

Learning in Place: Teachers' Experiences with a Place-Based Language Arts Curriculum in  
Rural Appalachia

Michelle Christian Rasheed

Dissertation submitted to the faculty of the Virginia Polytechnic Institute and State University  
in partial fulfillment of the requirement for the degree of

Doctor of Philosophy

In

Curriculum and Instruction

Amy Price Azano, Chair

Bonnie Billingsley

Carolyn M. Callahan

Claire Robbins

March 25, 2021  
Blacksburg, Virginia

Data used in this dissertation were part of a federally-funded Jacob K. Javits Grant, U.S. Department  
of Education PR/Award # S206A140034

Keywords: critical pedagogy of place, gifted education, rural gifted education, rural education,  
place-based education

© 2021 Michelle Christian Rasheed  
All Rights Reserved

Learning in Place:

Teachers' Experiences with a Place-Based Language Arts Curriculum in Rural Appalachia

Michelle Christian Rasheed

### **ABSTRACT**

Research in rural gifted education is garnering increased national attention (Plucker & Callahan, 2014; Lewis & Boswell, 2020), yet inequities in rural gifted services continue to challenge educators in their efforts to meet the needs of a unique population (Azano et al., 2014, 2017). Understandings about existing systemic structural challenges in rural gifted services highlight a need to mitigate opportunity gaps for rural gifted students (Azano et al., 2017). Using Greenwood's (2003, 2008) critical pedagogy of place as the theoretical framework, this qualitative case study examined how 16 teachers in a high-poverty rural district consisting of eight schools experienced the Promoting PLACE in Rural Schools curriculum, a place-based language arts curriculum designed for gifted third- and fourth-grade students. Analytic induction and thematic coding of four distinct sources of evidence (fidelity logs, observation documents, questionnaires, and an interview) were used to make sense of teachers' experiences in implementing of the curriculum. With "an emphasis on experience, understanding, and meaning-making" (Merriam, 2009, p. 19), the researcher explored what teachers' experiences and perceptions could teach us about instruction in high-poverty rural communities and opportunities for gifted learners. Findings illuminated influences on teachers' ability to implement the curriculum such as the under-prioritization of gifted education by the larger school community and teachers' own ingenuity in ameliorating challenges to implementation. The study offers

insights about students' access to gifted instruction in one school district in Appalachia. Findings from this qualitative case study may shape gifted instruction in rural places and inform stakeholders of ways in which opportunity gaps for rural gifted populations may be addressed. Insights offer implications for practitioners, administrators, policymakers, community members, and researchers to mitigate instructional challenges and increase students' access to place-based gifted curriculum.

Learning in Place:

Teachers' Experiences with a Place-Based Language Arts Curriculum in Rural Appalachia

Michelle Christian Rasheed

### **GENERAL AUDIENCE ABSTRACT**

This qualitative case study examined teachers' experiences with a language arts curriculum for high-poverty rural gifted students. The study focused on one rural Appalachian school district where 16 elementary teachers working in eight schools implemented the Promoting PLACE in Rural Schools curriculum with third- and fourth-grade students. Methods included analytic induction and thematic coding of four distinct sources of evidence: fidelity logs, observation documents, questionnaires, and an interview. These sources were used to generate understandings about how teachers perceived their experiences with a rural specific curriculum designed for gifted students. These understandings suggested existing barriers influence implementation and impede students from access to the curriculum in its entirety. Insights from this case study offer implications for practitioners, administrators, policymakers, community members, and researchers to mitigate instructional challenges and increase students' access to place-based gifted curriculum.

## Dedication

To Larry, without you, I could not have done this. You have always believed in me . . . in my ability to accomplish whatever I set out to do, even when I did not believe in myself. Over decades, your support has been unwavering, and I am so grateful. This PhD journey has been one of the most arduous endeavors for me and with it I feel a great sense of accomplishment. Yet, the most extraordinary accomplishment in my life is that you and I have two amazing daughters which bond us together in a way that nothing else in life can. Thank you for all the ways you help me. Always.

To Holly and Abby, your words of encouragement, love, hugs, and smiles make everything in life worthwhile. The ways that you supported me in this PhD program are many. Through it, I have seen each of you grow in your own unique career paths. You are amazing young women with strength of character, intelligence, integrity, beauty, and talents beyond measure. Every day, I am grateful for your presence in my life. I am so very proud to be your mom! You are my greatest joy. With all my heart, I love you.

To Mom, your resolve and inner strength to get through life's challenges is commendable. I would like to think, that I, too, have a bit of those characteristics. You saw my aspirations, and my anxiety, in the first week of second grade when I looked ahead at the math problems in the very back of the book. I did not know how to do the problems. I wanted to solve them, but I did not know how or have much confidence. With patience and perseverance, I learned to do those problems, over time, through lots of work, and many revisions. This PhD is a lot like that. I was not sure I could do it, but did know, no matter what, you would love me just the same. I will always be grateful that *you* are my mom. I love you.

To Bill, *the* most wonderful dad! You have always asked me how things are going and even took time to read some of my work. I am forever grateful for your support, kindness, and love. Thank you for being there for me and for our family. Importantly, thank you for finding and loving Mom!

To Paul, thank you. You welcomed me in when I needed a friend and gave me space to complete the dissertation. At the end of some very long days, when I just could not read, write, and revise any more, you went on walks, ate pizza, played gin, and watched basketball with me. I appreciate your help and encouragement along the way.

To my canine friends, ChaChi, Scout, and Penny, your affection and doggie hugs, especially on the "ruff" days, were the best!

## Acknowledgement

To Dr. Amy Price Azano, thank you for your support every step of the way. I am very grateful for the opportunities provided through the Jacob K. Javits and Jack Kent Cooke grants. I have seen more of Virginia, and neighboring southwest regions, over the last five years than I have in all my life! Through my travels, research, conversations, observations, and collaborations, my understandings of place have evolved and deepened. Thank you for opportunities to publish, present at conferences, and participate in rural research. You are a wonderful advisor, mentor, and rural friend. From the bottom of my heart, thank you!

To Dr. Carolyn Callahan, it has been a privilege to work with you on the Promoting PLACE in Rural Schools grant. Collaborating with the University of Virginia grant team has been a highlight of my program. I appreciate your time and guidance as you reviewed my writing. I am honored to have you on my dissertation committee. Thank you.

To Dr. Bonnie Billingsley, the Professional Seminar class was my first introduction to research for the PhD. You shared your expertise and enthusiasm in education research with the class and challenged us to write our best literature reviews. From fall to spring, we worked: we wrote, we revised, and we wrote some more. You met with us, coached us, critiqued us, cheered us. Then, our literature reviews were shared with the class. After lots of meticulous feedback and many revisions, my literature was published in the *Journal of Advanced Academics*! I am honored to have you on my dissertation committee. Thank you.

Dr. Claire Robbins, your scholarship and support have helped guide my thinking through each of the exams. Your insights about access and equity are valuable contributions to my own understandings. Thank you for serving on my dissertation committee. I am honored that you are a part of my journey.

Rachelle, reader, reviewer, and friend, your thorough and thoughtful reading of my chapters has been an invaluable contribution in this dissertation process. While my words cannot convey the depth of my gratitude, I am sincerely thankful for your patience, kindness, and expertise. Thank you, thank you!

Erika, I enjoyed working with you on the Promoting PLACE in Rural Schools grant and will always have fond memories of our road trips across the state and into neighboring regions. From nearly impassable mountains to bridges over bays, our travels will always be one of the highlights of my journey in the program. Thank you for being a good friend and colleague. I hope, once again, we can soon talk about our research, travels, and dogs, over a beer and food at a local establishment.

Rebecca, thank you for your friendship! You welcomed me to VT, showed me around Blacksburg, shared many happy hours, answered so many questions about the PhD, and offered encouragement when I needed it most. I appreciate you being there for me.

Caryn and Marie, thank you, too, for your friendship, help, and encouragement. I hope we can all attend conferences (and shop, Caryn) together again!

Jennifer and Lezly, I appreciate your friendship, meet-ups in Blacksburg, and Zoom sessions. I look forward to sharing a bottle of wine with our group once again!

Eunice, thank you for your help with Qualtrics and your friendship. All the best to you!

Heather, I am so glad we could co-teach during our assistantships. Your encouragement, texts, phone calls, Zoom meetings, and willingness to take on additional responsibilities helped so much. Thank you.

Heather and Malle, I enjoyed working with you on the FEW Nexus curriculum and SEE VT. I look forward to our continued collaborations.

## Table of Contents

ABSTRACT.....	ii
GENERAL AUDIENCE ABSTRACT.....	iv
DEDICATION.....	v
ACKNOWLEDGMENTS .....	vi
LIST OF FIGURES .....	xi
CHAPTER 1: INTRODUCTION.....	1
Problem Statement.....	2
Purpose Statement.....	5
Research Questions.....	5
Rationale and Significance .....	6
Researcher as Instrument Statement.....	7
Definitions of Key Terminology.....	9
Rural.....	9
Gifted .....	10
Place-Based Education.....	11
Critical Pedagogy of Place.....	11
Summary.....	12
CHAPTER 2: REVIEW OF THE LITERATURE.....	14
Rurality as a Context for Gifted Education.....	15
What Is Rural? .....	16
Rural Versus Ruralities.....	19
Definitions of Ruralities.....	21
The Rural Imaginary.....	22
A Socially Constructed Rural .....	23
What Is Gifted? .....	24
Definitions of Giftedness .....	24
Summarizing Giftedness.....	26
Studies in Rural Gifted Education .....	29
Considerations for Rural Gifted Education.....	33
Identification Processes in Rural Gifted Education.....	34
Rural Gifted Programming .....	35
Place in the Rural Gifted Curriculum .....	36
Addressing Inequities Through Place-Based Curricula.....	37
Successes, Challenges, and Gaps in Rural Gifted Education .....	38
Successes in Rural Gifted Education .....	39
Continued Challenges in Rural Gifted Education.....	40
Adding to the Literature.....	41
Conclusion .....	43
CHAPTER 3: METHODS.....	46
Context for Research Study .....	46

The Curriculum.....	48
Professional Development .....	49
Hutton County.....	50
Research Sample and Design.....	51
Classroom Observations .....	55
Role as Graduate Research Assistant.....	55
Characteristics of a Rural Gifted Case Study .....	56
Four Phases of Data Collection and Four Data Sources .....	57
Phase One.....	57
Phase Two.....	58
Phase Three.....	60
Phase Four.....	61
Data Analysis .....	62
Synthesis of the Four Sources of Evidence.....	63
Ethical Considerations .....	63
Trustworthiness.....	64
Limitations .....	67
Summary .....	69
CHAPTER 4: FINDINGS .....	71
Understanding Context for the Case.....	72
Contextual Observations and Demographics.....	72
Situating the Case Study.....	75
Case Study Analysis and Connection to a Critical Pedagogy of Place Framework .....	76
Two Key Assertions and Support .....	77
Assertion 1 Structural Barriers Influence Teachers’ Experiences with the Curriculum ...	78
Structural Barriers Prevent Teachers from Delivering the Full Curriculum.....	79
Ms. Ellis’s Insights into Structural Barriers.....	80
Resource Shortages and Curriculum Delivery.....	82
Insights About the Prioritization of Gifted Education in Rural Schools .....	87
Assertion 2: Teachers’ Efforts Influence Curriculum Accessibility.....	89
Classroom Observations and Fidelity Notes Reveal Teachers’ Ingenuity and Enthusiasm...	90
Questionnaire Responses Reveal Teachers’ Enthusiasm for the Place-Based Curriculum....	92
Challenges Mitigated Teachers’ Enthusiasm.....	94
Relating Assertions to the Research Questions .....	95
Teachers’ Experiences and Interactions with the Curriculum .....	95
Teachers’ Characterization of Experiences .....	96
CHAPTER 5: DISCUSSION OF FINDINGS.....	99
Discussion of Assertion 1: Structural Barriers Influence Teachers’ Experiences with the Curriculum .....	100
Teachers’ Time and Resource Limitations Impeded Students’ Access to the Curriculum ..	100
Systemic Barriers Disadvantage Rural Students Living in High-Poverty Communities .....	101
Discussion of Assertion 2: Teachers’ Efforts Influence Curriculum Accessibility .....	102
Teachers Omitted Lesson Components Placed Near the End of Lessons .....	103
Teachers Lacked Understanding of Alignment with Common Core.....	103

Teachers Independently Sought Solutions to Resource Challenges .....	105
Opportunities for Gifted Learners in Rural Schools .....	106
Limitations of the Case Study .....	107
Implications and Contributions to the Field of Rural Gifted Education .....	109
Contributions to Understanding the Complexities of Ruralities .....	112
Contributions to Understanding the Complexities of Rural Gifted Services .....	112
Contributions to Confirm Previous Literature on Rural (In)Equity .....	112
Recommendations for Future Research in Rural Gifted Education .....	117
Conclusion .....	117
 REFERENCES .....	 120
 APPENDIX A: Folklore Unit, Lesson 1, Page 1 .....	 137
APPENDIX B: Poetry Unit, Lesson 1, Page 1 .....	138
APPENDIX C: Fiction Unit, Lesson 1, Page 1 .....	139
APPENDIX D: Research Unit, Lesson 1, Page 1 .....	140
APPENDIX E: Fidelity Log .....	141
APPENDIX F: Observer Log .....	144
APPENDIX G: Teacher Observation Protocol and Follow-Up Questions .....	148
APPENDIX H: Anecdotal and Field Notes .....	153
APPENDIX I: Online Qualtrics Questionnaire .....	154
APPENDIX J: Interview Guide Draft .....	157

**List of Figures**

Figure 1. <i>NCES Rural Designations</i> .....	18
Figure 2. <i>NCES Prevalence of Rural Districts, Schools, and Students</i> .....	19
Figure 3. <i>Maxwell's (2005) Interactive Model</i> .....	53

## Chapter 1

### Introduction

In this dissertation, I describe a bound qualitative case study conducted to bring about understanding of teachers' experiences and interactions with a rural place-based language arts curriculum designed for gifted students. The focus of the study was on one high-poverty rural Appalachian school district (Hutton County, a pseudonym) and teachers within the district who implemented a specially designed third- and fourth-grade rural place-based language arts curriculum designed for gifted students. The curriculum is part of *Promoting PLACE (Place, Literacy, Achievement, Community, and Engagement) in Rural Schools*, a six-year U.S. Department of Education grant funded through the Jacob K. Javits Foundation. Co-investigators Callahan and Azano, from the University of Virginia and Virginia Tech respectively, collaboratively created Promoting PLACE with the overarching goal of increasing access and opportunities for rural gifted students. By providing insight into ways teachers interacted with the curriculum, the study offers guidance for those who wish to create learning environments suited for gifted learners in rural schools.

A critical pedagogy of place serves as the theoretical framework for the case study. Critical pedagogy of place merges “critical pedagogy” and “place-based education,” which are “mutually supportive educational traditions” (Greenwood<sup>1</sup>, 2003, p. 3). With an emphasis on social and spatial experiences, critical pedagogy of place undergirds this case study on teachers' experiences with a unique curriculum (Greenwood, 2003). Additionally, a critical pedagogy of

---

<sup>1</sup> Previously used the last name Gruenewald.

place framework informed and shaped the methods used to explore and describe teachers' experiences with a rural place-based language arts curriculum designed for gifted students.

A critical pedagogy of place is a fitting framework for case study research. Harrison and colleagues (2017) valued the flexible nature of case study, noting the “versatility of case study research to accommodate the researcher's philosophical position [which] presents a unique platform for a range of studies that can generate greater insights into areas of inquiry” (p. 11). In their description of qualitative case study characteristics, the authors noted philosophical differences among leading methodologists (i.e., Merriam, 2009; Stake, 1995; Yin, 2014). These differences support why case study is a viable form of research as it is supported by a variety of philosophical stances. Wolcott (2001) advised, “theory should facilitate the inquiry process” (p. 78). In this way, critical pedagogy of place framed this qualitative research which examined teachers' interactions with a rural gifted place-based curriculum. As highlighted in Chapter 2, issues of access and equity result in opportunity gaps which impede rural gifted students' growth and enrichment (Azano et al., 2019). Silverman (2013) reported “theoretical models shape research” (p. 105) as well as “shape the meaning of the methods” (p. 125). Thus, framing this qualitative case study with a critical pedagogy of place, founded on principles of social justice, was an appropriate choice.

### **Problem Statement**

Access and equity are issues in rural education *and* gifted education. For many rural gifted students, issues of access and equity are compounded by geographic location of rural communities and limited gifted education services. Additionally, gifted services are not federally mandated and extant variations occur across individual states. Too often, rural gifted students are not provided services simply because they live in remote or isolated geographic places where

negligible funds are provided within school budgets for gifted services. Rural gifted education is often constrained by limited resources, services, and staffing to support rural gifted students' learning. Hence, many rural gifted students do not have access to gifted programs nor enrichment opportunities such as field trips to art exhibits, music concerts, science museums, or theater performances.

Rural communities often face additional challenges. While rural advocacy efforts have garnered some public attention to equip communities for 21st century demands, updates to infrastructure such as extending Wi-Fi services to rural communities have been slow. Over the years, rural schools have consolidated as populations have declined. Medical facilities, too, have closed due to rural economic struggles. A dearth of services means that many rural communities do not have adequate or equitable access to numerous services, including sufficient opportunities for rural gifted students to reach their potential. These challenges often serve as structural barriers for rural schools to provide opportunities that recognize and cultivate rural talent. As such, rural gifted students face opportunity gaps where their talents are neither recognized nor cultivated.

While challenges are noted, there are also many affordances of living and learning in rural places. Rural communities offer rich resources such as agriculture, aquaculture, art, music, traditions, and unique talents of residents of rural regions. These local resources offer opportunities to foster community and sustainability of rural landscapes through collaboration.

In Promoting PLACE, the place-based language arts curriculum designed for gifted students embedded locale-specific elements into the units, which linked rural resources to gifted education. The curriculum, consisting of four place-based language arts units based on the CLEAR curriculum model (Callahan et al., 2015) delivered over a two-year period for grades 3

(Folklore and Poetry) and 4 (Fiction and Research), coupled rural place strengths and students' individual interests to challenge, enrich, and support students in each of the units (see Appendices A, B, C, and D). All of the units reflected aspects and characteristics of each of the particular rural treatment districts in the grant. For example, in a rural coastal community, lessons reflected local economic contributors such as fishing and poultry farming as well as fiction excerpts by local authors with specific references to landscape and lore. In another district where mountainous landscapes and farming dominated the area, agriculture features were embedded in lessons. Teachers in Hutton County implemented the curriculum with their gifted students in grades 3 and 4, with some teachers teaching the same students both years and others only one year. Through this study, teachers' experiences with the curriculum were examined. Exploration of teachers' interactions with the curriculum provided further insight into understanding the value of a rural-focused, place-based curriculum. This study also provided understandings about the benefits of and barriers to enacting the place-based language arts curriculum. Consequently, these qualitative understandings offer insights about equitably serving rural gifted students.

Hutton County features unique demographic, economic, and geographic characteristics where opportunities and challenges in rural gifted education are juxtaposed. Racially, the population is overwhelmingly homogenous with approximately 95% White, 2.5% Black, and 2.5% categorized as being of one or more races. Economically, the district has experienced population and employment declines since the 1930s. The poverty rate is near 36% and, at approximately \$25,000, the average income is less than half the United States national average of \$57,652. Recent economic woes were exacerbated by closure of medical facilities, consolidation of schools, and corporate shutdowns. According to the National Center for Education Statistics

(NCES), Hutton County is categorized as rural fringe with a population of approximately 25,000 and a population loss in the past decade of 11%. A recent anecdotal report from a school administrator indicated “significant turnover” of teachers. As such, serving gifted students across stratifications of demographic, geographic, and social landscapes offers possibilities to engage and sustain rural communities with opportunities for local and global connectedness.

### **Purpose Statement**

The purpose of the study was to understand teachers’ experiences with the curriculum as they implemented it and interacted with their rural gifted students. The case study examined teachers’ experiences to better understand specific opportunities and challenges of implementing a rural specific gifted curriculum. Seeing firsthand how teachers creatively work to provide myriad opportunities for students made me think more critically about issues of equity and access, specifically with rural gifted students. With teachers at the center of this case study, insights about rural gifted education in Hutton County has provided valuable information about issues of access and equity in rural spaces.

### **Research Questions**

The following research questions guided the development and implementation of this study:

RQ 1: How did teachers in a high-poverty rural district experience and interact with a place-based language arts curriculum designed for gifted students?

RQ 2: How did the teachers characterize those experiences?

RQ 3: What can these experiences and perceptions teach us about the place-based curriculum and opportunities for gifted learners in high-poverty rural communities?

## Rationale and Significance

Limited information about specific successes of rural gifted programs and services exist in the literature. A. Howley and colleagues (2003) reported that the “frequent failure [of schools] to act wisely on behalf of talented students” is often the case across rural settings (p. 86). However, examination of implementation studies outside of rural gifted education yields insights about what contributes to effective implementation. In a study on effective teaching, Peneul et al. (2007) included considerations of time for teachers to plan for instruction and technical support as two measures for effective implementation of a curriculum. Knowing how a curriculum is experienced provides opportunities to refine and restructure rural gifted curriculum to challenge students in reaching their potential. Another study on effective teaching identified considerations of teachers’ perceptions, professional development, environment, time, and funding as influences on effectiveness of implementation (DaRosa et al., 2011). To provide quality curriculum and instruction, understandings about teachers’ experiences with curriculum and instructional implementation are essential for informed decision-making about what works to support rural gifted students.

A. Howley et al. (2003) offered scenarios whereby gifted students are either “ignored” or “privileged” in schools. In instances where gifted students are “ignored” rather than provided services, the schools function to “curtail opportunities for bright students” (p. 86). In many places, rural gifted students are encouraged to seek “higher” aspirations outside of their rural communities and, ultimately, to leave for more urban or suburban areas (Carr & Kefalas, 2009; Corbett, 2007; A. Howley et al., 2003). A. Howley et al. (2003) reported “provision for academically talented [students has] never been a rural project” (p. 95). Examining *rural* and *gifted* education, Colangelo and colleagues (1999) observed “some striking similarities” in which

“both have borne the brunt of educational fads, and both have received relatively little funding and national attention. Not surprisingly, very few studies have considered the two issues in tandem” (p. 2).

This case study focused particularly on rural gifted students, a population which has received limited attention in education research (Lewis & Boswell, 2020). Bound within one rural county, this research yielded possibilities from teachers’ insights about programming and instruction with gifted students in rural settings. While this was one case study, these insights from teachers’ direct experiences uncovered critical areas in rural gifted education to inform and shape instruction. Findings from studying the implementation of this specifically designed rural place-based gifted curriculum, tailored to the context of local culture and environment, delineate teachers’ firsthand knowledge about the benefits and challenges of using such a curriculum to support gifted students in their rural communities.

### **Researcher as Instrument Statement**

My interest in rural gifted research stems from my lived experiences in rural Virginia. I grew up in a rural farming community in the heart of Virginia’s Shenandoah Valley. It is here where I have been a teacher, an advocate for students of all ability levels, a parent of two daughters, and a lifelong learner. From my own experiences in rural Virginia, I have gleaned insights about achievement, challenges, opportunities, and potential with students. As a former rural teacher, I realize teachers are tasked with vast responsibilities that include pressures of meeting high stakes of accountability while challenging and supporting students in their learning. My teaching experiences piqued my curiosities about effective ways to meet students’ needs across the continuum, particularly with budget and staffing restrictions. It is through the

Promoting PLACE in Rural Schools grant that I developed an interest in and curiosity about the potential of rural gifted students in Hutton County and the efforts put forth by their teachers.

In addition to my own life experiences living and working in rural Virginia, my experiences as a doctoral student and graduate researcher have brought forth considerable—sometimes simultaneously ambiguous and perplexing—understandings about what it means to be both rural and gifted. Rural experiences and gifted experiences vary. Recognition of these variations in rural life experiences contributes to my curiosities and interests in the important role teachers play. Reflecting on my own rural experiences with gifted students provides context for my academic pursuits of an examination of teachers' experiences with a rural place-based language arts curriculum designed for gifted students.

As a graduate research assistant on the Promoting PLACE in Rural Schools grant, my experiences have been vast and varied. My responsibilities have included classroom observations, piloting instruments, contributing to annual reports, presenting at conferences, creating and scoring assessments, writing scaffolds to lessons in the curriculum, developing rural-specific tasks for curriculum units, coordinating school visits, communicating with district administrators, and collecting data. Over the past several years, the grant afforded me opportunities to travel across my home state of Virginia and into Kentucky where I have worked in 14 high-poverty rural school districts with dozens of teachers. These experiences have given me insight and deep understanding of the grant and its many components. My curiosities about rural gifted education were tied to personal and professional experiences which, in turn, precipitated what Freire (1996) called a “conscientization” (critical consciousness), and fueled a desire to understand, to a greater degree, the experiences, interactions, and occurrences of

teachers who implemented a rural specific place-based language arts curriculum designed for gifted students in a high-poverty rural district.

My experiences as a rural teacher, particularly those with gifted students, may have been both a benefit and a barrier to this research. I am an advocate for gifted education and have served on a gifted committee at the high school where I was an English teacher. While on the committee, I became aware of dynamics where there was dissention among staff regarding identification and allocation of funding for gifted services. These teaching experiences, too, underscored teachers' numerous responsibilities in addition to day-to-day instruction. As such, offering lessons that challenged, enriched, and supported gifted students sometimes proved daunting for teachers. I understand systemic issues such as inadequate funding and staffing shortages are not easily remedied, but I believe teachers are positioned to enact, and do enact, change each day with their students. My role as a rural educator may have skewed my understandings regarding rural gifted education in ways that limited findings. However, steps for providing transparency of such subjectivities included peer reviews, recursive reflective journaling, and member checks, which Lincoln and Guba (1985) suggested as a "crucial technique for establishing credibility" (p. 314).

### **Definitions of Key Terminology**

From a constructionist perspective, where meanings are made through social interactions and interpretations, it is my stance that *rural* and *gifted* are social constructs. As such, meanings of rural and gifted depend on, and vary according to, the context and purpose for which they are used.

#### ***Rural***

Definitions of rural are complex, in flux, and variant. Rural understandings are more than geographic location, more than fictionalized idyllic living, and far more than disparaging stereotypes of countryfolk accustomed to rudimentary lifeways. Yet, too often, rural representations in some entertainment, news, and even policies construct a monolithic amalgamation where degeneration and despair beget negative imaginings.

The National Center for Education Statistics (NCES), National Census Bureau, and U.S. Department of Agriculture each provide different definitions of rural. While many education researchers use the NCES rural definitions, a sentiment of dissatisfaction with a singular definition of rural pervades the literature (Azano et al., 2019; Bell & Osti, 2010; Coladarci, 2007; Cloke, 2006; Corbett & Donehower, 2017; C. Howley, 2003; Kettler et al., 2016; Woods, 2009). Perhaps these various national definitions are the very index of distinct rural differences.

To realize the meaning of rural is to understand one, and only one, rural place at a time (Azano et al., 2019; Coladarci, 2007; C. Howley, 2003, Richards & Stambaugh, 2015). To make meaning of rural, it is necessary to understand elements of rurality including, but not limited to, community, culture, economics, education, social dynamics, and myriad other features, some of which are apparent and others underlying. As Green and Corbett (2013) proffered, use of plural “ruralities” rather than singular “rural” illustrates diverse and distinct rural differences. Thus, use of ruralities serves to dispel the rural monolithic myth. As Richards and Stambaugh (2015) explained, understanding “the essence of rural” is necessary to “[serve] gifted students in rural settings” (p. 3).

### ***Gifted***

Gifted definitions, too, continue to differ and evolve. The literature review provided in the following chapter explores various accepted definitions in the field and outlines

characteristics of giftedness that are widely accepted. While definitions continue to develop, Callahan et al. (2014) advocated use of definitions to inform research, provide services, and offer support in gifted education. The National Association of Gifted Children (NAGC, 2010) definition of gifted as “those [students] who demonstrate outstanding levels of aptitude (defined as exceptional ability to reason and learn) or competence . . . in one or more domains” supported this qualitative case study. As such, multiple criteria were used in the Promoting PLACE grant to identify students for gifted services where recognition of talents, academic and nonacademic, is legitimized through a critical pedagogy of place framework.

### ***Place-Based Education***

Place-based education is a forward-thinking approach which honors and incorporates elements of community, landscape, language, and lifeworlds. Here, *lifeworld* encompasses the multitude of influences and complexities which exist in rural communities. Place-based education has roots in environmental education with tenets of sustainability and community viability; is applicable across content areas and grade levels; and works across the continuum of students’ ability levels.

Doyle and Singh (2006) purported, “the authentic voice of the teacher . . . is the single greatest tool in developing a critical pedagogy” (p. 105). With the purpose of understanding teachers’ experiences with rural gifted students, this study “[drew] on local phenomena . . .” (Greenwood & Smith, 2010, p. xvi) to learn what happened when a unique rural place-based curriculum was implemented.

### ***Critical Pedagogy of Place***

Greenwood (2008) argued that “the construct, ‘place’—a potential grounded nexus of cultural and ecological thought and experience— can help educators and citizens become more

aware of the relationships between culture and ecology” (p. 339). In this way, a critical pedagogy of place provided a framework for this case study where place was a central aspect of the curriculum. Greenwood asserted, “the best place-based education . . . emerges from the particularities of places, the people who know them best . . . and the people who wonder about all the opportunities that might arise from action-oriented place study” (p. 339). Greenwood’s notion supports questions such as, “What happened [in a particular place]? What is happening now? What should happen?” (p. 339). This case study centered on opportunities for rural gifted students through an examination of teachers’ interactions with a rural specific curriculum. Greenwood noted a critical pedagogy of place “can provide pragmatic direction for inquiry and action while helping to bring together educators working for social justice and those working for ecological sustainability” (p. 339). With a critical pedagogy of place framework, advocates, educators, and researchers have a viable platform to negotiate curricular access and equity for rural gifted students.

A critical pedagogy of place liberates teachers from conforming to prescribed instructional practices (Greenwood & Smith, 2010). A critical pedagogy of place provides “a focus on the lived experiences of place [which] puts culture in context, demonstrates the interconnection of culture and environment, and provides a locally relevant pathway for multidisciplinary inquiry and democratic participation” (Greenwood & Smith, 2010, p. 148). Thus, a critical pedagogy of place provided a lens to understand teachers’ firsthand experiences with a nuanced rural gifted language arts curriculum.

## **Summary**

The nuanced field of rural gifted education holds possibilities to address issues of access and equity where opportunity gaps exist for rural gifted students. Exploring teachers’

experiences in Hutton County to understand their unique interactions with the rural specific, place-based language arts curriculum has yielded understandings about supporting teachers as they serve their students which will be described in the following chapters. Teachers' experiences with the curriculum offered insights into specific strengths and challenges in rural gifted students' day-to day interactions with such curricula. As Smith (2002) purported,

The primary value in place-based education lies in the way that it serves to strengthen children's connections to others and to the regions in which they live. It enhances achievement . . . [and] . . . helps overcome the alienation and isolation of individuals that have become hallmarks of modernity. (p. 594)

To ensure rural gifted students are afforded opportunities to expand their learning, exploration of teachers' work with a unique place-based curriculum is a viable starting point. As Kettler et al. (2016) confirmed, "At the intersection of rural education, advanced academics, and gifted education, concerns about education opportunities for students persist" (p. 261). This case study has yielded possibilities for understanding these concerns.

## Chapter 2

### Review of the Literature<sup>2</sup>

In my study, I sought to explore teachers' experiences and interactions with a rural place-based curriculum designed for gifted students. My review of the literature provides a context for examining rurality as it relates to gifted education. First, I provide a review of the literature on the social construction of rurality and perceptions about giftedness. Next, I explore the degree to which rural-specific questions about curricula, particularly place-based curricula, in gifted education have been addressed, as well the literature on gifted language arts curricula in general. Finally, I examine studies that address successes, challenges, and gaps in the literature on rural gifted education.

As the purpose of this literature review is to understand gifted education in rural settings and curricula implementation within rural gifted education programs, I used several search strategies. First, I accessed EBSCOhost databases including ERIC, Education Research Complete, Academic Search Complete, Teacher Reference Center, and MasterFILE Premier using the following search terms: rural gifted education AND rural AND gifted AND education. Second, I searched peer-reviewed journals in rural education (e.g., *Journal of Research in Rural Education* and *The Rural Educator*) and gifted education (e.g., *Gifted Child Quarterly*, *Journal for the Education of the Gifted*, *Journal of Advanced Academics*, and *Roeper Review*). Next, I reviewed book chapters relevant to rural gifted education (e.g., Castellano, 2002; Stambaugh, 2015; Plucker, 2013). Based on readings of the abstracts, I used the following selection criteria to narrow results:

1. Rural salience and influence on gifted education;

---

<sup>2</sup> A version of this literature review was published in the *Journal of Advanced Academics* (2020) after successful completion of my preliminary exam.

2. Gifted as a focus, except in cases where rural studies inform gifted education practices;
3. Pre-kindergarten through 12th grade;
4. Peer-reviewed, scholarly journal article or book chapter.

The database searches produced 28 studies, with 15 of those meeting the selection criteria. I cross-referenced the results with Google Scholar and found two additional studies. I also cross-referenced the final list with experts in rural gifted education who were the co-principal investigators on Promoting PLACE (Callahan and Azano). Based on their suggestions, three additional publications were added. These search strategies, expert reviews, and inclusion/exclusion criteria yielded 20 publications that were included in this review (designated with asterisks in the reference list).

I offer a conceptual literature review based on the socially constructed concepts of rural and gifted. Comparing systematic and conceptual scholarly literature reviews, Kennedy (2007) suggested systematic reviews are appropriate for a variety of reasons, but conceptual reviews have the potential to make advances in the field. Advocating for underrepresented groups and looking for “new insights into . . . [issues]” within rural gifted education, a conceptual review has “the flexibility to address the complexity of the substantive issues [I] care about” (Kennedy, 2007, p. 146). I provide a conceptual review as a way to examine the scope and structure of the various aspects of rural gifted education.

### **Rurality as a Context for Gifted Education**

This section offers a theoretical discussion by asking three primary questions. First, what is rural? Second, what is gifted? Third, what do we know about rural gifted education? Before reviewing research in rural gifted education, it is important to understand “rural” and how

rurality serves as a unique context for gifted education. A theoretical discussion of rural and giftedness in this section provides insight for making sense of the empirical articles included in this review. As such, this section examines articles related to defining rural, rurality as a context for gifted education, the social construction of rurality, perceptions about giftedness, and rural gifted education.

### ***What Is Rural?***

Conceptualizing rural is an important but not a straightforward endeavor. Corbett (2016) captured the complexities of ruralities as wide-ranging and difficult to define. Corbett stated, “The more we know about rurality, the less we know, it seems, and, as the old saying goes, if you have seen one rural community, you have seen . . . well, one rural community” (p. 278). Rural education scholars describe rurality as multifaceted with unique and various characteristics from one rural place to another. Coladarci (2007), in his final column as editor of the *Journal of Research in Rural Education*, acknowledged the significance of understanding ruralities and cautioned against generalizations about rural education. Coladarci suggested that to say anything meaningful about rural education, the research must intentionally seek to understand rurality. In other words, he asserted rural education research should be “warranted” rather than occur by happenstance in rural locations. In this way, rural salience reflects and prioritizes the many cultural, demographic, environmental, geographic, and social variances in rural places. Biddle and colleagues (2019) reflected on Coladarci’s piece, expanding on research guidelines to include significant and just research for rural spaces. These suggestions reflect integrative and potentially transferable understandings of rural contexts for inclusive contributions to the broader field of education. With contextualization of spaces and power, Biddle et al. suggested that rural research will offer broader contributions across the field of education. In aggregate, these studies

yield understandings about specific contexts. The more studies there are, the more data there are available. Thus, more data collected from rural locales enable researchers to draw insights about these spaces. With these understandings, researchers, policy makers, and practitioners are equipped with tools to make rural gifted opportunities viable possibilities.

Corbett (2016) indicated “place-based education literature, along with much rural education scholarship is beginning to show how in complex rural context, place and school are not necessarily cozy and connected” (p. 278). Consequently, rural salience in rural gifted education research is more than geographical grid work where populations are sparse and locations remote. Consideration and further study of existing and absent connections between communities and schools necessitate critical examination. Corbett indicated an anthropologic approach might serve as a prescient approach to foreground rural research with aspects of cultures, peoples, and traditions of places.

Similarly addressing the nuances of ruralities, Azano et al. (2017) cautioned researchers about the “risk of generalizing rural to all rural places” (p. 62). Although some rural education researchers lament the value or validity of definitions of rural (e.g., Kettler et al., 2016), the definitions provided by the National Center for Education Statistics (NCES, 2011) are frequently used in the work of contemporary rural scholars. NCES, which derives its data from U.S. census data, defines rural by population density and proximity from urban areas. Further subcategorizing rural, the NCES designates rural as fringe, distant, or remote, depending on distance from urban areas and population size. Figure 1 provides a description of these subcategories.

**Figure 1***NCES Rural Designations*

Fringe	$\leq 5$ miles from an urbanized area and/or $\leq 2.5$ miles from an urban cluster
Distant	$>$ than 5 miles but $\leq 25$ miles from an urbanized area and/or $>2.5$ miles but $\leq 10$ miles from an urban cluster
Remote	$>25$ miles from an urbanized area and is $>10$ miles from an urban cluster

*Note.* Rural subcategories and definitions as outlined by NCES. Adapted from National Center for Education Statistics: Rural Education in America, 2011.

<https://nces.ed.gov/surveys/ruraled/definitions.asp>

Places are considered “most” rural when located farthest away from urban centers and sparsely populated, while the “least” rural places are closer to urban centers and are more densely populated. For rural advocates, these metrocentric codes (e.g., defining rural relative to urban) are a point of significant contention, not only in education research but in health care fields as well (Hart et al., 2005).

The definitions of rural, even with the NCES categorizations, are working definitions at best and do not readily serve all purposes in education research nor do they always reflect the lived experiences of people in a particular place. For example, the site for this study, Hutton County, is 466 square miles with its largest town having only 3,000 residents, yet the county is designated as rural *fringe* because of its location of five or fewer miles from an urban area. The NCES categorizations of rural make a case that rurality is not singular; there are marked distinctions, even in the quantitative data. Although the NCES designations provide easily identifiable numbers in miles and population counts, the categorizations do not provide understandings of the diverse populations and cultures in rural areas. What the NCES does

report, however, are the vast numbers of rural districts, schools, and students as documented through U.S. Census data collection. Despite the incomplete picture of rural spaces through the NCES designations, understandings about the designated rural communities may be gleaned through education research. Justification to include the NCES categorizations in the proposed study is to offer a robust understanding of teachers' experiences in one rural community. As seen in Figure 2, a sizable portion of districts, schools, and students are rural, yet the studies of students, teachers, and schools in urban settings considerably outnumber those studies in rural settings (Biddle & Azano, 2016).

## Figure 2

### *NCES Prevalence of Rural Districts, Schools, and Students*

	Percent	Approximate numbers
Rural School Districts	57% of all school districts	14,000
Rural Schools	33% of all schools	99,000
Rural Students	24% of total enrollment	12,000,000

*Note.* Prevalence of rural districts, schools, and students as outlined by NCES. Adapted from National Center for Education Statistics: Rural Education in America, 2011.

<https://nces.ed.gov/surveys/ruraled/definitions.asp>

**Rural Versus Ruralities.** To address the complexities and capture the differences of rural places, rural education researchers sometimes use plural “ruralities” rather than singular “rural” (Green & Corbett, 2013). Similarly, rural scholars concur there is much more to the meanings of ruralities than geographical placement. This language shift reflects vast rural differences including distinctions from urban/suburban areas, dissimilarities from one rural region to another, and variations within each rural place. Ruralities more accurately exemplify

the complexities of rural places including meanings—denotations and connotations—evidenced by evolving demographics of rural cultures, landscapes, and people.

Variations exist within, between, and among rural regions across the United States and include, but are not limited to, economic, environmental, demographic, infrastructure, and migratory differences (Hamilton et al., 2008). The significance of rural differences should not be understated. Rural differences are evident among and within regions throughout the United States and around the world. In Virginia, for example, rural places include tidewater areas on the Eastern Shore where crops such as tobacco, soybeans, and peanuts are grown, resource-rich aquaculture such as coastal fisheries and shellfish industries are plentiful, and tourism boosts the rural economies. Virginia also has mountainous regions of the Appalachians that tap into logging and mining resources, and the economy of the valleys located between the Allegheny and Blue Ridge Mountains are based on cattle, poultry, and soybean farming. In essence, contributions of rural production extend beyond the borders of rural regions whereby their unique goods and services can be used in their local communities, across the United States, and around the globe.

In a Community and Environment in Rural America survey of about 8,000 rural residents in various regions, researchers noted each “[region struggles] with its own place specific issues and problems, which call for different policies and solutions” (Hamilton et al., 2008, pp. 3–4). Educators, policymakers, and researchers who recognize these contextual differences are better positioned to realize specific supports for various unique rural needs. Conversely, acknowledging commonalities such as improved telecommunications, quality health care, viable transportation systems, and “access to good education” among rural regions affords educators, policymakers, and researchers with additional insight for decision-making (p. 4).

The shift from singular rural to plural ruralities supports a move from reductive to affirmative language in referencing rural regions. Coladarci (2007) proposed “rural education researchers carefully describe the context of their (putatively rural) investigations” rather than grappling with a “consensus on a single definition of rural” (p. 2). Advocating for a more complete picture of rurality in education research, Coladarci indicated “the images, scents, tactile sensations, and assorted inferences about the participants’ lives, values, and sense of community” are missing essentials in the research. These missing components are what some scholars referred to as the “essence” of, or what is inherent to, rural places (Richards & Stambaugh, 2015). Perhaps getting as close as possible to understanding the rural essence, C. Howley (2003) used the term “rural lifeworld” as a way of characterizing the meanings of rural. Rural lifeworld encompasses the multitude of influences and complexities of existing ruralities. Contextualizing ruralities for research requires a depth of understanding around the many meanings and variations of these rural lifeworlds (Richards & Stambaugh, 2015).

**Definitions of Ruralities.** Rural-centered research, however, avoids citing ruralities as “other” with the understanding that ruralities do not exist in opposition to urban. Ruralities encompass sundry geographic and cultural contexts. Providing a counter narrative to the deficit portrayal of ruralities, more recent rural scholarship advocates for equity, access, and opportunities in rural regions (Azano, et al., 2019; Biddle & Azano, 2016; Biddle et al., 2019; Corbett & Donehower, 2017; A. Howley & C. Howley, 2000; Tieken, 2014). Understanding rural communities allows opportunities for educators and researchers to strive for equity in rural education and not just for alternatives in metrocentric educational programming and policies (Eppley et al., 2018). Rather than presenting research or education agendas as rural versus urban, Theobald and Nachtigal (1995) emphasized a mindset of cooperation over competition starting

first in the schools. The value in collaboration, they wrote, is not solely for the benefit of rural regions but for the “viability of both rural and urban communities” (p. 11). To this end, Theobald and Nachtigal suggested educational plans should focus on the local region. While the idea of school and community collaboration has been noted for decades in research, Harmon and Schafft (2009) suggested rural schools and communities collectively share responsibilities to meet 21st-century needs—a mutually beneficial endeavor. In this way, academic and economic collaboration would ensure accountability while “[fostering] a sense of place” (Harmon & Schafft, 2009, p. 8). This shift toward more localized educational agendas and practices is further supported in place-based education research.

In an article examining pre-service teacher preparation for rural teaching, Azano and colleagues (2019) noted, “Definitions of rural shape perceptions of the literature about preparing teachers for rural education” (p. 6). Clearly, rural definitions carry weight in policy making, resource distribution, public perceptions, and education research. When rural is depicted as other, viewed as the “periphery of urban,” and framed through deficit language in which the struggles of ruralities are emphasized rather than the rewards of “resource-rich” rural, it becomes evident that ruralities are systemically sidelined, thus creating “opportunity gaps for rural students” (Azano et al., 2019, p. 7).

**The Rural Imaginary.** The context of rurality may seem easy to imagine, partly thanks to the entertainment industry, media, and idealized fictional novels. Rural populations and regions have been, and in some cases continue to be, viewed through deficit ideology. Historically marginalized and stereotyped, negative images of ruralities exist in the news media, social media, entertainment industry, and in some early rural education research (e.g., Cubberley, 1914). Musings of idyllic landscapes, complete with scenic pastures and livestock, may conjure

visions of rustic living and carefree days. Other imaginings may be more suggestive of isolation, even desolation, where countryfolk live rugged, meager lives. Yet, the context of rurality becomes more difficult to fathom when considering the various differences from one rural community to another (Richards & Stambaugh, 2015). From agriculture to aquaculture, mountainscapes to seascapes, rural differences and infinite possibilities abound.

Past and present stereotyping of rural inhabitants has systemically disparaged and oppressed a significant population of the United States. Perceived as uneducated, uncouth, and even unworthy, the message of rural as “not” (i.e., not urban, not suburban) continues to perpetuate a negative mindset even into the 21st century (Kettler et al., 2016). The images, even, or perhaps especially, when construed as entertainment profoundly shape the way people living in and out of rural places think about what rural means. As with other stereotypes, the images construed inaccurately portray the realities and complexities of all things rural—including the people who reside there. Thus, with a constructive definition of ruralities, negative perceptions and stereotypes may be dispelled whereby greater understanding of ruralities as context for gifted education becomes attainable.

**A Socially Constructed Rural.** Ruralities are socially constructed and represent more than statistical categorizations as described by the NCES. The meaning of rural, ruralities, the “essence of place,” or “rural lifeworlds” includes diverse cultures, customs, communities, geographies, landscapes, people, and traditions. When the myriad of rural contexts is considered, the possibilities of ruralities are not only promising but also plausible.

Rural scholars recognize education is political, economic, geographical, social, and cultural (Cervone, 2017; Corbett & Forsey, 2017; Schafft & Jackson, 2010). Notably, the review of the literature indicates differences from one rural region to another and within rural regions

(Azano et al., 2017). The literature suggests rural research should organically reflect the communities which they serve.

### ***What Is Gifted?***

Just as there is contention around definitions of rural, there are debates around definitions of giftedness, identification of gifted students, and effective programming and practice in gifted education literature. However, understanding what constitutes giftedness is a step toward realizing the rural context as a purposeful one in gifted education. Placing gifted education together with the rural context further nuances understandings. Richards and Stambaugh (2015) addressed “the essence of rural” as a prerequisite for “serving gifted students in rural settings” (p. 3). Recognition of and respect for geographic, cultural, social, and economic variations in rural communities provides a critical lens for researchers in the field of rural gifted research.

**Definitions of Giftedness.** Purpose, context, and multidimensionality are important to conceptualize giftedness. Plucker and Barab (2005) stated, “All definitions of giftedness imply the necessity of a social context because such a context is requisite for determining whether (and how) a person, action, or product will be defined or judged as gifted” (p. 202). Also exploring the concept of giftedness, Plucker and Callahan (2014) proposed that “Examining new paradigms for definition, talent development, and identification in conjunction with proposed curricular and service interventions would provide policymakers with clear pathways in decision making” (p. 400). Much like an artist’s sculpture in flux—a work in progress, scholars continue to inform and shape conceptualizations of giftedness. Plucker and Callahan (2014) affirmed this notion as they stated, “thinking about the nature and development of giftedness and talent continues to develop” (p. 393). Although definitions of giftedness vary, similarities in characteristics of giftedness exist in the literature. Lawrence (2009) noted, “giftedness occurs

throughout the population and is not skewed by race, ethnicity, or culture” (p. 467).

Understanding giftedness as a feature across demographics is impetus for expanding the nuanced field of research.

NAGC defines giftedness as a child’s “ability [that] is significantly above the norm for their age” (National Association for Gifted Children, n.d.[b], para. 1). NAGC recognizes the following domains of giftedness: “intellectual, creative, artistic, leadership, or in a specific academic field such as language arts, mathematics or science” (para. 2). This expanded definition of giftedness raises questions about how giftedness might manifest differently in various populations (such as the many rural populations) in ways other than IQ.

McBee and Makel (2019) sought to quantify internal consistency of giftedness in a quantitative analysis of four prevalent definitions: “(a) high cognitive ability, (b) multiple criteria definitions, (c) Renzulli’s (1978, 2005) three-ring model, and (d) the position statement of the National Association for Gifted Children (NAGC, 2010).” In doing so, McBee and Makel (2019) examined the proportion of students identified as “gifted.” Finding ambiguities in these four predominant definitions, the researchers questioned the purposes of enacting specific definitions and noted implications for employing selected definitions. As a result, the researchers argued for “quantifying conceptual definitions of giftedness” to “accompany quantitative or psychometric arguments when conceptual or theoretical ideas about giftedness are being considered” (McBee & Makel, 2019, p. 2). Without such quantitative standards, the researchers suggested overrepresentation may occur. McBee and Makel (2019) advocated for specificity and understandings for the implications of “gifted” definitions in research. As with definitions of rurality, definitions of giftedness are socially constructed and context dependent.

Proponents of more subjective approaches to identifying giftedness, Reis and Renzulli (1982) advocated for “the revolving-door model for identifying and teaching the gifted” by “using more flexible criteria to select students for participation in gifted programs” (p. 619). The researchers used “talent pool” selections consisting of “15% to 25% of the general student population” to identify students using more subjective criteria such as parent, educator, and self-reporting to identify academically advanced students based on observations of students (p. 619). Reis and Renzulli contended, “traditional identification procedures may not be serving the wrong students, but they are certainly excluding large numbers of above-average pupils who, given the opportunity, are capable of producing equally good products” (p. 620).

Brown et al. (2005) found discrepancies in educators’ assumptions about gifted identification processes with identification practices documented by researchers and imposed by state and local identification restrictions (p. 76). Brown et al. found “more objective measures such as intelligence and achievement tests are more frequently mandated than subjective measures that require personal judgments of students’ work, behaviors, or characteristics” despite research to suggest inclusion of subjective measures (p. 76). These contradictions indicate more work is needed to align identification procedures for gifted identification with salient research.

**Summarizing Giftedness.** The literature points to a range of definitions of giftedness. Moreover, current scholarship emphasizes how definitions of giftedness inform research and foster equity in the field of gifted education. Callahan et al. (2014) asserted the following:

Definition and identification, in theory, should directly guide the types of services that are delivered to students within the program, the curriculum instruction, and supporting

resources that are used for instruction, and the types of professional development opportunities offered to program faculty. (p. 10)

Equity in gifted programming is possible for advanced students in rural environments when consideration of rural specific needs, including those of the community and environment, are part of program planning for gifted students. Yoder (1985) purported quality programming for gifted students in rural schools should include advanced content, curriculum that is different from general education, and opportunities to work with peers of similar “abilities and interests” (p. 68). In my review of decades of rural gifted research, the scholarship shows recurring themes describing characteristics of quality programming, yet yields little information about the success of program modifications or restructuring over long periods of time (Colangelo & Assouline, 1991; Jones & Southern, 1992; Lawrence, 2009; Yoder, 1985).

Plucker and Callahan (2014) observed an inequity in areas that have and have not been thoroughly researched in gifted education. For example, Plucker and Callahan (2014) asserted that differentiation of instruction, acceleration, and curriculum design have been “studied extensively” (p. 393). However, they noted few research studies on the gifted identification process and inequity and underrepresentation of diverse populations (p. 400). Yet, practical applications of research, as Plucker and Callahan demonstrated through the differentiation example, indicate progress in the field for “determining the types of programming to aid educators in planning effective interventions for advanced students” (p. 395). Although more research is encouraged, these foundational studies provide insight into expanded ways of thinking about giftedness, identification processes, and types of potential program options for rural gifted students. There is a paucity of studies related to whether giftedness might manifest differently in various populations and, thus, may be overlooked through stand-alone narrow

assessments such as IQ or other standardized tests. Frasier's (1991) work on underrepresentation of disadvantaged and culturally diverse gifted students, however, represents an exception by offering plausible solutions in identification procedures to mitigate underrepresentation.

The dearth of research on gifted program outcomes is evident through extensive searches in Academic Research Complete and Google Scholar databases. Using numerous combinations of key terms such as "gifted program outcomes," only a few studies (Callahan et al., 2015; Delcourt et al., 2007; Gavin et al., 2009; Kettler, 2016; Reis & Renzulli, 1982, 1992) addressed gifted program outcomes. In an investigation of gifted program outcomes, Delcourt et al. (2007) noted "many provisions for the gifted are being eliminated in schools across the United States because of a lack of relevant information about the effects of appropriate educational services" (p. 377).

Studying the effects of using the revolving-door model for identifying and serving gifted students, Reis and Renzulli (1982) arrived at four relevant conclusions for gifted programming. First, "gifted services increased with involvement from both special education and general education teachers" (p. 620). Second, use of "action information expanded the opportunities for gifted programs to serve other students than the top 5% on standardized tests" (p. 620). Third, traditional standardized test-based identification procedures "exclude large numbers of above-average" students (p. 620). Fourth, "flexibility" of the "revolving door model can help ensure more appropriate identification of gifted students and more appropriate programs to meet their individual needs" (p. 620).

In a critical examination of "why and how economists study the impact of gifted education programs," Kettler (2016) recommended that "those who study and practice gifted education seek common ground on the goals and measurable outcomes of gifted education

programs” to inform the “field of gifted education and . . . policy” (p. 81). Kettler cautioned, if “gifted education is implemented lightly without fidelity and without evidence-based practices, that furthers the argument that it ought not be required or funded” (p. 87). Thus, understanding “gifted” as a social construct imbued with various meanings offers insight into the significance of “gifted” definitions and parameters for inclusion into gifted programs to evaluate program outcomes.

### ***Studies in Rural Gifted Education***

Included in this section are six studies that focused on rural gifted education. Given the unique context of rural schooling and known challenges related to funding and resources (Pendarvis & Wood, 2009), education researchers have examined a number of barriers affecting gifted services, rural youth aspirations, and challenges hindering rural gifted students from reaching their potential. Supporting equity in rural gifted education, these researchers examined how rural gifted students might be better served.

In a provocative piece, “Rural Scholars or Bright Rednecks?,” C. Howley et al. (1996) examined “the ideas of community and sense of place as an object of aspiration” (p. 151). To understand youth aspirations about community and sense of place, the researchers compared 158 rural and nonrural Governor’s Honors Academy (GHA) students to 644 students from seven rural high schools in West Virginia. Using a questionnaire about ideal communities, the researchers found rural GHA students were “less satisfied with their local communities than GHA students living elsewhere” (p. 150). C. Howley et al. noted a “push-pull” phenomenon whereby students “experience both a push from dissatisfaction with their current communities and a pull from modern dispositions” (p. 158). The implications are a prescient reminder of the conflict for rural students contemplating whether to remain in their rural communities or leave

for academic pursuits. The researchers affirmed the value of place and “possibility of sense-of place aspirations” as “rational and honorable” options for rural youth (p. 159).

In a case study also focused in West Virginia, Pendarvis and Wood (2009) examined historically underserved gifted students (HUGS) in a high-poverty rural school district. The district implemented procedural changes for identifying gifted students to include traditional standardized testing and teacher referrals plus alternative assessments and teacher referral training. In this study, Pendarvis and Wood identified inequities in the identification processes when studying economically disadvantaged and more affluent student populations. The researchers also found a disproportionate number of “children from racial minority groups” placed in special education programs for learning disabilities or behavioral issues while these same students were “underrepresented in gifted programs” (p. 497). Pendarvis and Wood concluded the case study was “illustrative” rather than generalizable and called for equity in policy, identification, and program processes to combat the underrepresentation of minority populations in gifted education. The results of Pendarvis and Wood’s study indicated increased numbers of under-identified students and that a combined plan of traditional testing with other measures such as referrals is more efficacious for rural gifted students.

In another examination of rural gifted education inequities, Kettler and colleagues (2015) examined program service discrepancies. Using pairwise comparisons of 1,029 public school districts in Texas, the researchers found locale, school size, and economic disadvantage as the “strongest predictors of variance in funding and staffing gifted education programs” (p. 99). Drawing on earlier studies, Kettler et al. noted prevalent shortcomings of equity and access in gifted education for in-school programs, but they observed “even more significant” inequities in enrichment programs outside of the school day and with those located

off-site (p. 101). Most compelling and disconcerting are the disproportionate disparities in funding and staffing for rural gifted education. Specifically, Kettler et al. found rural schools receive far fewer human resources and less money designated for gifted services than nonrural and more economically advantaged schools. In this study, locale was found to be more influential on funding and staffing than race and ethnicity. These inequities are not commensurate with democratic ideals in education to meet the needs of all students. As evidenced in the Kettler et al. study, locale, school size, and economic disadvantage complicate and further marginalize deserving rural gifted students. For advocates, educators, policymakers, and scholars, rural gifted education requires more attention and research.

Equity issues in rural education are often at the forefront of comparative studies; however, understandings about the inequities may be made clearer when school size is factored into the rural categorization equation. In another study, Kettler et al. (2016) contended that definitions of rural such as the NCES locale codes are insufficient in conceptualizing ruralities. The researchers found the NCES designations too broad because there could be large rural schools with rich resources and small rural schools with poor resources within the same rural classification. Kettler et al. (2016) argued that inclusion of school size would offer a better picture of “rural education and could improve research design and generalization across studies involving rural schools” (p. 245). Before critically addressing three research questions about rural and nonrural differences and the effect of school size on paired comparisons, Kettler et al. (2016) completed a systematic review of recent research examining how rural was defined. Their review indicated that a range of various definitions and omissions of definitions occurred in reviewed studies. Valid group assignment was identified as a “methodological challenge associated with rural versus non-rural comparative research” (p. 258). The researchers

emphasized alignment of context and purpose for rural research. In contextualizing rural research, the researchers noted that school size based on student enrollment should be accounted for when pursuing comparative rural research. In doing so, Kettler et al. further proffered, “attention to context matters, and describing those contexts will require understanding the value of place and community, hallmarks of what we value as rural” (p. 261). Influential in funding, the variable of school size cannot and should not be overlooked.

In a more recent study, Azano et al. (2017) examined nontraditional identification processes and investigated the use of place-based language arts curricula in rural gifted settings. As documented in the research, traditional ways of identifying students for gifted programming often miss high potential students and, as a result, “achievement and opportunity gaps” exist (p. 62). Although the research was in the preliminary stages at the date of publication, Azano et al. found the results to be encouraging for identifying students who would otherwise be missed in the process. The researchers found that by using local norms as opposed to national norms, participating school districts increased the number of students eligible for gifted services. In addition to identification processes and curriculum intervention, the research team considered deficit thinking as it relates to gifted education. Promising initiatives in rural gifted education, such as alternative identification, teacher training, and mindset interventions, are steps toward equity for advanced students.

In the final study for this section of the review, Puryear and Kettler (2017) used the NCES locale codes to classify Texas school districts (rural or nonrural with subcategories) to observe opportunity differences between districts for the provision of gifted services and the effect of distance to metropolitan centers on gifted programming. The “demographic, financial, and student performance data” was taken from the Texas Education Agency database—

Academic Excellence Indicator System—and a multivariate analysis was run (p. 145).

Borrowing the term “geography of opportunity” from housing policy research, Puryear and Kettler found gaps between subcategories of rural classifications. Primarily, the farther the distance from metropolitan areas, the fewer the opportunities for rural students. This study highlighted the significant distinctions between rural and nonrural and examined the differences between various classifications of rural gifted education. Puryear and Kettler further suggested that school student population size is an important contributor to the effect of proximity. For rural researchers, the implications of proximity suggest that inequities in funding and resources widen with the distance from these urban areas.

These six studies address the disparities which further marginalize and hinder rural gifted students from the growth they might otherwise achieve. Observing discrepancies and inequities in rural gifted populations, these studies highlighted the devaluing of rural aspirations, under-identification of gifted students, program inadequacies, reductive rural categorizations, and limited resources which have shortchanged rural gifted students. My analysis of these studies provides a rationale for continued inquiry into the needs of gifted and high potential students in rural schools.

### **Considerations for Rural Gifted Education**

This section reviews studies that ask rural-specific questions about curricula, particularly place-based curricula, in gifted education. Curriculum is a point of inquiry for scholars working to better serve rural gifted students and advance the specialized field. Van Tassel-Baska and Hubbard (2015) found six emergent themes in research literature on quality gifted curricula: “supportive learning environments with peers; access to multicultural materials and resources; curriculum that emphasizes critical thinking and problem-solving skills; project- and problem-

based learning; access to a range of education opportunities; and assessment of learning in a wider context” (pp. 159–160). Offering rural gifted students adequate opportunities to extend and challenge their thinking provides equity in growth. Further exploration and understanding of rural gifted curricula has the potential to increase opportunities and access for rural gifted students. This section first explores identification processes in gifted education, curricula specifically designed for gifted students, and the role of place in rural gifted curricula.

### ***Identification Processes in Rural Gifted Education***

The identification process is an essential step in gifted education, but it is a huge equity issue in rural schools (National Association for Gifted Children, n.d.[a]; Plucker & Callahan, 2014; Plucker & Peters, 2018). Due to funding restraints, many rural schools only test students who have been referred for the identification process. More resource-rich districts, however, administer universal screenings for all students. The issue with using referrals rather than universal screening is that qualified students, particularly minorities and economically disadvantaged students, are overlooked many times (Callahan, 2005; Card & Giuliano, 2016; Peters & Engerrand, 2016). Often, identification of rural gifted students is based on standardized test scores using national norms, resulting in very few identified gifted students in rural areas (Renzulli, 2002a, 2002b). For example, in a 5-year federal grant for rural gifted education, Azano et al. (2017) found that some rural schools had not identified any gifted students when only standardized test scores and referrals were used in the identification process. Thus, identification challenges such as underrepresentation of populations occur. However, when local norms are used and the focus is on developing talent within a particular context, as in the Promoting PLACE in Rural Schools grant treatment districts (Azano et al., 2017), the number of students identified as gifted increases. The identification process can shape the services provided

by a school or district. When more students are identified, services may be provided to a broader range of students with varying abilities and interests. Thus, fewer students would be missed through expanded identification, and growth would not be limited to students identified by the traditionally restrictive criteria (Azano et al., 2017; Renzulli, 2002a, 2002b). Allowing local norms, referrals, and alternative assessments as part of the identification process mitigates the under-identification issues reflected in the literature.

### ***Rural Gifted Programming***

Variations in gifted programming exist from state to state, district to district, and even from school to school within a district. Just as in general education, funding, staffing, and leadership philosophy affect gifted education programming (Callahan et al., 2015). Through a federally funded Jacob K. Javits grant supporting high potential marginalized students, Davalos and Griffin (1999) examined teacher instruction and implementation of differentiation strategies for gifted students within a heterogeneous, general education classroom. With teachers' adequate training, motivation, understanding of education for unique individual students, and ability to relinquish "control" to learners, researchers found positive results in keeping gifted students in general education classrooms for gifted instruction (p. 318). Somewhat disconcerting in the Davalos and Griffin study is the deficit language around challenges in rural gifted education as evidenced by the dozen uses of the word "problem" in association with rural gifted education and/or students. Although rural gifted research indicates efforts to highlight the multitude of possibilities in rural gifted education, framing of "problems" results in deficit perspectives, even if unintentional. Meriweather and Karnes (1986) expose both "strengths and weaknesses" in rural environments but also frame the obstacles as "problems" with a list of 12 problems cited through surveys of gifted consultants (p. 11). In reviewing the literature, recent research (as

opposed to decades old research) more favorably reflects rural gifted challenges as opportunities to address inequities.

Although there are several differing curriculum models, one of the commonalities is rigor beyond what the “norm” would be able and expected to achieve (Adams, 2018). That is, advanced students would meet with challenging curriculum beyond what would be appropriate for students in the “norm” category. Such considerations of curriculum and instruction are important to provide quality enrichment to students (Van Tassel-Baska & Stambaugh, 2008).

### ***Place in the Rural Gifted Curriculum***

Gifted education in rural settings presents particular challenges related to funding and staffing that affect many aspects of the gifted programs. In a study examining teaching experiences with a place-based language arts curriculum and fidelity of implementation, Azano and colleagues (2014) noted teachers have difficulty serving gifted students because of barriers such as “rural-specific characteristics of gifted programming, limited resources, and time challenges” (p. 88). Azano et al. asserted that an underserved population deserves equitable services and support for gifted programming in rural schools. Consideration of environment is important in terms of curricular relevance and engagement. Azano (2011) asserted critical literacy and place-based pedagogy benefit students with “the potential to deepen student understanding of place and its importance in their lives” (p. 11). Place has the potential to garner students’ attention in the classroom and make meaningful curricular connections to their lives outside of the classroom. Not only is it possible to make the curriculum more relevant to the students’ past and present, when place is specifically part of the curricula, there are opportunities for connections between the students’ futures and their rural communities.

The review of the literature indicates that proximity of rural locations from urban/suburban areas may be an influential variable in rural students' learning. In much of the rural research, inequity in rural education is a consistent theme. Specifically discussing rural as a variable in the education process, Corbett (2018) asserted "geography is an element of educational disadvantage that needs further exploration" (para. 18). To address the barriers affecting disadvantaged students, evidence in the literature suggests prioritization of place in education research and practice.

### ***Addressing Inequities Through Place-Based Curricula***

Deconstructing the power and privilege of hierarchical, imposed standards-based curricula through place-based initiatives allows for empowerment and sustainability of rural communities. As a counter to the perpetuation of standards-based curricula, rural researchers (Azano, 2011; Azano et al., 2019; Greenwood, 2003) support place-based curricula in rural education. Greenwood (2003) affirmed, "A critical pedagogy of place aims to contribute to the production of educational discourses and practices that explicitly examine the place-specific nexus between environment, culture, and education" (p. 10). In this way, curriculum connections through place are an inherent part of the learning process. Affirming the unique characteristics of environment and culture, Aamidor and Spicker (1995) addressed the need for "culturally specific" assessments and "curriculum intervention" for advanced students (p. 39). The research literature indicated that traditional urban models of identification and programming are insufficient for rural gifted students. Aamidor and Spicker (1995) advocated for further research and exploration of options focusing on rural cultures.

Azano et al. (2017) provided research on a place-based, rural gifted language arts curriculum. *The Challenge Leading to Engagement, Achievement, and Results (CLEAR)*

curriculum (Callahan et al., 2015) is based on elements of Tomlinson's (2001), Renzulli and Reis's (1985, 2000), and Kaplan's (2005) work in gifted curriculum and demonstrates a comprehensive approach in gifted education. In the Azano et al. (2017) study, place-specific lessons adapted from the original CLEAR curriculum were designed to engage students and provide context for the learning objectives. In addition, the curriculum adaptations worked to mitigate rural students' feelings of marginalization and reduce barriers obstructing students from reaching their full potential (Azano et al., 2017).

To minimize "social and economic" disadvantages affecting rural gifted students, A. Howley and colleagues (1988) proposed acceleration as an efficacious means for challenging advanced students to reach their potential (p. 48). Acknowledging budget shortfalls in rural schools, A. Howley et al. purported the cost effectiveness of using acceleration not only for students identified as gifted but for "all students who are able" (p. 48). With support for acceleration through "educational policy and practice," there is potential for progress in students' achievement (p. 48). Moreover, schools may address the challenges in rural gifted programs through low-cost efforts while maintaining high standards.

### **Successes, Challenges, and Gaps in Rural Gifted Education**

Understanding the challenges in identification of rural gifted students, Azano et al. (2017) investigated implications of the identification process to expand the number of students identified as gifted and examined initiatives to train teachers to implement a place-based language arts curriculum in high-poverty rural school districts. Preliminary findings in the five-year study showed increased numbers in the rural gifted programs, and later publications confirm those initial findings (Azano & Callahan, 2021; Azano et al., in press). Findings indicated

teachers could identify talent development and obtained positive results from the implementation of the CLEAR curriculum.

In another study, A. Howley and colleagues (2009) examined years of research literature for challenges affecting rural gifted students. Findings in the literature review indicated four areas of challenges adversely affecting rural gifted education: “declining population, persistent poverty, changing demographics, and ongoing accountability requirements” (p. 515). A. Howley et al. framed these complex challenges as “opportunities” for “creative alternatives” to mitigate the effects on learning (p. 515). In the spirit of optimism observed in much of the rural literature, A. Howley et al. (2009) noted the community benefits for developing “critical thinking” skills in rural gifted programs as a means for students to better “understand the value of contributing as leaders to their own communities” (p. 515).

### ***Successes in Rural Gifted Education***

Continued research in the field helps to bring awareness to the successes in programming and practice in rural gifted education. Meeting the individual needs of advanced students and challenging them to think about the possibilities within their communities opens possibilities for students to see themselves as contributors, decision-makers, and problem-solvers in their communities. Recurring themes such as collaborative community input for program initiatives, prioritization of gifted education programs, and curricular differentiation in rural gifted education research drive positive change. Spicker et al. (1987) asserted that rural students need accessibility to “cultural, intellectual, and scientific resources” (p. 157). Rural gifted students deserve equity in educational opportunities including resources afforded to urban and suburban gifted students.

Success in gifted education programming has been noted in the review of the literature. Plucker and Callahan (2014) found that “programs based on prescriptive models of curriculum and instruction” (i.e., teachers follow a predeveloped unit based on a framework or model’s guiding principles) “are more likely to produce improvements in student growth” over descriptive models (i.e., teachers use a model as a guide in developing daily lessons; p. 395). For rural gifted education, the implications of this study suggest prescriptive models for gifted instruction to positively influence achievement.

### ***Continued Challenges in Rural Gifted Education***

For high-poverty rural school districts, access to resources and opportunities is an ongoing challenge (Azano, 2011; Puryear & Kettler, 2017), yet opportunities for improvement are catalysts for rural researchers and educators to mitigate these barriers. Callahan et al. (2014) indicated “definition . . . identification [and] philosophical belief [are] an integral part of gifted programming” (p. 10). Replication of studies is also recommended for confirmation of data validity. Further research in professional development with gifted educators is also essential. In addition, Callahan et al. (2014) asserted “there has been limited transfer, if any at all, of the work of experts . . . into the field of practice” (p. 10). Thus, more studies in the area of teacher training and replications of studies may yield results for continued efforts toward equitable rural gifted services for students.

Despite numerous challenges in the area of rural gifted education including staffing and funding, persistent efforts are evident in the literature. Scholars in the field call for future research to expand on the body of research through replication of studies and continued exploration of questions yet to be answered (Plucker & Callahan, 2014). The indicators for future research provide a pathway for examining programming possibilities that have not been fully

researched. Also, Colangelo et al. found rural gifted education research “to be written for people with either a strong knowledge base in either gifted education or rural education, but not in both” (p. 32). Collaborative efforts from rural and gifted researchers would further advance efforts in the specialized field of rural gifted. Evident in the literature is the need for programming that incorporates the unique aspects of rural communities. According to Colangelo et al., there is often no discernment of rural from urban program planning for the gifted; in fact, they noted, “very little information of any depth is published regarding rural and gifted education” (p. 32). Although disconcerting, rural gifted researchers, past and present, provide significant foundational research for further exploration into advanced opportunities for high potential students.

Confirming findings about the challenges in rural gifted education, Burney and Cross (2006) explored lessons learned from Project Aspire, a grant-funded endeavor to expand the number of students taking advanced courses in rural areas. They provided takeaways for educators and researchers to make continued efforts in early identification of gifted students, development of relationships with students and parents, and recognition of the challenges unique to “rural students with academic promise living in poverty” (p. 20). These recommendations are not an end point but a starting point for educators and researchers in the advancement of rural gifted students.

### ***Adding to the Literature***

Several gaps in the review of rural gifted education literature were observed. First, there are few research studies that collectively address either rural or gifted education. The underrepresentation issue of rural research generally raises further questions around the slight number of research studies in gifted and rural education (Azano, 2014). Considering one-fifth of

the U.S. school population is rural, many students would benefit from quality gifted curriculum and services. Second, previous research has highlighted the challenges of rural gifted education, yet the barriers continue to obstruct students from maximizing their potential. Puryear and Kettler (2017) focused on the comparison of gifted services in rural versus nonrural places. Further studies may not only illuminate the vast disparities of funding in rural gifted programming but may also provide insight into the potential benefits for implementing high-quality programs specifically geared toward the needs of diverse geographic areas and populations. Attention to the needs of rural gifted populations exists among education scholars but has not fully proliferated in terms of practice in gifted education programs. Turning research into effective professional development may yield a more robust return on rural gifted students reaching their potential. Third, the literature suggests that research may assist in the development and sustainment of partnerships among stakeholders including, but not limited to, researchers, educators, administrative leaders, community members, business members, civic groups, and universities.

Evident in the literature review is the continued theme of inadequate resources in rural gifted programming. In a rural study going back to the 1980s, Jones and Southern (1992) noted that lack of funding makes a significant difference in rural gifted programming. Colangelo et al. (1999) noted that rural education and gifted education alike “have borne the brunt of educational fads, and both have received relatively little funding and national attention. Not surprisingly, very few studies have considered the two issues in tandem” (p. 9). In addition, disputes around giftedness—definitions, identification, and services—are ongoing considerations in the literature. Russel and Meikamp (1995) attributed “ignorance and misunderstanding about giftedness and cultural diversity . . . to the underrepresentation of minorities” (p. 171). Further research on

underserved and underrepresented populations in rural areas may mitigate “misunderstanding[s]” related to diversity. C. Howley (2009) illuminated the “imputations of inferiority associated with someone else’s perception of difference” and uses the term “redneck” to point out just how “rural ways of living and being and knowing are devalued—literally marginalized” (pp. 539–540). Yet, since C. Howley’s (2009) assertion that “rural places are relatively powerless in political, economic, and cultural terms,” there has been an eye-opening response to the magnitude of the collective rural voice in recent presidential elections.

Another consideration for future rural gifted research is raised by C. Howley et al. (1996) regarding aspiration differences and satisfaction of living in rural communities, if any, between gifted students and “their less academically oriented classmates” (p. 152). Although C. Howley et al. raised these issues for study more than 20 years ago, a recent search using EBSCOhost and Google Scholar together yield only one result, a Corbett and Forsey (2017) study related to rural youth aspiration differences.

## **Conclusion**

The review of the literature in rural gifted education provides insights into various facets of the specialized field including the benefits and barriers of rural gifted education. Continued opportunities for education researchers, policymakers, and practitioners to collaborate for effective identification, curriculum, and instruction for advanced students in rural regions is imperative for the sustainability of rural communities. As an integral part of rural communities, Azano and Stewart (2016) asserted that schools have the potential to bring the community together. Although some research in the literature indicated smaller schools and class sizes may be challenges, these are observed as benefits to the community by Azano and Stewart. Additional advantages of rural communities include agriculture production of food and other natural

resources for consumption and distribution to all parts of the world (Corbett, 2007; Donehower et al., 2012; Theobald & Nachtigal, 1995). The numerous resource-rich offerings and potential services offered in rural communities are advantages to a community's viability.

Providing students with opportunities for growth is a foundational tenet of education. Opportunities should be afforded to all students in all regions. There is promise in rural gifted education research for creating more equitable opportunities for advanced students, who, like their peers who struggle and their peers in the middle, need opportunities that will facilitate growth. Despite low prioritization in funding and other support at local, state, and national levels, rural gifted programming is essential for fostering the potential of advanced students, and all students, including gifted students, deserve to grow at a pace aligned with their capabilities. Perhaps the potential influences of gifted education on rural communities would further illuminate the imprint of rural gifted programs. When quality programs are lacking, education of advanced students suffers. Leaving rural gifted education to chance is a risk.

Key points from the literature review on rural gifted education include the need for cultivating the talents of advanced students in their many forms. One example detailed the identification of a specific make and model of a vehicle, when Corbett (2007) recalled an anecdote of a student who easily distinguished a 1968 Impala from a 1969 model. Corbett recognized student talents beyond purely academic. A final takeaway, and impetus for further research, is that rural gifted students "may be at risk for not having their academic needs met" (Azano, 2014, p. 299). For rural researchers invested in education, opportunities for student growth create both a challenge and an opportunity for scholars.

Emphasizing the complexities in gifted education, Plucker and Peters (2018) advised "future research on poverty and gifted students should be sensitive to recent advances in the

measurement of poverty and economic vulnerability” (p. 64). Lifelong scholarship and rural advocacy are evident with numerous publications and decades of research in rural education. Notable are researchers’ candid positionality and reflexivity statements, personal narratives, inclinations, and commitments in rural scholarship. The literature reflects professional attentiveness to ruralities and dedication to a wide range of rural issues from curriculum and policy development to community building through economic endeavors. Indeed, the rural polemic and its implications as context for gifted education justifies further exploration and study. The depth and breadth of rural scholarship indicates a continued effort, yet unrealized potential, in the field of rural education.

Rural gifted students deserve opportunities for development and growth each school year, yet their academic needs sometimes go unfulfilled or unmet altogether (A. Howley et al., 2009). Resource limitations in rural schools have been well documented in education research (e.g., Azano et al., 2017; Ticken, 2014). When resources and services are scarce or absent, as they are in many rural regions in the United States, opportunities for growth are limited. Thus, missed chances—opportunity gaps—for learning occur which impede students from reaching their potential, hinder yearly growth, and stifle achievement (Azano et al., 2017). Opportunity gaps deny rural gifted students access to equitable education experiences. While responsibilities for equitable funding, curriculum, instruction, services, and staffing fall on many shoulders—including those of administrators, community citizens, policy makers, local school boards, state education departments, and federal agencies—it is teachers who work to meet the needs of their students. In the following chapter, I discuss methods used in this study to address research questions about teachers’ experiences with a unique rural place-based language arts curriculum for gifted students.

## Chapter 3

### Methods

In this chapter, I provide a discussion of the methods I used in this qualitative research study to address three research questions:

1. How did teachers in a high-poverty rural district experience and interact with a place-based language arts curriculum designed for gifted students?
2. How do the teachers characterize those experiences?
3. What can these experiences and perceptions teach us about the place-based curriculum and opportunities for gifted learners in high-poverty rural communities?

Data from the larger Promoting PLACE grant “validated . . . assumptions that rural communities are unique places” and indicated “it is inefficient and ineffective to plan interventions and curriculum based on stereotypic or even generalizations across communities” (Azano et al., 2017, p. 74). My methodology was designed to provide insight into the unique ways rural teacher and gifted experience a particular intervention with the goal of informing educators and policy makers in offering support.

In order to understand my methods, I first provide context for the research study followed by descriptions of the research sample and design. Next, I share data collection methods and procedures for analysis. Then, I offer ethical considerations and discussions of trustworthiness and limitations to the study. Finally, I summarize the qualitative case study in rural gifted education before presenting my findings in Chapter 4.

#### Context for Research Study

This research study is part of *Promoting PLACE in Rural Schools* (Promoting PLACE), a project with five primary goals for rural gifted education. These include:

1. Increase the number of students identified for gifted education services in high-poverty rural schools;
2. Create high-quality, place-based language arts units based on the CLEAR Curriculum Model;
3. Implement interventions designed to increase student achievement in language arts;
4. Increase student achievement in language arts; and
5. Increase student engagement and self-efficacy.

The grant staff created and implemented an alternative identification process for gifted students in rural schools. After participating districts identified students through previously established processes, all second-grade students were assessed using the verbal subtest of the Cognitive Abilities Test (CogAT) as a universal screener. The project staff also provided rural-focused professional development to second grade teachers in all participating districts on how to recognize giftedness as it may manifest in rural students, who then completed the motivation, creativity, and reading portions of the Scale for Rating the Behavioral Characteristics of Superior Students (SRBCSS) for each of their students.

Scores from the aptitude assessment and rating scales were then shared with district leaders (as determined by the districts). The scores included national and local norms for the CogAT and district and classroom norms and school division norms on the rating scales. Project staff and district personnel then identified additional students who they agreed demonstrated potential and could be added to the group of students receiving services in the district (Azano & Callahan, 2021; Callahan & Azano, 2021). As a result, all 14 participating districts increased the number of students eligible for gifted education services. In doing so, students who might otherwise have been missed or overlooked due to underperformance on standardized testing or

other teacher nomination or rating scales were identified. Districts were randomly assigned as treatment or control districts.

The larger sample for the PLACE grant included 14 high-poverty rural districts. There were a total of 578 students in the PLACE grant database with 384 students in treatment districts and 194 in control districts over five years and three cohorts. This includes 60 total schools and 144 teachers over five years with all three cohorts.

### ***The Curriculum***

While control districts implemented gifted instruction at the discretion of their districts (business as usual), treatment districts received a specially designed rural, place-based language arts curriculum for gifted students. The curriculum consisted of four units for two grade levels: Poetry and Folklore units for Grade 3; Fiction and Research units for Grade 4. Each unit consisted of 16 to 20 lessons (designed for 45-minute time blocks) which teachers implemented over the course of a semester.

All four units aligned with Virginia's Standards of Learning Objectives (SOLs) and Common Core State Standards (CCSS). As such, the basic/core content of the curriculum units were not "over and above" or "beyond" what teachers were expected to teach at the grade level of the students; rather, teaching the units allowed teachers to cover the expected grade level curriculum while providing increased rigor to meet the specific needs of advanced learners. Adapted from the CLEAR curriculum (Azano, 2012), an evidence-based model, the curriculum fostered depth and complexity (Kaplan, 2005), differentiated instruction (Tomlinson, 2001) and product expectations adapted from the schoolwide enrichment model (Renzulli & Reis, 1985) to challenge and support student learning.

The place-adapted curriculum promoted advanced and in-depth content understanding, creativity, engagement, and relevance while centering on students' individual interests, rural community, and needs, which were assessed formatively and summatively in each unit.

Authentic product outcomes were embedded into the curriculum, such as when students in Grade 4 created and designed a research project determined by their individual interests and presented their research upon completion to an audience of peers and adults in the school community.

Students did not just learn about the role of researchers, they *were* the researchers from beginning (i.e., formulating a research question) to end (i.e., publication and presentation). For illustration, page 1 from Lesson 1 of each unit—Folklore, Poetry, Fiction, and Research—is included (see Appendices A, B, C, and D).

### ***Professional Development***

Prior to implementing the curriculum, participating teachers in all treatment districts received brief professional development conducted by Promoting PLACE grant staff. Purposes of the professional development were to explain the overarching goals of the grant; outline the curriculum background and research framework; review content of the language arts units; demonstrate lessons; offer instructional guidance and support for implementation; provide phone and email contact information for ongoing availability of grant staff; and address curriculum concerns and questions.

Teachers who worked with third- and fourth-grade students and who would be using the curriculum also received professional development which emphasized how the language arts units embedded place connections using resources which reflected aspects unique to the region. These resources were provided for each of the four units. Implementation varied greatly among

districts depending on gifted programming (e.g., some teachers taught 1–2 lessons weekly in pullout groups and others implemented daily as part of general education to all students).

### ***Hutton County***

To provide a general context of Hutton County, this section highlights several discerning statistics from U.S. Census Bureau data (2018<sup>3</sup>) with anecdotal descriptions from numerous firsthand trips and observations over the last three years.

Nestled between picturesque mountains, Hutton County is geographically isolated, spans nearly 466 square miles, and is accessible by circuitous highways which meander around peaks, ravines, and creeks. With a steady and marked decline since 1940, the population of Hutton County decreased by nearly 49,000 people between 1940 and 2010. From 2010 to 2019, the population further decreased by nearly 10% to just over 26,500. According to 2018 U.S. Census Bureau data, median income for individual households in Hutton County was just above \$24,000 with more than 41% of the total population living below the poverty level. Demographically, nearly 96% of the population self-identified as white, 2% black, and 2% Hispanic/Latino or combined race. Over one-quarter of the population under age 65 reported living with a disability. Nearly one-third of the population over age 25 did not earn a high school degree. More than 40% did not have broadband subscription service. Underemployment, joblessness, opioid addiction, and myriad health-related issues plague Hutton County.

U.S. Census Bureau (2018) statistics illuminate realities of a struggling rural community. While individual statistics appear to stand alone, obstacles for the community do not exist in isolation. Ripple effects, as observed through my experiences working on the Promoting PLACE grant, are reflected in the schools and manifest as education challenges. Although informative,

---

<sup>3</sup> For purposes of anonymity, specific identifying reference details about Hutton County have been omitted.

the statistics fail to provide a full picture of people in this rural community or to shed light on their strengths as well as their struggles. Teachers work at the frontline with gifted students whose rural community contends with past and present economic woes. Throughout my work on the Promoting PLACE project, I was drawn to teachers' understandings and perspectives about their experiences and interactions with a rural place-based curriculum designed for gifted students.

### **Research Sample and Design**

Data collection in Hutton County began in 2017 and included students' CogAT scores; ratings for each student on the Scales for Rating the Behavioral Characteristics of Superior Students (SRBCSS); teacher fidelity logs; teacher surveys; students' scores on Grades 3 and 4 curriculum assessments (objective assessments, pre- and post-tests, writing tasks, performance assessments); observation documents (logs, protocols with follow-up questions, field and anecdotal notes); and students' language arts Iowa Assessments scores.

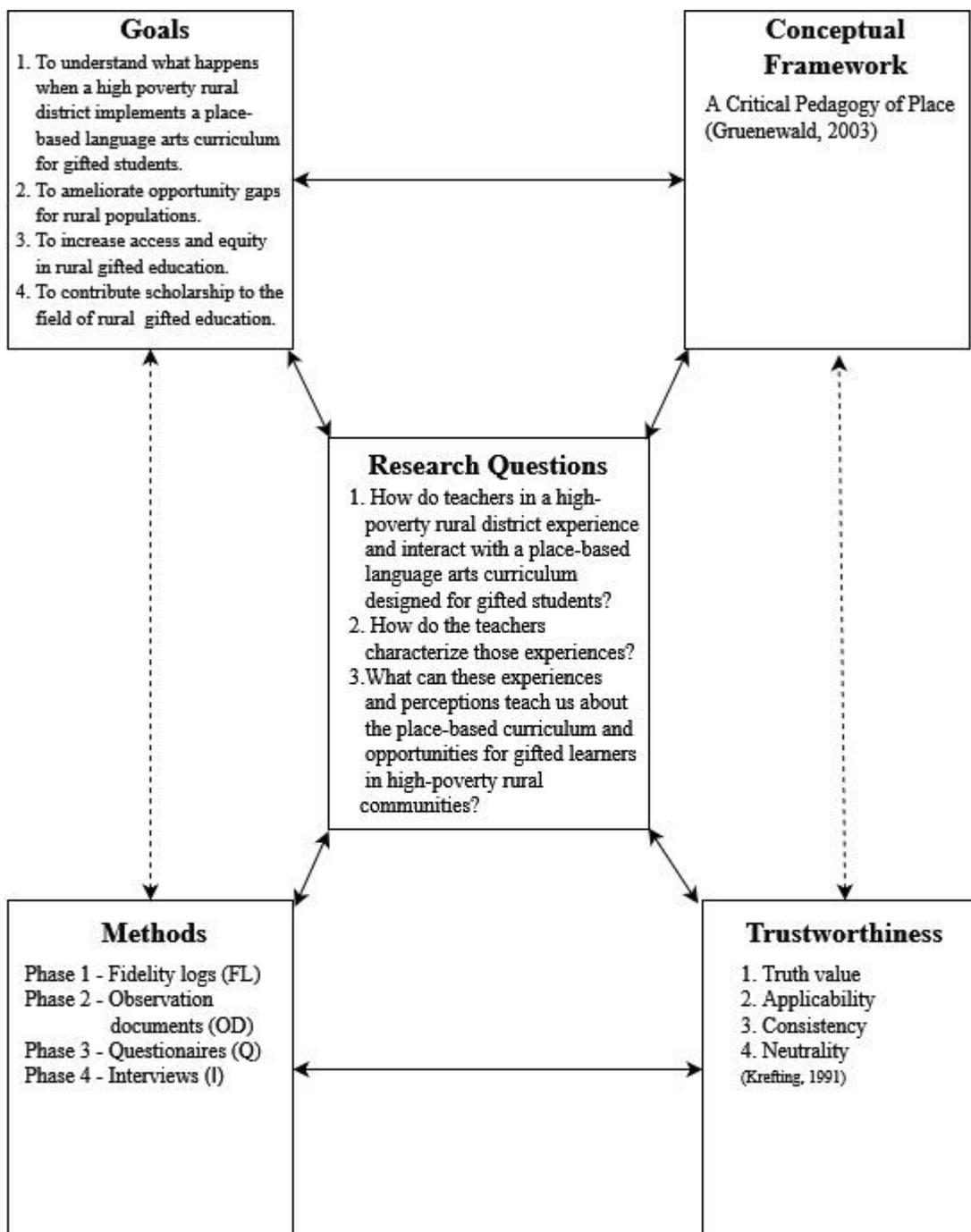
The recursive nature of qualitative research allows for depth and discovery over time to yield rich description (Merriam, 1998). To obtain detailed descriptions for this case study, I examined teachers' experiences and interactions using the following data sources across four iterations: teachers' self-report documents (fidelity logs); observer documents (protocols and logs); follow-up questions with teacher responses; and field and anecdotal notes, the majority of which I collected as a research assistant. I collected and analyzed additional data through teacher questionnaires and a subsequent teacher interview. The use of multiple data sources allowed for data triangulation, which Cronin (2014) purported "decreases, negates or counterbalances the deficiencies of a single strategy, thereby increasing the scope for interpreting the findings" (p. 26). Thus, triangulation supported inductive analysis and interpretation.

For this research, I used a qualitative case study in one school division to understand teachers' experiences and interactions with a rural place-based language arts curriculum designed for gifted students in Hutton County. Guided by Erickson's (1985) "Qualitative Methods in Research on Teaching," I ask the following questions through an interpretive approach: (a) What is happening in Hutton County with teacher's experiences and interactions with a unique rural gifted curriculum? (b) What do these happenings mean to the teachers engaged in them? Erickson (1985) described benefits of an interpretive approach in qualitative research to capture "meaning-perspectives" of "those who are themselves overlooked" (p. 124). Hutton County is a marginalized rural region. As such, I took into account the perspectives and meanings of participants throughout the study.

The case study meets Merriam's (1998) four characteristics of qualitative research: "the emic, or insider's perspective; the researcher as primary instrument for collection and analysis; fieldwork; and inductive research strategy" (pp. 6–7). In this study, a critical pedagogy of place theoretical framework supported the assumption "that meaning is embedded in people's experiences and . . . mediated through the investigator's own perceptions" (Merriam, 1998, p. 6). Undergirded by a critical pedagogy of place and aligned with Merriam's characteristics of case study, qualitative understandings were gleaned through rich description of teachers' experiences and interactions with a rural place-based gifted curriculum. Used as a template, Maxwell's (2005) "interactive model" illustrates the research design of the qualitative case study (see Figure 3).

Figure 3

Maxwell's (2005) Interactive Model



It is through this understanding of case study that I conducted a study of teachers' experiences with a rural place-based language arts curriculum for gifted students. Case study involves examination of layers of information to ascertain distinct understandings of a phenomenon. With teachers' authentic experiences and interactions with the curriculum at the design core, I aimed to uncover and better understand the "complex situation" of implementing a specifically designed place-based language arts curriculum for rural gifted students (Barone, 2011, p. 25).

For this study, the purposeful research sample included Hutton County, a high-poverty rural school district which participated in the Promoting PLACE grant. Hutton County was selected for this case study because of its unique geographic location, specific district challenges (e.g., high poverty, population decline, and resource limitations), number of schools ( $n = 8$ ), teachers ( $n = 16$ ), and the participation of a full-time gifted education coordinator in the Promoting PLACE grant. Boundedness of this case study, too, was unique in that Hutton County is literally bound geographically as a narrow, low-lying valley nestled between rivers and bookended by towering mountain peaks in excess of 4,000 feet above sea level. The level of geographic isolation of Hutton County is distinct from any other district in the Promoting PLACE grant. To illustrate the remoteness of this district, the nearest city with a population over 10,000 is approximately a one-hour drive through national forests.

As a treatment group, Hutton County implemented the rural, place-based language arts curriculum with one cohort over two consecutive years in Grades 3 and 4. Specifically, data related to teacher participants who implemented the rural place-based gifted curriculum for one or both years in the grant and the only district gifted coordinator for the county are included in

the sample. Hutton County was unique with general education teachers implementing the curriculum with gifted students. Primarily, instruction was provided in heterogeneous (mixed ability) classrooms, often without support staff (i.e., assistants, co-teachers, or specialists). This arrangement meant teachers provided the place-based curriculum to all students or simultaneously managed the classroom by splitting the classes—those identified as gifted separated from those not identified as gifted—and teaching two entirely different lessons within one open classroom space. Unlike other districts in the larger research study, Hutton County teacher participants not only lacked physical spaces for separate gifted service options but also lacked opportunities to create spaces where gifted students could work solely with their teachers and their high-ability peers.

### ***Classroom Observations***

Grant staff conducted three observations per semester in both treatment and control districts. Treatment district teachers were observed during implementation of the rural place-based lessons designed for gifted students; control district teachers were observed during their regular “business as usual” instruction with gifted students. Occasionally, two grant staff members simultaneously observed lessons, with each observer individually recording observations. These two observations were then cross-checked for alignment.

Observation documents for control districts included a teacher observation protocol, follow-up questions, and anecdotal/field notes. Observation documents for treatment districts also included observer logs, teacher observation protocol, follow-up questions, and anecdotal/field notes (see Appendices E, F, and G).

### ***Role as Graduate Research Assistant***

Having worked on the grant for four years as a graduate research assistant, I actively participated in the aforementioned aspects of the grant. As a result, I was interested in exploring teacher participants' experiences and interactions with the Promoting PLACE curriculum as they worked with gifted students in unique rural districts. I wondered how, if, and in what ways a rural gifted curriculum with place and community at its core was valued, and I was curious about teachers' attitudes or inhibitions about the curriculum and how they might reflect on their experiences. Finally, I wanted to understand if teachers' experiences would provide insights about their rural communities and whether the teachers regarded the curriculum as a viable means to promote growth and enrichment with rural gifted students.

### *Characteristics of a Rural Gifted Case Study*

Merriam's (2002) assertions about case studies provides context and applications for using this approach in qualitative research. My study aligned with Merriam's assertions that "qualitative researchers are interested in understanding what [constructions and interpretations of reality] are at a particular point in time and in a particular context" (p. 4). Through this case study, I wanted to "[learn] how individuals experience and interact with their social world [and] the meaning it has for them" (p. 4). Specifically, I was interested in rural teachers' experiences with a rural gifted language arts curriculum as they implemented it over a one- or two-year period.

I explored teachers' perceptions during and after implementation of the Promoting PLACE curriculum. In doing so, I analyzed data through "an interpretive qualitative approach" as a way "to understand the meaning people have constructed about their world and their experiences" (pp. 4-5). These experiences and perceptions of teachers made up "the unit of analysis" and the Promoting PLACE curriculum constituted "one particular program" (a

bounded system) which characterized this qualitative research as a case study (p. 8). In this case study, teachers' experiences and interactions with the curriculum and context (i.e., rural gifted classrooms) were intertwined.

The study met Merriam's (1998) characterization of traditional case study as descriptive, heuristic, and particularistic. As such, the case study provided "thick description" of "an incident or entity" (i.e., teachers' experiences with a rural place-based language arts curriculum designed for gifted students) including "as many variables as possible" which captured "interaction[s] over time" (Merriam, 1998, pp. 29–30).

An inductive, heuristic approach allowed me to "illuminate . . . understandings of the phenomenon" in order to "bring about the discovery of new meaning" (Merriam, 1998, p. 30). Thus, the heuristic characteristics increased the "potential applicability" of case study findings (p. 31). This case study, designed to understand teachers' experiences and interactions with a specific curriculum, incorporated "occurrences arising from everyday practice" which "focus on a particular situation, event, program, or phenomenon" (Merriam, 1998, p. 29). Thus, this case study was particularistic in that I "examine[d] a specific" situation and made holistic observations (p. 29).

#### ***Four Phases of Data Collection and Four Data Sources***

The following section outlines four phases of data collection. It also describes four sources of evidence to explore teachers' experiences with the Promoting PLACE curriculum: fidelity logs ( $n = 486$ ), observation documents ( $n = 10$ ), questionnaires ( $n = 10$ ), and an interview.

**Phase One.** In Phase One, I analyzed teacher fidelity logs, which are teachers' self-reporting of adherence to the lessons' instructional steps with room for teachers' annotations

about lesson modifications and/or other curricular decisions affecting adherence. Fidelity logs correspond to each lesson for all four curriculum units. I analyzed fidelity logs ( $n = 409$ ) for all teachers ( $n = 16$ ) in Hutton County who implemented the curriculum units for one or both years.

In another study (Caughey, 2018), fidelity logs from other districts in the Promoting PLACE grant (excluding Hutton County) were used to account for how closely teachers adhered to the curriculum. Caughey's study indicated that "all teachers made adaptations to evidence-based gifted education curriculum," but "teachers with lower levels of fidelity had more difficulty balancing completion of the curriculum with other obligations" (p. 193).

In contrast with Caughey's study, my purpose was not to offer a quantitative report of teachers' fidelity to the curriculum; rather, my analysis was concentrated on the notes teachers included on their fidelity logs, which I hoped would provide insight into the reasons *why* teachers made adjustments to the curriculum. Consequently, fidelity log data are not used for their original expressed purpose in this study. Instead, they were used as explanatory indicators of teachers' self-reports of their experiences and perceptions with the curriculum in this place. I examined whether or not teachers were able to finish the lessons and specifically reviewed the teachers' notes that were included on the logs (i.e., brief notes written to explain any alterations they made to the lesson). A sample fidelity log can be found in Appendix E.

While reading through fidelity log notes, I noted emergent themes and inferences for each unit. I then organized inferential and thematic codes in tables. Themes included modifications, additions, omissions, strengths and challenges of lessons, and influences on implementation such as availability of resources, classroom space, and time.

**Phase Two.** Observations offer "way[s] of understanding someone's perspective . . . to draw inferences about this perspective . . . [and] to [get] at tacit understandings" (Maxwell, 2005,

p. 94). Merriam (1998) indicated that “an observer will notice things that have become routine to the participants themselves,” and that observations allow the researcher to witness the phenomenon firsthand rather than through the filter of the participant’s mind during an interview (p. 95). Thus, observation is an important way to both triangulate emerging findings and bring awareness to certain aspects of the situation under study that the researcher can follow up on during subsequent interviews.

***Collection of Observation Data.*** During the Promoting PLACE grant, team members visited teachers’ classrooms during gifted instruction sessions. As part of the team, I interacted with the teachers, observed as lessons were implemented, documented happenings during the lessons, and followed each classroom visit by asking teachers structured questions pertaining to the lessons. Three observations in the district per unit were conducted in Hutton County over two years of participation. However, not all teachers were observed, and some teachers were observed multiple times.

For each lesson observation conducted in treatment districts, grant team observers were responsible for completing four observation documents (OD):

1. observer logs (see Appendix F),
2. observation protocols (see Appendix G),
3. follow-up questions (see Appendix G), and
4. anecdotal and/or field notes (see Appendix H).

First, observer logs corresponded with teacher fidelity logs and provided information on instructional implementation. Observer logs, like the fidelity logs, listed each instructional step for every lesson. Observers noted each sequential instructional step completed and explained any modifications.

Second, observation protocols ( $n = 12$ ) provided detailed information about instruction and curriculum. Information for instruction included items such as supports and challenges observed, assessments used, and perceived mindset of the teacher and students. Information for curriculum included details about learning goals and levels of depth and complexity of the observed lessons.

Third, as part of the observation protocols, grant team observers met with teachers for 10 to 20 minutes after each observed lesson ( $n = 12$ ) and asked specific follow-up questions pertaining to the lesson. Observers transcribed teachers' responses. Follow-up questions ascertained information about teachers' experiences before, during, and after lesson instruction. These questions included information about prior assessments and building of students' background knowledge, lesson strengths and weaknesses, specific challenges experienced, and teachers' thoughts about the lesson.

Fourth, the researchers' anecdotal and/or field notes taken during the lesson observations were used as an additional data source. Information about teachers' experiences with the curriculum and instruction were coded inferentially and thematically on charts similar to the ones used for fidelity log data.

**Phase Three.** In Phase Three an online questionnaire (see Appendix I) was provided for teachers to reflect on their experiences and interactions with the curriculum. Questionnaires were designed to enhance understanding of teachers' experiences with the Promoting PLACE curriculum and were emailed to participants. Qualtrics, a secure online platform through Virginia Tech, was used for teachers to view the questions and submit responses. Teachers had a two-week window to complete the questionnaires; however, since teachers were dealing with instructional changes in the district because of the COVID-19 pandemic, I extended the window

an additional week. In total, I received nine responses from the 16 teachers to whom I sent the request.

The questionnaire began with short response questions such as: *Do you live in Hutton County? How long have you taught in Hutton County?* To allow the teacher to share various aspects of her experiences that were not captured with the set of structured questions or through previously collected data, open-ended questions about the teachers' interactions with the curriculum followed; see Appendix I for the questionnaire protocol. There was an option to submit the questionnaire anonymously; however, because I hoped to better understand the teachers' responses through cognitive interviews, I added the following statement: "I would like to talk with as many teachers as possible about their experiences and interactions with the rural place-based curriculum designed for gifted students. If you would like to talk about your responses, please provide your name and contact information. I would love to meet with you in Hutton County." One teacher volunteered to continue the dialogue during Phase Four interviews, and I contacted her via email to work out details (e.g., time, date, location).

**Phase Four.** Desimone and Le Floch (2004) reported, "cognitive interviews . . . allow for in-depth analysis of individual items" and "help guard against [validity] threats" (p. 6). As such, the final phase of data collection consisted of a semi-structured cognitive interview with one teacher (see Appendix J for interview guide). The teacher interview, like the other three sources, was designed to examine teachers' experiences with the curriculum and was intended as a way "to check, confirm and clarify the emerging themes in the data" (Nassaji, 2015).

Interview questions were informed by data previously analyzed in Phases One, Two, and Three. Upon approval from my dissertation committee, I conducted two pilot cognitive interviews with a treatment teacher from a similar rural treatment district to ensure questions

reliably asked information about teachers' experiences and interactions. Based on findings from the piloted cognitive interview, modifications to the question set were made prior to the cognitive interview with a teacher in Hutton County.

Although I had hoped to have several teacher interviews, only one teacher volunteered. Perhaps due to the pandemic or because it had been a year after the Promoting PLACE grant ended in the district, only one teacher, Ms. Ellis (pseudonym), volunteered for an interview. Because of the pandemic, an in-person interview could not be conducted. Thus, I provided options of Zoom, FaceTime, Google Meet (where camera was optional), or phone call. Ms. Ellis indicated a phone call would be best. With her permission, the interview call was recorded and then transcribed. The Interview protocol is listed in Appendix J.

Bartlett and Vavrus (2017) advised consideration and documentation of “who, how, about what, and why” interviews are conducted (p. 55). Semi-structured interviews “attend to the processural nature of conversation and the social dimensions of knowledge production” (p. 55). The interview was used to “extend and alter [my] understandings of the phenomenon” (Kvale, 1996, p. 100). In this way, teachers' experiences—successes, challenges, and perceptions—with a place-based curriculum could be more clearly understood.

Questions were individualized for the interview with the specific teacher volunteer to yield additional specific details related to her experiences with the curriculum and her responses to the questionnaire.

### ***Data Analysis***

Miles and Huberman (1994) suggested “qualitative analysis needs to be well documented as a process . . . to understand more clearly just what is going on when we analyze data, to reflect, refine our methods, and make them more generally usable by others” (p. 12). For this

study, four phases of inductive analysis with multiple data sources offered opportunities for “contextualized deep understanding[s]” (Bloomberg & Volpe, 2019, p. 105) of teachers’ experiences and interactions with a unique rural gifted curriculum. I read, reread, coded, and analyzed data in the process of analytic induction (Erickson, 1985) looking for recurring words or phrases to generate thematic findings described in the next chapter as assertions. Then, I recorded these incidences and repeated the process to account for any oversights. Next, I unified the themes using color codes in my notes. The color codes reflected categories of themes which influenced lesson fidelity. Categories were further divided as needed. For example, because several influences affected implementation of the curriculum, the categories were subdivided to represent those specific influences (e.g., book shortages or technology limitations).

### ***Synthesis of the Four Sources of Evidence***

Synthesis of data, accrued through four iterative collection and analysis phases, yielded qualitative understandings about how teachers experienced and interacted with a rural place-based curriculum designed for gifted students. Through synthesis of qualitative data collected over time, across eight schools with 16 teachers, understandings about teachers’ experiences with a rural place-based language arts curriculum designed for gifted students were highlighted. Merriam (1998) noted “insights gleaned from case studies can directly influence policy, practice, and future research” (p. 19). Thus, the understandings derived hold possibilities for increased access, advocacy, and equity in rural gifted education. Synthesis of data is reported in subsequent chapters.

### **Ethical Considerations**

Kvale (1996) recognized “foreknowledge of . . . moral issues” as a way to make informed “choices while designing a study” (p. 110). Kvale’s (1996) understandings of ethical research

informed and guided my decisions for this case study. Essential for research conducted with people and communities, ethical considerations ensure protection from potential exploitation and harm to research participants.

Over several years of work with teachers in Hutton County, I have not only built valuable professional relationships with colleagues who share similar interests, I have also garnered support and trust in the form of continued partnerships to advance the field of rural gifted education. As a researcher and member of the Promoting PLACE grant team, I am a trusted broker in the researcher–participant relationship. On several occasions in my observational visits, teachers asked about data and findings from the larger Promoting PLACE grant. Specifically, teachers wanted to know “how” and “in what ways” the data might support their efforts to educate rural gifted students. They asked how it would “help them” and how the data might “make a difference” with rural policy regarding specific needs in their schools. To fulfill my responsibilities as an ethical researcher and grant team member, I am committed to these evolving relationships. In this way, I worked as a trusted broker to better understand the nuanced experiences of teachers with a place-based curriculum designed for gifted students in a unique high-poverty rural district. As such, I used member checking whereby teachers read my observation and interview notes to ensure I ethically and accurately represented teachers’ experiences.

### **Trustworthiness**

The follow section addresses steps I took to increase trustworthiness for the qualitative case study, which Krefting (1991) considered the “most important criterion for the assessment of qualitative research” (p. 216). Krefting (1991) indicated criteria for quantitative and qualitative research should differ because their purposes differ. With a shift in language from quantitative

terms to qualitative terms, Krefling, borrowing from Lincoln and Guba (1985), proffered a model for standards to increase “rigor” in qualitative research. For this study, I used Krefling’s (1991) four criteria—truth value, applicability, consistency, and neutrality—to evaluate trustworthiness.

Truth value (often termed credibility), “based on research design, informants, and context,” indicates “how confident the researcher is with the truth of the findings” (Krefling, 1991, p. 215). This case study was supported by a critical pedagogy of place in which the interplay between content, context, social construction of realities, and meanings were dynamic and overlapping. With this theoretical framework, I described, analyzed, and interpreted understandings about teacher experiences with member checks, reflexivity, and memos to increase truth value. Denzin (2009), operating “from a critical pedagogy framework,” distinguished qualitative from quantitative research and cautioned against “guidelines for conducting and evaluating” qualitative research when those guidelines apply to quantitative research (p. 139). Additionally, I incorporated “peer review or debriefing” as a means for “review of the data and research process by someone who is familiar with the research or the phenomenon being explored” (Creswell & Miller, 2000, p. 129).

Krefling (1991) referred to applicability (sometimes termed transferability) as “the degree to which the findings can be applied to other contexts and settings or with other groups” (p. 216). As such, the purpose of this case study was to describe teachers’ particular experiences that may not be “[generalizable] to others” but hold possibilities to yield understandings about rural “contexts outside the study” with a “degree of similarity” (p. 216). To improve applicability, I have provided “sufficient descriptive data” through four phases using multiple data sources (p. 216).

Consistency (sometimes termed repeatability or replicability), as described by Krefting (1991), relates to “variability” in data. For quantitative research, variability in data requires explanations of anomalies or outliers. However, for qualitative research, Krefting noted the “range” of human experiences—all of which should be considered—“rather than the average experience” (p. 216). For this study, I have explicated methods of data collection and analysis to “learn from the [teachers’ experiences] rather than control for them” because “variability is expected in qualitative research” (p. 216).

Krefting (1991) reported neutrality (often termed bias) as a means of conveying data in an objective way. While interpretation in qualitative work cannot be completely neutral, neutrality of reporting can occur with deliberate steps to minimize bias. In this way, I have described the experiences as objectively as possible while also acknowledging my role as researcher. It was my intent to maintain trustworthiness in every aspect of this and future research to become a valued contributor to the field of rural gifted education. Additionally, I have synthesized and triangulated “multiple sources of information and multiple types of methods” to “strengthen the quality and credibility of the evidentiary support for findings and recommendations” (Board on Global Health, 2014, p. 69).

Issues of subjectivity were addressed through disclosure of my stance as a researcher. First, my lifelong experiences living in a rural region are extensive and were influential in aspects of my research. While I cannot entirely separate my personal and professional insights about ruralities, I can acknowledge them through reflexivity in my research. My worldviews, in light of being raised, educated, and employed in a rural area, provide a rich source for advocacy with marginalized communities. While I continue to reside in the rural area where I was born, my candidness about my own rural life experiences has been expressed through reflexivity,

memos, and member checks. As Atkins and Wallace (2012) advised, “transparency in the selection and presentation of data” and “objectivity in interpreting evidence” are essential for trustworthiness in qualitative research (p. 19).

### **Limitations**

In this rural gifted education case study, my own experiences as a lifelong rural resident were not, nor should not have been, dismissed. Even with disclosure of my own rural life experiences, it is likely that my understandings about this case study were influenced by my experiences. However, it was my intent to understand what happens when teachers implement a place-based curriculum focused on a specific rural region while keeping my own prior rural understandings neutral throughout the phases. In doing so, I used journal memos, member checks, and peer reviews to fully, and as accurately as possible, collect, analyze, synthesize, and report data. Use of peer reviews has provided valuable feedback throughout the case study. Additionally, feedback from my dissertation committee has provided valuable insights for the overall design and integrity of this qualitative case study. Such use of “ethical practices” ensures sound research (Creswell, 2009, p. 93).

Through three years of data collection as a primary fieldworker on the Promoting PLACE grant, I have become deeply invested in rural gifted education and research. Investment, too, stems from my own 15 years of teaching in a rural community. Yet, my experiences as a novice researcher have limitations which may have inadvertently and adversely affected the integrity of the case study. Iterative reflexivity, member checks, and consultations with one or more Promoting PLACE grant members has mitigated possible issues with my role and investment in this study.

This case study, with multiple data sources collected over a period of several years, has yielded significant “amounts of data” (Barone, 2011, p. 24). Limitations with such a substantial amount of data include possibilities of overlooking particular and relevant information.

Silverman (2013) advised beginning researchers to “seek advice from supervisors” and “work systematically” (p. 233) to simultaneously collect and analyze data and “recognize the useful role that theoretical models play in shaping [the] research” (p. 230) for effective collection and analysis. Meticulous observation, collection, organization, coding, and analysis of data throughout the four phases has minimized the possibility of missing relevant data for the study.

While not new to education, I am relatively new to qualitative research in rural gifted education. As such, my understandings of methods, data analysis, interpretations, and reporting must be considered. For example, although my role as a classroom teacher allowed me to hone effective communication skills, conducting qualitative semi-structured interviews was quite different from posing questions with students. Field experiences with the Promoting PLACE grant, PhD coursework at Virginia Tech, and “consultancy and supervision” with colleagues and scholars in education research has mitigated “performance errors in qualitative interviews” that may have stemmed from inexperience as a researcher (Hopf, 2004, p. 207–208). To grow as a researcher, I will continue to refine my research skills and “reflect regularly on [my] development and share [my] development journeys” so that my work may lead “to better ways” of researching for others in the field (Robbins & LePeau, 2018, p. 124). In doing so, I have maintained “methodological awareness . . . to anticipate the consequences of methodological decisions while carrying out” this qualitative case study (Seale, 2002, p. 97).

## Summary

Systemically, rural gifted students have been shortchanged, despite calls for access and equity for quality curriculum, programs, and services. Rural students deserve enriching opportunities and equitable access to quality gifted services. Qualitative understandings gleaned through teachers' experiences and interactions with a specially designed rural place-based gifted curriculum leave open possibilities to reimagine how support structures for teachers working with rural gifted students may evolve. Investment in rural gifted education has a vital return and warrants continued advocacy and attention.

While it is beyond the scope of this study to offer causalities for implementation of a rural place-based language arts curriculum designed for gifted students, the descriptive qualitative findings will provide insight into possible, even plausible, understandings about teachers' experiences with rural gifted students. Although it is understood that qualitative research does not indicate causality, education researchers Anderson and Scott (2012) proffered "process causality as a scaffolding for multilevel analysis" (p. 674) to potentially "inform and critique ongoing policy initiatives" (p. 683). These qualitative understandings have potential to inform practice and policy, and—at a minimum—warrant further research in the nuanced, understudied field of rural gifted education.

This qualitative case study "is a ticket that allows us to enter a research field in which we discover the unknown within well-known borders while continually monitoring our own performance; scalability; and our own, as well as general, existing knowledge" (Starman, 2013, p. 42). With decades of research indicating financial shortcomings and limited opportunities in rural communities, understandings about teachers' experiences and interactions with a rural place-based curriculum for gifted students has potential to advance the field of rural gifted

education. This qualitative case study “is applicable to real life because it relates directly to . . . experiences, and it facilitates understanding of complex situations . . . that cannot be made explicit in most other research designs” (Barone, 2011, p. 25).

Azano and colleagues (2014) reported, “Relatively little is known about the experiences of gifted students in rural areas and even less about the teachers serving this population” (p. 88). Through four phases of “rigorous data collection,” it was my “overall intent . . . to develop an in-depth understanding” of teachers’ experiences and interactions “and the context in which he or she works” (Creswell et al., 2007, p. 248). This study holds possibilities to shed light on nuanced experiences and interactions as teachers navigated a specially designed curriculum for a unique rural population. This case study “has local relevance” (Vavrus & Bartlett, 2006, p. 101), and as such, insights about teachers’ experiences and interactions with a rural place-based language arts curriculum afford researchers and practitioners with possibilities to shape gifted curriculum and instruction to meet the unique needs of rural gifted students. On a larger scale, understandings about rural gifted curriculum and instruction hold possibilities to mitigate opportunity gaps for gifted students in marginalized rural communities.

In the following chapter, I present findings related to my research questions, and in Chapter 5, I provide a discussion of these findings and their implications for the field of rural gifted education research.

## Chapter 4

### Findings

The purpose of this case study was to explore teachers' experiences with a rural specific, place-based curriculum for rural gifted students. For this qualitative study, "experiences" are teachers' perceptions, interactions, and insights as they implemented the Promoting PLACE curriculum. For the case study, research questions were designed to open a window into teachers' experiences and offer insights into how existing opportunity gaps for rural gifted students may be addressed. I asked:

- How do teachers in a high-poverty rural district describe their experiences with a place-based language arts curriculum designed for gifted students?
- How do the teachers characterize those experiences?
- What can these experiences and perceptions teach us about the use of a place-based curriculum model and opportunities for gifted learners in high-poverty rural communities?

For this study, I worked within a constructionist epistemology wherein meanings are made through social interactions and interpretations. In the first section of this chapter, I provide context for the case study. I describe the context of Hutton County as I experienced it as a grant team member and graduate researcher who sought to understand teachers' experiences with a unique curriculum. In the second section of this chapter, I describe two key qualitative findings that emerged from the data, labeled throughout as assertions (Erickson, 1985). Assertion One addresses structural barriers which influence curriculum implementation, and Assertion Two describes teachers' reactions to and perceptions of their experiences with the Promoting PLACE

curriculum. In the third section of this chapter, I explain how these key assertions respond to my three research questions.

### **Understanding Context for the Case**

Before I present assertions and how they respond to research questions, it is important to understand the context. This case study examined teachers' experiences as they implemented a rural specific, place-based language arts curriculum for gifted third- and fourth- grade students in Hutton County. The study is derived from my experiences as a graduate research assistant on the *Promoting PLACE in Rural Schools* (Promoting PLACE) grant project. Funded through the U.S. Department of Education Jacob K. Javits program, the grant supported a large-scale research study that included 14 high-poverty rural school districts and took place across six years. However, for this case study, I looked at only one of the 14 districts in the grant: Hutton County, one of the six treatment districts in the study that implemented the Promoting PLACE curriculum. For this dissertation study, I explored 16 teachers' perceptions and experiences in the school division of Hutton County as they implemented the Promoting PLACE curriculum. Thus, the case study is bound by one district and includes 16 teachers from the district's eight elementary schools, who implemented the Promoting PLACE curriculum over a two-year period with third- and fourth-grade students.

### ***Contextual Observations and Demographics***

Hutton County is geographically bound by the Appalachian Mountains. With some of the highest peaks in the state, travel between schools is often impassable when there is snow, ice, or heavy rain. I traveled to Hutton County many times in the last four years. With each trip, the scenic beauty of the mountains was breathtaking, quite literally and metaphorically: the altitude was palpable with elevations exceeding 4,000 feet and spectacular scenery. Driving through

mountain passes, rock ledges dwarfed my car with striations of prehistoric life that flanked my left and right, reaching as high up as I could see from my car window, along the winding road, far below the cliffs above.

Each visit to Hutton County, I settled into a small chain hotel and in the evenings, I frequented a local, coal mining themed, pizza restaurant which depicted the area's history with the industry. Among only a few other patrons in the establishment, I explored the narrow, second-floor dining area where the street below laid bare abandoned buildings, some with windows boarded. The vacant, brick-front businesses represented a time, nearly a century before, when the town was at its economic peak. The walls around the bar area were adorned with black and white pictures of coal miners, clothes laden with charcoal, bodies worn, faces dusty, and eyes peering at the camera lens. Each miners' gaze appeared in waiting, as if wanting to tell their narratives. There were pictures of a strike where coal miners who wanted to unionize stood up against mine owners. The strikes caused a contentious divide. Newspaper articles, yellowed with age, reported at least five deaths over unionization violence. The coal mining heritage of Hutton County permeated the restaurant. As I sipped a Hutton sunrise and waited for the pizza I had ordered from the waitress who called me "honey," I noticed the restrooms marked "coal miner" and "coal miner's daughter." The history *and* presence of the place captivated me.

Hutton County Public Schools' gifted coordinator, Ms. Lynn (pseudonym), the primary liaison between the district and grant team, graciously welcomed grant team members, one or several of us at a time, as we arrived at the district's central office. Ms. Lynn personally escorted us to the most remote schools, as our GPS maps did not work in much of the district. The grant team made regular visits to the eight elementary schools in Hutton County, approximately three each semester for two years, for professional development and classroom observations (the data

generated from these visits described below). On morning visits to schools, I was greeted warmly and, more than once, was offered coffee upon checking in at the main office.

During my many conversations with Ms. Lynn over the years, she offered context about life and schooling in Hutton County. She raised her own children in the school and shared with the grant team about her parenting and teaching experiences. She described the high poverty rate in Hutton County in which 100% of students are able to receive free lunch, breakfast, and dinner because such a high percentage of students qualify through the Community Eligibility Provision (CEP). She described the district as the “most rural” in the state where schools existed without many resources. During the grant, we witnessed an elementary school closure that resulted in consolidation.

According to the U.S. Census Bureau (2020), there is a wide financial chasm between Hutton County and the rest of the U.S., with the poverty rate in Hutton County (31.1%) at nearly three times the national average of 10.5% (Semega et al., 2020). The household income in Hutton County is approximately \$26,500, while the national median is above \$68,000. The population trend has been in a steady decline since the 1940s with a marked drop in the last 20 years (Semega et al., 2020). In a place where healthcare facilities are few and far between, and the opioid crisis one of the worst in the country, life expectancy in Hutton County, at 71.5 years, is nearly eight years below the national average, one of the shortest in the country for both men and women (Centers for Disease Control and Prevention, n.d.; Institute for Health Metrics and Evaluation, n.d.).

Hutton County is a community where teachers care deeply about students. We met one teacher who had come out of retirement twice to teach second grade. Because of the struggling

economy and resulting tight school district budgets, Ms. Lynn took on multiple roles, serving simultaneously as administrator, teacher, and gifted coordinator for the school system.

School and community pride is evident through the recently built high school in Hutton County, where people gather for Friday night football games and seasonal theatre productions. The county is laden with historic experiences where traditions of bootlegging, coal mining, folk music, poke sallet festivals, and sorghum stir-offs are rooted. Nestled deep in the Appalachian Mountains, amid rich cultural influences, Hutton County is a storied place, and it is *this* place, its past and present, which bring me to this research.

### ***Situating the Case Study***

In this case study, I use Merriam's qualitative case study assertions to inform my research methodology. In doing so, I orient the research with "the overall purpose . . . to *understand* how people make sense of their lives and their experiences . . . [in] a bounded system" (Merriam, 2009, p. 23). I was guided by Merriam's (2009) four key characteristics for qualitative research:

- the focus is on process, understanding, and meaning;
- the researcher is the primary instrument of data collection and analysis;
- the process is inductive;
- and the product is richly descriptive (p. 14).

What makes this research uniquely a case study is that it involves "an in-depth analysis of a bound system" (Merriam, 2009, p. 38) and "focuses on holistic description and explanation" (p. 43).

Using Merriam's description as a guide, this case study is "particularistic, descriptive, and heuristic" (p. 43). As such, I explore a particular situation where teachers implement a rural specific, language arts enrichment curriculum with students identified as gifted. I describe

teachers' experiences and perceptions of their interactions with the curriculum. Through inductive analysis (holistic, thematic coding) of multiple data sources, I highlight teachers' experiences over a two-year period. In accordance with Merriam's (2009) characterizations and definitions, a qualitative case study may lead to "discovery of new meaning, extend the reader's experience, or confirm what is known" (p. 46). In keeping with Merriam's (2009) assertions about case study, I explore teachers' experiences and perceptions for meaning. Additionally, Merriam asserts, "the uniqueness of a case study lies not so much in the methods employed (although these are important) as in the questions asked and their relationship to the end product" (p. 44). As such, the research questions are addressed through two key assertions. In the next section, I foreground the key assertions with context for the data sources and analysis in the case study.

### ***Case Study Analysis and Connection to a Critical Pedagogy of Place Framework***

In this qualitative case study, I explored teachers' experiences with a unique curriculum. My interest was not in "outcome" but in "process," with the primary purpose "to gain an in-depth understanding of the situation and meaning for those involved" (Merriam, 1998, p. 19). The focus of the case study is on 16 teachers, all women, who implemented the Promoting PLACE curriculum in Hutton County. Five teachers implemented the curriculum for both years (teaching consecutive years with their gifted third- and fourth- graders), while 11 teachers implemented the curriculum for only one year. To describe these assertions, I follow Erickson's (1985) model and label support as "evidence" rather than "data" from four distinct sources. In keeping with Erickson's (1985) approach, I employed an inductive approach for thematic analysis. To guide my analysis, I used the process of inductive analysis, in which:

. . . researchers gather data to build concepts, hypotheses, or theories rather than deductively testing hypotheses as in positivist research. Qualitative researchers build toward theory from observations and intuitive understandings gleaned from being in the field. Bits and pieces of information from interviews, observations, or documents are combined and ordered into larger themes as the researcher works from the particular to the general. (Merriam & Tisdell, 2015, p. 15–16)

Using an inductive approach, I leaned on the evidence including teachers' self-reported fidelity logs, observations, questionnaires, and an interview to “glean understandings” from the teachers who implemented the curriculum. Through a critical pedagogy of place framework, “a theoretical rationale to connect schools with the social and ecological dimensions of places” (Greenwood, 2003, p. 10), I explored four sources of evidence to understand teachers' firsthand experiences with a nuanced rural specific, language arts enrichment curriculum for gifted students. Through the critical pedagogy of place lens, I explored the question of “What happened here?” which foregrounds place and experiences in the research (p. 11).

I examined the sources of evidence for emergent themes to address the three research questions to describe “what was happening” as teachers experienced and perceived their interactions with the curriculum. Through the heuristic nature of the case study, I examined four sources (described in the previous chapter) for insights into teachers' experiences and their characterizations of their interactions with the Promoting PLACE curriculum. Throughout the chapter, the following codes are used for each source: fidelity logs (FL), observation documents (OD), questionnaires (Q), and an interview (I).

### **Two Key Assertions and Support**

Through four phases of evidence collection, multiple sources offer evidentiary warrants (Erickson, 1985) for two key assertions about the teachers' experiences with the Promoting PLACE curriculum and influences on its implementation. The two assertions describe the relationships between challenges and affordances of influences on teachers' implementation and, consequently, to students' access to the curriculum activities. In this section, I provide descriptions and supportive details for each assertion.

***Assertion 1: Structural Barriers Influence Teachers' Experiences with the Curriculum***

Teachers' implementation of the curriculum was influenced by a variety of structural challenges such as limited resources of materials, time infringements, and availability of academic space. These structural barriers impeded teachers from fully implementing the curriculum as evident across the data sources. In the context of this case study, I use Simms and colleagues' (2015) definition of structural barriers to identify challenges that influenced implementation of the curriculum. Simms et al. (2015) assert, "Structural barriers are obstacles that collectively affect a group disproportionately and perpetuate or maintain stark disparities in outcomes" (Simms et al., 2015, p. v). Although this case study does not specifically identify or address outcomes of students' learning, the structural barriers influencing their access to the curriculum is noted in each of the sources across the eight schools.

Through thematic analysis, the sources indicate structural barriers influenced teachers' experiences with and perceptions of the curriculum. These challenges, too, were associated with students' level of *access* to the curriculum in that when instructional activities were modified or omitted, students' opportunities for enrichment were minimized or compromised altogether. Across all four units, teachers adapted and omitted lessons to varying degrees, as evidenced by fidelity log data. Out of 486 fidelity logs analyzed, 414 showed lessons were adapted, largely

through omission of activities and instructional steps. That is, teachers made adaptations in 85% of the lessons across these four units, according to teachers' fidelity of implementation self-reports. In this section, I provide evidence from four sources to demonstrate how adaptations to the curriculum relate to students' access to activities.

**Structural Barriers Prevent Teachers from Delivering the Full Curriculum.** The majority of departures from the curriculum were primarily brought about by structural challenges of time infringements and resource limitations whereby teachers resorted to “skipp[ing] big chunks” and “picking and choosing” activities from the curriculum. For example, in the Folklore unit, a teacher noted both time limitations and supply shortages as reasons for altering lessons. She reported there was “no board in the room” to use for whole group activities, so students had to “write on tables” in small groups instead (FL). She noted, “At times I have to pick and choose due to time” (FL). Rationale for teachers' selections of which activities to include or exclude were not noted in the data sources. Although consultations with grant staff were made available, no documentation of consultations related to modifications or omissions was indicated in the sources. While modifications to the curriculum could potentially have been for the better (e.g., if the teachers had shared an anecdote about an experience in the local community to help the students make real-world connections), omissions of activities meant students missed out on instructional enrichment activities within the four units.

In the Hutton County case study, only one teacher completed two entire units, Fiction and Research, without reporting having made any adaptations or omissions during instructional delivery (FL). For teachers who reported adapting or omitting lesson activities, the primary reasons for delivery interruptions resulted from challenges of time interferences, material shortages, physical environment constraints, and instructional support limitations across the four

units. Although lesson adaptations varied across the units (e.g., changing student groupings from small group to whole group when the class total was very small anyway), omissions of entire activities meant that students were not provided the full curriculum. In Hutton County, Promoting PLACE curricular lesson modifications (i.e., additions and omissions) arose from four primary areas: resource availability, environmental factors, nuances of time, and instructional support, all of which were also observed in Caughey's (2018) fidelity of implementation study.

As evidenced across all data sources, resource shortages influenced teachers' implementation of the curriculum. For example, in the Folklore unit, one teacher noted she did not follow any of the lessons closely. Citing resource limitations (FL), this teacher reported cutting instructional steps in 13 out of 15 lessons attempted and omitting the last two lessons of the Folklore unit altogether. Instructions for the folklore unit indicated that teachers should gather folktales from the school library to read, study, and use as models, but another teacher noted that the school did not have such library books (FL). Although the unit did include printable and online resources that could have provided students some access to folktales, resources outside those provided by the Promoting PLACE grant were limited across schools. Limited access to supplemental resources impedes the teacher's ability to offer opportunities for gifted students to access the curriculum.

**Ms. Ellis's Insights into Structural Barriers.** The interview with Ms. Ellis offers insights about her Promoting PLACE curriculum experiences and illuminates how barriers influence implementation and students' access to the activities. Ms. Ellis, a general education teacher, delivered instruction of the curriculum to students in her class identified as gifted in a small group. That is, while her other students were working on other learning activities in the computer lab, she convened the students identified as gifted to implement the curriculum.

Looping with her students for two sequential years, she taught the third-grade curriculum in Year One and taught the fourth-grade curriculum in Year Two. When asked about the nature of modifications made to the curriculum, Ms. Ellis expressed concerns about time constraints for instruction. She stated, “I had to really take a lot of things out” (I). Time allotted for gifted instruction was shortened, because the environmental logistics of moving her general education students to the computer lab and then getting gifted “kids back to [her] room to do the curriculum” resulted in lost time for gifted instruction (I). With “30 minutes once a week, maybe twice a week on a good week” designated for gifted instruction, the time infringement meant fewer opportunities for Ms. Ellis to complete instructional activities (I). She explained the influences of the changes and omissions to the curriculum: “I felt like I was doing them [the students] an injustice by just breezing through whatever the lesson was for that day. I felt like I skipped big chunks to get to the important thing at the end” (I).

Relative to the omission of activities, fidelity logs in the Poetry unit indicated instruction was challenging for Ms. Ellis because of time infringements including evacuation drills, standardized testing, and inclement weather. She noted, “multiple interruptions and programs this time of year at school especially during the time I have g/t [gifted and talented] students,” which resulted in incomplete implementation. As observed in the fidelity logs, Ms. Ellis worked from the beginning of each lesson through as many of the activities as she could for each instructional session. The next scheduled instruction time with her gifted students, Ms. Ellis started at the beginning of the next lesson rather than resume where the previous lesson was left off. Ms. Ellis indicated approximately one-third of each poetry lesson implemented was left incomplete (FL). Omitted activities were the ones situated near the end of each lesson, as was the case for the majority of teachers who reported cutting portions of activities out of instruction. For

Ms. Ellis, this pattern is evident in the Folklore unit as well. Ms. Ellis attempted to complete the Folklore, Poetry, and Fiction units over a two-year period with her gifted third- and fourth-grade students, however, she was unable to get to the Research unit because of time. Ms. Ellis acknowledged not being able to complete many of the lessons of the Folklore, Poetry, and Fiction units. She stated, “if I really would’ve had the time it would’ve been very beneficial, it would’ve been good” (I). When she could not complete the end of the lessons, students missed some of the culminating activities such as a poetry anthology with students’ original work.

**Resource Shortages and Curriculum Delivery.** In this section, I provide evidence from multiple data sources to illustrate the influence of resource shortages on instructional delivery of the Promoting PLACE curriculum. Whether tangible or intangible, resource availability influences implementation of the curriculum and students’ opportunities to access it. When teachers faced resource shortages, they did not provide the curriculum in full and students were not able to fully participate in all the activities.

Scarcity of resources in rural schools has been a consistently documented limitation, often due to inadequate funding (Azano et al., 2017). As is the case for many high-poverty districts, resource limitations for instructional materials in Hutton County present a consistent challenge to instruction. Across all eight schools, teachers noted resource shortages such as teaching supplies (e.g., books, folders, notebooks, maps) and instructional supports (e.g., time, computers, internet).

At the onset of the Promoting PLACE grant project for each year, teachers received professional development support for implementation and were supplied with instructional materials (through the grant budget) for identified gifted students. These materials included journals, notebooks, pens, sticky-notes, and various other items for use in teaching the four units.

Additional supplies were delivered by grant staff on visits to schools when teachers requested particular items for instruction. Although teachers were given supplies through the grant, teachers still noted resource shortages beyond which the grant provided (FL).

***Resource Limitations with Books.*** The curriculum includes library activities as part of its units of study. For example, several times in the Folklore unit, teachers are directed to visit the school library with their students to read folktales such as those attributed to the Brothers Grimm. These various folktales are to serve as models for students to write their own tales as the unit's culminating activity. In one instance, a teacher took her students to the school library as directed in the lesson only to find there were no folktale books on the shelves. She noted the books were not checked out; rather, there were simply no folktale books in the small library collection. Beyond the tales offered in the resource section of the unit, then, her students did not have opportunities to read folktales. Across the district, books of folktales in the schools' libraries were few and far between. Accessing folktales online may have been an option in some schools, but in others, school internet connections were so inconsistent that e-books were either inaccessible altogether or were only accessible for intermittent periods.

***Resource Limitations with Basic Classroom Supplies.*** Fifty percent of the teachers taught the curriculum to their entire classes. This meant they taught heterogeneous groups of students, including a variety of levels of students across general, special, and gifted education. Because of the inclusion of students in addition to those identified as gifted, these teachers encountered material resource limitations which influenced implementation. In cases where there was a whole class delivery model, teachers noted they "did not have supplies" and marked lesson activities that could not be completed as a result (FL).

One teacher faced resource supply shortages when several activities for the Poetry and Research units required additional materials. She noted, “no magazines or newspapers readily available” and marked incomplete for activities in both the Poetry and Research units (FL). These types of resource shortfalls were noted across all units and in each of the eight schools.

(Note: It is not clear whether the teachers who saw the lack of supplies as a barrier to instruction reached out to grant personnel for their specific needs, but having worked on the grant for four years, there were a couple of times teachers did reach out for items; it was our practice to provide any needed supplies at the onset of implementation.)

***Resource Limitations with Technologies.*** Computers were another commodity in scant supply, a condition that precluded students’ full access to the curriculum. Computer labs, typically only one per school in the district, were often unavailable for gifted instruction because of high scheduling demand, and thus time for gifted students to use the labs was sporadic. One of the teachers noted her gifted students were not allowed time to use the computer lab for research and writing because full class use was prioritized in the schedule. There was no mention of mobile computer lab units in the fidelity logs, observation documents, questionnaire responses, or interview. In conjunction with a limited computer lab schedule, additional technology issues plagued the district. Outdated equipment, slow internet connections, marked interruptions with Wi-Fi services, absence of internet, and broken equipment (e.g., unusable keyboards, monitors, and smart board) were consistent technological hurdles (FL, OD).

***Resource Limitations of Time.*** Time interferences were instructional barriers to implementation of the curriculum. Time infringements during gifted instruction included schoolwide celebrations, emergency drills, inclement weather, and standardized testing. During the Folklore unit, a teacher noted, “multiple interruptions and programs at school this time of

year” (FL) in her explanation for having completed only 50% of the folklore lessons. Of the eight implemented lessons, she cut seven short citing time infringements. Another teacher stated there was “not enough time to do it along with everything else we are required to teach with the Common Core standards. I had to adjust most lessons” (Q). A prevalent sentiment about the challenges of time allowances, compounded by accountability concerns, was evident across the district.

Time was a consistent barrier when teachers implemented the curriculum to entire heterogeneous classes. Frequently, when teachers implemented the curriculum in a whole group setting, they scaffolded lessons to increase understanding of the concepts with their students. Scaffolding filled gaps for students with limited background knowledge and supported students in their understandings of concepts. For example, in teaching abstract concepts such as rhythm, rhyme, and cliché in the Poetry unit, a teacher noted, “students really struggled” (FL). To support the students, she supplemented with videos and examples to increase their understandings about these unfamiliar concepts. Citing the time it took for scaffolding in the whole group setting, she did not complete lessons with her identified-gifted students.

***Resource Limitations of Physical Environment.*** Environmental inconsistencies, too, challenged teachers in the implementation of the curriculum across all four units of study. In one instance, a teacher indicated “the [classroom] space I had did not allow for this [arranging of desks for students to work in small groups] to happen” (FL). More than a slight inconvenience, it resulted in omission of activities.

Students’ limited participation in collaborative projects because of spatial limitations was noted across the data. For example, students were sometimes denied the opportunity to collaborate as part of the Writing Retreats because, according to one teacher, there was “a space

issue that did not allow for this to happen” (FL). Writing Retreats were specific place-based activities designed to provide students authentic opportunities to write about the world around them, including their own rural communities. During the Writing Retreats, students were to examine pictures of their local communities, talk about sensory details evident in those familiar places, write about their places, and share those ideas with their peers, as writers do. With “limited classroom space,” desks sometimes could not be physically moved, which limited collaborative activities. When Writing Retreats were omitted from the lessons due to spatial limitations, students were not afforded opportunities to consistently hone their writing skills. In their reports, teachers did not indicate whether they had considered gathering students together on the floor for these collaborative experiences as is often done in schools.

Several teachers noted physical classroom space limitations across their teaching experiences with the curriculum. For pull-out models, a few teachers taught in small, shared spaces or in the back quarter of a classroom. Other teachers borrowed their colleagues’ classrooms for gifted instructional space. Without classrooms of their own, teachers confronted shared space dilemmas. For example, one teacher could not put up a word wall meant to display newly learned vocabulary in the Fiction unit because the area she taught in was too small, and another teacher could not put up a word wall because the space she used belonged to one of her colleagues and its walls were already covered.

Environmental barriers such as spatial limitations and shared classrooms infringed on teachers’ efforts to provide the curriculum in full. When desks could not be arranged for small group collaborations and when visual displays such as the word wall could not be constructed, students missed opportunities to interact with the curriculum and each other.

**Insights About the Prioritization of Gifted Education in Rural Schools.** The

Promoting PLACE grant ended a school year prior to the interview with Ms. Ellis, and I wondered what gifted instruction had been offered in Hutton County since then. Specifically, I was curious about allocated time for gifted instruction and how it was prioritized. I asked Ms. Ellis about dedicated gifted instruction time during the school day, and she responded, “I’m not 100% sure . . . why we don’t have the gifted and talented program like it was” (that is, like it was prior to or during the Promoting PLACE grant) (I). Without a clear understanding of what gifted instruction, if any, was being implemented at Ms. Ellis’s school, I wondered about the supports for gifted education in the district as a whole.

When I asked about administrative support for gifted services, Ms. Ellis told me that “a gifted and talented curriculum coordinator [was appointed] at the school level, [but] I know personally in our school nothing was done . . . there wasn’t anything really. If there was, it was hit or miss, here or there, few and far between” (I). Indicative of the structural challenges and need for support, Ms. Ellis posited, “There’s been a breakdown in the district” around students’ access to gifted instruction (I).

*Ms. Ellis’s Experiences as a Gifted Teacher.* In reviewing teachers’ notes about adaptations and omissions of activities, I found myself wanting to know more specific details about teachers’ perceptions of the Promoting PLACE curriculum. In preparing for the interviews, then, I hoped for insights pertaining to how (or if) teachers valued the curriculum as a whole, or particular aspects of it individually, and I was curious about their experiences and choices for adaptations or omissions. In the interview, I asked, “Do you think [the Promoting PLACE curriculum] contributes to . . . or provides opportunities for learners in the rural communities?” In response, Ms. Ellis stated:

We just live in a district where it's the basics. We strictly have the basics in elementary. You know, this was a great thing for our elementary kids because this group [gifted students] they don't get the recognition and they don't get the special time just for them to have the enrichment (I).

Throughout the interview, Ms. Ellis indicated a desire for students to have time, attention, and instruction for gifted services, and her commitment to provide instruction for the school's gifted students was apparent. Even when she faced obvious implementation challenges, Ms. Ellis had students do as much as they could with the curriculum, when they could. She said, "I just had to learn to pick and choose what I thought I could get in and what they could do by giving them a challenge. They needed the challenge for sure" (I).

Ms. Ellis's interview provides evidence that the curriculum was taught when opportunities allowed, and teachers felt tasked with bridging instructional gaps as best they could from one lesson to the next. Because of their teachers having done so, students were provided with supports even if their access to the Promoting PLACE curriculum was inconsistent or incomplete.

***An Illustrative Vignette: Ms. Ellis's Parental Experiences with Gifted Instruction.***

During the interview conversation about gifted instruction in Hutton County and the Promoting PLACE curriculum, Ms. Ellis provided a personal narrative about her own daughter, who had been identified for gifted services. Because I wanted to understand the context for gifted education in the district (specifically, the prioritization of gifted education), I asked what gifted programming consisted of when her daughter participated. Ms. Ellis recounted that although her daughter was in the gifted program from elementary through high school, she did not recall specific times when her daughter participated in enrichment activities outside of the general

education classes. She said, “Honestly, [she] probably wasn’t pulled out (of the general education class)” (I). Ms. Ellis paused and followed with, “I’d say she was pulled out less than ten times from the time she was in third grade to the time she was in ninth grade” (I). She summed up her daughter’s experiences and her own teaching experiences in gifted education by saying that shortfalls in instruction have “been a problem for sure” (I). Ms. Ellis indicated that gifted services were inconsistent and followed with, “So, this [using the Promoting PLACE curriculum] was at least something” (I), even though the 30 minutes per week allotted for gifted instruction was not enough to implement the curriculum as designed.

Ms. Ellis noted evident shortfalls with gifted services in Hutton County. She intimated *some* gifted instruction is better than *no* gifted instruction. She considered the Promoting PLACE curriculum valuable as “it bumped it [teaching fairy tales] up to the next level” and included things I would’ve never thought to teach” (I). Ms. Ellis expressed concerns about the shortcomings of teaching the curriculum lessons in a “hit or miss” fashion (I). Ms. Ellis shouldered personal and professional responsibility, as she wanted to do more for gifted students. She stated, “I feel like I did them an injustice by not being able to do it better with them, and they deserve, those kids deserve to have extra things” (I). Ms. Ellis was unable to implement many lessons across the three units and expressed regret that students did not get to take part in all the activities because she felt they would have benefitted if there had been ample opportunity to do so.

***Assertion 2: Teachers’ Efforts Influence Curriculum Accessibility***

With the first assertion, I identify structural and building-level obstacles to lesson implementation and influences of resource shortages. Here, I shift the discussion to the teachers’ efforts to create opportunities for gifted students to interact with the curriculum. Consistently,

teachers offered positive support for teaching the curriculum with their gifted students. In doing so, they provided instructional scaffolds along the way and filled knowledge gaps for students. Often, resource shortages sometimes compelled teachers to seek resources outside of school—on their own time and with their own budgets—to aid in their delivery of as much of the Promoting PLACE curriculum as they could.

During my visits to Hutton County, I observed teachers offering verbal enthusiasm with the curriculum and encouragement for their students during implementation. For example, when several teachers lacked time for students to respond in writing to a folklore activity, teachers prompted students to discuss ideas aloud with the entire class or with peers in close proximity. Teachers, too, participated in these discussions of folklore and local oral narratives with their students. In this section, I provide evidence from multiple data sources to demonstrate how students' access to the curriculum and their experiences with the activities were contingent upon the extra initiative teachers took to ensure implementation.

**Classroom Observations and Fidelity Notes Reveal Teachers' Ingenuity and Enthusiasm.** Teachers demonstrated efforts to implement the curriculum, despite myriad challenges. One teacher reported she had “been keeping the students after school to get all the lessons in” (FL), and an observer highlighted the teacher’s efforts to scaffold instruction with supplemental website resources such as videos. The observation documents included a “need . . . to fill in [foundational knowledge] gaps” when her students “didn’t have a clue” about stereotypes and motifs (OD).

One teacher, confounded by the absence of folktales in the school library, used her time at home in the evenings, where she had a stronger internet connection than she had at the school, to search the internet for alternatives. She really wanted students to have access to a variety of

folktales and found the only way to provide that access was by using links to e-books of folktales that she found online. However, students' access to the e-books during the school day still proved difficult, as the teacher and her students were stymied by the school's slow internet connection. Similarly, another teacher who was unable to locate folktale books in the school library resorted to outsourcing by pulling books from her own personal book collection and those she borrowed from a public library.

Several teachers who taught the curriculum in a whole class setting (rather than in a pull-out setting) made substitutions with provisions they already had. For example, when students did not have journals, a teacher stapled lined paper together to provide students opportunities for engagement with the curriculum.

In their fidelity logs, teachers noted modifications and omissions of written response activities across the units; instead, their students discussed ideas aloud (FL). Several teachers noted their students "loved sharing" with the whole group. Referencing a lesson in the Research unit, a teacher noted her own excitement for learning. She stated, "I didn't know there could be this much information on any topic ever!" (OD). She expressed positive engagement throughout the implementation of the Promoting PLACE lessons. Another example of teacher enthusiasm is noted in the Fiction unit when students reviewed the concept of sensory imagery prior to a writing activity. Grant observers noted, a teacher "gets the students pumped up to write" as she reminds students "this [writing] is something that you have been chomping at the bit to do." Too, the teacher repeats a familiar choral response of her students, "Will you just please let us write!" (OD). In addition to the materials in the curriculum, she incorporated "history books to connect to place" as resource supplements in the Fiction unit (OD).

Teachers showed enthusiasm about the place specific lessons. For example, in the Fiction unit, a teacher noted she and her students “loved” the discussion of stereotypes and slang terms “hillbillies” and “rednecks” which complemented a particular writing activity (FL). She recounted the nature of the individualized assignment in which students were tasked to “write something you are proud of, whether or not everyone else likes it” (FL). She expressed appreciation for a gifted curriculum which afforded her students opportunities to write with their own places and experiences in mind, as they were not simply completing the writing for grades or for the sake of a classwork assignment.

In the Poetry unit, teacher enthusiasm was evident. A teacher explained that she could not teach poetry without reading her “most favorite poem” aloud in class (OD). She commenced the unit by reading the poem aloud to her students (the poem’s title was not documented) (FL). She also scaffolded one lesson with additional examples of abstract nouns to support students’ learning, exemplifying her enthusiasm to understand poetic concepts. In doing so, she encouraged students to collaborate in learning—to intentionally help each other—rather than to compete with their peers. In this way, she promoted problem-solving (i.e., the problem of not fully understanding the concept of abstract nouns) as authentic, shared learning opportunities.

Another example of commitment and enthusiasm was noted in the Fiction unit as an observer noted, “The teacher has been keeping the students after school to get all the lessons in (due to the length of the lessons and 30 minutes not being enough time)” (OD). Teachers’ investment in their gifted students and buy-in to the curriculum was evident across the district and in each of the units.

**Questionnaire Responses Reveal Teachers’ Enthusiasm for the Place-Based Curriculum.** Illustrative of teachers’ approaches, experiences, and perceptions of the

curriculum, the questionnaires captured a variety of assessments of the curriculum. One teacher explained how the specific rural focus of the curriculum sparked interest. She stated,

We knew from the beginning this would be something our teachers and students would like considering it focused on our hometown and the things that were important here. There was general sense of excitement about having an actual curriculum that teachers could go by and students could benefit from. (Q)

Her enthusiasm consisted of a triad of positive assessments: first, the units were place-based and centered on Hutton County; second, there was legitimacy to the curriculum and teachers “could” implement it; and third, content of the lessons afforded students with “benefits” (Q). She suggested the alignment of lessons to “things that were important” in Hutton County was an important consideration and curricular tie-ins to the local region embedded in the curriculum were valuable (Q).

Another teacher, too, mentioned the place connections to “home” in the curriculum. She noted,

The curriculum was innovative in that it included information related to the students’ home. We implemented the curriculum in all eight of our elementary schools. Some schools delivered the curriculum to both regular and gifted students and others delivered it only to gifted students. In both situations the pacing of the curriculum was a little faster than our students could easily accomplish. However, in classrooms where only the gifted students participated the pacing was much better. In both cases, the students really enjoyed the curriculum and found it valuable. The work was engaging and rigorous in just the right way. (Q)

She noted value in the curriculum and in students' enjoyment of the activities. Similar to other teachers, her efforts to implement the curriculum are evident even when working around challenges. With teacher efforts, students could experience the curriculum to the extent circumstances allowed. Teachers' buy-in was evident through their enthusiasm for the "innovative" curriculum.

Four teachers stated enthusiasm for a "new" and "different" curriculum for gifted students. One teacher noted, "I was excited to be able to teach something new" (Q). Even though teaching a new curriculum requires preparation time, her excitement to implement it was clear. Another teacher remarked, "I am thankful we were allowed to participate in this project. It provided a much-needed re-start to our gifted program" (Q), conveying support and willingness to implement the Promoting PLACE curriculum. A third teacher "loved the new material and upper-level skills" (Q), expressing affinity for the rigor embedded in the lessons, which were designed to provide students with opportunities to exercise their "upper-level skills" (Q). A fourth teacher "hated that [the Promoting PLACE curriculum] ended" (Q). Although the Promoting PLACE grant ended after implementation Year Two, the curriculum and all resources provided by the grant remained with the Hutton County school district so that teachers could, if they chose and were allowed to do so by administrators, continue using it.

**Challenges Mitigated Teachers' Enthusiasm.** Although teacher enthusiasm was evident across the four units and in all eight schools, teachers also expressed concerns and insights about curriculum challenges. When asked about their approaches, experiences, and perceptions of the curriculum, five questionnaire responses addressed challenges teachers faced during implementation. One teacher stated, "I felt like it was good for the students once I had figured out how to manage the time" (Q). As previously indicated, time infringements were a

considerable barrier which impeded teachers' opportunities to fully implement the lessons. Time infringements meant omissions of activities whereby teachers faced difficult instructional choices. Similarly, another teacher stated, "When I found out that others were having to cut parts of the curriculum out too, I felt better about it. [The curriculum] was great. It was just [a lot] in a short amount of time we have to do it" (Q). Yet another responded that it was "hard to complete lessons, due to time [constraints]" (Q). One teacher, grateful to have had the opportunity to implement the curriculum noted, "The kids enjoyed the last project, and I was glad to have completed as much as we could get done" (Q). While time constraints infringed on students' engagement with Promoting PLACE activities, it was not a deterrent for teachers to implement the units and complete as many steps in the lessons as time permitted. The value of the Promoting PLACE was evident, as another teacher "Gave up [her] planning to teach this" (Q). Even when structural challenges were present, teachers' efforts to support gifted students in their learning with the Promoting PLACE curriculum was clear.

### **Relating Assertions to the Research Questions**

In this section, I illustrate how the two key assertions respond to my three research questions.

#### ***Teachers' Experiences and Interactions with the Curriculum***

The two assertions each respond to the first research question, which asked: How did teachers in a high-poverty rural district experience and interact with a place-based language arts curriculum designed for gifted students?

The first assertion addressed influences on lesson implementation that resulted in modifications or omissions of activities and offered insights into teachers' experiences and interactions as they navigated through the units, lesson after lesson. Overwhelmingly, the

majority of teachers cited structural barriers as the reason for making modifications or omissions of activities. These challenges, however, did not preclude teachers from implementing the Promoting PLACE curriculum for one or two years with their gifted students. For the first assertion, evidence indicates teachers' experiences were marked by consistent barriers, but also with consistent teacher persistence.

The first assertion addressed resource challenges which influenced teachers' experiences with the curriculum. In all four units, teachers sought ways to mitigate negative influences of resource shortages to avoid compromising opportunities for their gifted students to participate in the activities. Facing tough instructional choices, teachers often chose to "make do" with what few resources they had. Even when there were limited options for obtaining necessary resources, teachers' implementation efforts were noted as they proceeded through the lessons, filling gaps as they could. Teachers' investment of time to prepare, plan, and procure resources was documented across all eight schools and with every teacher, and much of it took place outside of the normal school day.

The second assertion addressed how teachers in the district put forth concerted efforts to provide gifted instruction with the Promoting PLACE curriculum. As noted across the data sources, their experiences and interactions ranged from daunting and overwhelming (e.g., initially, teachers expressed concerns about the amount of material in the curriculum) to valuable and enjoyable (e.g., teachers noted the importance of gifted instruction in rural communities and indicated their students loved particular activities). Despite resource challenges and difficult instructional choices, teachers sought ways to make the curriculum accessible, providing opportunities for their gifted students beyond those offered in the general education classrooms.

### ***Teachers' Characterization of Experiences***

The first assertion described how resource shortages influenced curriculum delivery, and the second assertion spoke to the ingenuity of teachers as they sought ways to teach the curriculum. These two assertions each respond to the second research question, which explored how the teachers characterize their experiences with the curriculum. Despite the challenges in implementing the curriculum, teachers' characterizations of their experiences with the curriculum were overwhelmingly positive as indicated through fidelity logs, observation documents, questionnaires, and interview.

First, teachers faced significant challenges brought about by structural barriers. Consistent with structural barriers found across rural communities (Azano et al., 2017; A. Howley et al., 2009; Theobald, 2005) and as noted in the literature review (Chapter 2), Hutton County teachers confronted resource limitations head on. They put forth efforts to minimize the negative influences of these barriers and proceeded with implementation using modifications as needed. Instructional challenges and choices to mitigate the resource shortages resulted in teachers' laments about not providing the curriculum exactly and completely, because they wanted to do what was right by their students.

Second, all questionnaire respondents stated they valued the gifted curriculum for their rural students. Value for gifted instruction, too, was evident in their instructional practices (FL, OD, and I). At the onset of the project, a few teachers expressed trepidation with the Promoting PLACE curriculum. The curriculum was new and expansive; it consisted of four units—Folklore, Poetry, Fiction, and Research, and it spanned over two grade levels. Teachers participated in professional development sessions, implemented the curriculum with modifications and omissions, and maintained documentation of their experiences throughout the units. In hindsight, half the teachers who responded to the questionnaire affirmed they would

teach the curriculum again. The other half of the teachers noted they were no longer in teaching positions where they worked with elementary students. Either in new positions or in retirement, continuing with the curriculum would not be feasible for those no longer teaching third or fourth grade. Despite demands of accountability from the grant, the school district, and the state, Hutton County teachers prioritized the Promoting PLACE curriculum, even with structural challenges.

In 2020-2021, the pandemic exacerbated instructional challenges for teachers to provide gifted instruction, as Ms. Ellis indicated (I). Changes to instruction included missed days, online instruction, and hybrid learning. As a result, Ms. Ellis is not using the Promoting PLACE curriculum nor was she providing gifted instruction at the time of the interview (I).

In the next chapter, I provide a discussion of the significance of these findings in response to my third research question, What can these experiences and perceptions teach us about the use of a place-based curriculum model and opportunities for gifted learners in high-poverty rural communities?

## Chapter 5

### Discussion of Findings

The purpose of this qualitative case study was to examine teachers' experiences as they implemented a rural specific language arts curriculum designed for students identified as gifted. In the previous chapter, I explained two key assertions: how structural barriers influenced teachers' experiences with the curriculum; and how teachers' efforts influenced curriculum accessibility. I used analytic induction and thematic coding with four sources of evidence: fidelity logs, observation documents, questionnaires, and an interview to support the assertions. In the case study, I described experiences and perceptions of 16 teachers across eight elementary schools in one high-poverty rural school district as they implemented the Promoting PLACE curriculum with students identified as gifted using teacher ratings, universal screening procedures, and local norms. In doing so, I was guided by Merriam's (1998) approach to qualitative data analysis which is "the process of making sense out of the data. And making sense out of data involves consolidating, reducing, and interpreting what people have said and what the researcher has seen and read—it is the process of making meaning" (p. 178). In the case study, I described and made meaning of teachers' experiences as they implemented the curriculum.

In this chapter, I include a discussion of two key assertions which described teachers' interactions with the Promoting PLACE in Rural Schools curriculum. First, I provide a discussion of Assertions 1 and 2 as they address the research questions. Second, I present limitations of the case study. Next, I discuss implications and contributions for the field of rural gifted education. Then, I offer recommendations for future research based on the case study.

Last, I provide a brief conclusion of the study. The discussion helps to answer the research questions:

RQ 1: How do teachers in a high-poverty rural district experience and interact with a place-based language arts curriculum designed for gifted students?

RQ 2: How do the teachers characterize those experiences?

RQ 3: What can these experiences and perceptions teach us about the place-based curriculum and opportunities for gifted learners in high-poverty rural communities?

### **Discussion of Assertion 1: Structural Barriers Influence Teachers' Experiences with the Curriculum**

Across the four units, teachers noted challenges which interfered with implementation of lessons in the Promoting PLACE curriculum. Teachers noted barriers such as resource shortages, spatial limitations, and time constraints which consistently infringed on their ability to implement Fiction, Poetry, Folklore, and Research lessons in their entirety. Because of the noted challenges, teachers faced difficult instructional decisions of whether to adapt lessons by shortening or to omit activities or whole lessons altogether.

#### ***Teachers' Time and Resource Limitations Impeded Students' Access to the Curriculum***

Founded on the CLEAR curriculum, an evidenced-based approach for gifted instruction, the Promoting PLACE curriculum was specifically:

. . . designed around learning goals that are meaningful, important, and clear. The meaningfulness and importance of the learning goals are derived from their alignment with national standards; the goals also reflect the essential knowledge, skills, and principles central to the field of study. (Callahan et al., 2015, p. 144)

Earlier reports (e.g., Azano et al., 2020; Azano et al., 2017; Azano & Callahan, 2021; Azano et al., in press; Bass et al., 2020; Callahan & Azano, 2021; Kuehl et al., 2020) document success of the Promoting PLACE in Rural Schools curriculum. Findings in the Hutton County case study indicate numerous lessons were abbreviated over the two years of implementation and, as the teachers noted, challenges such as time limitations prevented instruction of activities or whole lessons from taking place with their students. When teachers are impeded from providing students with the scope and sequence of the curriculum, questions arise about the efficacy and integrity of the instruction. While limited information is noted in the sources of data for the teachers' decision-making process regarding which activities to adapt and which to omit, what is clear is that students missed out on purposeful activities.

### ***Systemic Barriers Disadvantage Rural Students Living in High-Poverty Communities***

Assertions 1 and 2 respond to the final research question, which asked: What can these experiences and perceptions teach us about the use of a place-based curriculum model and opportunities for gifted learners in high-poverty rural communities? Assertion 1 teaches us that structural barriers influence teachers' experiences with the curriculum and these challenges such as limitations of resources, time, and environment mean that teachers must make difficult instructional choices in whether to modify or omit activities in the Promoting PLACE curriculum. The teachers' instructional decisions determine which activities are selected and which are omitted for students. With known opportunity gaps for rural gifted students (Azano et al., 2019; Azano et al., 2017; Azano, 2014; Plucker, 2013; Stambaugh & Wood, 2015), the question becomes one of equity. In a study of "What works in gifted education," Callahan et al. (2015) described the foundation for the Promoting PLACE curriculum:

The units based on the CLEAR model allow teachers to provide instruction that guides students in developing and carrying out projects on topics of their own choosing using the methods and tools of professionals in a field of study. In addition, the CLEAR model units are designed to lead students beyond mere factual knowledge to deep understandings of essential knowledge, principles (big ideas), and skills of a discipline. High-level challenges are built into the units by having students identify and apply the sophisticated and advanced vocabulary and language of the discipline; investigate the patterns, rules, varied perspectives, unanswered questions, and ethical issues within a unit of study; and make connections within and across disciplines. (p. 144)

While further study may yield insights about what is gained or lost when select activities are adapted or omitted, it is evident that when activities were cut altogether, students were not afforded opportunities to access the curriculum in full. When instruction was cut or when time did not allow for activities to occur, students were unable to see and experience how these discrete lessons were structured to create authentic student products such as poems, short stories, and research projects. Over the course of the units, these omissions left students without access to enrichment activities specifically designed in the scope and sequence of the curriculum for gifted enrichment. The curriculum has been shown to work with gifted students in high-poverty rural schools: Azano et al. (2017) found the Promoting PLACE curriculum afforded teachers “opportunities to see talent by challenging students to think and to create beyond the parameters of the standard classroom curriculum” (p. 74). Therefore, when students do not receive the curriculum in full, they are denied opportunities to be challenged in the same way.

### **Discussion of Assertion 2: Teachers’ Efforts Influence Curriculum Accessibility**

Teachers in the district were conscientious and reported feeling badly about abbreviating lessons. When teachers could not teach lessons in their entirety, they reported feeling responsible about shortchanging their gifted students. Responsibility for successful implementation of the Promoting PLACE curriculum requires support through tangibles such as materials and technologies and intangibles such as administrative and community support. Although resource challenges influenced curriculum delivery, the challenges themselves were not complete deterrents for teachers of gifted students, who used ingenuity to deliver the lessons to the best of their ability under the specific circumstances in which they worked.

#### ***Teachers Omitted Lesson Components Placed Near the End of Lessons***

Teachers made difficult instructional choices about which activities to implement, adapt, or omit. However, it was notable that teachers, most often, started at the beginning of a lesson and concluded when the class time ended, rather than looking through the lessons ahead of time to select components they felt most valuable for their students to teach. Perhaps more time for planning and guidance for lesson modifications might help to inform their instructional decision-making.

Findings from this case study, which include multiple challenges noted by the teachers in Hutton County, suggest that curricula designed for gifted education should be tailored to the specific needs of the teachers and students in high-poverty rural communities. Given the findings from this case, a future iteration or version of Promoting PLACE could offer abridged versions of the lessons for those who are only able to see students for 30 minutes per week.

That way, the students would still get the essential components of the lessons, rather than only the first part.

#### ***Teachers Lacked Understanding of Alignment with Common Core***

Additionally, my findings reveal the need for providing teachers with more information to bring about deeper understandings of how the Promoting PLACE curriculum aligns with Common Core standards. As one teacher stated, there was “not enough time to do it along with everything else we are required to teach with the Common Core standards.” Although the Promoting PLACE grant team provided evidence of the alignment in the professional development prior to implementation, my study shows that a stronger emphasis was needed to show that delivering the curriculum *was* teaching the Common Core standards. In particular, school leaders in charge of gifted services (i.e., gifted coordinators and principals) needed to be told this clearly so they could alleviate pressure on the teachers to implement the Promoting PLACE curriculum instead of forgoing it in favor of preparing for standardized tests based on the Common Core. Responding to concerns of Common Core Standards and high-achieving students, Plucker (2015) proffered, (a) “Common Core is no excuse to ditch gifted services,” and (b) “schools should make use of existing high-quality materials that help teachers adapt the Common Core for gifted students” (p. 1). The Promoting PLACE curriculum is a high-quality curriculum aligned with the Common Core Standards and it offers opportunities for enrichment and rigor with a place-based approach. Plucker (2015) asserted, “Given the lack of focus on high-achieving students in federal and state policy, leadership on these issues at the local level becomes critical” (p. 4).

In another Promoting PLACE case study, Matthews et. al. (2021) noted similar “resistance” from general education teachers when gifted students were pulled out for gifted instruction. They wrote about an interaction between the gifted teacher, Ms. Summers, and her students’ classroom teacher:

When [the classroom teacher] was worried about students missing what she was teaching when they were pulled out for gifted services, primarily because teachers' annual evaluations are based on student scores from the state's proficiency exam, Ms. Summers reassured the teacher that she also is teaching content relevant to the state exam in the gifted classroom. Ms. Summers' occasional frustration with this kind of resistance is evident in her statement, "There has got to be a better way. Because we should not have to sacrifice good [gifted] instruction for fear factor from the [classroom] teacher." (p. 197)

Teachers who provide gifted instruction should not face additional challenges such as this, nor should they have to prove gifted students need high-quality, rigorous instruction. Mindset is an important consideration for prioritization of gifted instruction. Azano et al. (2017) noted a shift in teachers' thinking about gifted instruction in a previous Promoting PLACE in Rural Schools study when additional students, beyond the ones identified through traditional measures used in the school, were identified. A teacher noted acceptance and inclusion of these students who might not otherwise be identified as gifted in the program. From practitioners to leaders in education, a mind shift needs to occur in such a way that gifted instruction is not an addendum or asterisk in a lesson plan.

### ***Teachers Independently Sought Solutions to Resource Challenges***

The second assertion described teachers' positive reactions and efforts to implement the curriculum. In response to the second research question, Assertion 2 informs us that despite structural, systemic resource challenges, teachers' persistent efforts to offer as much of the gifted curriculum as possible afforded students opportunities to participate in the activities. For example, when teachers found that their school libraries did not have the books needed to

complete the lessons in the Folklore unit, several teachers brought in their own books from home, sourced them from the public library, or used their home internet connections to locate appropriate substitutes online. Teachers' efforts to implement the Promoting PLACE curriculum demonstrate how teachers valued the curriculum and worked to meet the students' needs regardless of existing challenges. Yet, these challenges are barriers which might be mitigated in light of teachers' insights about their experiences. Teachers' perceptions and voices are invaluable resources to inform and shape instructional practices in rural gifted education.

### **Opportunities for Gifted Learners in Rural Schools**

The Promoting PLACE grant allowed the district to implement a rural specific gifted curriculum with their students, but in doing so, it revealed pronounced opportunity gaps in gifted services in Hutton County. In this case study, opportunity gaps are noted when students do not have access to the curriculum. When activities are left out, students' exposure to all of the activities in the curriculum is compromised. This case study supports the literature about existing opportunity gaps (Azano, 2014; Azano et al., 2019; Azano et al., 2017; Plucker, 2013; Stambaugh & Wood, 2015) and these noted implementation challenges by Hutton County teachers provides further reason to address the challenges. It is about the teachers being able to do their jobs of teaching without additional barriers so that students have curricular affordances for growth. Ms. Ellis noted two instances of opportunity gaps—one past and one current. First, she noted few opportunities for enrichment in her daughters' experiences in the district. Second, Ms. Ellis stated that even after two years of participation in the study, she has not provided gifted instruction in the current school year, explaining that the districts' priorities pulled her attention elsewhere. Collectively, the teachers' experiences expose barriers to implementation of the gifted curriculum which create opportunity gaps for students. What has happened with curricular

implementation in the past or in the present in Hutton County is not indicative of the way rural gifted instruction needs to be for the future. As students learn from experiencing challenging tasks, so should we—practitioners, administrators, policy makers, and researchers.

The two assertions highlight teachers' experiences and perceptions of teaching the Promoting PLACE curriculum, identify influences on implementation, and show their efforts to teach as much of it as they could. While findings from the case study do not resolve the accessibility issue for students to have opportunities with the curriculum, these understandings can be a starting point for discussion. In doing so, there needs to be action to figure out low-cost ways to facilitate teachers' instruction with students identified as gifted. The literature in rural gifted education documents decades of challenges (e.g., Azano et al., 2014; Floyd et al., 2011; A. Howley et al., 2009), and this case study, too, reaffirms the need to address the challenges with action. Considerations such as time for gifted instruction, resources to complement the curriculum, and support for place-based curricula in the schools are worthwhile investments for deserving students and rural communities. When these challenges are considered and addressed, opportunities to support teachers and better serve students are viable possibilities.

### **Limitations of the Case Study**

This qualitative case study is subject to several limitations, specifically pertaining to researcher and methodology. First, I am the researcher, participant observer, former teacher, and emerging scholar whose own perceptions and experiences must be acknowledged. In doing so, I offer transparency through a positionality statement, reflexive memos, consultations with seven colleagues on the grant, including the two PIs, and peer reviews as I sought expertise in the research process to maximize the integrity of this research. While Merriam (1998) noted, "Aspiring case study researchers . . . [are] . . . left to rely on his or her own instincts and

abilities” in conducting research (p. 42), I am fortunate to have colleagues willing to discuss aspects of the research throughout the process. Here, too, I must acknowledge that any misrepresentation of what was advised is solely mine. I have put forth efforts to make meaning of the teachers’ experiences as they described. My burgeoning skills, particularly with conducting interviews and synthesizing multiple sources of evidence, are areas where I have gained valuable insights about future strategies to further hone these skills. Yazan (2015) notes, “[the] qualitative case study researcher needs to acquire the necessary skills and follow certain procedures to conduct effective interviews and careful observations and mine data from documents” (p. 149). As such, I continue to acquire skills to facilitate and refine future research.

Second, data collection changed because of the COVID-19 pandemic. The IRB approval time took longer than anticipated at the onset of the COVID-19 pandemic when restrictions were initially taking place. Once approved for the study, I could not meet the participants in person to conduct interviews, and only one teacher, Ms. Ellis, volunteered, perhaps because, like all of us during the pandemic, teachers may have been preoccupied with other matters.

When I was finally able to conduct the interview with Ms. Ellis, it was well over a year after she last taught the curriculum, and the interview was conducted via phone. The cell service was inconsistent and there was difficulty with the reception at several points during the conversation. At the time of the interview, Ms. Ellis was in the fall semester and teaching during the pandemic where remote learning presented its own set of challenges. Ms. Ellis discussed some of challenges as a result of the COVID-19 pandemic in the interview. I did not want to hurry her; these challenges were relevant to instruction, yet the discussion of these new circumstances seemed to divert attention away from the original purpose of the interview. I believe that an in-person interview would have likely offered a more robust conversation around

the adaptations and omissions of the curriculum, and speaking face-to-face would have increased my comfort level with asking more specific and probing questions.

Certainly, although I made efforts to yield a greater number of interviews, I was disappointed that the pandemic, understandably, seemed to affect teachers' willingness to participate. More interviews with teachers would have allowed for a greater variety of perspectives on implementation experiences and provided more robust and richer understandings.

Third, there are inherent limitations to the generalizability of a case study such as the one I conducted in Hutton County. However, findings from this qualitative case study, tailored to the context of local culture and environment, offer practitioners, administrators, and researchers' firsthand knowledge from teachers about curricular decision-making with the Promoting PLACE curriculum. While this is one case study, bound by one district with eight schools and 16 teachers, insights gleaned from teachers' direct experiences uncover critical areas in terms of implementation with a unique curriculum. Thus, there is potential to inform and shape instruction for other, perhaps similar, rural settings.

### **Implications and Contributions to the Field of Rural Gifted Education**

Framed by a critical pedagogy of place, this case study centers on "social experience" and "human relationships" of teachers as they implemented a curriculum with their students. In keeping with a critical pedagogy of place, which "foregrounds a narrative of local and regional politics that is attuned to the particularities of where people actually live," this case study explores the particularities of teachers' experiences in Hutton County. Bound by eight schools and 16 teachers, I identify the district "as the context . . . in which these situations are perceived and acted on" (Greenwood, 2003, p. 5). Greenwood's theory "challenges all educators to reflect

on the relationship between the kind of education they pursue and the kind of places we inhabit and leave behind for future generations” (2003, p. 3), and it is my contention that administrators, policymakers, and researchers, too, should likewise be tasked with the challenge.

Greenwood (2003) further asserts,

. . . a critical pedagogy of place ultimately encourages teachers and students to reinhabit their places, that is, to pursue the kind of social action that improves the social and ecological life of places, near and far, now and in the future. (p. 7)

Findings in this case study confirm existing structural challenges and present the need to act in ways to support gifted instruction in rural schools. Now is the time to address the barriers to gifted education in rural schools. Teachers need support, professional development (specifically, addressing modifications and omissions of activities in lessons), and, more broadly, training on gifted instruction. In Hutton County, only the gifted coordinator—and none of the 16 teachers—had training in providing gifted instruction prior to their participation in the Promoting PLACE grant. All, however, were champions for their gifted students as evidenced by their efforts to implement the curriculum, even with the challenges.

There is a need for more exploration around what teachers did and did not do regarding implementation to further understand what worked and what did not work with the curriculum. But first, the noted challenges ought to be addressed. Teachers had firsthand experiences with instructional challenges and showed efforts to mitigate the barriers which influenced their students’ opportunities. To bridge the opportunity gaps, viable action requires consideration of the teachers’ experiences and the evident challenges. If we buy into the notion that every child deserves to grow at the rate they are able, it only makes sense to heed the teachers’ understandings of the challenges and use their insights to inform curricular development and

implementation. It is the teachers' efforts which bolster students' access to curriculum that offer opportunities for enrichment, engagement, and acceleration.

The case study research organically reflects the rural community, specifically the rural gifted classrooms in which teachers implemented the Promoting PLACE curriculum. Exploration of teachers' firsthand interactions with a rural, place-based curriculum has potential to contribute to the broader field of education, even through a case study which contextualizes unique experiences in one rural gifted setting. Biddle et al. (2019) suggests that,

By engaging in thick description of the contexts in which our studies are situated, we can seek to situate participant agency, institutions, policies, and culture within broader dynamics of power across place. By positioning ourselves in this way, we make the case for the relevance of rural not only for its own sake, but for the sake of disciplinary coherence when it comes to understanding spatial phenomena. (pp. 11–12)

The rural salience of this case study aligns with Corbett's (2018) notion whereby proximity of rural is a variable which ought to be considered in research. Corbett suggested "geography is an element of education disadvantage that needs further exploration" (para. 18). In the Hutton County case study, rural salience is important; as such, the context of the district is prioritized and described (Biddle et al., 2019; Coladarci, 2007).

Given the accountability concerns with Common Core Standards, deemphasis of "teaching to the test" should be a priority and rural gifted populations considered. Floyd et al. (2011) noted, "In rural areas, an already small pool of resources is being depleted in the preparation of students for standardized tests and the meeting of state-set criteria" (p. 29). Standards tests are designed with "an urban or suburban middle-class bias," and their emphasis disadvantages high-poverty rural students (Floyd et al., 2011, p. 32).

### *Contributions to Understanding the Complexities of Ruralities*

This case study contributes to understandings about the complexities of “ruralities” to capture insights about differences of rural places (Green et al., 2013). Findings from teachers’ experiences in Hutton County position stakeholders to respond with specific supports to rural needs in gifted education. Hamilton et al. (2008) contend that each rural region has “specific issues . . . which call for different policies and solutions (pp. 3–4). While the teachers noted specific challenges, some of these barriers likely exist in other rural places, and drawing attention to the potential similarities may lead to collaborative efforts to respond to these challenges, which in turn may increase the likelihood of yielding viable solutions. This case study captures the “essence” of Hutton County’s rural gifted classrooms from the perspective of the teachers. As Richards and Stambaugh (2015) stated, “the essence of rural” is a prerequisite for “serving gifted students in rural settings” (p. 3). This exploration of teachers’ experiences and perceptions responds to Coladarci’s (2007) assertion that “assorted inferences about the participants’ lives, values, and sense of community” are missing elements in rural research (p. 2). This case study characterized teachers’ experiences with the curriculum in the community in which they serve.

### *Contributions to Understanding the Complexities of Rural Gifted Services*

This case study confirms the literature showing the need to prioritize research for rural gifted education. Because the case study focuses on teachers’ implementation experiences with a rural specific curriculum designed for students identified as gifted, it addresses both rural and gifted. Colangelo et al. (1999) found rural gifted education research “written for people with either a strong knowledge base in either gifted education or rural education, but not in both” (p. 24).

### **Contributions Confirm Previous Literature on Rural (In)Equity**

The case study in Hutton County highlights funding as an economic variable which disadvantages, complicates, and further marginalizes deserving rural gifted students (Kettler et al., 2015). The economic influence on gifted services is evident across the eight schools where staffing challenges, lack of access to material resources, and inadequate time allotment for instruction are prevalent. Corroborating the previous literature which addresses disparities in rural gifted education, this case study, too, confirms resource limitations which influence opportunities in rural areas (Puryear & Kettler, 2017).

The Hutton County case study offers researchers, practitioners, and policy-makers insights into existing “achievement and opportunity gaps” in rural schools (Azano et al., 2017). When barriers which influence teachers’ instruction are identified, stakeholders may better address the challenges they present. Underserved rural gifted populations deserve equitable services and supports, but teachers have difficulty serving gifted students because of structural barriers such as time and resource limitations (Azano et al., 2014). In the Hutton County case study, evidence confirms these barriers. To mitigate these opportunity gaps, acute action is needed to allow teachers to implement evidence-based curriculum and for students to fully access gifted activities. The type of action to address these challenges does not need to be just monetary (although funding would be beneficial); it can be a matter of educating the school community about the needs of gifted students and policies that adversely, even if unintentionally, affect them. Plucker (2015) asserted,

The existence of these opposing policies reflects the haphazard nature of gifted education today, in which little thought is given to the collective impact of policy and practice on high-achieving students. Regardless of the cause, these slapdash policies constrain

educators seeking to do right by high-ability students. They must be removed if the new [gifted education] standards are to be successfully implemented. (p. 6)

Gifted instruction does not have to conflict with national or state standards. Gifted curriculum is designed to meet a much higher bar, and students should not be denied access to it because school personnel are worried that when gifted students attend gifted instruction and “miss” regular instruction (or preparation drills for standards testing), they will risk not achieving accreditation standards as a school. After all, the standards “serve as a foundation to meet each student’s academic needs. They are not intended to limit any child’s achievement” (Plucker, 2015, p. 6).

Over a two-year period, a team of grant researchers was focused on Hutton County to implement the place-based curriculum. The team provided resources, professional development, and step-by-step lesson plans, yet rural students still faced opportunity gaps because they did not have library books, access to computer labs, adequate broadband services, and sufficient learning spaces.

These inequities are not only unfair to individual students, but they also disadvantage their rural communities. In Hutton County, when the coalmining industry collapsed, so did the economy. The population has steadily and significantly decreased by 65% over the past 80 years. In 1940, when the community was at its economic peak, there were approximately 75,000 residents; today, there are just over 26,000.

Students have the potential to revive and sustain Hutton County. If more students received gifted instruction with access to curriculum that teaches them critical thinking skills, curiosity about the world, and confidence in themselves, there would be more opportunities for the community to benefit. Skills from the Promoting PLACE curriculum, for example, would

prepare students to create viable ways to sustain their communities, so they could choose to live, work, and raise families there.

In one of my early visits to Hutton County, an employee in the school system shared her family history of living in the Hutton County for generations. Nostalgically, she described her grandparents' small house on the side of a mountain where she spent many days as a child and, with pride, noted the house had been in the family for as long as she could recall. She gave an account of the hard life of coalminers; her father was one. She explained that over the recent past, however, life had changed. She explained that people in Hutton County no longer had the choice to stay, because there is no work that pays enough for them to pay the bills and raise their children. Although matter of fact, her body language and inflection conveyed melancholy with “the way things are these days.” Students in Hutton County, particularly those who are afforded opportunities to participate in gifted instruction with access to a rich curriculum, are positioned to one day develop sustainable practices, bolster the economy, and contribute to the revival of their community.

While implementation barriers were observed on a local, individual teacher level, the challenges cannot singlehandedly be resolved by the district. Instead, these challenges require a restructuring in how education is funded across the country. Sutherland and Seelig (2021) proffered that educational governance and past policies, based on an urban-centric focus, offer insights about ways to move beyond universal policymaking and, instead, “conceptualize rurality in policy implementation” (in press). Until state and national policies reflect the needs of rural populations, districts such as Hutton County are largely left on their own to figure it out. Informed policymakers can and should promulgate institutional, systemic changes to benefit rural gifted students. With concerted action, challenges in rural gifted education may be

addressed when teachers, administrators, policymakers, parents, community members, and researchers seek common goals to viably create solutions for longstanding barriers.

The benefits of providing each student with opportunities for growth are exponential, both for the individual students and for sustainability of the communities in which they live. A. Howley et al. (2009) asserted the benefits of developing critical thinking skills in rural gifted programs as a means for students to better “understand the value of contributing as leaders to their own communities” (p. 515). These benefits, then, may best be realized when teachers are supported in their instruction with gifted students.

This case study confirms persistent challenges from decades of rural literature, but it also provides specific, firsthand insights from teachers who work with rural gifted students about their instructional practices. While more research is needed to further understand the teachers’ rationale for making specific adaptation and omission decisions, their insights about the experiences are viable starting places to mitigate the barriers which impede instruction. Colangelo et al. (1999) asserted rural education and gifted education alike “have borne the brunt of educational fads, and both have received relatively little funding and national attention. Not surprisingly, very few studies have considered the two issues in tandem (p. 9). The Hutton County case study examined both rural and gifted together with teachers at the center of the research, diving into rural gifted education from the perspective of a critical pedagogy of place (Greenwood, 2003). Azano and Biddle (2019) noted,

The rural schoolteacher plays a varied, important, and socially constructed role in rural communities . . . They embody the histories and meanings of place, understand implicit culture and politics, and play a role in the very construction of schooling and influence the value of education. (p. 7)

Teachers' insights are informative sources for resolutions to address the challenges of implementation and may also contribute to future curricular development designed for rural gifted students.

### **Recommendations for Future Research in Rural Gifted Education**

I offer several recommendations informed by the Hutton County case study. First, creation of a system that values gifted education and supports resources to engage teachers in the nuances of gifted instruction is needed. There is evidence in the case study of a fragile system where gifted instruction happens as it can in the district, when it can, where teachers do what they can with what they have to work with. Second, while gifted instruction is not federally mandated, instituting a federal mandate might be a natural next step in the direction of serving the needs of all students. Third, I recommend support for teachers through professional development opportunities or incentives for certification in gifted instruction. Giftedness occurs across schools, districts, and country. Yet, within Hutton County, none of the teachers noted training in gifted instruction prior to the professional development with the Promoting PLACE in Rural Schools grant. Finally, I recommend further studies in rural gifted instruction to yield additional understandings about how to support teachers in their instruction with rural gifted populations.

### **Conclusion**

I grew up in a rural Virginia farming community where I went to college, worked as teacher, and raised a family. As a first-generation college graduate, I realize the challenges of pursuing a college degree without having many supports along the way. As a high school student, I neither visited nor applied to any college. No one suggested that I do so. But, having occasionally visited the local community college library as a child, I decided that I would take a

few classes, after I graduated from high school, and see what happened. It was at the community college where I found some academic footing. From there, I applied to only one local liberal arts college, where I transferred. Although support structures were tenuous as I worked toward a degree, I had someone close to me who had been through college, who knew the ins and outs of financial aid forms and applications, who knew the difference between MLA and APA, who understood how to choose a major, and who would, ultimately, encourage me through a bachelor's degree, master's degree, and a PhD. I do not take these supports in my successes for granted, but I never really saw myself as one who could or should pursue higher education.

My daughters, on the other hand, were privileged to grow up with two parents who had the means, supports, and college experiences to provide them with myriad opportunities. They participated in gifted instruction through their schools, and, as their parents, we sought out experiences in the local community to engage and enrich them in a variety of areas. They attended Saturday Enrichment Programs at the University of Virginia, where their interests in music and law were deepened. They participated in theater, sports, and academic events. As teenagers, they visited many colleges, applied to many more, and selected carefully from numerous acceptances. While in college, they participated in campus events and took trips abroad. After graduation, they pursued their career goals in music, business, and law and now work with enthusiasm at jobs they love. With my own and my daughters' experiences, I know well what it means when children have, or do not have, academic opportunities and supports along the way.

My work in high-poverty rural schools is not by happenstance. It is personal, and it is my professional determinism that compels me to explore structures which support or hinder students in their learning. As a means to this end, I offer this case study as a window into the experiences

of 16 teachers, dedicated to serving the needs of their gifted students in one high-poverty rural school district. Through this case study, my work as an emerging scholar may offer insights about how we might address the challenges, mitigate the barriers, and afford rural students equity in gifted education. For teachers, this study may provide acknowledgment that their voices and experiences matter, as do their rural communities.

## References

- \*Aamidor, S., & Spicker, H. H. (1995). Promise for the future: Gifted education in rural communities. *Rural Special Education Quarterly*, *14*, 39–46.  
<https://doi.org/10.1177/875687059501400207>
- Adams, C. M. (2018). Pull-out programs as a service delivery option. In C. M. Callahan & H. L. Hertberg-Davis (Eds.), *Fundamentals of gifted education: Considering multiple perspectives* (2nd ed., pp. 187–199). Routledge.
- Anderson, G. L., & Scott, J. (2012). Toward an intersectional understanding of process causality and social context. *Qualitative Inquiry*, *18*(8), 674–685.  
<https://doi.org/10.1177/1077800412452857>
- Atkins, L., & Wallace, S. (2012). *Research methods in education: Qualitative research in education*. SAGE.
- Azano, A. P. (2011). The possibility of place: One teacher’s use of place-based instruction for English students in a rural high school. *Journal of Research in Rural Education*, *26*(10), 1–12.
- Azano, A. P. (2012). The CLEAR curriculum model. In C. M. Callahan & H. L. Hertberg-Davis (Eds.), *Fundamentals of gifted education: Considering multiple perspectives* (pp. 301–314).
- \*Azano, A. P. (2014). Gifted rural students. In J. A. Plucker & C. M. Callahan (Eds.), *Critical issues and practices in gifted education: What the research says* (pp. 297–304). Prufrock Press.

Azano, A. P., & Biddle, C. (2019). Disrupting dichotomous traps and rethinking problem formation for rural education. *The Rural Educator*, 40(2), 4–11.

<https://doi.org/10.35608/ruraled.v40i2.845>

Azano, A. P., & Callahan, C. M. (Eds.). (2021). *Gifted education in rural schools: Developing place-based interventions*. Routledge.

Azano, A. P., Callahan, C. M., Bass, E. L., & Rasheed, M. (2020). Supporting gifted education in rural schools. *Rural Educator*, 41(2), 47–54.

\*Azano, A. P., Callahan, C. M., Brodersen, A. V., & Caughey, M. (2017). Responding to the challenges of gifted education in rural communities. *Global Education Review*, 4(1), 62–77.

Azano, A. P., Callahan, C. M., & Kuehl, R. (In press). Challenges and innovative responses in rural gifted education. In A. P. Azano, K. Eppley, & C. Biddle (Eds.), *Bloomsbury handbook of rural education in the USA*. Bloomsbury.

\*Azano, A. P., Callahan, C. M., Missett, T. C., & Brunner, M. (2014). Understanding the experiences of gifted education teachers and fidelity of implementation in rural schools. *Journal of Advanced Academics*, 25(2), 88–100.

<https://doi.org/10.1177/1932202X14524405>

Azano, A. P., Downey, J., & Brenner, D. (2019). Preparing pre-service teachers for rural schools. In J. Lampert (Ed.), *The Oxford encyclopedia of global perspectives on teacher education* (pp. 1–25). Oxford University Press.

Azano, A. P., & Stewart, T. T. (2016). Confronting challenges at the intersection of rurality, place and teacher preparation: Improving efforts in teacher education to staff rural

- schools. *Global Education Review*, 3(1), 108–128.  
<https://doi.org/10.35608/ruraled.v4i1i2.851>
- Barone, D. M. (2011). Case study research. In N. K. Duke & M. H. Mallette (Eds.), *Literacy research methodologies* (2nd ed., pp. 7–27). Guilford Press.
- Bartlett, L., & Vavrus, F. (2017). *Rethinking case study research: A comparative approach*. Routledge.
- Bass, E. L., Azano, A. P., & Callahan, C. M. (2020). A place for writing: Examining a place-based curriculum for high-performing rural writers. *Theory & Practice in Rural Education*, 10(2), 11–25.
- Bell, M. M., & Osti, G. (2010). Mobilities and ruralities: An introduction. *Sociologia Ruralis*, 50(3), 199–204. <https://doi.org/10.1111/j.1467-9523.2010.00518.x>
- Biddle, C., & Azano, A. P. (2016). Constructing and reconstructing the “rural school problem”: A century of rurality and rural education research. *Review of Research in Education*, 40(1), 298–325. <https://doi.org/10.3102/0091732x16667700>
- Biddle, C., Sutherland, D. H., & McHenry-Sorber, E. (2019). On resisting “awayness” and being a good insider: Early career scholars revisit Coladarci's swan song a decade later. *Journal of Research in Rural Education (Online)*, 35(7), 1–16.
- Bloomberg, L. D., & Volpe, M. (2019). *Completing your qualitative dissertation: A road map from beginning to end* (4th ed.). SAGE.
- Board on Global Health. (2014). Analysis through triangulation and synthesis to interpret data in a mixed methods evaluation of the institute of medicine. In S. Olson (Rapporteur), *Evaluation Design for Complex Global Initiatives: Workshop Summary* (pp. 69–75). National Academies Press.

Brown, S. W., Renzulli, J. S., Gubbins, E. J., Siegle, D., Zhang, W., & Chen, C. H. (2005).

Assumptions underlying the identification of gifted and talented students. *Gifted Child Quarterly*, 49(1), 68–79. <https://doi.org/10.1177/001698620504900107>

\*Burney, V. H., & Cross, T. L. (2006). Impoverished students with academic promise in rural settings: 10 lessons from Project Aspire. *Gifted Child Today*, 29, 14–21.

<https://doi.org/10.4219/gct-2006-200>

Callahan, C. M. (2005). Identifying gifted students from underrepresented populations. *Theory into Practice*, 44(2), 98–104. [https://doi.org/10.1207/s15430421tip4402\\_4](https://doi.org/10.1207/s15430421tip4402_4)

Callahan, C. M., & Azano, A. P. (2021). Place-based gifted education in rural schools. In S. R. Smith (Ed.), *Handbook of giftedness and talent development in the Asia-Pacific* (pp. 535–554). Springer.

Callahan, C. M., Moon, T. R., & Oh, S. (2014). National surveys of gifted programs: Executive summary. University of Virginia, National Center for Research on Gifted Education.

Callahan, C. M., Moon, T. R., Oh, S., Azano, A. P., & Hailey, E. P. (2015). What works in gifted education: Documenting the effects of an integrated curricular/instructional model for gifted students. *American Educational Research Journal*, 52(1), 137–167.

<https://doi.org/10.3102/0002831214549448>

Card, D., & Giuliano, L. (2016). Universal screening increases the representation of low-income and minority students in gifted education. *Proceedings of the National Academy of Sciences of the United States of America*, 113, 13678–13683.

<https://doi.org/10.1073/pnas.1605043113>

<https://doi.org/10.1073/pnas.1605043113>

Carr, P. J., & Kefalas, M. J. (2009). *Hollowing out the middle: The rural brain drain and what it means for America*. Beacon Press.

- Castellano, J. A. (2002). *Special populations in gifted education: Working with diverse gifted learners*. Allyn & Bacon.
- Caughey, M. (2018). *Exploring teachers' fidelity of implementation of gifted language arts curriculum*. [Doctoral dissertation]. University of Virginia.
- Centers for Disease Control and Prevention (n.d.). National Center for Health Statistics. Life Expectancy. <https://www.cdc.gov/nchs/fastats/life-expectancy.htm>
- Cervone, J. A. (2017). *Corporatizing rural education: Neoliberal globalization and reaction in the United States*. Palgrave Macmillan.
- Cloke, P. (2006). Conceptualizing rurality. In P. Cloke, T. Marsden, & P. Mooney (Eds.), *Handbook of rural studies* (18–28). SAGE.
- Coladarci, T. (2007). Improving the yield of rural education research: An editor's swan song. *Journal of Research in Rural Education*, 22(3), 1–9.
- \*Colangelo, N., Assouline, S. G., & New, J. K. (1999). *Gifted education in rural schools: A national assessment*. [Policy report]. <https://eric.ed.gov/?id=ED430766>
- Corbett, M. (2007). *Learning to leave: The irony of schooling in a coastal community*. Fernwood Publishing.
- Corbett, M. (2016). Rural futures: Development, aspirations, mobilities, place, and education. *Peabody Journal of Education*, 91(2), 270–282.  
<https://doi.org/10.1080/0161956x.2016.1151750>
- Corbett, M., & Donehower, K. (2017). Rural literacies: Toward social cartography. *Journal of Research in Rural Education*, 32(5), 1–13. <https://jrre.psu.edu/sites/default/files/2019-08/32-5.pdf>

- Corbett, M., & Forsey, M. (2017). Rural youth out-migration and education: Challenges to aspirations discourse in mobile modernity. *Discourse: Studies in the Cultural Politics of Education*, 38, 429–444.
- Corbett, M. (2018). Improving rural trajectories. *Faculty profiles: University of Tasmania*.  
<http://www.utas.edu.au/profiles/staff/education/michael-corbett>
- Creswell, J. W. (2009). *Research design: Qualitative, quantitative, and mixed methods approaches* (3rd ed.). SAGE.
- Creswell, J. W., Hanson, W. E., Clark Plano, V. L., & Morales, A. (2007). Qualitative research designs: Selection and implementation. *The Counseling Psychologist*, 35(2), 236–264.  
<https://doi.org/10.1177/0011000006287390>
- Creswell, J. W., & Miller, D. L. (2000). Determining validity in qualitative inquiry. *Theory into Practice*, 39(3), 124–130. [https://doi.org/10.1207/s15430421tip3903\\_2](https://doi.org/10.1207/s15430421tip3903_2)
- Cronin, C. (2014). Using case study research as a rigorous form of inquiry. *Nurse Researcher*, 21(5), 19–27.
- Cubberley, E. P. (1914). *Rural life and education; a study of the rural-school problem as a phase of the rural-life problem*. Houghton Mifflin Harcourt.
- DaRosa, D.A., Skeff, K., Friedland, J. A., Coburn, M., Cox, S., Pollart, S., O’Connell, M., & Smith, S. (2011). Barriers to effective teaching. *Academic Medicine*, 86(4), 453–459.  
<https://doi.org/10.1097/ACM.0b013e31820defbe>
- \*Davalos, R., & Griffin, G. (1999). The impact of teachers’ individualized practices on gifted students in rural, heterogeneous classrooms. *Roeper Review*, 21, 308–314.  
<https://doi.org/10.1080/02783199909553982>

- Delcourt, M. A., Cornell, D. G., & Goldberg, M. D. (2007). Cognitive and affective learning outcomes of gifted elementary school students. *Gifted Child Quarterly*, *51*, 359–381. <https://doi.org/10.1177/0016986207306320>
- Denzin, N. K. (2009). The elephant in the living room: Or extending the conversation about the politics of evidence. *Qualitative Research*, *9*(2), 139–160. <https://doi.org/10.1177/1468794108098034>
- Desimone, L. M., & Le Floch, K. C. (2004). Are we asking the right questions? Using cognitive interviews to improve surveys in education research. *Educational evaluation and policy analysis*, *26*(1), 1–22. <https://doi.org/10.3102/01623737026001001>
- Donehower, K., Hogg, C., & Schell, E. E. (Eds.). (2012). *Reclaiming the rural: Essays on literacy, rhetoric, and pedagogy*. Southern Illinois University Press.
- Doyle, C., & Singh, A. (2006). *Reading & Teaching Henry Giroux: Vol. 4. Teaching contemporary scholars*. Peter Lang.
- Eppley, K., Azano, A. P., Brenner, D., & Shannon, P. (2018). What counts as evidence in rural schools? Evidence-based practice and practice-based evidence for diverse settings. *The Rural Educator*, *39*, 33–37. <https://doi.org/10.35608/ruraled.v39i2.208>
- Erickson, F. (1985). *Qualitative methods in research on teaching*. Institute for Research on Teaching.
- Floyd, E. F., McGinnis, J. L., & Grantham, T. C. (2011). Gifted education in rural environments. In J. A. Castellano & A. D. Frazier (Eds.), *Special populations in gifted education* (pp. 27–46). Prufrock Press.
- Frasier, M. M. (1991). Disadvantaged and culturally diverse gifted students. *Journal for the Education of the Gifted*, *14*(3), 234–245. <https://doi.org/10.1177/016235329101400305>

- Freire, P. (1996). *Pedagogy of the oppressed* (revised). Continuum.
- Gavin, M. K., Casa, T. M., Adelson, J. L., Carroll, S. R., & Sheffield, L. J. (2009). The impact of advanced curriculum on the achievement of mathematically promising elementary students. *Gifted Child Quarterly*, 53(3), 188–202.  
<https://doi.org/10.1177/0016986209334964>
- Green, B., & Corbett, M. (2013). Rural education and literacies: An introduction. In B. Green & M. Corbett (Eds.), *Rethinking rural literacies: Transnational perspectives* (pp. 1–13). Palgrave MacMillan.
- Greenwood, D. A. (formerly Gruenewald). (2003). The best of both worlds: A critical pedagogy of place. *Educational Researcher*, 32(4), 3–12.  
<https://doi.org/10.3102/0013189x032004003>
- Greenwood, D. A. (formerly Gruenewald). (2008). A critical pedagogy of place: From gridlock to parallax. *Environmental Education Research*, 14(3), 336–348.  
<https://doi.org/10.1080/13504620802190743>
- Greenwood, D. A., & Smith, G. A. (Eds.). (2010). *Place-based education in the global age: Local diversity*. Routledge.
- Hamilton, L. C., Hamilton, L. R., Duncan, C. M., & Colocousis, C. R. (2008). Place matters: Challenges and opportunities in four rural Americas. *Reports on Rural America*, 1(4), 1–36. <https://doi.org/10.34051/p/2020.41>
- Harmon, H. L., & Schafft, K. (2009). Rural school leadership for collaborative community development. *The Rural Educator*, 30, 4–9.

- Harrison, H., Birks, M., Franklin, R., & Mills, J. (2017). Case study research: Foundations and methodological orientations. *Forum Qualitative Sozialforschung/Forum: Qualitative Social Research*, 18(1).
- Hart, L. G., Larson, E. H., & Lishner, D. M. (2005). Critical concepts for reaching populations at risk. *American Journal of Public Health*, 95, 1149–1171.
- Hopf, C. (2004). Qualitative interviews: An overview. In U. Flick, E. von Kardorff, & I. Steinke (Eds.), *A companion to qualitative research* (pp. 203–208). SAGE.
- Howley, A. A., & Howley, C. B. (2000). The transformative challenge of rural context. *The Journal of Educational Foundations*, 14(4), 73–85.
- Howley, A., Howley, C. B., & Pendarvis, E. D. (2003). Talent development in rural communities. In Borland, J. H. (Ed.), *Rethinking gifted education* (Vol. 10). Columbia Teachers College Press.
- \*Howley, A. A., Pendarvis, E. D., & Howley, C. B. (1988). Gifted students in rural environments: Implications for school programs. *Rural Special Education Quarterly*, 8(4), 43–50. <https://doi.org/10.1177/875687058700800409>
- \*Howley, A. A., Rhodes, M., & Beall, J. (2009). Challenges facing rural schools: Implications for gifted students. *Journal for the Education of the Gifted*, 32(4), 515–536.
- Howley, C. B. (2003, November). *Making education research behave: Reflections from the rural lifeworld* [Paper presentation]. ACCLAIM Research Initiative, The Ohio University, Athens, OH, United States.
- \*Howley, C. B. (2009). The meaning of rural difference for bright rednecks. *Journal for the Education of the Gifted*, 32, 537–564. <https://doi.org/10.1177/016235320903200405>

- Howley, C. B., Harmon, H. L., & Leopold, G. D. (1996). Rural scholars or bright rednecks? Aspirations for a sense of place among rural youth in Appalachia. *Journal of Research in Rural Education, 12*, 150–160.
- Institute for Health Metrics and Evaluation (n.d.). US County Profile. Seattle, WA: IHME, 2016. <http://www.healthdata.org/us-county-profiles>
- \*Jones, E. D., & Southern, W. T. (1992). Programming, grouping, and acceleration in rural school districts: A survey of attitudes and practices. *Gifted Child Quarterly, 36*(2), 112–117. <https://doi.org/10.1177/001698629203600210>
- Kaplan, S. (2005). Layering differentiated curriculum for the gifted and talented. In F. Karnes & S. Bean (Eds.), *Methods and materials for teaching gifted students* (2nd ed., pp. 107–132). Prufrock Press.
- Kennedy, M. M. (2007). Defining a literature. *Educational Researcher, 36*(3), 139–147. <https://doi.org/10.3102/0013189X07299197>
- Kettler, T. (2016). Why are economists evaluating the impact of gifted education? *Journal of Advanced Academics, 27*(2), 81–89. <https://doi.org/10.1177/1932202x16636172>
- \*Kettler, T., Puryear, J. S., & Mullet, D. R. (2016). Defining rural in gifted education research: Methodological challenges and paths forward. *Journal of Advanced Academics, 27*(4), 245–265. <https://doi.org/10.1177/1932202x16656896>
- \*Kettler, T., Russell, J., & Puryear, J. S. (2015). Inequitable access to gifted education: Variance in funding and staffing based on locale and contextual school variables. *Journal for the Education of the Gifted, 38*(2), 99–117. <https://doi.org/10.1177/0162353215578277>

- Krefting, L. (1991). Rigor in qualitative research: The assessment of trustworthiness. *The American Journal of Occupational Therapy: Official publication of the American Occupational Therapy Association*, (45)3, 214–222. <https://doi.org/10.5014/ajot.45.3.214>
- Kuehl, R., Azano, A. P., & Callahan, C. M. (2020). Gifted rural writers explore place in narrative fiction stories. *Theory & Practice in Rural Education*, 10(2), 26–45.
- Kvale, S. (1996). *Interviews: An introduction to qualitative research interviewing*. SAGE.
- \*Lawrence, B. K. (2009). Rural gifted education: A comprehensive literature review. *Journal for the Education of the Gifted*, 32(4), 461–494.  
<https://doi.org/10.1177/016235320903200402>
- Lewis, K. D., & Boswell, C. (2020). Perceived challenges for rural gifted education. *Gifted Child Today*, 43(3), 184–198. <https://doi.org/10.1177/1076217520915742>
- Lincoln, Y., & Guba, E. (1985). *Naturalistic inquiry*. SAGE.
- Matthews, M. S., Azano, A. P., & Rasheed, M. (2021). Case study in rural Appalachia. In Azano, A. P. & Callahan, C. M., *Gifted education in rural schools: Developing place-based interventions* (pp. 186–206). Routledge.
- Maxwell, J. A. (2005). *Qualitative research design: An interactive approach* (2nd ed.). SAGE.
- McBee, M. T., & Makel, M. C. (2019). The quantitative implications of definitions of giftedness. *AERA Open*, 5, 1–13. <https://doi.org/10.1177/2332858419831007>
- \*Meriweather, S., & Karnes, F. A. (1986). Gifted education in rural areas. *Rural Special Education Quarterly*, 7(2), 10–14. <https://doi.org/10.1177/875687058600700203>
- Merriam, S. B. (1998). *Qualitative research and case study applications in education* (Revised and expanded ed.). Jossey-Bass.

- Merriam, S. B. (2002). Introduction to qualitative research. *Qualitative research in practice: Examples for discussion and analysis*, 1(1), 1–17.
- Merriam, S. B. (2009). *Qualitative research: A guide to design and implementation* (2nd ed.). Jossey-Bass.
- Merriam, S. B., & Tisdell, E. J. (2015). *Qualitative research: A guide to design and implementation*. John Wiley & Sons
- Miles, M. B., & Huberman, A. M. (1994). *An expanded sourcebook: Qualitative data analysis* (2nd ed.). SAGE.
- Nassaji, H. (2015). Qualitative and descriptive research: Data type versus data analysis. *Language Teaching Research*, 19(2), 129–132.
- National Association for Gifted Children. (n.d.[a]). *Increasing Equity in Gifted Education Programs and Services*. <https://www.nagc.org/resources-publications/resources/timely-topics/including-diverse-learners-gifted-education-programs>
- National Association for Gifted Children. (n.d.[b]). *What is Giftedness?* <https://www.nagc.org/resources-publications/resources/what-giftedness>
- National Association for Gifted Children. (2010). *NAGC position statement and white papers* [White Paper]. <https://www.nagc.org/about-nagc/nagc-position-statements-white-papers>
- National Center for Education Statistics. (2011). *The status of rural education*. [https://nces.ed.gov/programs/coe/pdf/coe\\_tla.pdf](https://nces.ed.gov/programs/coe/pdf/coe_tla.pdf)
- \*Pendarvis, E., & Wood, E. W. (2009). Eligibility of historically underrepresented students referred for gifted education in a rural school district: A case study. *Journal for the Education of the Gifted*, 32(4), 495–514. <https://doi.org/10.1177/016235320903200403>

- Penuel, W. R., Fishman, B. J., Yamaguchi, R., & Gallagher, L. P. (2007). What makes professional development effective? Strategies that foster curriculum implementation. *American Educational Research Journal*, *44*(4), 921–958.  
<https://doi.org/10.3102/0002831207308221>
- Peters, S. J., & Engerrand, K. G. (2016). Equity and excellence: Proactive efforts in the identification of underrepresented students for gifted and talented services. *Gifted Child Quarterly*, *60*(3), 159–171. <https://doi.org/10.1177/0016986216643165>
- Plucker, J. A. (2013). Students from rural environments. In C. M. Callahan & H. L. Hertberg-Davis (Eds.), *Fundamentals of gifted education* (pp. 301–314). Routledge.
- Plucker, J. A. (2015). *Common Core and America's high-achieving students* [Policy report]. Thomas B. Fordham Institute.
- Plucker, J. A., & Barab, S. A. (2005). The importance of contexts in theories of giftedness: Learning to embrace the messy joys of subjectivity. In R. J. Sternberg & J. E. Davidson (Eds.), *Conceptions of giftedness* (pp. 201–216). Cambridge University Press.
- \*Plucker, J. A., & Callahan, C. M. (2014). Research on giftedness and gifted education: Status of the field and considerations for the future. *Exceptional Children*, *80*(4), 390–406.  
<https://doi.org/10.1177/0014402914527244>
- Plucker, J. A., & Peters, S. J. (2018). Closing poverty-based excellence gaps: Conceptual, measurement, and educational issues. *Gifted Child Quarterly*, *62*(1), 56–67.  
<https://doi.org/10.1177/0016986217738566>
- \*Puryear, J. S., & Kettler, T. (2017). Rural gifted education and the effect of proximity. *Gifted Child Quarterly*, *61*(2), 143–152. <https://doi.org/10.1177/0016986217690229>

- Reis, S. M., & Renzulli, J. S. (1982). A case for a broadened conception of giftedness. *Phi Delta Kappan*, 63, 619–620.
- Reis, S. M., & Renzulli, J. S. (1992). Using curriculum compacting to challenge the above-average. *Educational Leadership*, 50(2), 51.
- Renzulli, J. S. (1978). What makes giftedness? Reexamining a definition. *Phi Delta Kappan*, 60(3), 180–184. <https://doi.org/10.1177/003172171109200821>
- Renzulli, J. S. (2002a). Emerging conceptions of giftedness: Building a bridge to the new century. *Exceptionality*, 10(2), 67–75. [https://doi.org/10.1207/s15327035ex1002\\_2](https://doi.org/10.1207/s15327035ex1002_2)
- Renzulli, J. S. (2002b). Expanding the conception of giftedness to include co-cognitive traits and to promote social capital. *Phi Delta Kappan*, 84(1), 33–58. <https://doi.org/10.1177/003172170208400109>
- Renzulli, J. S. (2005). The three-ring conception of giftedness: A developmental model for promoting creative productivity. In R. J. Sternberg & J. E. Davidson (Eds.), *Conceptions of giftedness* (pp. 246–279). Cambridge University Press.
- Renzulli, J. S., & Reis, S. (1985). *The schoolwide enrichment model: A comprehensive plan for educational excellence*. Creative Learning Press.
- Renzulli, J. S., & Reis, S. (2000). The schoolwide enrichment model. In K. Heller, F. Monchs, R. Sternberg, & R. Subotnik (Eds.), *The international handbook of giftedness and talent* (2nd ed., pp. 367–382). Elsevier.
- Richards, S. J., & Stambaugh, T. (2015). National context of rural schools. In T. Stambaugh & S. M. Wood (Eds.), *Serving gifted students in rural settings* (pp. 1–21). Prufrock Press.

- Robbins, C. K., & LePeau, L. A. (2018). Seeking “better ways”: Early career faculty researcher development. *Studies in Graduate and Postdoctoral Education*, 9(2), 113–126.  
<https://doi.org/10.1108/sgpe-d-17-00029>
- Russel, S., & Meikamp, J. (1995). Cultural diversity among gifted students and their teachers in rural West Virginia. In *Reaching to the future: Boldly facing challenges in rural communities*. Conference Proceedings of the American Council on Rural Special Education, Las Vegas. <https://files.eric.ed.gov/fulltext/ED381316.pdf>
- Schafft, K. A., & Jackson, A. Y. (Eds.). (2010). *Rural education for the twenty-first century*. The Pennsylvania State University Press.
- Seale, C. (2002). Quality issues in qualitative inquiry. *Qualitative Social Work*, 1(1), 97–110.  
<https://doi.org/10.1177/147332500200100107>
- Semega, J., Kollar, M., Shrider E.A., & Creamer, J. United States Census Bureau. (2020, September 15). *Income and Poverty in the United States: 2019*.  
<https://www.census.gov/library/publications/2020/demo/p60-270.html#:~:text=Median%20household%20income%20was%20%2468%2C703,and%20Table%20A%2D1>
- Silverman, D. (2013). *Doing qualitative research: A practical handbook* (4th ed.). SAGE.
- Simms, M. C., McDaniel, M., Fyffe, S. D., & Lowenstein, C. (2015). *Structural barriers to racial equity in Pittsburgh: expanding economic opportunity for African American men and boys*. Urban Institute.
- Smith, G. A. (2002). Place-based education: Learning to be where we are. *Phi delta kappan*, 83(8), 584–594. <https://www.jstor.org/stable/20440205>

- Spicker, H. H., Southern, W. T., & Davis, B. I. (1987). The rural gifted child. *Gifted Child Quarterly*, 31(4), 155–157. <https://doi.org/10.1177/001698628703100404>
- Stake, R. E. (1995). *The art of case study research*. SAGE.
- Stambaugh, T., & Wood, S. M. (Eds.). (2015). *Serving gifted students in rural settings*. Prufrock Press.
- Starman, A. B. (2013). The case study as a type of qualitative research. *Journal of Contemporary Educational Studies*, 64(1), 28–43.
- Sutherland, D. H., & Seelig, J. L. (in press). Educational governance and contemporary policy in rural America. In A. P. Azano, K. Eppley, & C. Biddle (Eds.), *Bloomsbury handbook of rural education in the USA*. Bloomsbury.
- Tellis, W. M. (1997). Application of a case study methodology. *The Qualitative Report*, 3(3), 1–19. <https://doi.org/10.46743/2160-3715/1997.2015>
- Theobald, P. (2005). Urban and rural schools: Overcoming lingering obstacles. *Phi Delta Kappan*, 87(2), 116-122.
- Theobald, P., & Nachtigal, P. (1995). *Culture, community, and the promise of rural education* [Position paper]. Viewpoints. <https://eric.ed.gov/?id=ED388464>
- Tieken, M. C. (2014). *Why rural schools matter*. University of North Carolina Press.
- Tomlinson, C. A. (2001). *How to differentiate instruction in mixed ability classrooms* (2nd ed.). Association for Supervision and Curriculum Development.
- Van Tassel-Baska, J., & Hubbard, G. F. (2015). Serving the rural gifted child through advanced curriculum. In T. Stambaugh & S. Wood (Eds.), *Serving gifted students in rural settings* (pp. 155–177). Prufrock Press.

- Van Tassel-Baska, J., & Stambaugh, T. (2008). Curriculum and instructional considerations in programs for the gifted. In *Handbook of giftedness in children* (pp. 347–365). Springer.
- Vavrus, F. & Bartlett, L. (2006). Comparatively knowing: Making a case for the vertical case study. *Current Issues in Comparative Education*, 8(2), 95–103.
- Wolcott, H. F. (2001). *Writing up qualitative research* (2nd ed.). SAGE.
- Woods, M. (2009). Rural geography: Blurring boundaries and making connections. *Progress in Human Geography*, 33(6), 849–858. <https://doi.org/10.1177/0309132508105001>
- Yazan, B. (2015). Three approaches to case study methods in education: Yin, Merriam, and Stake. *The qualitative report*, 20(2), 134–152.  
<https://nsuworks.nova.edu/tqr/vol20/iss2/12>
- Yin, R. K. (2014). *Case study research: Design and methods*. SAGE.
- \*Yoder, J. (1985). Gifted education is for rural students, too. *NASSP Bulletin*, 69(482), 68–74.  
<https://doi.org/10.1177/019263658506948210>

## Appendix A

### Folklore Unit, Lesson 1, Page 1

#### LESSON 1: Welcome to Fairytales, Fables, and Folklore!

##### **MATERIALS:**

- Folklorist Journal (one per student)
- Unit Pre-Assessment (one per student)
- Read aloud: *Why Possum Has a Bare Tail* (teacher copy)
- Folktale Recording Chart (one blank copy per student)
- Folkloristics Concept Map Key (one teacher key for reference)
- Folkloristics Concept Map (one blank copy for display, one blank copy per student)
- Examples of oral folklore: fable, fairytale, legend, myth, riddle (copies for each group)
- Exit Slip: Compound Words (one per student)
- Word Wall cards (**folklorist, folklore, fairytale, myth, legend, fable, lore, riddle**)
- Crayons or markers
- Index cards (several per student)

##### **OBJECTIVES:**

**Oral folklore is a literary genre that includes a variety of traditional tales, including folktales, fairytales, myths, legends, and fables.**

##### **Students will be able to:**

- read a wide range of literature to build an understanding of human experience.
- apply a wide range of strategies to comprehend, interpret, evaluate, and appreciate texts.
- apply knowledge of language structure, language conventions, and genre to create, critique, and discuss print and non-print texts.

##### **Key Terms:**

- folk
- folklore
- folktale
- fairytale
- oral
- myth
- legend

## Appendix B

### Poetry Unit, Lesson 1, Page 1

#### LESSON 1: WELCOME TO POETRY!

<p><b>MATERIALS:</b></p> <ul style="list-style-type: none"> <li>▪ <input type="checkbox"/> Student workbooks</li> <li>▪ <input type="checkbox"/> Teacher’s copy of “The Farm” by Joyce Sutphen (available at <a href="http://www.poetryfoundation.org/poem/181826">http://www.poetryfoundation.org/poem/181826</a>)</li> <li>▪ <input type="checkbox"/> Student copies of Poetry of Place Vocabulary Sheet</li> <li>▪ <input type="checkbox"/> *Formative Assessment 1: Exit Card</li> </ul>	
<p><b>OBJECTIVES:</b></p> <p><b>Poets use concrete language and sensory detail to communicate abstract ideas, emotions, and truths.</b></p> <p><b>Students will be able to:</b></p> <ul style="list-style-type: none"> <li>▪ <input type="checkbox"/> develop ideas for writing.</li> <li>▪ <input type="checkbox"/> learn and use the first step in the writing process.</li> <li>▪ <input type="checkbox"/> develop skills to participate as knowledgeable, reflective, creative, and critical members of a literary community.</li> </ul> <p><b>Important Vocabulary:</b></p> <ul style="list-style-type: none"> <li>▪ <input type="checkbox"/> imagery</li> <li>▪ <input type="checkbox"/> abstract and concrete language (<b>antonyms:</b> abstract-concrete)</li> </ul>	
<p><b>SEQUENCE:</b></p>	<p><b>TEACHER NOTES:</b></p>
<p><b>Introductory Activity</b></p> <p>Invite students to lie down, close their eyes, and relax by taking deep breaths (continue instructing students to breathe deeply until the room is quiet).</p> <p><i>Say: I am going to say a word. I want you to concentrate on the first image or picture that comes into your mind when I say the word. Try to notice as many details as you can about the picture or scene that comes into your mind. I will say the word and then give you 30 seconds to quietly get a clear picture with lots of details in your mind. Ready. The word is: excitement.</i></p> <p>Time students for 30 seconds.</p>	<p>This activity can also be done with students sitting at their desks with eyes closed, but the opportunity to lie down is likely to catch students’ attention and help them feel looser for free imagining. Make sure the words you suggest have a local context, such as words associated with local events, jobs, or economics (county fair, sheriff, hay). What values or concepts are important to the community?</p>

## Appendix C

### Fiction Unit, Lesson 1, Page 1

#### LESSON 1: Welcome to Fiction!

<p><b>MATERIALS:</b></p> <ul style="list-style-type: none"> <li>♣ <b>Results of Pre-Assessment</b> (Pre-Assessment should be given prior to Lesson 1)</li> <li>♣ Review Activity (Groups 1, 2, 3)—based on pre-assessment results</li> <li>♣ Passages: <i>Alice</i> (1 class, 3 small group)</li> <li>♣ <b>OPTIONAL:</b> Rural picture book (to take the place of the class <i>Alice</i> passage)—see List of Rural Picture Books in the Introduction resources folder</li> <li>♣ Fiction Fanatic Cards</li> <li>♣ Writer’s Notebook</li> <li>♣ Word Wall Cards: <b>fiction, literature, symbol, universal</b></li> </ul>	
<p><b>Writers use senses, emotions, and images to evoke connections between the text and the reader</b></p> <p><b>OBJECTIVES:</b></p> <ul style="list-style-type: none"> <li>• Use evidence from text to support opinions</li> <li>• Use brainstorming to generate ideas</li> </ul> <p><b>VOCABULARY:</b></p> <ul style="list-style-type: none"> <li>• Fiction</li> <li>• Literature</li> <li>• Universal</li> <li>• Symbol</li> </ul>	
<p><b>SEQUENCE:</b></p>	<p><b>TEACHER NOTES:</b></p>
<p><b>INTRODUCTION: What is Fiction?</b></p> <p>Explain to students that you will spend the next few weeks reading and writing fiction. Write <b>fiction</b> on the board and ask students what they think the word <b>fiction</b> means.</p> <p>Write down students’ responses as closely as you can and use their phrasing to create a class definition of the term. The key is to make sure students understand that fiction is invented, imagined, and/or not true.</p>	<p><b>Fiction:</b> “The category of literature, drama, film, or other creative work whose content is imagined and is not necessarily based on fact.” (<i>American Heritage Dictionary</i>)</p>

## Appendix D

### Research Unit, Lesson 1, Page 1

#### LESSON 1: Who are Explorers?

<p><b>MATERIALS:</b></p> <ul style="list-style-type: none"> <li>• Research Binder (3-ring binder)</li> <li>• Unit Pre-assessment</li> <li>• Computer / library pre-assessment (optional)</li> <li>• Anticipation Guide (1 per student)</li> <li>• Who am I? – An Exploration (1 per student)</li> <li>• Formative Assessment 1</li> </ul>	
<p><b>OBJECTIVES:</b>  <b>Exploration is a metaphor for understanding that research is an organized and systematic way of finding answers to questions.</b>  <b>Students will be able to:</b></p> <ul style="list-style-type: none"> <li>• Cite evidence in support of opinions</li> <li>• Examine multiple perspectives</li> </ul> <p><b>Important Vocabulary:</b></p> <ul style="list-style-type: none"> <li>• Consensus</li> </ul>	
<p><b>SEQUENCE:</b></p>	<p><b>TEACHER NOTES:</b></p>
<p><b>UNIT PRE-ASSESSMENT</b>  Administer the Unit Pre-assessment. Explain to students that this assessment is not for a grade. Rather, it is to find out how much they already know about exploration.  <b>Optional:</b> A computer- and-library-use pre-assessment is also included if you feel that students may need scaffolding in these areas.</p>	
<p><b>ACTIVITY: Warm-Up</b>  Before students enter the classroom, write/project the following journal prompt on the board:</p>	<p>If you have not used journal entries as warm-up or closure</p>

## Appendix E

### Fidelity Log

Exploration and Communication: Teacher Log\_Lesson 1

#### **LESSON 1: Who are Explorers?**

Name of Teacher: \_\_\_\_\_ School: \_\_\_\_\_

Date: \_\_\_\_\_ Class Time: \_\_\_\_\_

- a. How much time did you spend preparing for the lesson? \_\_\_ minutes
- b. How well do you feel you followed the lesson as written? (**Circle your response**)  
 Exactly as written    Very closely    Closely    Not very closely    Did not follow plan
- c. If modifications were made to the lesson, why were modifications made (check all that apply)?
- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Time constraints               | <input type="checkbox"/> Student ability (too tough, too easy)    | <input type="checkbox"/> Did not see the relevance |
| <input type="checkbox"/> Could improve the topic        | <input type="checkbox"/> Students already familiar with the topic | <input type="checkbox"/> Other class requirements  |
| <input type="checkbox"/> Material/resource availability | <input type="checkbox"/> Other: _____                             |  |

**DIRECTIONS:** Please indicate (by circling the appropriate letter) whether you **I: Implemented the activity as written, M: Modified the activity, or N: Did not implement the activity**. If the activity was optional, please indicate whether you **Y: Used the activity** or **N: Did not use the activity**

Use the section **Teacher Notes** to describe any modification or deletions and **WHY** they were made. Feel free to include any additional comments. You may use the back of the sheet if needed.

SEQUENCE		TEACHER NOTES
<b><u>UNIT PRE-ASSESSMENT</u></b>	I M N	
1. Administered the Unit Pre-assessment.		

2. Explained that it is not for a grade, but to find out how much they know about exploration.	I M N	
3. <b>Optional:</b> Administered computer/library pre-assessment.	Y N	
<b><u>ACTIVITY: Warm-Up</u></b>		
4. Wrote/projected the journal prompt on the board.	I M N	
5. Explained to students that journals will be used help them to keep track of their progress and their thoughts on research.	I M N	
6. Gave students a chance to share their responses with the whole group if they choose.	I M N	
<b><u>ANTICIPATION GUIDE</u></b>		
7. Passed out an Anticipation Guide to each student.	I M N	
8. Explain to students that they will work independently, then with a group.	I M N	
9. Guided students through the task by reading each statement and allowing time for students to respond.	I M N	
10. Had students write at least one sentence per statement, explaining why they agree or disagree.	I M N	
11. Placed students in groups of 3-4 students.	I M N	
12. Asked students to discuss each statement until they reach an agreement.	I M N	
13. Asked if there are questions.	I M N	
14. Walked students through the first statement and prompted them with questions.	I M N	
15. Had students talk through the statement or skip it if it was controversial.	I M N	
16. Instructed students to work through the rest of the guide in their small groups.	I M N	
17. <b>Optional:</b> Went over ground rules for discussion.	Y N	
<b><u>DISCUSSION: What is Exploration?</u></b>		
18. Distributed copies of Who am I?—An Exploration to students.	I M N	
19. Explained the assignment.	I M N	
20. <b>Optional:</b> Reminded students that where they live and the things they value can give others perspective.	Y N	

21. <b>Optional:</b> Asked students to consider additional questions while they do their homework.	Y N	
<b><u>CLOSURE: Formative Assessment 1</u></b>	I M N	
22. Had students return to their journals.	I M N	
23. Projected/wrote the prompt for Formative Assessment 1 on the board.	I M N	
24. Asked students to respond to the journal prompt for Formative Assessment 1.	I M N	
25. Made sure all binders return to the location where you have specified they should be kept.	I M N	

## Appendix F

### Observer Log

Sample: Used Only in Treatment District Observations

**(OBSERVER LOG) LESSON 1: Welcome to Fiction!**

Name of Teacher: \_\_\_\_\_ School: \_\_\_\_\_

Date: \_\_\_\_\_ Class Time: \_\_\_\_\_

How well do you feel the teacher followed the lesson as written? (**Circle your response**)

Exactly as written    Very closely    Closely    Not very closely    Did not follow plan

**DIRECTIONS:** Please indicate (by circling the appropriate letter) whether the teacher

**I: Implemented the activity as written**

**M: Modified the activity**

**N: Did not implement the activity.**

If the activity was optional, please indicate whether the teacher

**Y: Used the activity**

**N: Did not use the activity**

Use the +/- column to note whether modifications were positive or negative.

Use the section **Observer Notes** to describe any modification or deletions and **WHY** they were made. Feel free to include any additional comments. You may use the back of the sheet if needed.

SEQUENCE	+/-	OBSERVER NOTES
<b>INTRODUCTION: What is Fiction?</b>		
1. Explained to students that you will be spending the next few weeks reading and writing fiction.	I M N	
2. Wrote <b>fiction</b> on the board.	I M N	
3. Asked students what they think the word <b>fiction</b> means.	I M N	
4. Wrote down students' responses.	I M N	
5. Used students' phrasing to create a class definition of the term.	I M N	
6. Added <b>fiction</b> to the Word Wall.	I M N	
7. Explained to students that they will be looking at some of the terminology they discussed in	I M N	

the folklore and poetry units, since they are all works of literature.			
8. Asked students what they think the word <b>literature</b> means.	I M N		
9. Wrote down students' responses.	I M N		
10. Used students' phrasing to create a class definition of the term.	I M N		
11. Added <b>literature</b> to the Word Wall.	I M N		
<b>ACTIVITY: Universal and Audience</b>			
12. Read the five statements provided out loud (scared of dark/snows in winter/rains in spring/thirsty/drinking fountains).	I M N		
13. Asked students to give statements a thumbs up if they think they are universal and a thumbs down if they are not universal.	I M N		
14. Explained to the class that authors use universal elements to appeal to all readers.	I M N		
15. Used the example of drinking fountains to show why something might not be universal even though it is true for them.	I M N		
16. Added <b>universal</b> to the Word Wall.	I M N		
<b>APPLICATION: Imagery</b>			
17. <b>OPTIONAL:</b> Used a rural picture book in place of the Class Passage from <i>Alice</i>	Y N		
18. Invited students to find a comfortable place for listening.	I M N		
19. Reminded students to enjoy the way the passage sounds, but to listen for sensory imagery.	I M N		
20. Read passage/book out loud to students.	I M N		
21. Asked students to take a moment to review the passage/book again.	I M N		
22. Asked what kind of sensory imagery was used.	I M N		
23. Asked how the imagery helps us understand what Alice is experiencing/what is happening.	I M N		
24. Underlined or wrote students' examples on the board.	I M N		
25. Asked students about the images they got in their heads.	I M N		

26. Explained <b>symbols</b> and how students should look for them because imagery can have symbolic meanings.	I M N		
27. <b>OPTIONAL:</b> Discussion on rural/gender stereotypes.	Y N		
28. Add <b>symbol</b> to the Word Wall.	I M N		
<b>ACTIVITY: Searching for Sensory Imagery</b>			
29. Gave each student a different sensory imagery passage.	I M N		
30. Explained that students will read along with you, underline any sensory imagery they find, label the sense, and star any symbols they locate.	I M N		
31. Explained that they will share at least one of their examples in the class.	I M N		
32. Walked around and helped any students who were having difficulty.	I M N		
33. Asked students to share an example and had them explain it to the class.	I M N		
34. Checked to make sure the class agrees and discuss any examples they are unclear about.	I M N		
35. Discussed any examples of symbols the students noted.	I M N		
<b>APPLICATION: Fiction Fanatic</b>			
36. Asked how many students watch or read fiction outside of school.	I M N		
37. Explained that you want to get as many examples of fictional elements as possible.	I M N		
38. Explained that they will be asked to contribute examples to the Fiction Fanatic board.	I M N		
39. Told students that you want them to write down any sensory imagery or symbols that they remember from books/movies/games/TV shows/comics/etcetera.	I M N		
40. Showed students an image of the Fiction Fanatic Card and how to fill it out.	I M N		
41. Passed out Fiction Fanatic Cards.	I M N		
42. Asked students to write <b>imagery</b> or <b>symbol</b> on the card.	I M N		
43. Explained that students can complete them now or turn them in next class.	I M N		
<b>ACTIVITY: Writing Workshop #1</b> (Sensory Details)	I M N		

44. Explained that students are going to work on becoming authors and good authors have to practice.			
45. Explained they will have Writing Workshop time, which will start with a prompt.	I M N		
46. Explained that they might not be able to respond to the prompts just in class time, but they will be able to keep a Writer's Notebook to write down their thoughts at home.	I M N		
47. Explained that they will read their responses out loud and offer constructive criticism to their classmates.	I M N		
48. <b>OPTIONAL:</b> Discussed what constructive criticism is and what it should look like.	Y N		
49. Posted the prompt on the board for students.	I M N		
50. Passed out Writer's Notebooks.	I M N		
51. Stressed that students should <i>show</i> , not <i>tell</i> in their writing.	I M N		
52. Gave students until the end of class to work (if there was time left).	I M N		

## Appendix G

### Teacher Observation Protocol and Follow-Up Questions

Sample: Used in Treatment and Control Districts

#### Promoting PLACE: Teacher Observation Protocol

*Based on Tomlinson's Differentiated Instruction Observation Look-Fors and  
Maker's Classroom Observation Protocol*

**Observer ID:**

**Date of Observation:**

**School Name:**

**Grade:**

**Number of Students in the Classroom:**

**Teacher's Name:**

**Is the teacher a (circle one):**

General education teacher

Gifted education teacher

Other (explain):

**Does the classroom have (circle one):**

Homogeneous grouping: Gifted education classroom

Heterogeneous grouping: Cluster grouping within general education classroom

Heterogeneous grouping: General education classroom

**DIRECTIONS:** Please rate the lesson you observe according to the following scales. Provide a rating for both quality and frequency for each indicator listed.

QUALITY (Q)		FREQUENCY (F)	
Scale	Descriptor	Scale	Descriptor
N/A	Not applicable to this lesson	N/A	Not applicable to this lesson

<b>0</b>	No evidence of behavior, but would be appropriate for this lesson	<b>0</b>	No evidence of behavior, but would be appropriate for this lesson
<b>1</b>	Behavior noted at minimal level	<b>1</b>	Behavior observed only once or twice, <b>as appropriate</b> (inconsistent)
<b>2</b>	Behavior noted at average level	<b>2</b>	Behavior observed consistently, <b>as appropriate</b> (consistent)
<b>3</b>	Behavior noted at exemplary level		

If the teacher is working with small groups, be sure to move around the room as needed so you can hear the discussions that the teacher has with students so you can accurately note frequency. You must be able to provide evidence of the action occurring in order to give a teacher credit for it. Everything MUST either be observed or discussed in the interview—if an activity is introduced but you do not see how it works out, you cannot assume that it meets the criteria.

### Follow-Up Questions

**DIRECTIONS:** As you discuss the indicators in your observation with the teacher, note his/her responses to the questions below. If there are any elements of the observation protocol you would like to clarify with the teacher do this as part of the interview and add any relevant questions.

1. How and when did you pre-assess students for this lesson/activity?
2. What information did you learn from that pre-assessment?
3. How did you use that information to plan this lesson/activity?
4. How typical was this lesson?
5. What challenges did you anticipate before teaching this lesson?
6. What challenges did you actually experience in teaching this lesson?
7. Do you have any documentation of this lesson that you would be willing to share with us?

### I. Instruction

Teacher makes provisions for students to work at varied paces.	Q	F
<b>1. Gives appropriate additional support to students as needed.</b> <i>(e.g., re-reading materials to make sure students understand; adding extra material to lesson, appropriate use of technology, answering questions—if there is no evidence that this kind of support is necessary, then it should not count)</i>		
<b>2. Gives appropriate additional challenge to students as needed.</b>		

<i>(e.g., encouraging students to do something new or out of their comfort zone; encouraging a more difficult option)</i>		
<b>3. Tasks allow each student to work efficiently.</b> <i>Note that this should not be the classroom structure (e.g., sitting on the floor rather than at their desk) but the assigned task. If there is no off-task behavior observed, this should be considered a 2 for quality—a 3 would be if there are variations in the task that allow students to do things differently.</i>		
<b>4. Uses space, time, and materials flexibly to address learner differences.</b> <i>(e.g., flexibility in classroom structure, access to variety of materials, ability to work with others when appropriate)</i>		

Teacher designs data-driven learning experiences based on readiness. <i>If this is not observed directly, pose questions to the teacher to see if the assessment was done at an earlier time and he/she can explain how that data is being used. See follow-up questions.</i>	Q	F
<b>5. Uses pre-assessment of student readiness to plan activities and/or group students.</b> <i>(e.g., adding activities to ensure understanding, grouping by readiness through use of formative assessment)</i>		
<b>6. Uses ongoing formative assessment.</b> <i>(e.g., exit cards, collecting materials to use in planning; adjustments based on students' needs)</i>		

Teacher differentiates instruction according to interest and learning profile.	Q	F
<b>7. Aligns options for tasks with student interests or preferences.</b> <i>(e.g., provide opportunities for students to show their interests/preferences, provides options for student choice)</i>		
<b>8. Uses activities that appeal to a variety of learning profiles.</b> <i>(e.g., consider amount of freedom students have to complete work [both classroom structure and working materials, amount of time, etc.]</i>		
<b>9. Makes connections between learning goals and students' interests/experiences.</b> <i>(e.g., use of community activities/popular culture)</i>		

Teacher promotes the development of a growth mindset.	Q	F
<b>10. Provides feedback focused on effort and/or progress toward a learning goal.</b> <i>(e.g., emphasis on quality of work and/or the process; lack of pressure, planning cards; encouragement to find or try new things)</i>		
<b>11. Frames mistakes as learning opportunities.</b> <i>(e.g., using student misunderstandings as examples, lack punitive language when students are confused/wrong about something)</i>		
<b>12. Emphasizes student growth instead of competition.</b> <i>(e.g., students are not pressured but encouraged; process is more important than the product; view that class is a team that helps each other)</i>		

Teacher emphasizes higher-level and/or critical thinking.	Q	F
<b>13. Asks open-ended questions or assigns open-ended tasks.</b> <i>(e.g., questions that DO NOT direct or guide students to a particular answer— “how do you know?”; can be verbal or provided in worksheets/packets)</i>		
<b>14. Encourages use of problem-solving strategies.</b> <i>(e.g., having students use classroom resources, showing them how to answer a question, providing a strategy)</i>		
<b>15. Encourages use of creative thinking strategies.</b> <i>Outside-of-the-box thinking (e.g., SCAMPER, analogies, synectics, visualization, lateral thinking, six thinking hats, etc.)</i>		
<b>16. Provides opportunities for discovery/inquiry.</b> <i>Should be planned opportunities for students to direct the discourse in the classroom, not just providing time to think.</i>		
<b>17. Requires students to give evidence of their reasoning for answer/solution.</b> <i>(e.g., context clues from the text, consistently asking for text evidence)</i>		

## II. Curriculum

Content/material is at appropriate levels of complexity for the gifted students.	Q	F
<b>18. Employs advanced reading or advanced content according to student ability and level of achievement—particularly for gifted students.</b> <i>(e.g., different levels of reading material)</i>  <i>Note that the material in the CLEAR curriculum is designed to be at an appropriate level of complexity for gifted students, but you can put this at a lower quality level if you feel like students understand a concept and the teacher spends too much time on it</i>		

There is clarity about what students should know, understand, and do.	Q	F
<b>19. Articulates/has articulated clear learning goals.</b> <i>Should be stated out loud/discussed with students—if just posted in the room, it should be a 1 for quality/frequency</i>		

Curriculum promotes understanding.	Q	F
<b>20. Creates opportunities for students to examine big ideas, essential questions, concepts, and/or principles.</b> <i>Should be clearly displayed or communicated either in the room or materials distributed to students</i>		
<b>21. Creates/employs curriculum that is organized conceptually.</b> <i>Lesson should fit into a logical sequence—the teacher should be able to articulate what students have done previously to support the lesson and where it fits in the structure of the unit/curriculum. Note that material in the CLEAR curriculum is designed to be organized conceptually.</i>		

<p><b>22. Creates/employs curriculum that provides opportunities for students to work with abstract concepts and ideas.</b>  <i>Note that material in the CLEAR curriculum is designed to provide these opportunities, BUT it may not be present in every lesson. You should score this based on what you feel you see in the classroom.</i></p>		
<p>Teacher emphasizes authentic knowledge, understandings, and skills of the discipline.</p>	Q	F
<p><b>23. Uses the language of the discipline.</b>  <i>(e.g., terms authentic to the study of English literature and writing; emphasis on the students acting as professionals in disciplinary fields—should be beyond typical terms like noun, adjective, sentence that are basic terminology, unless those are connected back to the discipline [like authors/writers use adjectives to make their writing more appealing])</i></p>		
<p><b>24. Includes instruction on skills used by professionals in the field.</b>  <i>(e.g., articulates strategies good readers use to understand a text or good writers use to check their work)</i></p>		
<p><b>25. Designs tasks to approximate the thinking and/or the doing of practitioners in the discipline.</b>  <i>(e.g., instructing students to have their work be publishable/professional level; context clues to define unknown words; emulating the style of a certain type of writing/author/poet—teachers should explicitly state in either the lesson or the interview that they considered how practitioners of English work)</i></p>		
<p><b>26. Encourages students to apply knowledge and skills of discipline in authentic ways/contexts.</b>  <i>(e.g., connections to what professional writers/critics/performers do; discussion of authors' processes—not just having the students read and write)</i></p>		
<p><b>27. Content reflects depth and complexity of the discipline.</b>  <i>(e.g., students are asked to describe their thoughts, perspectives, connections, patterns, trends, etc. that they see in literature/writing processes—should not be the teacher telling them how to think about texts or writing, but engaging students in the process)</i></p>		

## Appendix H

### Anecdotal and Field Notes

Examples:

#### Anecdotal Notes

**8:19** He starts reading a Shel Silverstein poem called "Sick"—pretty sure this is not in our unit. He reads this enthusiastically. One student responds immediately when he finishes—"she doesn't want to go to school" (the poem is about a student who has a list of ailments as to why she cannot get out of bed and at the end finds out it is Saturday and wants to play)—then he shows a video of a 6-year-old reading the poem. She is rather shrill/shouty, but the memorization is on point. The kids are laughing at the end. 12030303 says that is a little fun with poetry. Another child comments that they think she was losing her voice "because she was talking so loud."

I officially have no idea where they are in the lesson/unit.

12030303 asks if 12030301 had the one she wanted to share, and she said it is "Puzzle Piece"—he looks it up and it is "Picture Puzzle Piece" by Shel Silverstein. 12030301 starts to read it out loud. She also reads it enthusiastically. Student asks if there is a video of that once she finishes. 12030301 says one thing with this poem is that there is a lot of imagery—as they are talking about all the things the picture puzzle piece might be, can they see it in their minds? The puzzle piece, that might make up that picture? No real responses—quiet chatter amongst them (they are in a circle around the carpet in chairs). Another student asks for a video—a student responds that they do not have time. She takes the screen down.

#### Field Notes

Using the slides "what is one image or phrase from the poem that stuck in your mind."

The students are just in a large group answering questions that come up on the slides.

8:21 am. There is another teacher that just walked in

Students are all sharing answers about what the world would look like if they were tiny; some of the students are talking over each other, lots of fidgeting. Some shouting out.

There is definitely a relaxed environment.

8:26 a.m.  
Pretend you are an ant, "write about it"

Sharing clip of honey I shrunk the kids to demonstrate the idea of perspective.

"So, lets think about it" – turning on the sound.

## Appendix I

### Online Qualtrics Questionnaire

Potential questions for the questionnaire are listed below. This list, however, will evolve to reflect findings from the existing data set (i.e., teacher fidelity logs, observation logs, follow up questions, observation protocol, and anecdotal/field notes from the larger PLACE grant). I will begin the questionnaire as follows:

“Thank you for participating in this Qualtrics questionnaire. I am asking you to reflect on your experiences and interactions with the PLACE curriculum. The purpose of the questionnaire is to learn about your experiences with this place-based curriculum as part of my dissertation and scholarship in the field of rural gifted education. I will start by asking demographic questions followed by open-ended questions to which there are neither right nor wrong responses. Your experiences as a teacher offer valuable insights. Thank you for sharing your responses with me.”

#### Demographic Information:

1. Do you currently live in Hutton County?
  - a. If so, for how long have you lived in Hutton County?
  - b. If you do not live here, how many miles do you live from your school?
2. What are is/are your area(s) of endorsement for teacher licensure? Choose all that apply.
  - a. Elementary education
  - b. Gifted education
  - c. Middle education
  - d. Secondary education
  - e. Special education
  - f. Reading Specialist
  - g. Other: \_\_\_\_\_

3. What, if any, subject area endorsements do you hold? (Example: English, biology, French, etc.): \_\_\_\_\_
4. How many total years have you taught?
5. How many years have you taught in Hutton County?

Curriculum & Instruction:

6. Did you teach the curriculum with only gifted students?
7. Did you teach the curriculum with both gifted and general education students?
8. What are your overall impressions of the rural place-based gifted curriculum? (Impressions may include, but are not limited to, perceptions, feelings, beliefs, attitudes, responses, or any other description of your encounter with the curriculum.)
9. Describe your impression(s) at various points with the curriculum.
  - a. At the initial orientation and professional development session.
  - b. At the beginning of teaching the curriculum.
  - c. During the mid-point of the school year.
  - d. At the end of the year, after teaching the curriculum for a year.
10. Do you think gifted education is valuable for students in rural areas?
11. Did you find the “place” features in the curriculum were important for students in Hutton County? If so, in what way(s)?
12. If at all, in what way(s) was the curriculum valuable?
  - a. For you as a teacher?
  - b. For your students?
  - c. For the gifted program?
  - d. For your school?
  - e. For the community?

- f. Other?
13. Are you teaching the curriculum now?
- a. Why or why not?
14. Are you likely to use the curriculum in the future?
- a. Why or why not?
15. What effect, if any, did the curriculum have on:
- a. Your day-to-day instruction?
  - b. Your planning?
  - c. Your interaction with gifted students?
  - d. The gifted program and services at your school?
  - e. Gifted students? (This may include but is not limited to students' behavior, attitudes, enthusiasm, etc.)
  - f. General education students? (This may include but is not limited to students' behavior, attitudes, enthusiasm, etc.)
  - g. Other: \_\_\_\_\_
16. What benefits did you find with the curriculum?
17. What challenges did you encounter with the curriculum?
18. What strengths did you note with the curriculum?
19. What weaknesses did you note with the curriculum?

Conclusion:

20. Are there other thoughts about the curriculum that you wish to share?

## Appendix J

### Interview Guide Draft

“Hello \_\_\_\_\_. I am Michelle Rasheed from Virginia Tech. Thank you for participating in today’s interview. This interview, like the online Qualtrics questionnaire you completed, is designed to help me understand your experiences and interactions with the rural place-based curriculum designed for gifted students. As with the questionnaire, responses are neither right nor wrong. You are encouraged to share information as you recall and reflect on your experiences and interactions with the curriculum. I will audio record your responses only with your consent. (Show line for signature on this sheet.) While doing so, I will also take written or typed notes. If you do not wish to be audio recorded, that is fine. In that case, I will only write or type your responses. Do you have any concerns or questions before we begin? Let me know when you are ready to begin.”

Participants: Please complete the following prior to the interview:

\_\_\_\_\_ Yes; I agree to an interview that is audio recorded.

\_\_\_\_\_ Yes; I agree to an interview, but I do NOT want to be audio recorded.

\_\_\_\_\_ No; I do not agree to an interview.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed name: \_\_\_\_\_

School: \_\_\_\_\_ Grade(s) I taught the curriculum: \_\_\_\_\_

1. In the questionnaire, you indicated \_\_\_\_\_. Could you tell me more about \_\_\_\_\_?
2. In what way(s) did the curriculum \_\_\_\_\_ ?
3. I would like to know about your gifted students as they worked on the various projects.

(If needed, prompt with: interactions with the materials, with each other, receptivity, engagement, attitude, etc.)

4. What were typical modifications you made in teaching lessons from the curriculum?
  - How did you adapt the lessons for those modifications?
  - Why were those modifications needed?
5. Could you elaborate on the strengths of the curriculum?
  - Can you provide examples?
6. Could you tell more about the weaknesses of the curriculum?
  - What recommendations do you have with this curriculum?
7. How did you respond to the rural place-based emphasis of the curriculum?
  - Can you provide examples?
8. How did your students respond to the rural place elements in the curriculum?
  - Can you provide examples?
9. How would you describe the overall value of the curriculum with your gifted students?
10. Are there specific benefits that you observed with your gifted students?
11. Are you currently using the curriculum with your students?
12. Are you planning on using the curriculum in the future with your students?
13. Are there additional thoughts about the experiences and interactions with the curriculum you would like to share?