedule.

Mrs. Tango began this consolidated lesson by introducing different systems of government, including federal, confederal, unitary, and parliamentary governments. While students read the short article defining and describing these systems, Mrs. Tango assisted students with complex vocabulary such as sovereign and autonomous. Students were instructed to take the official definition and reconstruct it to verbiage that they could more easily comprehend. As a class, students developed answers for the systems on a chart within their student binder, supporting them with illustrations that allowed students to be creative in understanding this new knowledge. Many student collaborate with others at their table to determine what their illustrations should resemble.

Once students completed the chart and the illustrations, Mrs. Tango decided to allow her students the rest of the class period to decompress, calmly socialize at their tables. Mrs. Tango passed out graded work, reviewed progress monitoring pre-test scores with individual students, and organized new seats for the next grading period. While this time was best suited for her students social-emotional needs, it was purposefully used by
Mrs. Tango to complete important logistics that allowed students the opportunity to interact with her without compromising instructional time.

**Ms. Parker.** Ms. Parker taught sixth grade Ancient Civilizations within a mixed ability setting at an engineering magnet middle school. Classroom observations with Ms. Parker were based on a block schedule; however the class period she selected was the only 45-minute class period of the school day. Five class periods were observed, also in the midst of the school-wide standardized testing season. Table 13 describes the board configuration for Ms. Parker’s class during the time of observations. Like Ms. Tango, Ms. Parker’s board configuration required the inclusion of the Marzano Learning Scales (2007) that aligned with the school district’s Marzano pilot program.

**Table 13:** Ms. Parker’s Board Configuration

<table>
<thead>
<tr>
<th>Observations</th>
<th>Essential Question</th>
<th>Objective</th>
<th>Agenda</th>
<th>Marzano Scales</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day One</td>
<td>How did the silk road promote an exchange of goods and ideas?</td>
<td>Explain the concept of cultural diffusion and identify the influences of different ancient cultures.</td>
<td>Turn in ISN Chapter 24 pp.168-171 using textbook pp.268-269. Map out ancient Greece pp.176-178. Greek Dinner Party: begin novels and plans</td>
<td>4 - I am able to take a position and successfully argue the costs and benefits of building the Great Wall. I can connect my 7 characteristics of a civilization to ancient China and provide concrete examples of each. 3 - I can explain using evidence, the costs and benefits of constructing the Great Wall and the overall contributions of ancient Greece. 2 - I understand our vocabulary: Mandate of Heaven, Confucianism, Daoism, Legalism, Feudalism, costs/benefits, Silk Road, Emperor Quinn, The Great Wall of China 1 - with help, I understand</td>
</tr>
</tbody>
</table>
Table 13 continued: Mrs. Parker’s Board Configuration

<table>
<thead>
<tr>
<th>Observations</th>
<th>Exxential Question</th>
<th>Objective</th>
<th>Agenda</th>
<th>Marzano Scales</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Day Two</strong></td>
<td>What are the major types of government that developed in the city-states of ancient Greece?</td>
<td>Explain the concept of cultural diffusion and identify the influences of different ancient cultures.</td>
<td>Turn in ISN Chapter 24 pp.168-171 using textbook pp.268-269. Map out ancient Greece pp.176-178. Greek Dinner Party: begin novels and plans</td>
<td>4 - I can explain the connection between ancient Greece and the democratic-republic that I am living in today. I am able to explain how these principles serve as a foundation for American constitutional democracy. 3 - I can identify the major types of government that developed in the city-states of ancient Greece and understand that these ideas led to the formation of democracy today. 2 - I can explain our vocabulary: Monarchy, Aristocrat, Oligarchy, tyranny, Democracy, citizen, assembly, city-state, Athens, Sparta, voting, polis. 1 - with help, I understand.</td>
</tr>
<tr>
<td><strong>Day Three</strong></td>
<td>What are the major types of government that developed in the city-states of ancient Greece?</td>
<td>Explain the concept of cultural diffusion and identify the influences of different ancient cultures.</td>
<td>Turn in Weebly permission slip. Take out assigned computer. Greek Dinner Party: begin novels, plans. Chapter 26: The roots of Democracy activity</td>
<td>4 - I can explain the connection between ancient Greece and the democratic-republic that I am living in today. I am able to explain how these principles serve as a foundation for American constitutional democracy. 3 - I can identify the major types of government that developed in the city-states of ancient Greece and understand that these ideas led to the formation of democracy today. 2 - I can explain our vocabulary: Monarchy, Aristocrat, Oligarchy, tyranny, Democracy, citizen, assembly, city-state, Athens, Sparta, voting, polis. 1 - with help, I understand.</td>
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**Table 13 continued:** Ms. Parker’s Board Configuration

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<th>Exxential Question</th>
<th>Objective</th>
<th>Agenda</th>
<th>Marzano Scales</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Day Four</strong></td>
<td>What were the major differences between Athens and Sparta?</td>
<td>Compare life in Athens and Sparta: Government, status of citizens, women, children, foreigners, and helots</td>
<td>Post-test challenge review. Discuss roles between Athens and Sparta. “Wife-Swap” clip Graphic.org Athens v. Sparta “You wouldn’t want to be a Spartan…” Ancient Civ-agram assignment/rubric</td>
<td>4 - I can take a position and describe why I think Athens or Sparta would be the ideal Greek city-state to live in and be a citizen of. 3 - I can compare the two Greek city-states of Athens and Sparta including the differences in: Government, status of citizens, women, children, foreigners, and helots. 2 - I can explain our vocabulary: Sparta, Athens, city-states, Democracy, Oligarchy, helots, agora, Council of Elders, Council of 500. 1 - with help I understand.</td>
</tr>
<tr>
<td><strong>Day Five</strong></td>
<td>What were the major differences between Athens and Sparta?</td>
<td>Compare life in Athens and Sparta: Government, status of citizens, women, children, foreigners, and helots</td>
<td>Post-test challenge review. Discuss roles between Athens and Sparta. “Wife-Swap” clip Graphic.org Athens v. Sparta “You wouldn’t want to be a Spartan…” Ancient Civ-agram assignment/rubric</td>
<td>4 - I can take a position and describe why I think Athens or Sparta would be the ideal Greek city-state to live in and be a citizen of. 3 - I can compare the two Greek city-states of Athens and Sparta including the differences in: Government, status of citizens, women, children, foreigners, and helots. 2 - I can explain our vocabulary: Sparta, Athens, city-states, Democracy, Oligarchy, helots, agora, Council of Elders, Council of 500. 1 - with help I understand.</td>
</tr>
</tbody>
</table>

*Day one.* At the beginning of the first observation period, Ms. Parker began instruction by guiding her students through a mapping activity of ancient Greece, which was located in the student’s *History Alive!* Interactive Student Notebook (ISN). To facilitate instruction, she modeled the labeling of surrounding waterways and landforms, as well as measuring distance using the scale. The teacher utilized supportive bulletin boards located in the front of the classroom that illustrated the Grecian region and
connections to previous units of study. Ms. Parker articulately infused skills that helped her students complete the mapping activity, which included careful spelling and pronunciation of complex vocabulary, labeling landmarks and waterways in different directions to best fit confined spaces, and the labeling regions that connected with previous units of study (e.g. Egypt, Asia, and Africa). Her students were engaged through the experience, as she kept close communication with the small groups throughout her instructional sequence. Communication strategies included checking in with their neighbor, the election of teaching assistants to help monitor other tables, and an open discussion with students as to how they could problem-solve through the identification process and various methods of distance measurement.

Transitioning to the next portion of the introduction lesson on ancient Greece, Ms. Parker instructed students to turn in their ISN to the preview activity, where two-part higher-order questions initiated student thinking about the overall objectives of the unit. Ms. Parker specifically explained to her students the importance of answering a two-part, or complex, question completely. Ms. Parker later explained in her post-observation interview that she believed her students could develop a greater awareness of how complex questions are organized as a means to improve upon the quality of their answers to said questions. In this case, she used a complex question as an example: Label the waterways of the Grecian region. How did the existing waterways influence Greek development? Her students weighed in with multiple answers.

This discussion of the geography and cultural development of ancient Greece was used as a structured segue for students to read a section of the textbook, while Ms. Parker verbally expressed the connections she made during the reading process. When complex
vocabulary appeared within the text, she often asked assistance of her students who spoke fluent Greek to pronounce and define the origin of the vocabulary terms. She used this opportunity to make reading relevant for her students who lived within a neighboring community close to the school that is nationally known for its Greek heritage. Ms. Parker and her students paused frequently to discuss the material and answer the comprehension questions found within their ISN.

To conclude the first observation period, Ms. Parker allowed students to go back to their maps and continue the labeling process, while she passed out permission slips for an activity they were going to begin in class within the next few weeks regarding the creation of Weebly websites (see Appendix BB).

Day two. For the entirety of the second observation period, Ms. Parker explored new strategies in teaching ancient civilizations content using simulation-based instruction that was differentiated to meet the needs of her students. As students entered the classroom, Ms. Parker instructed them to write three songs that sixth graders love on an index card. While students submitted their assignment to Ms. Parker so that she could look up some of the selections for her next activity, they were instructed to complete a page within their History Alive! Interactive Student Notebook that provided them time to recall the information about ancient Greece that they learned about in the previous class period. Some of the song selections included, *Centuries* by Fall Out Boy, *Sugar* by Maroon Five, *Radioactive* by Imagine Dragons, and *Shake It Off* by Taylor Swift.

Once all the students were finished with their beginning assignments, she initiated a simulation that used music and the role of authority to demonstrate the hierarchical organization of various forms of government: monarchy, democracy, oligarchy, and
tyranny. After asking students to come sit on the floor in the middle of the room, Ms. Parker oriented herself to the front of that area and positioned a couple chairs beside her. Ms. Parker simulated a monarchy by selected a student king and his son prince to the chairs in the front of the room. After a brief coronation took place, she asked the king to select one of the three songs she was able to download for the class. While the selected song played, Ms. Parker asked the king if she should make adjustments to the song by turning the volume up or down. As the song played for the class, she explained that the king died unexpectedly and the son prince would take the thrown. The new king quickly found that he could manipulate the simulation by changing the song and ordered that the volume should be increased. The other students reacted in various ways to the authoritative nature of the king and expressed discontent that their opinions were not considered in the decision-making. This reaction was exactly what Ms. Parker was seeking from her students.

Moving onto the other simulations, Ms. Parker changed the scenarios to fit the other forms of government. For instance, when covering Oligarchy, three student volunteers were selected and decided upon a specific song that many of the students liked. Another instance, when covering democracy, students voted as a class to determine the song selection. Before the class could get to Tyranny, the class period expired. Ms. Parker explained to her students that they would finish this simulation in class the following day.

_Day three._ As promised, the third observation period began with students sitting on the floor collectively in the middle of the room. Ms. Parker explained that with the use of Tyranny, this concept would be reintroduced in eighth grade to support the conflict
between the British and American colonists during the time of the Revolutionary War.

After Ms. Parker selected her student volunteers for this simulation, students made additional connections to other historical events that they previously studied, such as the French Revolution. One student inquisitively reacted toward the bias displayed by the monarch in her selection of the song, and Ms. Parker explicitly shared her interest in the student’s comment and her use of historical thinking terms.

While this simulation spanned the majority of two class periods, the students used their new developed understanding of the different forms of government within the culminating assignment for this lesson that was included within the ISN of their student binders. It reviewed the definitions for the different forms of government and an extended response which allowed students to evaluate and express connections between the ancient world and the current state of monarchial, oligarchical, and democratic governments today.

_Eday four_. There was a brief break between the third and fourth observation days due to state-regulated standardized testing for all middle schools. By the fourth observation, Ms. Parker had facilitated a number of lessons concerning the ancient Greek unit. As students entered the classroom, Ms. Parker assigned them to a table and gave them the role of an Athenian or a Spartan. One side of the room was designated for Athenians and the other side for Spartans. This was a lesson in comparing the two city-states through the portrayal of its citizens and cultural norms. After the students were seated and ready for class to begin, Ms. Parker posted a list on the projection screen that described how Athenians and Spartans should act (See Table 14). Ms. Parker explained
that it was their responsibility to follow these standards depending on the city-state that
they were assigned at the beginning of class.

Table 14: Ms. Parker’s Activity on How Athenians and Spartans Should Act

<table>
<thead>
<tr>
<th>How Athenians Should Act</th>
<th>How Spartans Should Act</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Show unity and loyalty. Creating a clever logo should help. (Consider Athenian history and its goddess.) Try to enter the classroom together. Make up a secret handshake.</td>
<td>1. Show unity by marching into the classroom together each day. Consider singing a chant or song as you march like ancient Spartans. Create a clever badge with a logo. Use the Greek letter ‘S’ (signal) often. Be assertive, act tough, and reflect a “no-nonsense” attitude.</td>
</tr>
<tr>
<td>2. Be courteous to all Greeks, regardless of city-state affiliation. Be especially supportive and helpful to other Athenians. If they are absent, encourage them to get well and return to the polis soon.</td>
<td>2. Be sharp! You members of an elite team. Be loud, but always be courteous to your teacher (who is your superior officer) and your archon (who is second in command). Address you superior officers militarily, such as “Sir-yes-sir” Remember, your honor comes from your military strength and discipline. Keep your appearance neat, your hair combed, and clothes pressed.</td>
</tr>
<tr>
<td>3. Give undivided loyalty and your best efforts to the archon and strategies for the day or activity. Remember you may be in a leadership position soon, and then the “Table will be turned.”</td>
<td>3. Be organized! Order is the way of the Spartan. Keep accurate records. Encourage all Spartans to be on time. Use military time at all times (e.g. 1400 hours = 2:00pm). Don’t be absent. Show your discipline by being in class on time each day of the simulation.</td>
</tr>
<tr>
<td>4. Be prepared to cheer for Athenian victories with a clever but quiet and respectful chant or song. Sing or say it each time some Athenian among you brings honor to the polis.</td>
<td>4. No complaining! Spartans never show pain or disappointment.</td>
</tr>
<tr>
<td>5. Be model students for your teacher who has worked so hard to plan and implement this simulation. Your cooperation with no doubt ensure a more successful and meaningful unit.</td>
<td>5. Cheer for Spartan victories in each phase and task. Make up a chant or poem to recite for the glory of Sparta. Perhaps recite the quote that is on Leonidas I’s monument acknowledging his bravery at Thermopylae: “Go tell Spartans, thou who passeth by, that here obedient to their law, we lie.”</td>
</tr>
</tbody>
</table>

To provide them with other examples of how culturally different Athenians and Spartans were, Ms. Parker showed a WIFE SWAP video from Learn360, an educator database that provides classroom appropriate videos, where actors simulated how a wife swap would take place. This satiric video showed a Spartan husband who had to take in an Athenian wife for a week, and vice versa. While the video played, students were very engaged in creative and academic-based brainstorming. Small groups determined their
roles within the assigned city-state and collaborated on how they would implement this into the rest of the class period. She allowed the brainstorming to continue through the last ten minutes of the class period. During her post-observation interview, Ms. Parker mentioned that many students appropriately continued following these guidelines within their other classes.

*Day five.* In support of the previous class periods comparison and contrast of the ancient city-states of Sparta and Athens, Ms. Parker began the class period by reading with her students an article she found on the internet titled, *Eight Reasons It Wasn’t Easy Being Spartan.* Using this literature as a jumping off point for more in-depth discussion of the content, Ms. Parker aligned the reasons with the content of the textbook. Discussion ranged from marital norms, military service, societal gender norms, education, to the roles of children. After students finished the article and discussion, they proceeded to enact their roles as Athenians and Spartans while completing a comparison chart of both city-states. As a way to support the information they gathered, Ms. Parker initiated one of her favorite verbal-based informal assessment exercises, called *Cast-Off.*

*Cast-Off,* as described earlier in the chapter concerning the adaption of instructional methods, is an activity that propels students to actively listen, gauge their opinions based on what other students share, and responds by supporting or disputing the previous student’s statement. It provides students with an avenue to practice public speaking, the organization of an opinion or argument, and pulling information from text and other sources to use as support for their statements. In this instance, Ms. Parker assigned this activity to small groups, so that students could collaborate on answers and help one another develop answers of greater quality and substance. Once one group stated
their opinion of a topic concerning Athens and Sparta, they would then “cast-off” the conversation to another group, who would then share their opinions by agreeing or disagreeing with the previous group (See Table 15). They engaged in this activity until the end of the class period. During her post-observation interview, Ms. Parker believed this provided her students the intense engagement, quick collaboration, and content-rich experiences necessary to prepare them for higher-level social studies classes in their future.

<table>
<thead>
<tr>
<th>OPINION/ARGUMENT</th>
<th>LINK</th>
<th>SUPPORTING EVIDENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>We agree/disagree…</td>
<td>Because…</td>
<td>Example from the text.</td>
</tr>
<tr>
<td>(Then cast off to another group)</td>
<td></td>
<td>(Then cast off to another group)</td>
</tr>
<tr>
<td>We agree/disagree… (paraphrase other group’s statement)</td>
<td>Because…</td>
<td>Example from the text.</td>
</tr>
</tbody>
</table>

**Conclusion**

In conclusion, this multiple case study examined how teachers tended the curricular-instructional gate in their middle level social studies classrooms. Several themes indicate that the curricular-instructional beliefs of teachers directly influence the decisions made when selecting curriculum, as well as when instruction is delivered for gifted students within their social studies classrooms. Teachers attentively tended the curricular-instructional gate by adapting existing curricular texts or selecting more appropriate and accelerated texts that provided greater opportunities for curricular depth. Participants also made decisions that determined the appropriateness of instructional methods for their gifted students through elements of complexity and challenge (e.g., higher-order thinking, problem-solving, research-based practices). Teachers showcased some of their curricular-instructional gatekeeping through classroom observations, giving
greater transparency to what instruction may look like for a social studies classroom of
gifted students.
CHAPTER FIVE
DISCUSSION AND CONCLUSIONS

Introduction

The final chapter of this multiple case study is dedicated to a thematic discussion of the findings described in chapter four, as well as conclusions that stem from researcher reflections, limitations of the study, and recommendations for future research.

Purpose of the Study

The rationale for selecting a study of curricular-instructional gatekeeping within the fields of middle level, social studies, and gifted education attended to a void within the extant literature. Scholars, like Van Tassel-Baska and Stambaugh (2006), called for greater attention toward researching the unique bonds between gifted and social studies, which were limited in connection to other subject areas (e.g., math, science). Furthermore, district programming and the availability of teacher participants provided ample data to illuminate in what ways teachers believed, prepared, adapted, and put in action various methods of differentiation for gifted learners within middle level social studies classrooms. By intersecting the fields of middle level, social studies, and gifted education, greater dialogue can guide these communities to recognize and unpack purposeful social studies curriculum and meaningful instructional methods for middle level gifted learners.

Student learning is greatly influenced by the quality of the curriculum and instructional methods. Therefore, the decisions teachers make directly affect thousands of
students they teach during a career in education. Each student has individual needs, academic strengths, and a zone of proximal development (Tolan, 1997; Vygotsky, 1978). Teachers, as curricular-instructional gatekeepers, actively influence how students interact with prior and new knowledge, as a means to reach their highest academic potential (Noddings, 2005). By the same token, teachers can take initiative with their own learning by increasing a knowledge base for making purposeful curricular and instructional decisions for their classroom and students (Levstik and Barton, 2011).

While curricular-instructional gatekeeping is powerful in theory, there is a lack of data revealing how teachers are making these curricular-instructional decisions in social studies gifted education settings. This study attempts to fill this void and illuminates the ways middle school teachers may tend the curricular-instructional gate for their social studies classrooms in gifted settings. More specifically, this study analyzed the ways teachers believed, prepared, adapted, and undertook differentiation of both curriculum and instructional efforts for gifted students.

**Research Questions**

Four central research questions guided this multiple case study focused on the curricular and instructional gatekeeping of social studies teacher of gifted students:

1. What do middle school social studies teachers believe they should do to teach gifted students?
2. In what ways do middle school social studies teacher prepare and adapt curriculum for their gifted students?
3. In what ways do middle school social studies teachers prepare and adapt instruction for their gifted students?

4. What does instruction look like for gifted students in their middle school social studies classrooms?

**Thematic Discussion**

A number of themes are discussed below to reflect the findings of this study. These themes include the role of the curricular-instructional gatekeeper for the gifted, the implementation of state and district agendas, keeping students at the forefront of curricular-instructional preparation and enactment. Best practices for gifted social studies and the increased inclusion and frequency of gifted initiatives in social studies education are also addressed.

**Characteristics of the Curricular-Instructional Gatekeeper for Gifted Students**

The term *gatekeeping* is derived from Thornton’s (1991) theoretical framework, where an educator takes on a primary structuring role in his or her social studies classroom and constructs curriculum that is provided in the classroom through chosen instructional practices. As a gatekeeper of curriculum and instruction, the teacher makes decisions concerning what content, sequence, and instructional strategies should be employed, organizing and shaping and their students’ learning experiences.

According to Thornton (1991; 2005), curricular-instructional gatekeeping is inevitable. This decision-making process often implies that teachers consistently make
both conscious decisions as well as act on unexamined assumptions and conventions about the curriculum and pedagogy (Thornton, 2014). Furthermore, differentiation of curriculum and instruction is inevitably part of what teachers consciously do when they tend the curricular-instructional gate. Teachers who actively gate-keep by differentiating curriculum and instruction inherently provided individualized learning for their students.

While studying how middle grades social studies teachers tended the curricular-instructional gate in the best interests of their gifted students, participants identified with this theoretical framework and contributed these connections regarding characteristics of a gatekeeping middle school social studies teacher of gifted students. This section of the discussion reveals how participants included a number of characteristics when describing their gatekeeping experiences (see Figure 2). When these characteristics were synergic, participants believed their curricular-instructional decisions were in the best interests of their students.

**Figure 2.** Characteristics of a Gatekeeping Middle School Social Studies Teacher of Gifted Students
Attentive gatekeeping and its impact on pedagogical design. When engaged in the process of gatekeeping, participants found that they were more attentive to the curricular-instructional decisions they made. Participants also expressed that they were more attentive to the impact their decisions made on learning experiences of their students. The opposite can be said for moments in which participants believed as though they were not actively gatekeeping. During these moments, participants believed they did not keep their students at the forefront of their instructional attention and decision-making. There were moments where participants made instinctive decisions that were connected with the following: requests of administration, district personnel, or in response to school-based logistical decisions.

In reflection, participants self-examined the gatekeeping decisions they made in the planning, modification, and enactment of curriculum and instruction. Participants indicated they made better decisions when they kept three priorities in mind when tending the curricular-instructional gate: their students best interests, and the selection of best practices for both (grades 6-8) social studies and (K-12) gifted education (see Table 16). Therefore, the essence of the best gatekeeping occurs when students and best practices are considered when teachers make curricular-instructional decisions.

Present-mindedness and gatekeeping. Participants shared that a delicate balance existed within the exact moment of gatekeeping where teachers needed to determine whether they would stick with the original teacher-created lesson plans or pre-scripted instructional directions given by district-selected curriculum tools, or if they needed to modify for students at a moment’s notice. While the gatekeeper’s planned pedagogy in both (grades 6-8) social studies and (K-12) gifted education fulfilled the needs of students,
there were variables that influenced the classroom environment, thereby affecting how
the planned pedagogy was enacted as instruction. When engaged in this moment,
participants made curricular-instructional decisions to modify instructional practices,
thereby affecting the quality of instruction within the classroom.

Sometimes these instinctive decisions affected student experiences by extending
classroom learning, condensing curriculum and instruction, or adjusting the sequence of
instructional methods. All participants shared experiences where they made in-the-
moment decisions due to the level of engagement observed from students, while others
adapted curriculum or instructional practices to fluctuate the roles of the teacher from
direct instruction to more of a facilitator role. While these in-the-moment decisions were
in reaction to events that unfolded in the classroom environment, there was always a
sense that teachers proactively anticipated change and were able to rely on best practices
of both (grades 6-8) social studies and (K-12) gifted best practices and individual gifted
student needs to guide their decision-making. Their ability to remain flexible,
accountable, and positive throughout the class periods made this topic even more
interesting to include as a way to characterize a gatekeeping teacher.

**Teacher confidence and its effect on gatekeeping.** According to participants,
the confidence to make good gatekeeping decisions affects the types of decisions they
make in the classroom. Participants believed that their confidence to provide meaningful
(grades 6-8) social studies and (K-12) gifted curriculum and instruction for their students
derived from both teaching experiences and teaching environments. Prior knowledge of
effective methods for middle level education, teaching social studies content and best
practices, and understanding the academic and social-emotional needs of gifted students
affected participant confidence. Supportive teaching colleagues, effective administrative and content-area leadership, and positive communication with parents/students also supported the growth and continuity of participants’ self-efficacy.

There were instances where participants did not feel confident in their abilities to provide meaningful curriculum and instruction for their gifted students consistently. This lack of confidence directly connected to the lack of teacher experience and content knowledge. For instance, Mrs. Tango recently changed school sites and grade levels. Previously, she had extensive experience teaching 8th grade U.S. History for gifted students. She moved to a 7th grade Civics position and was unfamiliar with many of the course objectives. The 7th grade Civics class is also involved in extensive assessment authorized by the state of Florida. With this in mind, she was hesitant to construct a new curriculum that did not cover what official curriculum directed. She was careful to differentiate only when she was comfortable with both the content and the instructional strategies the curriculum suggested she use.

Mrs. Compton, Ms. Heisman, and Ms. Parker shared previous experiences where they remembered feeling less confident about their abilities to make purposeful curricular-instructional decisions that placed gifted students at the forefront of their lesson planning and enactment. But these instances were sporadic and were often in response to school-based agendas and administrative recommendations that took greater precedence at the time.

**Preparedness and its impact on gatekeeping.** One significant component participants connected to the characteristics of a gatekeeping teacher was the feeling of preparedness when lesson planning and initiating instruction. Instructional preparedness
was an important characteristic of a gatekeeping teacher for many of the participants of this study. When participants believed they were less prepared, they reported that they felt less confident in their abilities to facilitate quality middle level social studies and gifted instruction in the classroom. In this sense, instructional preparedness directly affected the confidence of participants during and after they made curricular-instructional decisions for their students. Much of these determinations were made either prior to or immediately following instruction through reflective moments within the interview process.

Preparedness was also reflective of the prior instructional experiences and curricular background knowledge that teachers engaged and utilized to make such decisions in the middle school social studies classroom setting for gifted students. Many of the curricular-instructional decisions participants made in preparation of pedagogy were based on how students received materials, classroom activities, and products in previous years. Participants also considered the academic strengths, areas of improvement, and individual interests of gifted students currently enrolled in their social studies classes.

Participants also shared that preparedness affected the quality of their in-the-moment decisions during the class period. If participants did not believe they were prepared beforehand, it directly affected the quality and frequency of their decision making during instructional time. The more prepared teacher participants felt, the less they felt they needed to revise what instruction took place in the classroom setting. The less prepared teacher participants felt, the more those beliefs impacted the quality of instruction. Participants shared that as a result of this lack of preparation, participants felt
obligated to make changes to the curricular topics and instructional methods used for
gifted students.

**Gatekeeping with innovation and adaption in mind.** Participants believed they
considered the utilization of innovative middle level social studies curricular tools,
supplemental materials that served gifted populations, instructional methods aligning to
best practices for middle level gifted and social studies (see Table 16), and classroom
activities supporting when adapting the official curriculum or instructional methods for
middle level social studies for gifted learners. Often, participants suggested that they
were attentive to connect students’ interests with the curriculum. For example,
participants used analogies to help create greater contextual understanding for the time
period or cultural norms of a civilization. Mr. Gaines discussed how he used the analogy
the development of a child when discussing how colonial Americans developed from
depending upon England in the early 17th century to seeking independence from Great
Britain in 1776. Mr. Gaines shared that when using this analogy, his gifted students could
easily connect the US History content to how they were beginning to seek independence
as an early adolescent from their parents.

Participants also used supplemental curriculum resources to make learning more
relevant to their gifted students. The use of podcasts, vodcasts, and WebQuests gave
students an opportunity to access personal mobile technologies to digitally access
curriculum. Students also accessed programs paid through the gifted department budget
to organize research completed for classroom projects and academic competitions. Online
programs, like Noodletools, were utilized by students to keep track of and format their
research sources into MLA format for the National History Day academic competition.
But, participants share that they (and their teacher colleagues at the gifted magnet and other programs) also used Noodletools for smaller-scale classroom projects throughout the school year.

Participants also built in connections with students when designing student products. Ms. Parker used a screen shot of a Facebook or Instagram profile when designing an in-class activity where students were instructed to fill out all the different parts of the profile in relation to an important figure or event included within their study of the Ancient Greek civilization. Ms. Heisman gave students the opportunity to develop their own website as a means to discuss the impact Ancient Greece made on the modern world.

**Balancing agendas in gatekeeping.** Participants believed that while tending the curricular-instructional gate, they often contended with the balancing of different agendas for fulfill requests from multiple stakeholders. Stakeholders included initiatives promoted through the Florida Department of Education, a variety of school district departments (e.g., social studies specialists, gifted specialists, middle level administration, and various staff developers from these departments), and school-based administrative initiatives. Another stakeholder strongly considered while teacher participants make curricular-instructional decisions were their gifted students. And while their gifted students were at the forefront of many of the decisions made by participants, they still believed they were obligated to fulfill district and state requests. A more-detailed discussion of how participants balanced agendas is outlined within the next two sections of implications for this study. More specifically, the sections describe how gatekeepers balance the demands
of district and state agendas versus making decisions based on the needs of gifted students within a middle level social studies setting.

**Working for the Taj: Implementation of State and District Agendas**

Two critical responsibilities of any teacher professional is to cover the required curriculum that state education departments develop, partnered with implementing instructional methods that school districts employ as best practices. While these official curriculum and instructional standards provide teachers a foundation for how they should fulfill the duties of a school district employee for their particular discipline and grade level, they are presented space and flexibility as to how they can prepare, adapt, and enact the curriculum and instruction in their classrooms and for their diverse student populations.

Participants within this study frequently expressed how pressures from the state department of education and school districts to follow initiatives constricted that space and flexibility. While nicknaming the large and abundant school district office as the “Taj Mahal,” participants dealt with district-originated pressures during the 2014-2015 school year more than in years past. This section of the discussion describes how teachers were pressured to modify and adapt the ways of work in their classroom to meet the needs of their state and school districts’ agendas.

**Marzano pilot programming.** An initiative that impacted participants’ curricular-instructional decision-making during the time of this study was the inclusion of a model developed by Robert J. Marzano (2007) that encourages the engagement of students through the display and incorporation of a four-tiered scale system which
monitors student progress through a unit of study. At the first tier of the scale, students show that they understand concepts with assistance from their teacher or peers. At the second tier of the scale, students achieve the “target scale” or supportive knowledge needed to attain tier three and/or four. The third tier of the scale exemplifies the state curricular standard/benchmark that students must achieve within their studies. The fourth tier of the scale exceeds the benchmark, providing students who need greater acceleration or depth of knowledge.

The model also includes measures for administration to monitor teacher growth and development through an evaluation system. The overall evaluation score for teachers includes informal and formal classroom observations and student assessment progress monitoring results that are collected from student standardized unit assessments.

Two of the six participants were located at schools that piloted the program for the school district. In comparison to the other participants, their instructional time was compromised significantly by additional pre and post-assessment at the beginning and end of every grading period, as well as time carved into the instructional sequences for additional review of main concepts prior to post-testing. This additional assessment was in addition to the Florida Standardized Assessments, and the 7th grade Civics End of Course Assessment at the end of the school year. Both teachers expressed frustration with the pilot in terms of instructional time constraints. However, they believed that the Marzano learning scales portion of the pilot program provided students with meaningful connections to the units of study. Both participants reported that they saw student accountability increase, while students remained honest about which tier exemplified their level of understanding.
After the majority of the data were collected, the two participants reported that the school district office planned to implement the model for the following school year in all schools. Due to the adoption of recent laws, the Florida legislature ruled that school districts should restrict to a degree the amount of assessment for all grade levels, which impacted the planned implementation and frequency of student progress monitoring assessments with the Marzano model. The absence of Marzano student progress monitoring assessments could provide teachers some relief in terms of constraints to their instructional time. Participants shared that the Marzano student learning scales will be utilized district wide. As described earlier, the Marzano student learning scales provide an opportunity for teachers to gauge student progress in the classroom by engaging students to reflect and self-monitor their own understanding of content-based state curriculum standards. So, the district implementation of learning scales is not directly dependent upon the progress monitoring assessments.

**Standardized assessments.** According to the participants for this study, the expansion and increase of standardized assessment came from two initiatives. The first was through the Marzano pilot program described in the previous section. The other initiative was through state legislation passed in 2010 that required school districts to develop and implement midterms and final exams in all K-12 classes. In response to the second initiative, the Seaside School District’s social studies department gathered teachers from all grade levels to develop standardized assessments for their social studies classes.

During the data collection process for this study, the Florida legislature ruled that the original legislative push for greater levels of progress monitoring should not be left up
to the state. It was ruled that school districts should decide the frequency and grade level selections where students should be monitored with mid-term and final exams. In reaction to the revised legislation, Seaside School District required all middle grade social studies classes to include a final exam, whether teachers used the final exams developed by the district or created their own. Seaside School District is still determining how these progress-monitoring measures should be revised and applied at their school sites for the following school year. Initiated during the 2014-2015 school year, the Florida Standards Assessment (FSA) will continue to be the state’s annual method of measuring student progress, which typically occurs in the middle of the spring semester.

**Curriculum maps and pacing guides.** The Seaside School District’s social studies department developed curriculum maps and pacing guides to support teachers to stay on track with where they should be during the school year prior to the midterm and final exam time periods allotted by the school district. This initiative was implemented to support and encourage teachers to be more mindful of standardized assessments and better manage the coverage of their curriculum.

The curriculum guides were welcomed by all participants, as they provided greater insight into the standards, benchmarks, and resources that teachers could utilize in partnership with the district-selected textbook. However, the pacing guides were not warmly welcomed by some participants (e.g., Mr. Gaines, Ms. Lindy, Mrs. Compton, Mrs. Tango, Ms. Parker). These participants explained that in order to keep up with the pacing guide, many of the curriculum options and instructional methods they typically used to differentiate learning for gifted students were compromised by the length of time the pacing guides directed teachers to cover specific topics or units of study. The same
can be said for the curriculum selection process. As a result, teachers believed that they were frequently unable to design, prepare, and implement lessons that offered accelerated and in-depth curriculum options, complex and challenging instructional methods, and creative student products.

However, Mrs. Compton, Ms. Heisman, Mrs. Tango, and Ms. Parker remained optimistic as they implemented the new pacing guides into their classroom ways of work. Other participants (e.g., Mr. Gaines, Ms. Lindy) expressed very little support for the pacing guides, progressed at their own pace within the curriculum, and took into consideration that they would need to still prepare their student for the district-developed midterm and final exams. District content area supervisors were aware that teachers shared mixed reactions to the recently enforced district initiatives. Collectively, participants expressed that their curricular-instructional decisions were consistently influenced as a result of all these newly adopted district initiatives.

**Working for the Students: Trusting a Teacher’s Instincts**

Participants kept their students at the forefront of their decisions when tending the curricular-instructional gate, all the while keeping the curricular standards of the Florida Department of Education and the local school district in perspective (see Figure 3). Serving the best interests of the school district and students became a balancing act for all the participants of this study. As one participant described it, “Happy district, steady employment. Happy students, happy teacher” (Mrs. Tango, Interview, March 10, 2015). There was a collective belief among all participants that the district-selected social studies curriculum did not provide differentiation for gifted student populations.
All participants drew from their own expertise in gifted education by instinctively differentiating according to their students’ academic needs. For example, Mr. Gaines utilized primary source documents and collegiate-level literature for his 8th grade Advance US History gifted students. Mrs. Compton found ways to infuse more document-based questioning and primary source analysis for her 6th grade Ancient Civilizations gifted students through the use of supplemental curriculum units. Ms. Lindy and Mrs. Tango used thinking models and other various organizers to show evidence of gifted students’ higher-order questioning on complex historical topics. Ms. Heisman and Ms. Parker designed and implemented classroom assignments that engaged gifted students in technology-based learning, increased critical thinking, and encouraging individual creativity for their 6th grade Ancient Civilizations classes.

This section of the discussion highlights the ways in which participants prioritized their students’ needs before administrative or district-related requirements when making curricular-instructional decisions. All participants made curricular-instructional decisions...
for their gifted students that sufficiently met or exceeded the expectations from the school district. However, some participants (e.g., Mr. Gaines, Ms. Lindy, Mrs. Compton, Mrs. Tango, Ms. Parker) made decisions that altered the pace, sequence, or content of units within the official social studies curriculum and suggested instructional practices promoted by the school district. By doing so, they were altering the district-wide expectations in order to comply with the expectations of special school-based programming through the gifted magnets or STEM academy requirements. The alterations described earlier in the findings of this study included supportive teaming and interdisciplinary opportunities, as well as purposeful curriculum planning and instructional delivery. Participants also made alterations to the official curriculum and suggested instructional practices by accommodating for diverse gifted student populations, meeting the social-emotional needs of gifted through social studies content and practice, and encouraged students to develop an academic voice and scholarly disposition.

The power of teacher teaming. The common phrase “It takes a village to raise a child” suggests that a large collection of individuals are influential to the development of a child. In this case, participants disclosed that a huge part in the overall success of their gifted students did not stem from just one classroom, but from a number of classrooms that the gifted student frequented during their middle level education. Participants believed that each core curriculum teacher played an intricate role in the development of gifted students’ academic life. Therefore, it would be fitting to suggest that in many cases it takes a team of dedicated teachers to influence a child’s educational progress, not just one.
This level of support is not possible unless teachers take the necessary steps to collaborate, learn from, and support one another. Several instances within the data collected illuminated how participants believed that their gifted students were provided higher quality educational experiences because students were enrolled in homogeneous settings, with gifted certified teachers who taught all the same students throughout the day. These programming options for gifted magnet schools and the STEM academy motivated teacher participants to collaborate frequently with their colleagues in other subject areas (e.g., Math, Science, English Language Arts, Spanish, and Literature) to develop interdisciplinary curriculum and instructional practices for all the gifted classrooms. Participants also worked across grade levels with other social studies teachers who taught within the gifted magnets and other special programming options to discuss best practices for specifically gifted social studies.

**Purposeful curriculum planning and instructional delivery.** It is important to give purpose to why teachers plan and deliver specific curriculum and instruction. The majority of the participants identified themselves as a “social studies teacher of gifted students” rather than a “gifted teacher of social studies content” (All Participants, Personal Communication, September 5, 2015). These descriptions are not synonymous, per se. They highlight a prioritization of where and for what purpose curricular-instructional gatekeeping occurs. For instance, social studies teachers refer to describing the content in which the teacher employs, the gifted students refer to how the content is put in practice through pedagogy that meets the needs of special student populations, which is in this case gifted students. It is this identification that supports why many of the participants found purpose behind the differentiation of official social studies
curriculum and instructional strategies to meet the needs of gifted students. In many cases, participants were gatekeeping the needs of their gifted students in ways that often inherently affected the gatekeeping of their curriculum and instructional methods.

The adaption of social studies curricula for gifted learners centers around students’ use of high-order thinking and analytical skills, supporting conclusions made within the extant literature of VanTassel-Baska and Stambaugh (2006) and Sandling (2011). All participants planned for, adapted, and facilitated social studies curricula that involved active learning and critical inquiry. Participants utilized specific thinking models and tools with the goal to enhance student understanding of important concepts and units of study. Overarching concepts and themes were embedded into the dialogue between teacher and students as a means to bind together different social studies topics and encourage high-level inquiry (e.g., leadership, systems, models, change, causality). Similar methods related to social studies (i.e., Ambitious Teaching) have also explored the use of big ideas or thematic learning (Grant, 2005; Grant & Gradwell, 2009). Extensive primary source materials were easily accessible and frequently used in participant classrooms to develop students’ analytic thinking and problem-solving skills. Multicultural views and multiple perspectives were often used to nurture a broader understanding of significant historical events and eras. Technology was used to aid in many ways: the exposition of multiple perspectives and current issues, the assessment of primary and secondary source credibility, and opportunities to develop and craft creative products using 21st century learning tools.

**Social-emotional development and the social studies.** Often the social-emotional connections gifted students make with any curriculum are hidden or implicit in
nature. These connections were not always apparent to teacher participants during the instructional sequence of a class period. At times it was difficult for teacher participants to observe the non-verbal cues and thought processes of students, unless teachers explicitly requested students to share personal connections with social studies content or skill sets that promoted historical inquiry. Furthermore, participants disclosed that conversations (e.g., professional development, professional learning cadres) rarely took place among their teaching colleagues as to how teachers can socially and emotionally connect students to the social studies content.

When the participant interviews segued to these social-emotional connections to social studies, participants immediately made connections with cited instructional modifications they made for this purpose. These modifications took the form of social development of gifted middle level students. Specific methods included the use of homework or project deadline extension, one-on-one conferencing with students, moderated small group work, and extended time on classroom assignments. Participants also recognized that connections could exist between skill sets commonly practiced in social studies classrooms and social-emotional development through the development of students’ social skills and measures of responsibility, timeliness, respect for themselves and others, etc.

Participants connected social studies and the social-emotional development of gifted adolescents when describing the development of students’ academic skills. The majority of participants said that their gifted students were challenged when forming conclusions related to historical issues. Especially in sixth grade, participants found that many students did not understand what it meant to develop a thesis statement or
conclusion based on historical inquiry. All of the teacher participants used a variety of summative products for evaluating students (e.g., Document-Based Question essays, in-class debates, Socratic seminars, National History Day projects). Participants described that teachers instructed students to complete activities where students could nurture their academic voice and that these skills were practiced frequently. As a result, participants said that the majority of their students showed growth in their academic confidence and ability to verbalize and articulate opinions and arguments by the end of the school year.

Mr. Gaines, Ms. Lindy, Mrs. Compton, Ms. Heisman, and Mrs. Tango were able to share some of the more abstract connections between social studies and the social-emotional development of gifted. With the addition of some probing questions, participants began to identify with examples from their classroom experiences. Mrs. Tango claimed that the civics curriculum (Florida Joint Center for Citizenship, 2014) promoted the ideas of civility and democratic ideals. As described in the findings, Mrs. Tango referred to a gifted student who reflected upon a story used to illustrate the hardships of students in Sierra Leone and the role of UNICEF. “He answered by explaining how UNICEF should take a more direct role in helping child hunger. He said that he always sees commercials of kids who are hungry and it bothers him that some of our citizens do not support helping other people” (Mrs. Tango, Interview, March 10, 2015). Participants who taught ancient civilizations and U.S. history identified that the inclusion of influential leaders and figures in history as providing students insight into the characteristics of a good leader. Mrs. Compton, Ms. Heisman, and Mr. Gaines shared instances where the social studies content focused on specific individuals in history (e.g., George Washington, Andrew Jackson, Abraham Lincoln, Alexander the Great, Emperor
Qin) that were influential because of their leadership skills. By talking about the characteristics of leadership, participants were able to make direct and conceptual connections between the social studies content and gifted social-emotional topics.

These findings help distinguish that there are thematic contextual intersections with abstractedness in gifted curriculum and instruction that are often times implicit within the overarching themes presented within social studies content. The conversation within the academic community has only recently acknowledged its existence (VanTassel-Baska & Stambaugh, 2006). Very little research is available to discuss the connection between social-emotional needs of gifted in collaboration with social studies content and practice in an academic setting among scholars and practicing teachers (e.g., Sheffield & Duplass, 2009). With the recent educational reform supporting civics, it is time to expand this conversation to include practicing teachers.

**Implementation of Best Practices for Middle School Social Studies for Gifted Students**

The results of this multiple case study research help define and describe what best practices exist for gifted social studies curriculum and instruction. The results of this study also add to the extant theoretical discussion examining how social studies and gifted education intersect in curriculum and instruction (e.g., Avery & Chandler, 2011; Sandling, 2011). Some may contend that the strategies included in this section are already considered best practices of social studies in general (e.g., problem-solving, critical thinking, creative thinking, and research strategies). While this is a relevant argument, there are levels of rigor and relevance that one should consider when determining the
frequency and depth a teacher can utilize strategies specifically for gifted students (Sandling, 2011). This was seen in the curricular-instructional decisions made by participants in this study (see Table 16).

There are ways of incorporating best practices in gifted education (e.g., higher ordering reasoning, conceptual-oriented curricula, multicultural/global emphasis, interdisciplinary connections, technology integration, inquiry-based learning) to differentiate for gifted learners in a social studies setting (VanTassel-Baska & Stambaugh, 2006). Keeping the special needs of gifted children in mind, a range of backgrounds, academic strengths, and subject interests should be considered when planning instruction.

Table 16: Participants’ Gatekeeping Practices regarding Middle Grades Social Studies and Gifted Education

<table>
<thead>
<tr>
<th>Social Studies (6-8) Education (e.g., Grant, 2005; Harris, 2015; Libresco, 2014; Sandling, 2011; Sheffield, 2009)</th>
<th>Gifted (K-12) Education (e.g., Avery &amp; Chandler, 2011; Van Tassel-Baska &amp; Stambaugh, 2006)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Problem-solving</td>
<td>• Homogeneous grouping with gifted peers</td>
</tr>
<tr>
<td>• Critical thinking</td>
<td>• Higher-order reasoning</td>
</tr>
<tr>
<td>• Creative thinking</td>
<td>• Conceptual-oriented curriculum</td>
</tr>
<tr>
<td>• Research skills</td>
<td>• Multicultural/global emphasis</td>
</tr>
<tr>
<td>• Depth and frequency</td>
<td>• Interdisciplinary connections</td>
</tr>
<tr>
<td>• Thematic approaches</td>
<td>• Technology integration</td>
</tr>
<tr>
<td>• Multiple perspectives</td>
<td>• Inquiry-based learning</td>
</tr>
<tr>
<td>• Multicultural approaches</td>
<td></td>
</tr>
<tr>
<td>• 21st Century Technologies</td>
<td></td>
</tr>
</tbody>
</table>

During participant interviews, participants discussed various methods by which they prepared and adapted both curriculum and instruction for gifted students. All participants agreed that consideration of both social studies and gifted best practices, as well as the students’ individual needs, would result in meaningful methods of differentiation. In this case, a figure was developed to illustrate this generalizable way
through which teachers can visualize the process of differentiating social studies for gifted learners (see Figure 4).

Pertaining to specific best practices for gifted education for social studies content, problem-solving strategies were used by all participants to bring about greater awareness and creative thinking about how to solve problems of the past, relating their impact and significance to current events and issues, and allowed students to draw conclusions based on their own research, primary source analysis, and inquiry-based learning. Critical thinking strategies were employed when students engaged in problem-solving activities during class. In doing so, students inquired past the textbook, pulling evidence from a variety of supplemental texts (e.g., primary sources, statistics and census data, reliable secondary sources). This connects critical thinking and problem solving with student research. Laptops, tablets, and SMART Board technologies were used to provide students access to several archival databases (e.g., National Archives, Library of Congress).

Figure 4: Elements of Curricular-Instructional Gatekeeping for Middle Grades Social Studies Teachers of Gifted Students

Curricular-Instructional Methods of Differentiation for Gifted Social Studies

As Tomlinson’s research suggested, teachers can differentiate in a number of ways. Tomlinson’s (2001) model for differentiation includes the content, processes, products, and environments that can be adapted to meet the needs of gifted learners. The
findings of this study support Tomlinson’s research. Participants differentiated social studies content, instructional practices, student products, and the classroom environment in lesson planning, lesson adaption, and lesson enactment.

While Tomlinson’s model was used to determine if and when participants differentiated curriculum and instruction, VanTassel-Baska’s (2011) model for differentiation determined how participants differentiated curriculum and instruction in greater detail. Through gatekeeping measures, participants disclosed how they modified the existing official curriculum and suggested instructional practices through measures of acceleration, complexity, depth, challenge, and creativity. This section of the discussion will describe how participants utilized these measures for middle level social studies.

Participants linked acceleration and depth to the available curriculum options selected by the district’s social studies department. Sixth grade Ancient Civilizations and eighth grade Advanced U.S. History classes were provided a textbook curriculum (Teachers’ Curriculum Institute, 2011a; 2011b), while seventh grade Civics was comprised from a number of resources found within a binder of curriculum that is provided to each Civics teacher (Florida Joint Center for Citizenship, 2014). Depending on the school and special programming, participants were provided additional resources from the district’s gifted department or participants found supplemental curriculum resources that helped boost acceleration for their gifted classes. Gifted curriculum units were issued to gifted magnet schools to help promote both acceleration and depth to the course curriculum. Supplemental curriculum resources were used for a variety of differentiation purposes, however the official social studies textbooks for middle grades did not contain options for implementing differentiation for gifted populations. The
provision of curricular differentiation for gifted middle level learners was pursued by the actions of district curriculum specialists who provided supplemental materials and social studies teachers of gifted who heeded the call to provide their students with rigorous and relevant curriculum options.

Participants linked challenge and complexity to pedagogy. As the findings discuss, participants utilized methods, like Paul’s Reasoning Model and the Cast-Off Socratic seminar activity, to increase the depth and frequency in which student questioned, inquired, and analyzed historical topics. It was a priority for participants to provide students rigor and relevant learning experiences in relationship with social studies content. With that said, many of the participants decided to break away from the pre-scripted instructional methods found within the district-selected curriculum textbooks and teaching materials. Ms. Parker’s Cast-Off activity was one example of how a teacher designed and facilitated a Socratic seminar-based activity that helped her students critically think about key concepts and complex problems related to ancient civilizations, and also helped them practice the skills to articulate their opinions and conclusions in comparison to their peers. Participants utilized methods, like Cast-Off, that increased student exposure and interaction with higher-order questioning, critical thinking and problem-solving.

Accompanying the curricular and pedagogical differentiation methods for gifted social studies, participants believed that they utilized creativity when they adapted activities and/or products that showed evidence of student learning. These products were often designed by the teacher or adapted from the suggested culminating activities found in the district-selected curriculum textbook and teaching materials. Verbal-based products
included class wide debates, alternative forms of Socratic seminars, PowerPoint and Prezi presentations, and historic role-play. Written-based products included a variety of RAFT activities, DBQ essays, and other visual-oriented and artistic representations of historical topics. Technology-powered products allowed students to gain access and craft digital-powered projects such as PowerPoint and Prezi presentations, iMovie documentaries, Weebly websites, avatar-generated videos, and the historic replications of fake Instagram and Facebook profile posts. Lastly, hands-on products allowed students to design and develop projects that included three-dimensional models, dramatic simulations, and musical interpretations of historical topics. Mr. Gaines, Ms. Lindy, Ms. Heisman, Mrs. Tango, and Ms. Parker said that they enjoyed differentiating the design and implementation of creative projects and in-class activities. It was this freedom to design and create pedagogy that gave participants opportunities to personalize instruction for their students. These participants believed they could see the greatest amount of interaction between the curriculum, the student, and the teacher, more so than any other time in the classroom during this multiple case study.

Implications

Given there were few empirical studies that similarly intersect the fields of gifted and middle level social studies education, it became clear to expand dialogue, literature, and advocacy regarding the overlap present among these fields of education. Accompanying this call, several implications were identified in relationship to this multiple case study. Among these implications include how increased standardized assessment influenced some teachers to dedicate less time to differentiated methods, as
participants decided to follow or waver from the curricular pacing guides. Some participants also questioned what types of differentiation were meaningful for their gifted students, since participants were unsure how an ideal gifted social studies classroom should function in practice.

Other implications include how some participants mistook differentiated practices with the models of individualized or personalized instruction. For example, other participants dedicated much attention and spirited support for differentiated practices. They shared the difficulties involved in planning, adapting and enacting a differentiated curriculum, as well as feeling less than satisfied with the level of differentiation they were able to enact in the classroom setting. Participants found that differentiation came naturally when they infused social studies concepts and topics with methods that employed skills in literacy, writing, and research efforts (e.g., National History Day, RAFTs, DBQs).

However, there were other implications that furthered the call for intersection between the fields of middle level social studies and gifted education. Participants believed that much of their training in middle level gifted social studies came from their gifted endorsements or graduate studies in gifted education and not in social studies methodology. Participants believed there was much to be desired from purposeful professional development, as well as appropriate inclusion of gifted initiatives within the mandatory teacher education undergraduate coursework.
Lack of Confidence Stifles Purposeful Instruction

One thought-provoking implication from this study was the power of teachers’ pedagogical confidence. All participants believed that they were confident in their abilities to provide students with purposeful curriculum and instruction. While tending the curricular-instructional gate, “teachers who exhibit confidence are more willing to take risks and to continually improve upon their practices” (Ms. Parker, Interview, June 4, 2015). When participants reflected on times when they overcame educational worries and other pedagogical challenges, such as struggling student engagement or inaccessibility to curriculum tools, participants believed confidence influenced the quality of curricular-instructional decisions they made for gifted students. Much of what participants credited to their educational confidence was an inquisitiveness to continue their professional education, content knowledge of their subject area, and comfort level in facilitating instructional strategies with comfort and ease. This can be seen for both participants who facilitated a more stringent pre-scripted curriculum, like 7th grade Civics, or 6th and 8th grade history-based curriculum that allowed for greater flexibility and variety with differentiation.

Participants shared that a number of variables enhanced their level of confidence in making decisions concerning the preparation, adaption, and enactment of curriculum and instruction. Participants believed that support they received from teaching colleagues and administration influenced teacher confidence, especially when sharing innovative pedagogical ideas with complex content and 21st century skills. Confidence increased when participants were able to deliver lessons unencumbered by various distractions. Confidence also increased when school administration or district officials recognized
when teacher participants went above and beyond their job description and pedagogical duties. Other factors that enhanced teacher confidence were the level of student engagement and learning in the classroom, as well as assessment data and statistical trends that measured student progress.

Participants disclosed that time constraints due to curriculum pacing guides stifled their confidence in the classroom. Time constraints impacted the quality and outcome of lesson design, adaption, and enactment. Due to these constraints, participants believed that they were unable to differentiate the curriculum and instructional methods consistently or as frequently. Upon reflection, participants confirmed that the individualization of both curriculum and instruction fell behind in comparison to decisions made in order to fulfill school district and state agendas. The central influence for increased time constraints were the implementation of curriculum pacing guides designed by the district curriculum offices.

Participants shared how other barriers kept them from finding opportunities to adapt curriculum to reflect creativity and the depth of curriculum coverage. Barriers include hardships with collaborating with teacher peers, lack of social studies professional development that promoted differentiation, and lack of school district support for nurturing/reinstating the original design for gifted magnet programming. For example, Mr. Gaines found he lost confidence in his pedagogical abilities due to lack of collaborative planning with his middle level social studies colleagues at other school locations who also taught gifted students. There were no opportunities for Mr. Gaines to observe other gifted social studies classrooms. Ms. Lindy was denied the ability to attend a desired gifted training by her school administrator. Ms. Lindy’s administrator requested
that Ms. Lindy attend a general education session based on the basic instructional concept of inquiry. Other participants (e.g., Mr. Gaines, Ms. Lindy, Mrs. Compton) within gifted magnets witnessed when appropriate programs were not supported and developed as they were originally designed. All participants lost confidence when the educational system imposed standards that did not align with gifted models for education, and when their efforts to provide best practices to gifted students were not encouraged due to state legislation and district initiatives.

Participants experienced various levels of teacher confidence within their careers. Moments that resonated with them most were memories of losing control or making mistakes in the classroom. As a result, they always learned from those errors in order to discover better ways of work. For some participants, teaching gifted student populations was at first a humbling prospect. “I didn’t like the fact that they might know more than me. Once I got over that, I was able to use their strengths to make the classroom culture stronger and collectively smarter” (Ms. Lindy, Interview, February 13, 2015). These moments of struggle were partnered with moments of innovative and successful teaching experiences. “When my door shuts, I’m left alone with my student. When the momentum builds, that’s when the academic magic happens” (Mr. Gaines, Interview, June 17, 2015).

**There’s No Time: Curriculum Pacing and Depth of Student Learning**

Participants in this study shared that the school district’s inclusion of curriculum pacing impacted the quality of their teaching. With the adoption of content-specific pacing guides, participants shared that they were rushed to cover the included topics that were connected with subject area standards. Participants believed that in recent years
their instructional time was not affected as much before the implementation of district pacing. Participants disclosed that at times they were swayed to consolidate the depth of curriculum coverage in order to stay on pace with the pacing guide. Furthermore, participants were unable to frequently modify the curriculum to provide opportunities where students could go more in depth with topics that related to current events, complex issues, global issues, or multicultural connections with the official curriculum.

For example, Mrs. Tango was persuaded to constrict the time she spent with her students during an examination of key U.S. Supreme Court cases within her Civics classroom. She was given two days to cover a pre-scripted lesson with different texts and a graphic organizer. Students were asked to organize summaries and the historical significance about each court case. However, if she would have designed a lesson that better met the creativity of her student’s academic strengths, she said “I would have provided students access to primary sources, creative options for showing me what new information they learned, and the opportunity to take their time with new knowledge. I feel so rushed with the pre-scripted pacing guide” (Mrs. Tango, Interview, March 10, 2015).

Prior to the implementation of pacing guides, social studies middle school teachers modified curriculum and instructional methods without much constriction. The school district’s social studies department required teachers to provide pre and post course assessment scores and utilize district-created unit assessments throughout the school year. Also, social studies teachers used a curriculum map to guide instructional planning. The curriculum map provided ample ideas for how teachers could address unit benchmarks with best practices, supplemental curriculum, and alternative methods for
evaluating student learning. When the curriculum maps merged with the recent addition of stricter pacing guides, the ways in which the curriculum maps were used changed due to the time constraints provided by the district office to establish progress monitoring assessments throughout the year and midterm/final examinations that the end of every semester. Participants acknowledged that the implementation of pacing guides was in line with the recent increases in standardized assessment and implementation of school-based piloting programs, which they considered authoritative. Many of the participants were obligated to meet the needs of the pacing guides, as they were concerned that falling behind would result in a negative effect on their annual teacher evaluation and in their professional reputation with administration and district personnel.

**Where is the Academic Ceiling for Gifted Social Studies?**

As gifted learners have greatly varying interests and abilities, participants believed that the only meaningful limit governing student achievement might be students’ zone of proximal development (Vygotsky, 1978). Participants believed that students could continue to push their development through the completion of complex tasks, higher-order thinking, and nurturing creativity in various ways. While this was supported in theory (e.g., Sandling, 2011; Van Tassel-Baska & Stambaugh, 2006), these best practices varied slightly from participant to participant. Some participants favored course construction using a holistic approach looking at cross cultural examples of political systems, social systems, settlement patterns, and religious ideology. Valuing deeper cognitive thinking would fit nicely with the existing gifted curriculum developed by the College of William and Mary (1998; 2011). Using overarching concepts, like the themes
employed at the gifted magnets, teachers could make stronger and more purposeful connections between their curriculum and the modern world (Grant, 2005; Grant & Gradwell, 2009; Libresco, 2014).

Participants favored the use of personalized learning through the use of differentiation of curriculum, where students worked creatively and critically in different avenues to master content area benchmarks. This included more student-led activities, while the teacher fulfilled more of a facilitating role in the classroom. The standing social studies curriculum materials included many well-respected creative lessons that would be appropriate for mixed ability settings and students who acquire materials that support lower to middle academic levels. But the standing curriculum materials did not provide teachers access to materials that were consistently creative and interactive. When participants modified the standing curriculum materials, they employed greater use of problem solving, collaborative project-based learning, and one-on-one teacher guidance and mentorship.

While these descriptions begin to pave the way for a clearer definition or description for what middle level gifted social studies should look like (i.e., conceptual/thematic units, complex and creative thinking, 21st century learning tools, extensive research practices, and opportunities for personalized learning), breadth and research are needed to examine a larger and multiple samples. With these efforts, we can begin to continue determining how we can envision the ideal gifted social studies setting in the middle grades classroom.
**Differentiation versus Individualized and Personalized Learning**

Alongside the request to develop a clearer description of what ideal middle grades gifted social studies classrooms should look like, there is also a call for a clearer description of differentiation. In several instances, the term differentiation was confusing for participants, who envisioned differentiation as closely related to the concept of personalized learning. While differentiation and personalized learning are not synonymous, their desired outcome is one in the same: to provide students with specialized curriculum and instruction that encourages higher levels of student engagement and the inclusivity of varied best practices based on the needs of diverse students populations (Basye, 2014). During the beginning semi-structured interview, greater clarification was given to define differentiation in comparison and contrast with individualized or personalized learning. In order to determine how teachers modified curriculum and instruction for this study, specific attention was paid during the data collection and analysis processes to determine the ways in which curriculum and instruction were planned, adapted, facilitated, and disseminated.

Participants consistently utilized differentiation to modify and adapt curriculum and instruction to meet the needs of their gifted students. As defined in the review of the related literature in Chapter Two, differentiation is a type of learning where teachers determined the curricular selection and instructional methods that were tailored to meet the needs, preferences, and goals of gifted students. Differentiation can be described as a teacher’s awareness of and active response by adapting the official curriculum to make subject matter, learning process, assessment measures, and the classroom environment
purposeful for diverse learners through use of acceleration, challenge, depth, complexity, creativity, and/or abstractedness.

In addition to the standing definitions and descriptions for differentiation, this study drew attention specifically toward providing differentiation within a middle grade social studies classroom setting. The participants used what resources and approaches they saw fit to tend the curricular-instructional gate and meet the needs of their students overarching goals. Therefore, a teacher’s differentiated approach to curriculum and instructional decision-making provides appropriate levels of challenge for all students without requiring separate lesson plans for each student or reducing the level of curriculum rigor of some students.

In order to better understand the contrasts between differentiation, individualized, and personalized methodologies, it is important to outline how they are divergent. An individualized approach to curricular-instructional decision-making focuses more on meeting the unique pace of individual students’ highest academic potential, all the while maintaining similar academic goals for the collective student population (Basye, 2014). In many ways, differentiation is “how” teachers modify curriculum and instruction, while individualization is “when” teachers provide additional modifications for selected students. Individualized instruction is described as students who are collectively working through the same curricular materials, but progressing through said curriculum at different rates of instructional coverage to meet each student’s needs.

In relationship to this study, some participants misinterpreted individualized instruction for differentiation. They were under the impression that differentiation referred to the individualization of instruction for each student. Some participants were
also unfamiliar with options for differentiating curriculum and instruction between
different class periods or small group arrangements. Furthermore, some participants were
not aware that they were already differentiating in their classroom through the curricular-
instructional decisions they employed regularly. These confusions lend to the call by
other scholars (e.g., Callahan et. al, 2015; Delisle, 2014; Heacox, 2012) that greater
clarification is needed to distinguish the purpose and impact of differentiation in
comparison with individualized instructional methods. With a broader understanding of
its purpose and impact, differentiation can continue to be a tool that social studies
teachers use when making curricular-instructional decisions.

Some participants also often misunderstood personalized learning as a form of
individualized learning without connections to differentiation. However, this learning
model refers to learning that is specifically tailored to the interests and preferences of
students of various learning styles, coupled with an individualized pace to meet the
student’s needs (Basye, 2014). Teachers can make a variety of decisions to modify all
aspects of curricular-instructional decision-making to modify academic goals, curriculum,
content, assessment, or environment, thereby constructing a true personalized learning
experience for every student. Students become the active participant in the creation of
learning activities based on their academic strengths and interests. In this sense, education
is not something that happens to the learner; rather learning is something that occurs as a
result of what the learner is doing. Successful personalized learning occurs when students
have learned how to independently pursue and engage with new ideas, opinions, and new
knowledge. Therefore, personalized learning is more about how learning is facilitated,
rather than how it is disseminated. In the case of this study, some of the participants were
confused as to the meaning of differentiation. Therefore, this provides clarity needed in order for continued discussion of the differences between the aforementioned methods of adapting curriculum and instruction for all learners.

**Differentiation: Meaningful in Theory, Difficult in Application**

While differentiation is the method in which participants of this study modified and adapted curriculum and instruction for gifted student populations, it does not go without saying that the process in which differentiation was achieved in a classroom setting was not ideal in all cases. Differentiation in theory is meaningful, rigorous, and relevant for gifted populations. However, it was incredibly difficult for participants to apply in many cases. All participants shared several concerns for how the curricular-instructional decisions of others, namely district and school-based administrators, impacted how frequently and purposefully teachers differentiated in their classrooms.

One conflict that affected teachers’ use of differentiation was the lack of time teachers were allowed to both plan and enact differentiated curriculum and instructional practices. Cuban (2009; 2012) supported this concern regarding a decrease in customized standards and an increase in standardized assessment. Wilcox and Angelis (2008; 2009) argued that giving teachers the flexibility to plan instruction is considered a best practice in middle school education. In support of the existing literature, participants’ instructional time decreased in response to impediments that decreased the frequency of curricular-instructional creativity and flexibility. These impediments include the initiation of district-initiated piloting programs, increased standardized assessment and progress monitoring measures, and the requests made by district officials to follow curriculum
maps and pacing guides. It is important to note that in addition to these administrative-based impediments, some teacher participants experienced a transition from one grade level to another and one social studies discipline to another. For example, two participants transitioned from teaching 8th grade Advanced US History to 6th grade Ancient Civilizations and 7th grade Civics during the course of this study. These changes in grade level and curriculum reduced the participants’ time to consistently differentiate, because they were familiarizing themselves with a curriculum throughout the school year, and as noted earlier, aligning with the Marzano pilot program.

Another conflict that affected teachers’ use of differentiation was the lack of diverse resources for some social studies grade levels. Mrs. Tango, who taught the 7th grade Civics, shared her disappointment that the curriculum selected by the school district office leaves much desire for differentiation. To follow the curriculum, as it is pedagogically written for teachers to follow by script, facilitates learning with a one-size-fits-all approach in mind. While Mrs. Tango didn’t rely solely on the official curriculum assigned to her course, she believed that it could cater to a more diverse student population with the implementation of a looser pacing guide and the inclusion of activities that were differentiated for her gifted students.

As Delisle (2015) indicates, making the claim that differentiation is difficult to apply in a classroom setting does not imply that it is impossible. In many cases, participants frequently and purposefully applied differentiated methods. Participants shared that there were many supportive measures in place that made differentiation possible. One measure that provided immense support to participants was the implementation of homogeneous gifted class settings in gifted magnet or team
classrooms. Klimis and VanTassell-Baska (2013) and Missett et al. (2014) also make this assertion for facilitating inclusively populated gifted settings at the middle school level. Without the implementation of inclusively-populated gifted class scheduling required of gifted magnet middle schools and in the team-based scheduling of mixed ability middle schools, participants believed that they might not have been able to implement as much differentiation as they could for gifted students. Participants believed that they were able to differentiate more in homogeneous class settings. Without these arrangements, participants believed they might not be able to differentiate for gifted students as frequently.

**Exploring Bonds between Social Studies, Literacy, Writing, and Research**

Participants consistently coupled social studies curriculum by bonding content to the application of literacy, writing, and research skills. Participants favored selecting curriculum that provided literary rigor and relevance for their students. Participants also favored instructional practices and methods in which they measured student learning that provoked students to critically research and record their ideas in creative ways. As a conclusion of this study, there seems to be in-depth connections between the field of social studies and its partnered subject areas of English/Language Arts and the infusion of research-based strategies.

One noticeable example of the bond between gifted and social studies curriculum is the utilization of document-based questions (DBQs) within the social studies classroom. The structured teacher instructions provided by the DBQ Project promoted various methods in which teachers could facilitate in-depth document analysis, guide students to
plan their writing, and provide students with an array of ways in which their conclusive thoughts, arguments, and use of supportive evidence could be evaluated. Some participants utilized documents found within this curriculum in a more simplistic sense to support student exposure of multiple perspectives and address complex issues within the textbook curriculum. No matter the extent to which this curriculum was utilized, the DBQ Project curriculum gave teachers access to differentiated materials who had little time to make pre-determined modifications.

Another way in which participants utilized literacy, writing, and research with social studies was with the facilitation of National History Day (NHD) projects for both 6th grade students who attended a gifted magnet school and 8th grade students enrolled in Advanced U.S. History. During the process of completing this long-term history project, students conducted in-depth historical research on a topic that connected to NHD’s annual theme and with their own personal interests. Many students extensively read and examined historical databases, scholarly works, and primary source documentation. Using the research gathered from their investigative efforts, students then planned, designed, and constructed a project that required extensive writing practice and the assemblage of said research in a way that illuminated the topic in context and in connection with NHD’s annual theme. Students also partook in a school-based competition, where a small selection of projects then progressed to the district, state, and national level of competition. It is important to note that the National History Day competition begins at 6th grade, and there is no existing elementary-based academic competition that compares with or prepares students to complete a project of this
magnitude. Therefore it is important for incoming 6\textsuperscript{th} graders to begin research-based historical inquiry prior to their middle school enrollment.

**Offer Professional Development and Teachers Will Come**

As described earlier within the findings of this study, participants believed that their requests for purposeful social studies professional development did not meet their expectations. Treatments of the curricular and instructional needs of gifted students have been reserved for gifted trainings that occur commonly once a year and were developed with the needs of district-wide initiatives in mind. These initiatives focused on promoting higher-order thinking and historical inquiry, support of literacy and writing skills, and the equal pacing of curriculum coverage across schools and special programs. While these initiatives support best practices for gifted students, they do not provide the in-depth and continuous dialogue concerning a variety of core disciplines. Typically these trainings consist of best practices that focus on the infusion of literacy, writing, or conceptual and thematic connections across curriculums within a subject area. Attempts to provide social studies specific training for middle level educators of gifted have been acknowledged by district curriculum specialists, and training has been offered for advanced level social studies, specifically for Advanced U.S. History teachers at the 8\textsuperscript{th} grade level. However, there is a lack of training for modifying 6\textsuperscript{th} and 7\textsuperscript{th} grade social studies curriculum for a more academically advanced student population.

Teachers are not accustomed to addressing and modifying content and instruction for highly intellectual students. Trainings dedicated to methods of differentiating for gifted populations are infrequently offered for general education teachers. Instead,
trainings continue to focus on increasing the rigor and relevance for struggling readers and thinkers. Within the regional area in which this study was completed, there could be a triadic connection between the scarcity of scholarship and research concerning gifted social studies, the absence of gifted initiatives in teacher education curriculum, and the deficiency of gifted trainings for core subject areas like social studies. These are topics for further examination among the academic community and will be explored later regarding future research possibilities.

What exists from the findings of this study are participant requests to engage in conversation with colleagues who also teach similar social studies content and grade levels. Many of the participants within this study favor communication with colleagues that teach gifted students within the same subject area or grade level. However, such communication is typically found through email or during their free time outside the classroom or training locations. While these forms of communication provide teachers outlets to share best practices, as well as gain advice and guidance from their peers, it does not equate to the same quality conversations that may occur face-to-face. There have been instance within the confines of gifted professional development when teachers are given time to collaborate, lesson plan, and discuss the implementation of new initiatives. Yet, this time is simply not enough to make a significant change in participant beliefs about what a gifted social studies classroom should look like and how their ways of work could be considered as exemplary of a highly effective gifted classroom setting. In order to better describe best practices for gifted social studies, teachers must have an outlet for in-depth conversation.
Participants also desire opportunities to observe other gifted social studies classrooms to better understand what an ideal environment should look like and how other teachers enact purposeful social studies curriculum and instruction in the presence of gifted students. Many participants (e.g., Mr. Gaines, Ms. Lindy, Mrs. Compton, Ms. Parker) inferred how curricular and instructional practices should look like in their classrooms, yet something remains unfulfilled in that endeavor. Interpreting how practices should look and observing them first hand are two completely different experiences for a practicing teacher. The participants of this study believed that opportunities to explore a variety of gifted social studies classrooms could bridge this disconnect. The act of watching instruction unfold cannot be matched in the text of a manuscript or the words of a professional developer. Even within the context of this study, teachers cannot fully comprehend the events that occurred in the classroom observations or the actions of participants described within the script of this study. Therefore, teachers need to see other teachers teach. Teachers need to witness the art of learning unfold for gifted students in order to deeply consider exploring new possibilities. These methods of professional development can engage teachers in a way that can motivate them to reflect upon their own instruction and make more purposeful curricular-instructional decisions in regard to their own teaching.

**Inclusion of Gifted Initiatives in Teacher Education Curriculum**

The call to provide purposeful professional development for practicing teachers can also be considered within teacher education undergraduate and graduate programs. Gifted initiatives remained dormant within the teacher education programming of
participants in this study. Not until they pursued additional certification in gifted education or the equivalent of a graduate degree in education were participants capable of making meaningful curricular-instructional decisions that met the needs for their gifted students. All participants within this study shared that they do not remember completing undergraduate coursework objectives that pertained to gifted education. While they were required to complete special education or Exceptional Student Education (ESE) coursework for their undergraduate degrees in education, gifted education was not included as an objective within ESE coursework or an optional elective class.

The call is clear for teacher education programs to prepare student teachers for diverse classroom settings, both in elementary and secondary education programs. Specifically in the special education classes and classroom management courses, specific topics can attend to core gifted initiatives. These include and are not limited to the nature and needs of gifted students, social-emotional needs of gifted students, effective course design and development for gifted students, inclusion of creativity and complexity in instructional methods, and developing a greater understanding for diverse populations of gifted students.

The promotion and inclusion of gifted education in Social Studies teacher education curriculum remains at the forefront of recommendations for this study. Teacher educators can include a number of best practices that could promote innovative pedagogy and purposeful curriculum selection for gifted learners. Areas in which social studies methods coursework can include gifted students within dialogue are the implementation of historical inquiry, higher-order questioning, rigorous research practices, document analysis, and creative product development. The use of relevant and supplemental
curriculum sources can connect content to current events, promote the use of multiple perspectives, and address global issues and supportive social science disciplines. Teacher educators should not rely only on the content and context that a methods textbook may provide in the classroom. Many times the textbook is selected to meet the needs of the general education student population. Gifted learners need history texts that are rigorous for higher-level readers, contains overarching and conceptual themes, and provides students to critique and reflect upon complex issues, and show evidence of learning through creative products based on interdisciplinary strengths and interests. Furthermore, the allocation and inclusion of innovative technology and digital resources provide students opportunities to develop 21st century skills and craft personalized products that show the depth of learning on a greater scale.

Including this implication as a conclusion of this research study initiates a greater conversation that should take place between both the fields of social studies and gifted education, teacher educators and scholars alike. We must recognize that if teachers are to meaningfully serve a diverse population, it takes great care and attention to the part of all stakeholders. Without appropriate teacher education and professional development opportunities, teachers of gifted are likely to be underserved. Much of the attention and recent educational reforms attend to struggling readers and thinkers. While these educational reforms trickle down through state departments of education and surrounding school districts, the needs of gifted students continue to not be appropriately addressed where it makes the most sense, in teacher education programs, professional development settings, and K-12 classrooms.
Limitations

As with all qualitative research, generalizations are limited because data was collected in a particular place, time, and under particular circumstances (Wolcott, 2002). It is important to note that some degree of plausibility should result allowing other social studies educators to go beyond the information given in theory or practice (Donmoyer, 1990). With that said, educators could generate interpretations and make inferences in order to construe meaning and relate to revealed experiences of their own. Differences in the types of training experienced by teachers in terms of content, methodology, and commitment will further strengthen or dilute the connection between the results of this study and other educator’s experiences.

Another limitation of this multiple case study is in reference to the way in which participant interviews were transcribed. A transcriptionist was hired to transcribe all semi-structured interviews. While this allowed quicker turnaround of data during the collection process, several measures were employed to increase the trustworthiness of the data that was recorded by the third party. The researcher reviewed the audio file and compared it to the transcription file. The only changes made to the original transcription were minor spelling, grammatical, and punctuation errors made by the hired transcriptionist. These occurred irregularly, though were necessary to revise for accuracy. Additional notes were added by the researcher to the transcriptions to better connect the data to researcher notes that were originally recorded during or directly after each interview. Since a transcriptionist was hired to transcribe all interviews, the researcher listened to and read through transcriptions on a number of occasions to experience the interactions between the researcher and participants in an attempt to gain what intimacy
was lost between the researcher and the data. While nothing can replace the authentic interview as it was recorded, the audio and transcriptions are the closest way for the researcher to re-experience those moments.

Lastly, as mentioned in the methodology chapter, a working relationship was already established between some of the participants and the researcher. While this presented opportunities for the researcher to hand-select candidate participants for this study, specific criteria was employed to determine the best possible candidates. The availability of participating school districts and participants were limited for three reasons. First, many school districts do not provide special programming in middle school for inclusively gifted student populations and gifted certified educators. Second, all teachers were required to teach middle grade social studies with gifted students enrolled in their classes. Third, the middle grades social studies teachers of gifted should have completed, or were in the process of completing, a gifted endorsement. Only six out of eleven qualified participants volunteered to participate in this research study. It was circumstantial that many of the participants who agreed to participate in the multiple case study research previously knew of and had worked with the researcher on other projects or attended professional development over the span of their careers. Several measures were put in place to verify the data collected and analyzed by the researcher to limit bias and increase trustworthiness, which include member checking of all semi-structured interviews and participant narratives, peer review of codes and themes completed by outside colleagues within the university system, and the collection of a researcher reflective journal to monitor and examine personal experiences associated with the completion of this study.
Summary

As curricular-instructional gatekeepers, middle grades social studies teachers make important decisions in order to provide their gifted students with purposeful differentiated instruction. This multiple case study explores what teachers believe they should do to instruct gifted students, in what ways teachers prepare and adapt curriculum and instruction for gifted students, and how instruction takes place in a middle school social studies classroom.

Through semi-structured interviews, classroom observations, and the supportive evidence from classroom and teacher artifacts, six middle grades social studies teachers disclosed how and why they differentiate their middle grades social studies curriculum and instruction for their gifted adolescent learners. Through various data analysis methods and verification measures, findings were recorded and presented in the form of individual teacher case studies and thematic cross-case analysis using Hatch’s (2002) Inductive model.

Findings suggest that middle grades social studies teachers take into consideration many factors that influence their curricular-instructional beliefs, directly affecting the decisions they make in terms of curriculum selection, instructional delivery, and the methods of differentiation employed to meet the needs of gifted students. Much of what teachers planned, prepared, and adapted was influenced by the individual needs of students, but also addressed requests of the school and district agendas. This duality between meeting the needs of both students and administration resulted in gatekeeping that at times favored administration, thus limiting best practices for gifted students. Participants made curricular-instructional decisions for gifted students based on practices
that aligned with best practices in the fields of social studies and gifted education scholars and with current models for differentiation in gifted education (Tomlinson, 2001; Van Tassel-Baska, 2011).

**Recommendations for Future Research**

While there is a rising number of students enrolled in Advanced Placement (AP), dual enrollment, and early college coursework in high school, efforts to determine how and by what means to prepare gifted students for rigorous high school programming and coursework options is more pertinent than ever before in social studies education. In this study, social studies teachers shared how they deliver instruction for their gifted middle school students. As a result, many topics were uncovered that could spur greater inquiry and future research. Recommendations include providing social studies teachers of gifted purposeful professional development opportunities, expound on what best practices might look like in a social studies classroom for gifted students, and dedicate resources to ensure teachers are differentiating for gifted students. Also included in the recommendations are calls for elementary grades to increase student exposure to the social studies and increase the coverage of gifted education initiatives within all teacher education programs. It is with this call that scholars and practicing teachers can continue unpacking the intersections between the fields of social studies, gifted, and middle level education.

One recommendation for future research relates to the continued study of the gatekeeping teacher. Purposeful professional development should be provided for social studies teachers who instruct gifted students. Addressed earlier in the chapter,
participants explicitly requested greater attention and clarity toward best practices for teaching middle level social studies to gifted students. Coupled with meaningful professional development for practicing teachers, participants also requested opportunities to observe gifted social studies classrooms, followed by discussion with colleagues to share what occurred in these special classroom settings. Participants believed that by observing gifted social studies classrooms and having reflective discussions with their colleagues would bring awareness as to what methods are working for gifted student populations. It can also provide teachers time to reflect on previous experiences with differentiated curriculum and instruction. Teachers can also brainstorm and share innovative and purposeful lessons. As a result, these conversations can spur greater conversation toward evaluating the effectiveness of these practices. This research can continue building the empirical literature related to differentiated instruction for gifted populations and social studies settings. And while some literature exists on Ambitious Teaching in social studies (Grant, 2005; Grant & Gradwell, 2009; Libresco, 2014) which can be considered a close relation to gifted social studies, there is still so much that distinguishes a classroom of inclusively gifted students apart from its mixed-ability setting neighbor. This is why scholars and practicing teachers should begin envisioning, for example, a more progressive view of what the academic ceiling might look like for a gifted social studies classroom.

Another recommendation for future research concerns the investigation of differentiated methods in the social studies classroom. Continued application and practice of differentiation in the field of social studies can provide teachers the flexibility for creative and innovative lesson design and implementation, while also providing
meaningful instruction for gifted students. Educators who have not gained appropriate training to enact these methods in their classroom often misunderstand differentiation, especially in contrast to the models of individualized and personalized learning. Furthermore, teachers’ lack of confidence can play an influential role into the frequency and depth of how teachers use differentiation in their classrooms. While these obstacles impede the progress of implementing what many scholars proclaim as best practices, there are several avenues open for teachers to continue their journeys to better understand and facilitate differentiated instructional practices. Future research can uncover understanding of how the influences of teachers’ lack of confidence impact the implementation of new curricular-instructional practices, such as differentiation. This can also include methods and/or solutions for overcoming these obstacles.

The next recommendation for future research calls for a greater awareness and servicing of gifted learners in the middle school classroom. The participants of this study were selected due to their continuous training in social studies and gifted education, as well as experience teaching gifted students. This provides a limited description for how less experienced social studies educators meet the needs of gifted students. This does not address head-on the larger issue that could have long-lasting effects in the educational experiences of gifted youth. What this study does imply is that while some gifted students are receiving meaningful instruction from highly qualified educators, other gifted students might not be as fortunate. This study motivates scholarship that explores how middle level educators make curricular-instructional decisions for gifted students. This call ought to expand into elementary and high school environments.
Specifically related to elementary classroom environments, the 6th grade teacher participants within this study claimed that incoming 6th grade students have a natural curiosity for the social studies subject area. However, participants were concerned that student exposure to social studies in the elementary grades depends on the elementary teacher’s vested interest in social studies education, background knowledge of social studies methodology, and district support for elementary social studies curriculum. Future research can address the need for greater inclusivity of social studies in elementary classrooms, as well as how elementary teachers are including social studies independently into daily instruction and/or infused through other subject areas.

Lastly, future research can address greater acknowledgment and increased inclusion of gifted populations within undergraduate and graduate social studies education programs. As discussed earlier, participants shared that during their time in teacher education programs, there was limited exposure to coursework that discussed gifted students populations. There are also a number of topics within teacher education curriculum that connect to gifted initiatives, such as similarities in best practices and methods of modifying curriculum and instruction. However the connection is not explicit in supporting social studies for gifted learners. Opportunities exist for education scholars to dedicate future research towards the exploration and investigation to what extent and of how existing teacher education programs reach student teachers in regard to gifted populations.
Personal Reflections

Selecting this dissertation topic is best described as a personal crossroads of two paths: prior teaching experience and graduate research. Prior to my doctoral studies, I was a middle grades social studies teacher of gifted students. With limited access and outreach to scholars that specialized in both gifted and social studies education, I often believed that the curricular-instructional decisions I made for my students were drawn from instinct and trial by fire. There were many moments when I used creativity and intuition when planning instruction, resulting in some of my most cherished memories with my gifted students. The school district provided ample professional development opportunities in social studies and gifted methodology, but this did not mend the disconnect between the initiatives implemented and the needs of my gifted students. When I had an opportunity to sit among my gifted social studies colleagues, they too expressed this sense of isolation.

I quickly found through early doctoral coursework and research efforts that the literature in which I sought was either obsolete, limited in scope, or contained implicit similarities in theory. The fields of gifted education and social studies disciplines rarely intersected explicitly in theory or practice. This was the distinct moment that I discovered a niche within the empirical literature that I could dedicate to my research agenda.

Designing the methodology for this study was a synthesis between two models of differentiation within the field of gifted education. VanTassel-Baska’s (2011) model for differentiation was applied through my school district in order to measure the effectiveness of differentiation efforts in core subject areas. Tomlinson’s (2001) model for differentiation was one popularly used within core subject areas. While VanTassel-
Baska’s model focused more on the methods in which differentiation occurs, Tomlinson’s model focused on the areas in which differentiation can be applied through a variety of instructional experiences. I found that merging these two models allowed me to explore the experiences of my participants in more ways than if I just used one model to base the findings for my data collection.

While I was able to easily design a methodology that would successfully answer the research questions for my study, the process of finding participants was no easy task. There were administrative obstacles that prevented access to two gifted social studies classrooms that could have built upon the diversity of the study’s findings. While this was an unfortunate circumstance, the information those two participants provided in their interviews helped illustrate what their gifted classrooms might look and do. In addition to the shared experiences, these two participants also provided access to a plethora of supportive artifacts. These artifacts were a combination of classroom images, classroom materials/technologies, unidentified student work products, and interdisciplinary curriculum units with teaching colleagues. I was able to interview the other four social studies teachers of gifted and observe their instructional methods first-hand in their classrooms.

Conclusively, each classroom revealed that there are countless approaches to how social studies teachers of gifted can plan for, adapt, and enact curriculum and instructional methods. There are similarities in what participants used for curriculum materials and instructional methods, for some participants (e.g., Mr. Gaines, Ms. Lindy, Mrs. Compton) received similar training opportunities and support through the district social studies and gifted departments. All the teachers paid close attention to meeting the
requirements of what the state and district expect, the special requests of two separate curricular departments (gifted and social studies), all the while keeping the needs of gifted students at the forefront of their curricular-instructional decision making. Ms. Lindy described this as though she was “being pulled from multiple directions” (Interview, April 2, 2015). It was comforting to know, from my perspective as a social studies teacher of gifted students, that the participants were expressing these same concerns. I wasn’t the only teacher who felt the pressure to exceed the expectations of several stakeholders. It was even more motivating to advocate on behalf of these educators and speak for these concerns as a result of this research project.
REFERENCES


Delisle, J. R., & Galbraith, J. (2002). *When gifted kids don’t have all the answers: How to meet their social and emotional needs.* Minneapolis, MN: Free Spirit Publishing, Inc.


Erb, T. O. (2001). *This we believe... and now we must act.* Westerville, OH: National Middle School Association.


Florida Department of Education & Florida Association for the Gifted (2007). *Florida's frameworks for k-12 gifted learners* (ESE 312674) In cooperation with Working on Gifted Issues Challenge Grant Project. Tallahassee, FL: Florida Department of Education.


National Middle School Association & National Association for Gifted Children (2004). *Meeting the needs of high ability and high potential learners in the middle grades*. Position statement.


APPENDICES
Appendix A: Semi-structured interview questions for Interview #1

Teacher Preparation for Gifted Populations
1. Share you name, school site, grade level, and subject area.
2. What undergraduate experiences or professional development helped prepare you to teach gifted populations? (courses, assignments, special presentations, observations, etc.)
3. What has made you feel most (and least) prepared for teaching gifted students?
4. What do you feel might be missing from undergraduate or graduate education programs that could benefit teachers of gifted students?
5. What additional professional development might you be interested in that supports servicing gifted students?

Opinions regarding Gifted Education Initiatives
1. Define academically talented (gifted) students in your own words.
2. What kind of secondary instructional strategies or techniques would you suggest are necessary for gifted students?
3. How have you professionally prepared yourself to meet the needs of gifted students?
4. How can social studies curriculum support middle school gifted students in their social or emotional development?

Experiences with Differentiation and Social Studies
1. How do you usually differentiate curriculum and instruction for your gifted students? Describe examples.
2. How have you used methods of differentiation to modify the content of the intended curriculum? Describe examples.
3. How have you used methods of differentiation to modify the processes by which your students learn the intended curriculum? Describe examples.
4. How have you used methods of differentiation to modify the products students create which verify student learning? Describe examples.
5. How have you used methods of differentiation to modify the classroom environment or tone of the classroom? Describe examples.
Appendix B: Semi-structured Interview Questions for Interviews #2 and #3.

**Post-Observation Reflection Questions**

1. In our previous observation, how did you facilitate the curriculum planning and delivery for gifted student populations?
   a. How did you set high expectations for student performance?
   b. How did you incorporate activities for student to apply new knowledge?
   c. How did you ensure that students were engaged in planning, monitoring, or assessing their own learning?
   d. How did you encourage student to express their thoughts?
   e. How did students reflect on what they learned?

2. In our previous observation, how did you accommodate for individual differences within your gifted population?
   a. How did you provide opportunities for independent or group learning to promote depth in understanding content?
   b. How did you accommodate individual or subgroup differences?
   c. How did you encourage multiple interpretations of events or situations?
   d. How did you allow students to discover key ideas individually through structured activities and/or questions?

3. In our previous observation, how did you incorporate problem-solving strategies into the facilitated curriculum and instruction?
   a. How did you employ brainstorming techniques?
   b. How did you engage students in problem identification and definition?
   c. How did you engage students in solution-finding activities and the articulation of comprehensive solutions?

4. In our previous observation, how did you incorporate critical thinking strategies into the facilitated curriculum and instruction?
   a. How did you encourage students to judge or evaluate situations, problems or issues?
   b. How did you engage students in comparing and contrasting ideas?
   c. How did you provide opportunities for students to generalize from concrete data?
   d. How did you encourage student synthesis or summary of information within or across disciplines?

5. In our previous observation, how did you incorporate creative thinking strategies into the facilitated curriculum and instruction?
   a. How did you solicit many diverse thoughts about issues or ideas?
   b. How did you engage students in the exploration of diverse points of view to reframe ideas?
   c. How did you encourage students to demonstrate open-mindedness and tolerance of imaginative, sometimes playful solutions to problems?
   d. How did you provide opportunities for students to develop and elaborate on their ideas?

6. In our previous observation, how did you incorporate research strategies into the facilitated curriculum and instruction?
   a. How did you require students to gather evidence from multiple sources through research-based techniques?
   b. How did you provide opportunities for students to analyze data and represent it in appropriate charts, graphs, or tables?
   c. How did you ask questions to assist students in making inferences from data or drawing conclusions?
   d. How did you encourage students to determine implications and consequences of findings?
   e. How did you provide time for students to communicate research study findings to relevant audiences in a formal report and/or presentation?
Appendix C: Email Recruitment for Study Participants

Dear _______________________

I am a doctoral candidate in Social Science Education at the University of South Florida in Tampa, Florida. I am pursuing my doctorate by conducting research on social studies teachers and the decisions they make and employ to differentiate curriculum and instruction to meet the needs of gifted student populations. You are invited to become a participant in this research study (IRB Study # Pro00018507).

I would like to discuss with you about the curricular decision-making and instructional strategies you employ to teach gifted learners. As compensation for your time and participation in the study, you will receive a $20.00 gift certificate to Starbucks at the completion of each interview. During the interviews, I will pay for all food and beverage at the time of our interviews. To support our discussions during the interviews, a series of concurrent observations will take place in your classroom for a one-week period of time. One class period will be selected, of your choice, that houses gifted student populations. Field notes and transcriptions will also be provided to you for review and additional feedback.

Participation in the study will require about four one-hour interviews, five consecutive days of one-period classroom observations and approximately two to three hours of verifying transcripts and themes. This will equate to an approximately 12 hour commitment. With your permission, the interviews will be recorded and transcribed. To maintain confidentiality, you will be given a pseudonym in all transcriptions and you will not be identified by name on the tape. Transcription software and/or a professional transcriptionist may be used to transcribe the audio files. The audio files will be locked at
my personal residence for security purposes. Each participant will be offered a copy of their audio files and a copy of their transcription. The participants and I will be the only ones with access to the audio files. The master audio file and any other confidential records will remain in my possession and will be destroyed five years after the publication of the dissertation.

The four interviews will be arranged at a location of your convenience during non-school hours and at a non-school facility. The first interview could occur as early as January 2015 and the last interview will take place in late April 2015. Transcripts for the first interview will be made available for participant review before any subsequent interviews are arranged. Transcripts from the last interview will be made available by the end of May 2015.

I appreciate your thoughtful consideration of my request. Please contact me at the email or phone number listed below if you would like to participate in this voluntary research.

Sincerely,

Teresa M. Bergstrom, M.Ed.
Doctoral Candidate and Adjunct Faculty
University of South Florida

bergstromt@mail.usf.edu
Appendix D: Informed Consent

Informed Consent to Participate in Research
Information to Consider Before Taking Part in this Research Study

IRB Study # Pro00018507

You are being asked to take part in a research study. Research studies include only people who choose to take part. This document is called an informed consent form. Please read this information carefully and take your time making your decision. Ask the researcher or study staff to discuss this consent form with you, please ask him/her to explain any words or information you do not clearly understand. The nature of the study, risks, inconveniences, discomforts, and other important information about the study are listed below.

We are asking you to take part in a research study called: Gatekeepers for Gifted Social Studies: Case Studies of Middle School Teachers

The person who is in charge of this research study is Teresa Bergstrom, M.Ed. This person is called the Principal Investigator. However, other research staff may be involved and can act on behalf of the person in charge. She is being guided in this research by Dr. Stephen Thornton.

The research will be conducted at various sites based on the participants’ school location.

Purpose of the study
The purpose of this dissertation study is to disclose by what criteria and in what manner teachers tend to curricular-instructional gate-keep, thereby differentiating for gifted students in middle school social studies classrooms.

Study Procedures
If you take part in this study, you will be asked to:

• Participate in four one-hour semi-structured interviews, one-week concurrent observations of one class period of middle school social studies instruction, and approximately two to three hours of verifying transcripts and themes.
• With your permission the interviews and observations can be taped and transcribed. To maintain confidentiality, you will be given a pseudonym in all transcriptions and you will not be identified by name on the tape. Transcription software and/or a professional transcriptionist may be used to transcribe the audio files.

• The audio files will be locked in Mrs. Bergstrom’s personal residence. Each participant will be offered a copy of their own audio files and a copy of their own transcription. The participants and principle investigator will be the only ones with access to the audio files. The master audio file will remain in Mrs. Bergstrom’s possession and will be destroyed three years after the publication of the dissertation.

• The four interviews will be arranged at a location of the participants’ convenience. The first interview will occur during the month of December 2014 and the last interview will take place in May 2015.

• The one-week concurrent classroom observations will be scheduled by the teacher participant between the months of January through March of 2015.

• Transcripts for the first interview will be made available for participant review before any subsequent interviews. Transcripts of the last interview will be made available by the end of April 2015.

• The researcher will collect any supportive artifacts (e.g., lesson plans, curriculum maps, supplemental texts, primary and secondary sources, graphic organizers, de-identified completed student work, photos of classroom environments, floor plans of seating arrangements, and other documents) that might be communicated or used within interviews and classroom observations.

**Total Number of Participants**
A total of 6 individuals will participate in the study at all sites.

**Alternatives**
You do not have to participate in this research study.

**Benefits**
We are unsure if you will receive any benefits by taking part in this research study.

**Risks or Discomfort**
This research is considered to be minimal risk. That means that the risks associated with this study are the same as what you face every day. There are no known additional risks to those who take part in this study.

**Compensation**
You will be paid $80.00 if you complete all the scheduled study visits. If you withdraw for any reason from the study before completion you will be paid $20.00 for each complete study visit.
Privacy and Confidentiality
We will keep your study records private and confidential. Certain people may need to see your study records. By law, anyone who looks at your records must keep them completely confidential. The only people who will be allowed to see these records are:

- The research team, including the Principal Investigator, study coordinator, research nurses, and all other research staff.
- Certain government and university people who need to know more about the study. For example, individuals who provide oversight on this study may need to look at your records. This is done to make sure that we are doing the study in the right way. They also need to make sure that we are protecting your rights and your safety.
- Any agency of the federal, state, or local government that regulates this research. This includes the Department of Health and Human Services (DHHS) and the Office for Human Research Protection (OHRP).
- The USF Institutional Review Board (IRB) and its related staff who have oversight responsibilities for this study, staff in the USF Office of Research and Innovation, USF Division of Research Integrity and Compliance, and other USF offices who oversee this research.

We may publish what we learn from this study. If we do, we will not include your name. We will not publish anything that would let people know who you are.

Voluntary Participation / Withdrawal
You should only take part in this study if you want to volunteer. You should not feel that there is any pressure to take part in the study. You are free to participate in this research or withdraw at any time. There will be no penalty or loss of benefits you are entitled to receive if you stop taking part in this study. Decision to participate or not to participate will not affect your job status.

You can get the answers to your questions, concerns, or complaints
If you have any questions, concerns or complaints about this study, or experience an adverse event or unanticipated problem, call Teresa Bergstrom at (727) 692-9271.
If you have questions about your rights as a participant in this study, general questions, or have complaints, concerns or issues you want to discuss with someone outside the research, call the USF IRB at (813) 974-5638.
Appendix E: Informed Consent Signature Form

Consent to Take Part in this Research Study
It is up to you to decide whether you want to take part in this study. If you want to take part, please sign the form, if the following statements are true.

I freely give my consent to take part in this study. I understand that by signing this form I am agreeing to take part in research. I have received a copy of this form to take with me.

______________________________________________
Signature of Person Taking Part in Study

______________________________________________
Date

______________________________________________
Printed Name of Person Taking Part in Study

Statement of Person Obtaining Informed Consent
I have carefully explained to the person taking part in the study what he or she can expect from their participation. I hereby certify that when this person signs this form, to the best of my knowledge, he/she understands:
• What the study is about;
• What procedures will be used;
• What the potential benefits might be; and
• What the known risks might be.

I can confirm that this research subject speaks the language that was used to explain this research and is receiving an informed consent form in the appropriate language. Additionally, this subject reads well enough to understand this document or, if not, this person is able to hear and understand when the form is read to him or her. This subject does not have a medical/psychological problem that would compromise comprehension and therefore makes it hard to understand what is being explained and can, therefore, give legally effective informed consent. This subject is not under any type of anesthesia or analgesic that may cloud their judgment or make it hard to understand what is being explained and, therefore, can be considered competent to give informed consent.

______________________________________________
Signature of Person Obtaining Informed Consent

______________________________________________
Date

______________________________________________
Printed Name of Person Obtaining Informed Consent
### Interview Field Notes Organizer

<table>
<thead>
<tr>
<th>Location, Date, &amp; Time</th>
<th>Observations</th>
<th>Impressions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant #1 Interview, 1/5/15*</td>
<td>Participant explains how they implement how they promote critical thinking through the use of document analysis*</td>
<td>Participant leans forward and expresses excitement for DBQs, smiles and uses hands while talking*</td>
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</table>

*Example in italics*
## Appendix G: Classroom Observation Field Notes Organizer

### Field Notes Organizer for Classroom Observations

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<tr>
<th>Location, Date, and Time</th>
<th>Observations:</th>
<th>Impressions: supportive non-verbal, expressive, observations</th>
<th>Differentiation Features: acceleration, complexity, depth, challenge, creativity, abstractedness**</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Participant explains to students how they get utilize gifted strengths when choosing from various products to create as a culminating project for National History Day (NHD)</strong>*</td>
<td><strong>Participant leans forward and expresses excitement for the various product options for NHD project</strong> *</td>
<td><strong>Creativity</strong>*</td>
<td></td>
</tr>
</tbody>
</table>

*denotes example

** Features of VanTassel-Baska’s (2011) model for differentiation
Appendix H: Supportive Visual Evidence Collection Form

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<td>Interview/Observation Date:</td>
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<tr>
<td>Artifact Title:</td>
<td></td>
</tr>
<tr>
<td>Description:</td>
<td></td>
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<tr>
<td>Intended Use of Artifact:</td>
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### Connection to Research Questions

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<td>How does this artifact support answering Research Question #2?</td>
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<tr>
<td>How does this artifact support answering Research Question #3?</td>
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<tr>
<td>How does this artifact support answering Research Question #4?</td>
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</table>

### Possible Theme and Code Connections

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<th>Specific Data</th>
<th>Theme Connections</th>
<th>Code Connections</th>
<th>Additional Insight</th>
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Appendix I: Institutional Review Board Expedited Approval for Initial Review Letter

October 20, 2014

Teresa Bergstrom
Teaching and Learning
Tampa, FL 33612

RE: Expedited Approval for Initial Review
IRB#: Pro00018507
Title: Gatekeepers for Gifted Social Studies: Phenomenological Case Studies illuminating Differentiation for Gifted Adolescents in Middle School Social Studies

Study Approval Period: 10/20/2014 to 10/20/2015

Dear Ms. Bergstrom:

On 10/20/2014, the Institutional Review Board (IRB) reviewed and APPROVED the above application and all documents outlined below.

Approved Item(s):
Protocol Document(s):
Gatekeepers for Gifted SSE-Bergstrom-USF IRB Study Protocol.pdf

** You will need to provide the letter from the school district and inquire with the school district if you are to obtain separate letters from the school principals of each school you plan to use. If yes, then you will need to upload those letters thru the Amendment process. No research activities can begin until these letters are approved thru the Amendment process.

Consent/Assent Document(s)*:
Gatekeepers for Gifted SSE-Bergstrom-Revised Informed Consent.docx.pdf

*Please use only the official IRB stamped informed consent/assent document(s) found under the "Attachments" tab. Please note, these consent/assent document(s) are only valid during the approval period indicated at the top of the form(s).
It was the determination of the IRB that your study qualified for expedited review which includes activities that (1) present no more than minimal risk to human subjects, and (2) involve only procedures listed in one or more of the categories outlined below. The IRB may review research through the expedited review procedure authorized by 45CFR46.110 and 21 CFR 56.110. The research proposed in this study is categorized under the following expedited review category:

(5) Research involving materials (data, documents, records, or specimens) that have been collected, or will be collected solely for nonresearch purposes (such as medical treatment or diagnosis).

(6) Collection of data from voice, video, digital, or image recordings made for research purposes.

(7) Research on individual or group characteristics or behavior (including, but not limited to, research on perception, cognition, motivation, identity, language, communication, cultural beliefs or practices, and social behavior) or research employing survey, interview, oral history, focus group, program evaluation, human factors evaluation, or quality assurance methodologies.

As the principal investigator of this study, it is your responsibility to conduct this study in accordance with IRB policies and procedures and as approved by the IRB. Any changes to the approved research must be submitted to the IRB for review and approval by an amendment.

We appreciate your dedication to the ethical conduct of human subject research at the University of South Florida and your continued commitment to human research protections. If you have any questions regarding this matter, please call 813-974-5638.

Sincerely,

Kristen Salomon, Ph.D., Vice Chairperson
USF Institutional Review Board
November 3, 2014

Ms. Teresa Bergstrom
686 Marjon Avenue
Dunedin, FL 34698

Re: Proposal number O-007-1415

Dear Teresa:

Preliminary approval is granted for your research proposal, “Gatekeepers for Gifted Social Studies: Phenomenological Case Studies Illuminating Differentiation for Gifted Adolescents in Middle School Social Studies.” Approval is based on the application submitted to this office for review.

Compliance with the following item(s) is required to obtain final approval and conduct the research:

- Obtaining IRB approval, please submit a copy of the final approval to the Assessment, Accountability and Research (AAR) Office.

- A signed Principal Approval Form (Form A). This needs to include a signed statement indicating that the Principal agrees to you signing in order to enter campus.

Please notify this office of any modifications made to this study prior to initiating your study. If there are any questions or if additional information is needed, please contact the Assessment, Accountability and Research office at 727-588-6253.

Best wishes for continued success.

Merlaine Petit-Bois, Ph.D.
Executive Manager, Evaluation
Assessment, Accountability and Research
Pinellas County Schools
Appendix K: CITI Human Research Curriculum Completion Report

COLLABORATIVE INSTITUTIONAL TRAINING INITIATIVE (CITI)
HUMAN RESEARCH CURRICULUM COMPLETION REPORT
Printed on 07/14/2014

LEARNER
Teresa Bergstrom (ID: 3094022)
686 Marjon Avenue
Dunedin
FL 34698
United States of America

DEPARTMENT
Social Science Education

PHONE
(727)692-9271

EMAIL
bergstromt

INSTITUTION
University of South Florida

EXPIRATION DATE
07/13/2016

IRB MEMBERS

COURSE/STAGE: Refresher Course/2
PASSED ON: 07/14/2014
REFERENCE ID: 13301619

REQUIRED MODULES
DATE COMPLETED
SBE Refresher 1 – Defining Research with Human Subjects 07/14/14
SBE Refresher 1 – Privacy and Confidentiality 07/14/14
SBE Refresher 1 – Assessing Risk 07/14/14
SBE Refresher 1 – Research with Children 07/14/14
SBE Refresher 1 – International Research 07/14/14
Biomed Refresher 1 - Instructions 07/14/14
SBE Refresher 1 – History and Ethical Principles 07/14/14
SBE Refresher 1 – Federal Regulations for Protecting Research Subjects 07/14/14
SBE Refresher 1 – Informed Consent 07/14/14
SBE Refresher 1 – Research with Prisoners 07/14/14
SBE Refresher 1 – Research in Educational Settings 07/14/14
SBE Refresher 1 – Instructions 07/14/14
Biomed Refresher 1 – History and Ethical Principles 07/14/14
Biomed Refresher 1 – Regulations and Process 07/14/14
Biomed Refresher 1 – Informed Consent 07/14/14
Biomed Refresher 1 – SBR Methodologies in Biomedical Research 07/14/14
Biomed Refresher 1 – Records-Based Research 07/14/14
Biomed Refresher 1 – Genetics Research 07/14/14
Biomed Refresher 1 – Research Involving Vulnerable Subjects 07/14/14
Biomed Refresher 1 – Vulnerable Subjects - Prisoners. 07/14/14
Biomed Refresher 1 – Vulnerable Subjects - Children 07/14/14
Biomed Refresher 1 – Vulnerable Subjects - Pregnant Women, Human Fetuses, Neonates 07/14/14
Biomed Refresher 1 – FDA-Regulated Research 07/14/14
Biomedical 101 Refresher Course - Complete the course 07/14/14

For this Completion Report to be valid, the learner listed above must be affiliated with a CITI Program participating institution or be a paid Independent Learner. Falsified information and unauthorized use of the CITI Program course site is unethical, and may be considered research misconduct by your institution.

Paul Braunschweiger Ph.D.
Professor, University of Miami
Director Office of Research Education
CITI Program Course Coordinator
Appendix L: CITI Social and Behavioral Responsible Conduct of Research Curriculum Completion Report

COLLABORATIVE INSTITUTIONAL TRAINING INITIATIVE (CITI)
SOCIAL AND BEHAVIORAL RESPONSIBLE CONDUCT OF RESEARCH CURRICULUM COMPLETION REPORT
Printed on 07/14/2014

LEARNER
Teresa Bergstrom (ID: 3094022)
686 Marjon Avenue
Dunedin
FL 34698
United States of America

DEPARTMENT
Social Science Education

PHONE
(727)692-9271

EMAIL
bergstromt

INSTITUTION
University of South Florida

EXPIRATION DATE
SOCIAL AND BEHAVIORAL RESPONSIBLE CONDUCT OF RESEARCH: This course is for investigators, staff and students with an interest or focus in Social and Behavioral research. This course contains text, embedded case studies AND quizzes.

COURSE/STAGE
Basic Course/1

PASSED ON
07/14/2014

REFERENCE ID
8791080

REQUIRED MODULES
DATE COMPLETED
Responsible Conduct of Research (RCR) Course Introduction 07/14/14
Research Misconduct (RCR-SBE) 07/14/14
Data Management (RCR-SBE) 07/14/14
Authorship (RCR-SBE) 07/14/14
Peer Review (RCR-SBE) 07/14/14
Responsible Mentoring 01-1625 Archived 1625 07/14/14
Using Animal Subjects in Research (RCR-Interdisciplinary) 07/14/14
Conflicts of Interest (RCR-SBE) 07/14/14
Collaborative Research (RCR-SBE) 07/14/14
Research Involving Human Subjects (RCR-Interdisciplinary) 07/14/14
Responsible Conduct of Research (RCR) Course Conclusion 07/14/14

For this Completion Report to be valid, the learner listed above must be affiliated with a CITI Program participating institution or be a paid Independent Learner. Falsified information and unauthorized use of the CITI Program course site is unethical, and may be considered research misconduct by your institution.

Paul Braunschweiger Ph.D.
Professor, University of Miami
Director Office of Research Education
CITI Program Course Coordinator
Appendix M: Mr. Gaines’s Classroom Pictures

Caption: Photograph of classroom entrance facing the back of the instructional space.

Caption: Photograph of inner classroom wall toward the front of the instructional space.
Caption: Photograph of the front of the instructional space.

Caption: Photograph of classroom posters related the teacher interests and curriculum.

Caption: Photograph of the back of the classroom.
Caption: Photograph of artifacts, literature, and directions for classroom activities.

Caption: Photograph of the front corner of the classroom behind teaching podium.
Appendix N: Excerpt from Mr. Gaines’s Interviews

T- Talk to me a little bit about your definition of what gifted should look like. Who are gifted students?

I- Gifted students are and the primary thing is they are students, they are teenagers. They have been tested to be in the top couple percentiles of the population. They have amazing intellectual capacity but they are still teenagers. It doesn't mean that they actually achieve to that level. They are as self conscious, maybe more so, as any other kids or as any other kid. They are nervous like everybody else. They are just trying to get through middle school without being embarrassed and have people like them.

T- Can you think of any examples of students to kind of illuminate a description of what you just told me? Like is there a Johnny or Suzy Q that comes to mind that you can describe as...?

I- I have all types. A lot of kids is the same social hierarchy that you see anywhere else. There are the dorks, the really popular kids and even though they are all in the same gifted classroom sometimes of a kid gets a 100% on a test and the dorks in the class will say “that kid, really?” and I just say you do realize you are in a classroom full of geniuses and there's not a dumb person in here and they have to be reminded of that.

T- Do you find that this population that you teach are far different from the general ed population just in terms of being kids? Are they different in specific ways or do they interact differently than you would find in a general ed classroom setting from your experience?

I- They are curious about a lot of different things whereas in a regular class, so to speak, you hear students sometimes in a lesson having a heated debate about something and you kind of learn as a teacher to kind of clamp down on that stuff and quiet them down because they are probably talking about some drama that happened in the lunchroom or somebody dating somebody. The other day I gave my students an assignment and heard a few of them in the front row. It was turning into a loud argument and I had to fight that instinct to tell them to be quiet and I listened and they were having a debate on Andrew Jackson and how he behaved in Florida and it was getting really heated and intense and these are 8th graders. It's not what you would probably see in a regular population.

T- Talk to me a little bit about that debate. What were the differences of opinions? What were their arguments?

I- Just whether or not Andrew Jackson, specifically, when he invaded Florida whether or not he was justified in doing so and how he treated the Native Americans and whether that was justified, his whole legacy. It was pretty intense.

T- Were they arguing specifically...I don't want to put words in your mouth but were they really passionate about their beliefs or were they...?
I- Yeah, very passionate.

T- Okay. You talk about holding informal debates in your classroom or allowing it to happen but what other instructional strategies or techniques do you employ in your classroom setting?

I- I use small group instruction. I have them do a variety of projects. Like for instance, the other day we were talking about the Louisiana Purchase and students broke into small groups and each small group looked at one aspect of the Louisiana Purchase, the backgrounds of it, the Constitutional debate, the core of discovery, the aftermath and each small group made a presentation to give to the rest of the class so they were actually teaching themselves. My population of kids almost entirely go to very advanced programs such as IB once they go to high school so I feel some responsibility to take them from more of the lower grades gifted type projects that they come in having done to then prepare them to go off to AP and IB classes. So I slowly over the course of the year ramp up my use of lecture notes and things like that so they are prepared for the intensity of...or I hope that they are prepared for the intensity of the program that they are going to sign on for in high school.

T- Are you focusing more on accelerating the content in which you teach or the method of how that content is being delivered or both?

I- Both. I feel a lot of responsibility to get through the content that I'm supposed to get through. It's almost a cliché in history education that you don't get through all that you are supposed to get through and frequently at the end of the year I hear teachers say “hey, how far did you actually get?” I pride myself on getting through all of it because my students if they go to high school and they haven't gotten through all of the curriculum they are going to be in a hole from day one.

T- What time periods in history do you cover or try to cover?

I- It's essentially US history from the dawn of creation to 1877. So, the aftermath of the US Civil War.

T- Do you cover Native populations or do you start at Jamestown?

I- Essentially we start at Jamestown. I said this year that there is no way we can adequately and respectfully get through Native populations so we are not even going to try. We are going to skip it.
Appendix O: Ms. Lindy’s Classroom Pictures and Student Work

Caption: Photograph of replica artifacts, classroom posters, and student products.

Caption: Photograph of classroom posters, student products, and literature.

Caption: Photograph of authentic oil lamp artifacts from ancient Rome.
Caption: Photograph of student products related to ancient China, the Silk Road, and the concept of change.

Caption: Photograph of student products related to the concept of change.
Caption: Photograph of a student product related to the Silk Road.
Appendix P: Excerpt from Ms. Lindy’s Interviews

T-Once you found out that you were teaching this curriculum, how did you go about initially making decisions in terms of how that curriculum was going to work for you?

I-Because I have an anthropology degree with a focus on cultural anthropology, I did not want to eliminate the early main chapter, which they did. So I felt that I couldn’t eliminate that and have a foundation for to teach Bronze Age and the foundation of civilization, so I brought the change model in in the beginning and laid the foundation for the course. So actually what I did is I went and got this curriculum called Big Era 2, Big Era 3, out of California. And they use it as a gen ed curriculum, I’ve implemented some of what they do because they had really good Power Points and notes that explain early humans in a transition to domestication of plants and animals. And I delve into that really deeply. So where they address it in one chapter, and then they suggest that we have the kids paint a cave painting, which for me is a second-grade level activity for gifted. So what we do, rather than that, is I found in that Big Era curriculum, they actually have real archeological site information, and they get a site; and they read the site; and they have to cull out of that climate factors, where it is located, geographic factors, vegetation. They may use a real Atlas and look up the site, what’s happening at the site as far as the tools, the artifacts, the seeds, the plants, the foundation of early cultivation. And then they do a project of their own choosing. Could be a 3D model, Power Points, just pretty much anything…skits, plays, and they present it to each other. And then I pull down my map, and we locate, “Okay. This is where corn developed. This is where rice…” So it's a very holistic approach to the foundation of the earth and the implications of geography to the development of early civilizations. And this is in…I pretty much lay that foundation because we can’t look at Sumer and early civilizations until we really understand agriculture, and it's not enough for them to just understand that the people find wheat near Mesopotamia and then invent the plow.

T-How geography influences history.

I-So and then my goal for them when I can is to say that there are these process working in multiple places simultaneously, and they are evolving in a somewhat similar fashion, but based upon where they are, they're now going to look different places to see how this human trait manifests differently around the world at nearly the same time. And I just plant that seed for them because I can't really do a lot more than that, but if we do that often enough, I think that they can really start to see patterns.

T-Do you see that later on in the year, that it triggers that recall?

I-I don’t know because I don’t necessarily go in… I don’t know, but I think it probably does because they are starting to get the idea of river civilizations when I'm not saying it as much. I do say it, but I'm not beating them over the head with it with, “The objective today is river civilization.”

T-It's implicit. Right.
Because one of these sites they're doing, they're river civilizations, but not all of them are, and so early on we talk about why is the Peruvian site different than the site in Jericho which is different than the site on the Indus Valley which is next to a river, and we talk about grains. I think they get it. I just don’t think I have to keep asking about it.

So after you lay the foundation, how else did you interpret the official curriculum for world civ in terms of plant…

Well, no. Ancient civ.

I'm sorry. Yeah. Ancient civilizations. Did you… I know that you have already a mapped out guide of where you should be on a certain day, etc….

Yeah. Well, last year that was really a trial for me because I felt that it was going to be mandated to cover the material in a pacing guide. What I just described to you is delving deeper, and so I would take a concept and delve into it that week. And then I’ll pace and fast pace some of the other material. And because I also helped with history day in the same year, I was off pace, and the other teacher in the school would say, “Well. Mrs. X is now… she’s already got to Egypt. I’m like, “That’s okay. You guys know a lot about Egypt. We’re going to do Egypt just a little bit, and we’re going to expand it here.” But now that they changed the calendar so it's in the nine weeks, it seems like… actually, no… I was forced to cut curriculum that I think is really valuable and creative, but creative in a valuable way in order for it to be ready for the EOC. So I had to become part of the… I had to adjust to the pacing because my evaluation will be based on it. But then the EOC was so flawed and so of such poor quality that it was irrelevant that I had done that because then they just jacked up the grades. So…

So now that you’re in the second semester, has your opinion as to how the pacing guide should be followed… has that changed to where you're not as worried about where you are in comparison to calendar?

Oh no. I'm still compliant, and there's going to be an EOC. So therefore, I have to try to get them through a certain portion of the curriculum by a certain time, which means at the end of the year, I’ll probably have a chunk of time to do something with, which is probably not the time of year that you want to start doing something and wildly creative because of the quality of the product is reduced. So even if I have them creating Roman houses or doing some really cool stuff with that, I'm going to get a lesser quality because they're done.
Appendix Q: Mrs. Compton’s Classroom Pictures and Student Work

Caption: Photograph of classroom facing the front right corner of instructional space.

Caption: Photograph of classroom facing the back of the instructional space.

Caption: Photograph of board configuration (e.g., objective, agenda, assignments)
Caption: Photograph of classroom whiteboard with modeling elements of a thesis.

Caption: Photograph of worktable in the back of the classroom for students that contain student products, geography materials, and replica artifacts.

Caption: Photograph of bulletin board displaying concepts of change and various thinking strategies that are employed by Mrs. Compton in the classroom.
Caption: Photograph of a student-made exhibit board related to the Great Wall of China that was a competition piece in the National History Day academic competition.

Caption: Photograph of bookshelf filled by literature, student binders, and other resources.
Caption: Photograph of a classroom bulletin board dedicated to the unit of ancient Egypt.
Appendix R: Excerpt from Mrs. Compton’s Interviews

T - how did you set high expectations for student performance over the five days that I observed your classroom?

I - Being that it's later in the school year, the last 25%, the expectations have been set since Day 1 and they’re constantly reiterated but the expectations are following the school code of conduct with behavior but also in academic performance it’s more so being able to speak freely and respecting others who are speaking and also elaborations is what I focus on in both written and spoken answers.

T - Okay. So, within those five days in which I observed your classroom, how did you incorporate activities for students to apply new knowledge?

I - It varies because there’s a sequential order with a new topic or lesson. The introduction where I go over kind of the overview, the essential question that we’re kind of delving into, how we’re going to do it, the things they should be able to respond to after being done with the lesson and then, the evaluative kind of question or action that they should be able to do. That’s all shown in the board configuration so, that’s the introduction. Then, we go over the topic itself, key points. We usually do the reading together and then, there’s discussion. Along with the reading and discussion there sometimes is an activity where it may come before or after the reading depending on the nature of the lesson and then, usually a follow through with either note taking activity or an assignment itself. Then, finally following up after that, we do go over that and then connect it to previous topics and kind of look at the big picture.

T - So, as an example I know that the first two days I observed you were in the review process of a unit. So, what type of applicative activities did your students participate or…yeah did they participate in prior to that review?

I - With that unit…with the lessons that we reviewed on the days you’re referring to, there were activities on one of the days. We did a simulation where students were out of their seats actually doing certain body movements. There are different groups that are differentiated to assume the roles of different groups in ancient Greece and they were doing an activity in representing different groups at the time period we were studying. So, that was the activity that was present there and then, in the days that you’re mentioning of review we referenced that and talked about what we did and what those actions meant and kind of what was going on in Greece and how our actions were representing that.

T - So, is that in reference to the, I’ve been working on the farm?

I - Correct, the geography and settlement of Greece. We looked at the people who lived within Greece…the settlers. The non-settlers…they were called because they lacked farmland and then the people who went up and set up colonies. So, we had students representing those three groups and simultaneously they were learning about that group and then they brought that forth to the class. So, the other groups were able to learn and
witness what that group was encountering and so forth with the other groups. There was
a song and different movements and actions that took place during the activity.

T-Cool. So, are there any activities that you’re planning after your…I guess the last two
days that I’ve observed your classroom in the Roman Republic unit? What are those?

I-There’s several different activities…some that I might not be able to recall of the top of
my head but I can look if needs be but one, it’s a station assignment where there will be
different stations set up as we talk about daily life in Rome. Where at each station
students will travel and they’ll be able to kind of read something, do something
kinesthetic where they may…like for instance when we talk about sports, there’s like a
javelin toss and a hop where they record their own record and kind of learn what the…to
represent the different actions. In other parts there’s where they have to listen to a speech
and/or read it and then write their reflection on what’s being said per philosophy. So,
that’s stations. We are going to be talking about Christianity…one of the world’s
religions and being that it’s the last one that we’re referring to this year, we’re comparing
that to all other religions that we’ve learned about thus far. Then, lastly the legacy of
Rome. There is another traveling station assignment where students will be working
simultaneously but moving to different groups.

T- Throughout the way that you’ve designed your class, how do you ensure that students
are engaged in monitoring their learning? Is there anything that you have them complete
in order to keep track of their growth over a certain amount of time?

I-I mean definitely through their oral and written responses in actual class they do keep a
binder in class that shows all of their work and then collectively with all their other
academic subjects a portfolio. So, that is kind of self reflective. As teachers we don’t go
through with a fine tooth comb but it is something that could be referred to, to show
growth. The students do student lead conferences at the year which they should be
reflective on their own but as a teacher you can kind of see in their written work their
grades, the actual things that their responding to, what their actually learning and/or their
participation in class.

T-Would the note taking…like the design of how you implement note taking in your
classroom be an example of looking at their growth with that skill?

I-Definitely.

T-Talk to me a little bit about that. How have you designed that and how you’ve
facilitated that in your classroom?

I-Okay. Being that our students came from a variety of different schools…elementary
schools…although probably they were learning the same things, they were learning them
differently and whereas I am their only teacher in sixth grade and they will all have the
same teaching in seventh and eighth, and assuming they will stay in the center…
Appendix S: Ms. Heisman’s Classroom Pictures and Student Work

Caption: Photograph of inner wall toward the back of the instructional space.

Caption: Photograph of the student desk configuration and front instructional space.

Caption: Photograph of the back of the instructional space where board configuration, student data, and other logistics are located in relationship to students.
Caption: Photograph of primary sources used with the Alexander the Great DBQ.

Caption: Photograph of the board configuration located in the back whiteboard including the objective, agenda, and assignments.

Caption: Photograph of student-made poster related to Greek theatre.
Caption: Photograph of easel used to display key terminology and literature sources.

Caption: Photograph of the completed History Alive! Interactive Student Notebook worksheet displayed on the classroom issued SMART Board.
Caption: Photograph of completed activity determining Alexander the Great’s leadership abilities. Post-its are designated where students believed he rated in relationship to topics.

Caption: Photograph of student work regarding Alexander the Great’s leadership abilities.

Caption: Photograph of student work regarding Alexander the Great’s leadership abilities.
Appendix T: Excerpt from Ms. Heisman’s Interviews

T- You made mention before about utilizing or trying to go deeper with your students. I know you mentioned before about creativity. Do you ever employ acceleration or greater uses of complexity within your lessons?

I- Yes. I think I definitely go faster with them, so it’s accelerated. I think it’s more complex also because even the typical assignment that they might do for the gifted students it’s going to be more complex answer. I’m going to expect a more complex answer than with my regular students. They may have to write a paragraph where the others it’s okay to have one sentence, or maybe a couple of sentences.

T- Okay.

I- With like creative activities like they may do a journal entry and do an illustration with it, again I thought that was pretty easy but a lot of the regular students won't do it. They may be capable but they'll just maybe won't do it. Giving them that opportunity to show me what they have because that’s...I feel like sometimes I want to make sure I do that and I tell myself that often because if I don't give them the opportunity to show me what they have, then well it’s just a loss opportunity for them. I may never see it if I don't given them that creative opportunity. I like to do those things a lot and I try to...even just the drawing an illustration doesn’t have to really be artistic. They might have to come up with something. Come up with a phrase for it or come up with a slogan for it. Giving them those opportunities where they think its fun. If I don't do that than it’s just missed opportunities.

T- When it comes to the content of your class, is there...do you modify that at all?

I- I do add in...I try to add in technology so I like...we do websites. They make websites and they make prezzies, which is, you probably know what that is. It’s kind of like PowerPoint but slightly more fun. I would like to add in more technology but don't quite have the time.

T- What materials do you use in order to....?

I- Make the website or prezzies?

T- No, just in general. Do you have a textbook that you use?

I- Yes, I have a textbook. I actually love our textbook, its TCI and it is History Alive! And mine is ancient civilizations. I love it. I think it is really, really good. The reading level is...it’s actually because I've done Lexile on it. It actually comes out between...because I did samples of different pages, between fifth grade and eighth grade. I think it’s actually very appropriate for my gifted students, though many of them are reading on a higher level than that. I do still think it’s good. I think that most of the activities that they have are pretty well done. I don't like all of them so I'll change them, but overall I like those. We have it....it’s like a workbook, interactive student notebook.
I use that a lot because there’s a lot of good questions in there, and it does give them the opportunity to possible do some drawing or things like that. I do use that.

T- Do you use any supplemental materials, other than the textbook?

I- Well I use, every once in a while, I'll use the Learn 360. Sometimes I do Flocabulary if we have a little bit of time for the current events, like The Week In Rap. I like Brain pop. We use Brain pop a lot, maybe not a lot. Sometimes. Some of the other things that I have that I liked to add in. I'm trying to... I have a world history atlas that I use sometimes.

T- What other process...you mentioned that you don't do some of the activities in there, in the curriculum.

I- Right.

T- What are some of the activities that you've replaced them with.

I- Well, I do the websites instead. I was doing for the last couple of years I did the Han Dynasty, I used website. Then the Han Dynasty got taken out of our curriculum. What I did was I just added it back in a little bit because I was going to skip it but then I couldn't because it's all the inventions and it's so fun. I said, all right guys. This isn't going to be on the final but we're going to do it anyways, so we did. I didn't do it with website.

T- Okay. You mentioned the different products that you allow your...you let your students create, like the website and the prezzies. Is there anything else that comes to mind that...?

I- Year, yeah. I know probably a lot of things I'm going to think about and say, oh I should've said that. I'll write it down. That’s what I do, I write everything down.

T- Then lastly, what are some ways that you modify your classroom environment of the tone of your classroom?

I- Well, I like to use music sometimes, but I use like the brain building music and I'll use classical music. Also, I've had my students say to me several times over the years that I always use big words. I don't really think I do that on purpose, except for maybe now more I try to because I think it’s important to show good vocabulary with them so that they can, you know just be exposed to it. I think that it’s one thing. I do like it to be a calm environment, so I have a color scheme of blue and green. I want them to fee calm when they come in. Also, lot of academic things around, which I think probably all teachers do. I have the word wall and I like to have things up for the unit. Since we're starting ancient Greece soon, like today I was putting up stuff for Greece so that when they come in they'll see it and they'll be like, oh okay its new. I think all teachers do that. I don't know that’s specific with gifted.
Appendix U: Mrs. Tango’s Classroom Pictures and Student Work

Caption: Photograph of student desk configuration and the front of the instructional space.

Caption: Photograph of student desk configuration and the back of the instructional space.

Caption: Photograph of front whiteboard, showing the various forms of government.

Caption: Photograph of board configuration including objective, agenda, key terminology, and assignments.
Appendix V: Excerpt from Mrs. Tango’s Interviews

T- Do you talk about anyone else that has overcome great adversity or challenge in their lives? Do you talk about any other intellectuals who have impacted our world?

I- Not really I mean the only two other people we talked about are Montesquieu and John Locke and they don’t really recognize them. They want me to skip over that chapter. I mean we do go over the civil rights movement with them. A lot of them were just completely like shocked and surprised in you know the struggle. I don’t think they realized the struggle that people went through. Even women for the right to vote, and some of them seemed very touched by it that they thought it was just oh women got the right to vote. Or oh it was overnight. There was no slavery and everyone is equal and they didn’t realize the amount of time and the struggle and the things that people went through. So I think they liked learning about that. I think they you know, had some preconceived notions about that. So they …..

T- It was glazed over quite a bit in elementary school, if students get an opportunity to experience social studies in elementary school.

I- Yeah it's true. I mean they come in thinking that Martin Luther King freed the slaves. I’m like no guys this was a long time in between. I get a lot of oh my God that makes more sense, okay that’s interesting. So that makes you know.

T- So you have some opportunities to talk about social justice?

I- Oh yeah.

T- The advocacy for the minority voice and …..

I- Yeah that’s what we just finished covering and they really enjoyed talking about that. They got to watch parts of I Have a Dream speech. They watched Lyndon Johnson give his speech to congress. We talked about the literacy test they use to give in the south. I mean they were just… I gave them a copy of it and they were just blown away that people were like that and how different it was. I mean they were like how could this be okay. You know, it really I mean I had a kid who was almost like crying. She was so upset that people could be so horrible. We did a little bit with Japanese interment, and they had to do a presentation on a bunch of different topics with constitutional rights. But one of them was Japanese interment and there was this picture of this house and somebody put a banner on the front that said “JAPS GO AWAY YOU ARE NOT WELCOME HERE”. The kids were just like…… one kid had her hand over her mouth. They were just like how could people be like that. You know, they were just surprised.

T- So you’ve noticed firsthand how these gifted students can be very sensitive to …..

I- Oh yeah because that’s who I was talking about very sensitive. Yeah I mean the one I’m thinking of, she turned around and she was just like Oh My God. How could people
do that to each other. I’m like I know it was a different time it's sad. You know, I tried
to help her understand you know, that we learn so we know what it was like and we know
that we will not do that. You know, and she was very saddened by our history. You
know, she had no idea it was that bad.

T- Do you see that your teaching empower students as well?

I- Yes. I feel like sometimes when I look at them there is this one, he sits there he is so
cute. When I talk and I know I hit something home he sits there and he nods. He’s like
yeah got it. I can see him nodding with me like it's exciting. He’s the one I always shoot
for because he’s such a cute kid. He nods so it's like okay I did it right, he gets it, it hit
home, he’s got it. But he only nods at certain times but I know when he nods he sits there
and nods while I’m teaching. I’m like okay I did something right. But you know, with
especially like with our Marzano I’ll tell the kids, I will say what level do you think you
are on now at the end of the last sentence. They will tell me no I’m a two. Sometimes
there will be a four and I’m like let me slam this one out of the park. Like whew who
they are a four. But yeah so I feel like sometimes I definitely do get through to them.
The Civics curriculum is very interesting for them. They really like it. The kids say it's a
lot of work, but it's interesting because it's stuff they can go home and talk to their parents
about.

T- Right.

I- You know, and it's stuff that’s going on right now.

T- Do they ever share with you what conversations they have with their parents?

I- Oh yeah, we did Miranda verses Arizona and one of my students’ dad is a cop, so of
course he went home and said have you ever heard of the Miranda rights? I thought that
was hilarious. I’m like yeah I think he’s heard of that. He said his dad was telling him
all about that and they were talking. I had one student who asked about the Japanese
interment who said her grandmother witnessed that, and she was telling him about that.
So it's to me one of the most fulfilling things when they come back and tell me they had a
conversation with somebody in their family about something we talked about in class.

T- It makes it relevant and meaningful and purposeful.

I- It does, it does.. It makes me think and them think I think there is a reason why they
are learning this. That there is a point to it. Especially like there are so bored when we
talk about like local laws, and county laws, state laws. But then when they get it they are
like oh okay so I get it now. The speed limit is this; this; and this. I was telling my dad
you know, that is an ordinance. You know, then they are teaching their parents
something. I think that’s pretty cool too.
Appendix W: Ms. Parker’s Classroom Pictures and Student Work

Caption: Photograph of student desk configuration and the front instructional space.

Caption: Photograph of accessible technologies and the back instructional space.

Caption: Photograph of bulletin board related to ancient Greek key concepts.
Caption: Photograph of the accessible technologies used at the front instructional space.

Caption: Photograph of student work related to statements that initiated *Cast-Off* activity.

Caption: Photograph of student work related to music selections used during simulation of forms of government that influenced ancient Greece.

Caption: Photograph of board configuration including objective, agenda, and assignments.
Appendix X: Excerpt from Ms. Parker’s Interviews

T- So what kind of instructional strategies or techniques would you suggest are necessary for gifted students?

I- Well I think a lot of in history, like the inquiry based which naturally lends to itself because of our subject. It's easy and kind of like, how would history be different and giving them that opportunity to expand on different topics. I feel like for me this year, I don't know that I've even been able to do that as much as I would like to because I feel like I'm just barely swimming in what I'm doing. I know, thinking in the old seventh grade curriculum, I had different literature circles for when we did World War II, the Holocaust books, so giving them, I guess, different options. I think for me, choice for all middle school kids, giving them choice in terms of a product, I think is just something that I've always done. I think all students do better with that. You don't tell them that they have to do X, Y, and Z, but I also think differentiation in general...I do a lot of music stuff. I do a lot of art stuff. We made models earlier this year for Meso America, looking at adapting to technology or technology in the 1500's if you will. But just problem based, kind of giving them there's not necessarily like an answer, but there are many answers, and then giving them the chance to explain. They love fishbowl. I do that.

T- What is fishbowl?

I- It's basically where you have the inner circle and the outer circle. It's probably got a different name. Kind of like a Socratic seminar. So you have the inner circle, they're the only ones that get to talk. So we did it for Hammurabi's Code. They came up with different levels of questioning because in the beginning of the year I realized that none of them kind of have any idea of levels of questioning and knowing that our district tests have different levels of questioning, that was something I realized I had to teach them. So you have to make a level 1 recall up to level 3. So with the Marzano levels of questioning. So them come up with questions so they have that little card when they go in there, and then the outer circle have a rubric so their just kind of evaluating the discussion and then you switch. I like 3 different groups. So that's something that they enjoy, a structured discussion. But just giving them those chances where it's not just like I'm expecting one answer kind of thing, which is very easy to do in history.

T- How have you professionally prepared yourself to meet the needs of your gifted students? Is there a process in which you actively think about them in terms of your planning and your delivery?

I- I think I'm thinking more so about all the students to be honest. When I'm planning, I feel like I can't always just be doing Cornell notes, like everything. That just doesn't work for me unless it's eighth grade which was preparing them for high school. That's a little different. So looking at what we've done and just giving them different, all students, different ways to show what they've learned. And so a lot of it is just producing something to show what you've learned. With the History Alive, there's a lot of processing tasks which they have to think about, they have to illustrate, they have to in a
creative way…so I just look at it as I have the different things…for me, the Weebly. That was something that I've used in eighth grade with NHD, but in sixth grade, none of them had made even a simple website. So right now they're just, all of them are working on paraphrasing. All of them are working on direct quotes. So exposing kind of all of them, and the gifted students as well. Every website is different. Every topic is different. It's basically like a jigsaw of the chapter and they can pick whatever they want. So it's been interesting to see what they're picking, the combinations. They might have one like religion in Ancient Greece and one has government on the same page. It's just whatever they want. So I think just thinking about all and just the middle school student in general…I don't know that I'm planning specifically for gifted but just what's going to be best for the whole group. Because in each class I probably have about 3 gifted kids, so my population is not all gifted whereas in other sites it might be…like at my former school they had a gifted team. So I think that class would look a little different than my kind of all abilities.

T - So how frequently do you think you make curricular and instructional decisions?

I- Probably daily. With the A day/B day, because this year everything I'm just trying out for the first time, so even if I do a lesson from the TCI, from my A day to B day class I'm modifying with what didn't go well. So that's the one benefit of block, being able to do that. But in terms of right now, for the majority most all my classes are doing the same thing because I just personally haven't had the time.

T- Do you find as though that you make a lot of decisions on the fly to make it work for the period that you are in at that moment in time?

I- Yes. If I make a rubric, there are just certain things…for example, with the websites. I wanted them to focus on 2 chapters, the achievements of the Greeks. Well, they're still stuck on Athens and Sparta so that's still in our benchmark. Okay, chapter 27, sure. Just 'cuz we're going to present them all…none of it is like the achievements, it's like government this. It's like one little page. It's not that detailed so to me at the end of the day, this is more about technology and exposure to technology and the creative of well, do you want to read a whole essay? And just kind of thinking about those things in a creative way. So that's kind of what I'm focusing on with these 2 chapters because they're kind of like, not that exciting the chapters themselves, and it's just very bland, very vanilla. So yeah, certain students I've just yes…I want them to be engaged at the end of the day so whether they're gifted or not and it's all in our benchmarks and they're all…part of it is presenting their favorite part of the website. This will be the first time that they've presented without a team and so for sixth grade, it's a big deal. So those kinds of more so, like life skills. At the end of the day, if they don't remember Hammurabi's Code, I'm not going to be devastated, but I think that there's a lot more happening skills-wise which I have to remind myself is also equally as important as the content.
## Field Notes Organizer for Classroom Observations

<table>
<thead>
<tr>
<th>Location, Date, and Time</th>
<th>COMPTON, 4.13.15, Period 4 (12:38-1:25)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Observations:</strong></td>
<td>Content, process, product, classroom environment or tone</td>
</tr>
<tr>
<td><strong>Impressions:</strong></td>
<td>supportive non-verbal, expressive, observations</td>
</tr>
<tr>
<td><strong>Differentiation Features:</strong></td>
<td>acceleration, complexity, depth, challenge, creativity, abstractedness</td>
</tr>
</tbody>
</table>

Students enter the room, teacher has folded numbers in a basket that she hands out to the students as they come in the room and have a seat. Folded papers are colors that will coordinate seating placement for all students.

**BOARD CONFIGURATION**
*Pats v. Plebs*
*HS: J#25 Due Friday 4/17*

**Essential Question:**
*What will I learn? What were the characteristics of the Roman Republic and how did they change over time?*
*How will I learn it? Assume the roles of patricians and plebeians*
*How will I use it? 1) Describe the founding of the Roman Republic 2) Compare and contract the rights and powers of patricians and plebeians during various phases of the Roman Republic 3) Describe how the government of the Roman Republic became more democratic over time]*
*How will I know I’ve learned it? Summarize the lasting significance of the ideas and organization of the Roman Republic.*

Teacher begins class with a review of topics and activities covered in the previous week’s class periods. Students take part in discussion by answering teacher questions and expanding on

Teacher at front of the room close to technology and SMART Board.

Review, recall
prior knowledge with one another in quiet dialogue.

Students are organized in seating groups of four or six. Students have out on their desks their agendas, textbooks, and binders.

Teacher uses Essential Question to wrap up the review and discussion of this week’s topics and activities.

Teacher segues to the front table to utilize the Elmo and SMART Board. Teacher displays a Roman Mosaic from the textbook.

Teacher explains the activity. There are two groups. Center group represent the patricians. Four outside groups represent plebeians. Patricians are directed to make the decisions/answers for the following question. Plebeians are directed to complete the tasks directed by patricians.

**ACTIVITY GUIDELINES (Patricians answers in red)**

1. *Shall the mosaic have 5, 7, or 10 colors? 7*
2. *Which of these colors shall be included: black, brown, gray, blue, green, purple, red, orange, white, yellow, or pink? Blue, Green, Purple, Red, White, Yellow, Pink*
3. *Shall the Plebs cut out 300, 450, or 600 tiles for the mosaic? 300*
4. *Shall the Plebs have 5, 10, 15 minutes to cut out tiles? 15*

Patricians rotate around the groups to ensure that Plebeians are following the guidelines. Plebeians are cutting mosaic tiles (.5 inch x .5 inch)
Teacher pauses activity to discuss with the class Plebeian concerns from the process. Teacher brings those Plebeians to the front of the room. Teacher continues discussing the concerns with the class. Discussion leads to compromise.

Student representatives change their answers to better the productivity and work conditions of the simulation. Answered the following:
1. 10
2. All but Grey
3. 300
4. 15

Teacher reveals that they are not putting a mosaic together. She reflects on the experience with her students.

Students weigh in on their experiences.

Teacher segues into a textbook comparison between Roman government and current US government (Republic: Began to sing Pledge of Allegiance until the word Republic…)

Students read the text as a class on History of Roman origins, discussion of Patrician senate and Plebeian counterparts (Chapter 33.1-33.4)

Last few minutes of the class period, the teacher directs students to tidy their work areas and to collect craft supplies. Bell rings <END OBSERVATION>

<table>
<thead>
<tr>
<th>Use of reflection, compromise, and teambuilding skills.</th>
<th>Depth Abstractedness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Redirects simulation experiences; presents connections to content.</td>
<td>Student reflection</td>
</tr>
<tr>
<td>Referencing to text as foundational curriculum source.</td>
<td>Musical connections</td>
</tr>
<tr>
<td>Support for non-fictional text reading and analysis of tertiary sources</td>
<td></td>
</tr>
</tbody>
</table>
# Appendix Z: Example Classroom Observation Notes (Ms. Heisman)

## Field Notes Organizer for Classroom Observations

<table>
<thead>
<tr>
<th>Location, Date, and Time</th>
<th>HEISMAN, 3.13.15, 3rd (11:49am-12:36pm)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Observations:</strong></td>
<td>Content, process, product, classroom environment or tone</td>
</tr>
<tr>
<td><strong>Impressions:</strong></td>
<td>supportive non-verbal, expressive, observations</td>
</tr>
<tr>
<td><strong>Differentiation Features:</strong></td>
<td>Acceleration, complexity, depth, challenge, creativity, abstractedness</td>
</tr>
</tbody>
</table>

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Students enter classroom. Teacher remains in the hallway for duty.</td>
<td></td>
</tr>
<tr>
<td>BOARD CONFIGURATION STANDARD - Determine the impact of key figures from ancient Greece. SS.6.W.3.6 TARGET - I will be able to determine the impact of Alexander the Great. PLANNER - Pd 1,3,6,7 - ISN p. 211-212 Pd2 - VVC 30 ISN p. 209-210 BELL - Pd 2 - Tear out, SH8 &amp; Staple, Ch 30 ISN p. 209-214 and complete p. 209, open text pg 312 Pd 1,3,6,7 - Have VVCs out; #9 How is the Peloponnesian War related to Macedonia’s expansion? Use text pg. 314.</td>
<td>Note to ask participant during Interview #3: What is a VVC?</td>
</tr>
<tr>
<td>Teacher initiates class focus: Reviews board configuration. Students pass out 7th grade Washington DC packets.</td>
<td>Teacher very excited about opportunities for students to explore history and civics based topics up close.</td>
</tr>
<tr>
<td>Students complete bellwork. Teacher checks it at small group tables. Afterward, reconvenes class and asks for the joke of the day -&gt;</td>
<td>Joke of the Day - “What does a leprechaun do for a living?” Answer - “He’s a short-order cook.”</td>
</tr>
<tr>
<td>Reviews answers for bellwork question.</td>
<td>Teacher shows TCI History Alive! PowerPoint presentation</td>
</tr>
<tr>
<td>Students read section 4 in textbook. Teacher uses sticks to determine student readers.</td>
<td>Review, recall Complexity, Abstractedness re: bellwork question.</td>
</tr>
</tbody>
</table>
Students complete page in ISN devoted to map of Alexander’s empire. Students share #3 findings with group mates. Teacher selects group member #2 to begin discussion.

Teacher asks some comprehension questions to determine student understanding.

Students read section 5 of the textbook as a class.

Teacher uses digital timer (online-stopwatch.com) to keep track of student time for ISN assignments. Students complete section 5 in their ISN. Students share in small groups what answers they developed for section 5 of ISN.

Students move onto a small group activity concerning the tools the teacher placed on their table. Teacher asks students to discuss Critical Thinking Question A (see powerpoint)

Step 1 - Discuss sub-questions in the small groups

Step 2 - Individually consider Critical Thinking Question A. Have each group member share several reasons for his or her placement of the token on the spectrum (tools on table) from very unsuccessful to very successful.

Group Member #2 is in charge of sharing with the class where the group collectively evaluated Alexander’s success. Students vary in opinion, but usually determine that they are in the from previous class on the Smart Board. Teacher uses sticks to select group member responsibilities.

Teacher paces around small groups to assist one-on-one and offer proximity for students to stay focused.

Teacher passes out post-its and a laminated handout to each small group table.

Critical Thinking Questions A: Alexander planned to spread Greek culture and ideas to the people he had conquered. How successful was this part of his plan for uniting the empire?

- Why do you think Alexander insisted that government officials and soldiers speak only Greek? Was this a good or bad idea? Why?
- How do you think non-Greeks felt about Greeks when they saw Greek styles in the cities Alexander
middle; some success yet he wasn’t successful in other ways. Force v. Choice to adapt Greek culture.

Students read Section 6 in textbook as a class. Students complete Section 6 in their ISN.

Teacher wanted to pass out grades from websites before the bell rings. Students pack up belongings and instruction ends for the class period.

END OBSERVATION

founded? Do you think it gave them more respect or less respect for the Greeks? Why?

(see photo of student product example)
# Appendix AA: Example Classroom Observation Notes (Mrs. Tango)

## Field Notes Organizer for Classroom Observations

<table>
<thead>
<tr>
<th>Location, Date, and Time</th>
<th>TANGO, 2.23.15, 11:01am - 11:51am (3rd period - 50 minute class)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Observations:</strong></td>
<td><strong>Impressions:</strong></td>
</tr>
<tr>
<td>Content, process, product, classroom environment or tone</td>
<td>Supportive non-verbal, expressive, observations</td>
</tr>
</tbody>
</table>

**BOARD CONFIGURATION**

- Essential Q - What are the outcomes of select supreme court? Why are these cases significant?
- Learning Goal - Recognize how several U.S. Supreme Court Cases have had an impact on society.
- Vocab - judicial review, landmark

**Page 56 in Student Binder - Review of court cases**


**Review Q’s (pg. 59)**

**Marzano Scales Review**

- 4- I can take a position on which of the us supremem cort cases most impact today’s society. I can state what would have happened to our society of a US supreme court case never happened.
- 3- I can differentiate between the US Supreme Court cases and how they have had an impact on society
- 2- I can describe the landmark US Supreme Court cases. I can recognize the constitutional principles and/or rights in relation to the decisions.
- Vocabulary - judicial review, landmark.

**Beginning remarks**

- won grade level contest, kids were engaged and excited about celebrating their success with a donut party. They were also happy that they were ahead of the other classes in the curriculum pacing. They mentioned taking some time off to relax.

**Desk configuration**

- groups of three, mixed ability/personality grouping

(56) Kids engaged. 75%+ of them participate in recall

- Warm inviting stance, uses proximity movement

Majority of students (approximately 80%) felt they were at a 2.5 or higher

Recall, review

Checking for needed acceleration & challenge
1- with help, partial success.

**Comparing Forms of Government**

**Introduction**
- Students read introduction text from student binder materials
- Utilize various levels of questioning to promote student voice.
- Clarifying questions stump participant when asked if there are countries in anarchy.

**iCivics Activity**
- Read, individually select text highlight, discuss in small group (10 minutes).
- Use chart and reading to identify the characteristics of various governments. Students work in small groups to determine accurate descriptions.
- Copied handout - Use one reading for one of nine forms of government.
- Next class, presentations from each small group on the selected form of government.
- Students work up until the end of the class period; end observation.

<table>
<thead>
<tr>
<th>Checking for Understanding</th>
<th>Depth, Challenge</th>
</tr>
</thead>
</table>
| Participant seems nervous, use hands to cover face to interpret thinking when asked questions she didn’t know the answer to. Open with students that this is not her forte. | }
Appendix BB: Example of Classroom Observation Notes (Ms. Parker)

Field Notes Organizer for Classroom Observations

<table>
<thead>
<tr>
<th>Location, Date, and Time</th>
<th>Observations:</th>
<th>Impressions:</th>
<th>Differentiation Features:</th>
</tr>
</thead>
<tbody>
<tr>
<td>PARKER, 3.6.15, 3rd period (11:00-11:51am)</td>
<td>Content, process, product, classroom environment or tone</td>
<td>supportive non-verbal, expressive, observations</td>
<td>acceleration, complexity, depth, challenge, creativity, abstractedness</td>
</tr>
</tbody>
</table>

Students enter room, Teacher directs them with logistic responsibilities. TAs are responsible for passing out ISN.

ESSENTIAL QUESTION - How did the silk road promote an exchange of goods and ideas?

OBJECTIVE - Explain the concept of cultural diffusion and identify the influences of different ancient cultures.

AGENDA
- Turn in ISN Chapter 24 pp. 168-171, using Textbook pp. 268-269
- Map out Ancient Greece pp. 176-178
- Greek Dinner Party: begin novels, plans

HOMEWORK
- Weebly presentation slips due March 11-12
- Dinner Party Projects B Day - March 27, A Day - March 26th

MARZANO SCALES
4- I am able to take a position and successfully argue the costs and benefits of building the Great Wall. I can connect my 7 characteristics of Civilization to ancient china and provide concrete examples of each.
3 - I can explain using evidence, the costs and benefits of constructing the Great Wall and the overall contribute Ancient Greece.

Teacher is calm, collected, and indifferent in terms of attitude. Seriousness in terms of responsibility and accountability for student learning. Students seem to respond to her well. At times they veer off topic in small discussion, but can easily refocus themselves for the most part. (12 boys, 8 girls)
2 - I understand our vocabulary: Mandate of Heaven, Confucianism, Daoism, Legalism, Feudalism, Costs/Benefits, Silk Road, Emperor Quinn, The Great Wall of China

1 - With help, I understand

Students sit in groups of four at tables around the room, teacher front table is front and center surrounded by student tables. Agenda is placed on left side white board. Classroom library, student binders on right side of the room.

First few minutes of class - Students are finishing a map activity that they began in class the previous day. Teacher check-in, reviews with class where we left off, where they should be on their own responsibilities for homework, and a review of what they just finished in terms of classroom activities (DBQ on Silk Road).

In review of map, teacher utilizes bulletin board that way made conceptually to symbolize the silk road and the Grecian region. (Take picture)

Teacher utilizes students that have completed the assignment to roam around to other student tables and assist.

Teacher utilizes verb in GEOGRAPHY SKILLS questions so that students can identify what they are supposed to do. Teacher also makes several interesting skills to help with mapmaking: Careful spelling complex words, labeling in various directions to make labeling fit in confined spaces. Teacher also labels areas (Egypt, Asia, Africa) that have been discussed earlier in the course.

Uses “check with neighbor” to double check they are on track with the class.

Teacher has a great sense

(VERY INTERESTING - USE IN INTERVIEW; FIND ORIGIN OF INSTRUCTIONAL SKILL)

Recall, review

Review

Seems as though she uses student accountability quite a bit to manage the classroom.
| Allows students to complete parts of the map the participant uses with the class. Asks students to walk class through problem-solving. In this case, student uses “finger method” to determine how far away Iberian Peninsula is from Greece mainland. Other students weighed in on their answers based on other methods of measurement. When it comes to two-part questions, teacher asks students to be careful when students answer two-part questions. Uses this opportunity to develop greater student awareness. In this case, (question 5) asks students to identify, label, but also asks how waterways influenced Greek development. Students weighed in on multiple answers. Teacher reads textbook pp. 268-269. Asks for students to help, who are familiar with Greek language (especially since communities are local). Students answer review questions based on reading in textbook pp. 268-269. After students are done with questions, Teacher passes out permission slips for weebly websites. Teacher mentions she forgot to show the week in rap, but wants to celebrate someone’s birthday. <END OBSERVATION> | of what’s going on around her. She’s very aware of her surroundings. She is very active (changes thermostat, picks up trash on floor, gets up to assist students who need refocusing, rotates herself to the various tables from her front chair to ensure that all students are on track and following direction). Teacher is able to redirect students after discussion goes off track re: Greek food and lamb meat on gyros. Cute moment to illustrate gifted discussions and connections. Teacher has an amazing voice. Students seem to love to see the lighter side to her personality. | Depth Complexity Abstractedness Challenge Abstractedness |
ABOUT THE AUTHOR

Teresa Bergstrom is a doctoral candidate and adjunct instructor for the Department of Teaching and Learning with the College of Education at the University of South Florida. She is pursuing a Doctorate of Philosophy in Curriculum and Instruction, with a specialization in social science education. Her research focuses on curricular-instructional gatekeeping within middle grades social studies, specializing in methods of differentiation for gifted student populations. Other areas of research include the advocacy for gifted and indigenous student populations, as well as the increased inclusion of gifted initiatives and diverse populations in social studies education.

Teresa’s methodological interests include qualitative case study methodology, interview and classroom observation techniques, and autoethnography. Her publications include the Social Studies and the Young Learner, Oregon Journal of Social Studies, and the Florida Council for the Social Studies Trends and Issues. Since 2010, her conference presentations include the National Council for the Social Studies, College and University Faculty Assembly, International Society for the Social Studies, Florida Council for the Social Studies, National Association for Gifted Children, Florida Association for the Gifted, and the American Education and Research Association.

Residing in Dunedin, Florida, Teresa has been a full-time middle school social studies teacher at Dunedin Highland Middle School’s Center for Gifted Studies for ten years. Recently she was awarded the Excellence in Teaching History (2015) for the FCSS and she served as the NCSS CUFA Graduate Forum Communications Officer in 2015.