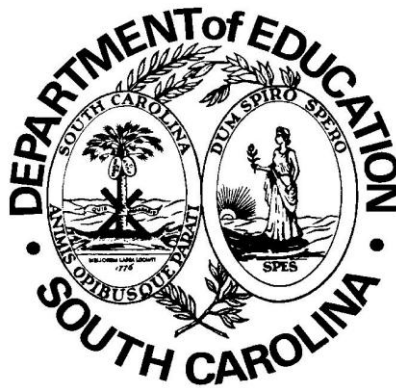


South Carolina Gifted and Talented Best Practices

Identification of Academically Gifted and Talented Students: Referral, Screening, and Assessment

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The identification process should be a needs assessment whose primary purpose is the placement of [gifted and talented] students into educational programs designed to develop their latent potential.

—E. Susanne Richert
Global Institute for Maximizing Potential
Brigantine, New Jersey

Identification

State Board of Education Regulation 43-220 specifies requirements and procedures for identifying gifted and talented students. As described R 43-220, the purposes of the identification process are

- to find students who display characteristics of the gifted and talented (i.e., ability or potential for high performance in academic areas);
- to assess the aptitudes, attributes, and behaviors of each student; and
- to evaluate each student for the purposes of placement. (24 S.C. Code Ann. Regs. 43-220.2(B)(1))

This description reflects South Carolina’s definition of gifted and talented in R 43-220: “Gifted and talented students are those who are identified in grades one through twelve as demonstrating high performance ability or potential in academic and/or artistic areas and therefore require an educational program beyond that normally provided by the general school program in order to achieve their potential” (24 S.C. Code Ann. Regs. 43-220.1(A)(1)).

South Carolina’s definition of gifted and talented students is in keeping with that given in the foreword to *National Excellence: A Case for Developing America’s Talent* (Ross 1993), which itself is based on the definition in the federal Jacob K. Javits Gifted and Talented Students Education Act of 1988:

Children and youth with outstanding talent perform or show the potential for performing at remarkably high levels of accomplishment when compared with others of their age, experience, or environment.

These children and youth exhibit high performance capability in intellectual, creative, and/or artistic areas, possess an unusual leadership capacity, or excel in specific academic fields. They require services or activities not ordinarily provided by the schools.

Outstanding talents are present in children and youth from all cultural groups, across all economic strata, and in all areas of human endeavor.

“To put this definition into practice,” *National Excellence* continues, “schools must develop a system to identify gifted and talented students”—a system that operates in the following manner:

- Seeks variety—looks throughout a range of disciplines for students with diverse talents;
- Uses many assessment measures—uses a variety of appraisals so that schools can find students in different talent areas and at different ages;
- Is free of bias—provides students of all backgrounds with equal access to appropriate opportunities;
- Is fluid—uses assessment procedures that can accommodate students who develop at different rates and whose interests may change as they mature;
- Identifies potential—discovers talents that are not readily apparent in students, as well as those that are obvious; and
- Assesses motivation—takes into account the drive and passion that play a key role in accomplishment. (Ross 1993, 26)

In undertaking the identification process, it is essential for district personnel to remember that, as 43-220 states, “gifted and talented students may be found within any racial, ethnic, or socioeconomic group; within any nationality; within both genders; and within populations with physical disabilities, learning disabilities, or behavioral problems” (24 S.C. Code Ann. Regs. 43-220.2(B)(2)).

To be in compliance with Title IX and the Office for Civil Rights, district personnel should monitor referral, screening, and eligibility data in terms of the previously referenced groups to determine where underrepresentation might occur in the district and to implement strategies to ensure that all students have equal access to referral and are screened with valid, reliable, and appropriate assessments.

R 43-220 describes *identification* as a multistep process that must include the following:

1. notification of parents/guardians regarding gifted and talented program services and identification procedures;
2. training and guidance regarding the characteristics of academic giftedness for teachers and other district staff involved in the identification process;
3. referrals from administrators, parents, teachers, and students;
4. screening of all students with aptitude and achievement measures;
5. assessment and reassessment of student eligibility; and
6. evaluation of student data for placement.

This resource document provides an explanation of the entire identification process. Included in the appendix is the sample “Referral-Screening-Assessment Student Profile Sheet,” which can be used to facilitate that process.

Notification

According to R 43-220, school districts must provide parents/guardians with effective, written notice of the gifted education program's existence, its screening and referral procedures, and its eligibility requirements (24 S.C. Code Ann. Regs. 43-220.2(B)(6)(b)(1)). The school district must issue this notice annually with the same level of importance that it does for other significant district activities, policies, and procedures.

Methods for disseminating this notification include brochures and flyers that are distributed during school registration and the inclusion of the notice in the school's student handbook. To ensure broad awareness of the gifted and talented program, the district may wish to use mass media and technology to provide notice throughout all segments of the community. Along with the distribution of written notice, districts may wish to conduct annual meetings to inform parents/guardians about the program and such related issues as the characteristics of academic giftedness and the role of parents/guardians in the identification of gifted and talented students.

Districts must make certain that parents/guardians of underrepresented students receive effective notice of the gifted and talented program. According to a national survey on identification practices, underrepresented groups include economically disadvantaged students, culturally diverse students, students with minimal proficiency in English, males (when identifying verbal ability below grade five), females (when identifying mathematical ability), intellectually creative students, academically underachieving students, and physically handicapped and learning disabled students (Alvino, McDonnell, and Richert 1981).

At a minimum, notification should contain these components:

- (a) the definition of the term *academic giftedness* as put forth by R 43-220 and the State Department of Education;
- (b) the purpose of the gifted and talented program and a description of the district's program models and services;
- (c) a description of the identification process and eligibility criteria (with an explanation of Dimensions A, B, and C as delineated in R 43-220);
- (d) an explanation of the referral process, specifying who may refer a student and how and when a referral can be made;
- (e) a discussion of the screening process, explaining which tests are used, who is tested, and when the testing is done;
- (f) a statement of nondiscrimination or assurance of equity of opportunity for participation (see the sample statement in the appendix); and
- (g) a description of the process for obtaining additional information regarding identification procedures and program services, as well as a clear statement of the process by which

parents/guardians may raise concerns with respect to identification, evaluation, and services.

The district should employ various strategies to determine the effectiveness of the notification procedure. For example, the annual written notice may include a form for parents to sign and return as an acknowledgement that they have received the notice. The district might also periodically conduct parent surveys to assess awareness of the gifted and talented program and to solicit suggestions for disseminating program information.

Training and Guidance

In addition to the notification requirements for parents, R 43-220 mandates that school districts provide training and guidance regarding the characteristics of academic giftedness for teachers and other district staff involved in the identification process (24 S.C. Code Ann. Regs. 43-220.2(B)(6)(b)(3)). Administrators, guidance counselors, and teachers all require knowledge of the characteristics of gifted and talented students.

To assist districts with their training efforts, the State Department of Education has created a staff development resource entitled *Gifted Students: Who Are They?* Copies of this document, which is appropriate for use with the total school staff, are available from the state's gifted and talented coordinator in the Office of Curriculum and Standards.

Districts should incorporate initial awareness of gifted students in their orientation sessions for new teachers. In addition, annual presentations and discussion on the nature and needs of gifted children should be conducted at each school to ensure that the knowledge base of administrators, guidance counselors, and teachers continues to grow.

Referrals

Referral procedures ensure that students who have demonstrated ability or potential for high performance in academic areas will have access to the gifted and talented program. In accordance with R 43-220, the district's procedures must allow for referrals from administrators, parents, teachers, and the students themselves (24 S.C. Code Ann. Regs. 43-220.2(B)(6)(a)).

Districts should select or develop referral forms that clearly describe the characteristics of gifted and talented students. These referral instruments should be relevant to the socioeconomic characteristics of the district's students and should include characteristics that are specific to the underrepresented groups in that district. As delineated in the "Notification" section, above, underrepresented groups in general are economically disadvantaged students, culturally diverse students, students with minimal proficiency in English, males (when identifying verbal ability below grade five), females (when identifying mathematical ability), intellectually creative students, academically underachieving students, and physically handicapped and learning disabled students.

The district’s referral instruments should be easily accessible to administrators, parents, teachers, and students. Private test results may be considered for referral purposes, but they may not be used to determine eligibility for the gifted and talented program.

Districts must collect and maintain records of all student referrals for use during the assessment process and annual reporting. Fields in the Curriculum and Standards Atom of SASI are available to collect and report these data. Districts may use the software program called Gifted Identification Forms and Tasks (GIFT) for collection of these data on referrals as well.

Screening

R 43-220 specifies that districts must screen all students with regard to aptitude and achievement (24 S.C. Code Ann. Regs. 43-220.2(B)(6)(a)). Census testing (i.e., the testing of *every* student) for both aptitude and achievement should be administered to all second-grade students in the state.

It is recommended that census testing also be conducted at points of significant programmatic changes for students (e.g., from an elementary pull-out program to a middle school special class with a specific subject-area focus).

As a best practice, census testing for aptitude and achievement is conducted on a yearly basis for the sole purpose of finding additional students for the program. Such testing may *not* be used for the removal of students who are already placed in the program. Once identified, students do not have to requalify for the gifted and talented program each year.

Whether or not additional census testing is done, the district should develop procedures to ensure that students who have not previously qualified for the gifted and talented program are not overlooked, that students who move into the district have the opportunity to be considered for placement, and that underrepresented student populations are assessed with appropriate instruments.

CRITERIA USED IN THE SCREENING PROCESS

R 43-220 explains the criteria for the identification of gifted and talented students in terms of three dimensions (see 24 S.C. Code Ann. Regs. 43-220.2(B)(7)(c)(1–3)).

Dimension A: Reasoning Abilities

Reasoning abilities are those higher-level cognitive processes that reflect general aptitude for thought—strategies such as inferring, analyzing, and problem solving. For the purposes of identifying students with high potential in this area, nationally normed individual or group aptitude tests must be employed. Students must demonstrate high aptitude (93rd national *age* percentile or above) in one or more of the following areas: verbal/linguistic, quantitative/mathematical, nonverbal, and/or a composite of the three.

NOTE: Students may qualify for the academically gifted and talented program solely on the basis of their composite aptitude scores. Students who meet or exceed the 96th national age percentile composite score (placement into grades three through twelve) or the 98th national age percentile composite score or higher (placement into grades one through two) are not required to meet any other criteria (see 24 S.C. Code Ann. Regs. 43-220.2(B)(5)(c)).

Dimension B: High Achievement in Reading and/or Mathematics

The term *achievement* refers to academic performance in the areas of reading and/or mathematics. Students must demonstrate high achievement in at least one of these areas as measured by nationally normed achievement tests or by the South Carolina statewide assessment instrument PACT (Palmetto Achievement Challenge Tests). The term *high achievement* is defined as the 94th percentile or above on the nationally normed tests or a score at the *advanced* level on the PACT. Approved subtests for nationally normed achievement tests are reading comprehension and/or mathematical concepts and problem solving. On the PACT, the only approved subtest is the reading portion of the English language arts test.

Dimension C: Intellectual/Academic Performance

Intellectual/academic performance as defined is the student's demonstration of a high degree of interest in and commitment to academic and/or intellectual pursuits. Students may also demonstrate intellectual characteristics such as curiosity/inquiry, reflection, and persistence/tenacity in the face of challenge and creative productive thinking. The acceptable measures for placement in grades one through six are the verbal or nonverbal assessments by Project STAR. These test materials must be maintained and administered under S.C. Code Ann. § 59-1-445 (1990), "Violations of mandatory test security; penalties; investigations."

For placement in grades seven through twelve, the acceptable measure is the student's grade point average (GPA) in the academic disciplines: 3.75 points on a 4.0 scale.

NOTE: The only acceptable measures are those specified for each dimension. Private test results cannot be used for determining student eligibility, although they may be considered for referral purposes (24 S.C. Code Ann. Regs. 43-220.2(B)(7)(b)).

Students who meet the criteria in *two* of the three dimensions are eligible for gifted and talented services (24 S.C. Code Ann. Regs. 43-220.2(B)(5)(b)). Aptitude test results alone can qualify a student for placement. (See Dimension A). No single criterion, however, can eliminate a student from consideration for placement in a gifted and talented program (24 S.C. Code Ann. Regs. 43-220.2(B)(7)(c)(4)).

In addition to specifying eligibility requirements related to each of the three dimensions, R 43-220 states the following with regard to student eligibility for gifted and talented services:

- Students who were served and qualified by state regulations prior to 1999 are eligible for services (24 S.C. Code Ann. Regs. 43-220.2(B)(5)(a)).
- Students identified (by state criteria) in one South Carolina school district are eligible for services in any South Carolina school district (24 S.C. Code Ann. Regs. 43-220.2(B)(5)(d)).

STEPS IN THE SCREENING PROCESS

1. Administer an aptitude measure to all students at the district entry grade level (e.g., grade two-testing for grade-three placement). For all other grades, districts may use data from an aptitude test that has been administered within the past two years. If two-year-old data are not available, then the district must administer an aptitude test. The aptitude measure used may be either an individual aptitude test or a group aptitude test. These aptitude tests must have been nationally normed *within the past five years* and must render national *age* percentile scores for verbal/linguistic, quantitative/mathematical, and nonverbal components, as well as a composite score.

In accordance with R 43-220, districts must ensure that all assessment tests are reviewed for bias, that these tests accurately assess the abilities/skills/potentials intended to be measured, that these abilities/skills/potentials are consistent with the definition of giftedness, and that test administrators are properly trained (24 S.C. Code Ann. Regs. 43-220.2(B)(7)(a)).

2. Administer an *achievement measure* to all students at the district entry grade level (e.g., grade two for grade-three placement). For all other grades, districts may use achievement test data that has been obtained within the past two years. If the data test data are over two years old, then the district must administer an achievement test.

Achievement must be measured either by a nationally normed test or by the PACT, South Carolina's statewide assessment instrument. The nationally normed test must render national percentile scores for reading comprehension and math concepts/problem solving. The approved tests for the PACT are the reading portion of the English language arts and the mathematics test. As with the aptitude tests, school districts must ensure that achievement instruments are reviewed for bias, that they provide valid measures of relevant abilities/skills/potentials, and that they are administered by trained personnel.

3. Ensure that all aptitude and achievement tests are accurately scored, and conduct a thorough review of test results. (See the "Assessment" section, below.)

Assessment

During the assessment phase, district personnel must review the data obtained from the screening and referral procedures to identify students who are eligible for gifted and talented placement. Some students will meet the eligibility criteria without further assessment; others, whose screening and/or referral information suggests that they are *potential* qualifiers, may require additional testing.

The table "Criteria Used in the Assessment Process" in the appendix delineates the criteria for placing students in the academically gifted and talented program. Note that within each dimension, the criteria may vary depending on the grade level of placement.

RECOMMENDED STEPS IN THE ASSESSMENT PROCESS

Step 1. Review screening test results—aptitude and achievement test data (Dimensions A and B)—for all students.

- 1a. Identify students who are eligible for placement on the basis of their *composite aptitude scores alone*. (See Dimension A in the table “Criteria Used in the Assessment Process” in the appendix.) These students do not have to satisfy any other eligibility requirements. Proceed to step 4.

Only aptitude tests that yield a composite score may be used for placement on the basis of aptitude alone. Aptitude tests such as Ravens and Naglieri, which do not yield composite scores, are inappropriate for this purpose.

- 1b. Identify students who are eligible for placement on the basis of *aptitude and achievement*. These are students who meet the criteria for Dimension A *and* Dimension B. (See the table “Criteria Used in the Assessment Process” in the appendix.) These students do not have to satisfy any other eligibility requirements. Proceed to step 4.
- 1c. Identify students who meet the criteria for Dimension B only. Consider the appropriateness of administering an additional aptitude measure to reassess those students. Students qualifying on the additional aptitude measure are eligible for placement. They do not have to satisfy any other eligibility requirements. Proceed to step 4.
- 1d. Determine which students meet the criteria for either Dimension A *or* B but not for both. Proceed to step 2.

Step 2: Review the academic performance data (Dimension C) for students who meet the criteria for either Dimension A or Dimension B but not for both.

- 2a. Identify students from step 1d who are eligible for placement on the basis of *aptitude and academic performance*. These are students who meet the criteria for both Dimension A *and* for Dimension C. (See the table “Criteria Used in the Assessment Process” in the appendix.) These students do not have to satisfy any other eligibility requirements. Proceed to step 4.
- 2b. Identify students from step 1d who are eligible for placement on the basis of *achievement and academic performance*. These are students who meet the criteria for Dimension B *and* for Dimension C. (See the table “Criteria Used in the Assessment Process” in the appendix.) These students do not have to satisfy any other eligibility requirements. Proceed to step 4.

NOTE: Districts must administer Project STAR to obtain verbal and nonverbal performance data for students entering grades three through six. All individuals who administer Project STAR must have received training in its administration. **South Carolina test security laws and guidelines apply to this assessment.**

Step 3: Review referrals.

- 3a. From the referrals, determine which students are eligible for placement on the basis of Dimensions A, B, and/or C—students identified in steps 1a, 1b, 2a, or 2b. These students do not have to satisfy any other eligibility requirements.
- 3b. From the remaining referrals, determine which students should be recommended for additional aptitude testing. These could be students who meet the criteria for one dimension only (either Dimension A, B, or C), as well as those whose referral information suggests that alternative measures should be used. Proceed to step 4 for these students.

Step 4: Forward to the evaluation and placement team the student profiles for all students identified as eligible for placement.

Send profiles for all students identified in steps 1a, 1b, 1c, 2a, 2b, 3a, and 3b.

NOTE: The assessment phase of the identification process must include a procedure for resolving disagreements between parents/guardians and the school district when a student is not identified as eligible for gifted and talented program services.

Evaluation and Placement

As described in 24 S.C. Code Ann. Regs. 43-220.2(B)(8)(a), the evaluation step of the identification process is the responsibility of an evaluation and placement team within the school or district. R 43-220 specifies that the team should be composed of a teacher, an administrator, and a psychologist (if employed by the district) at the least. It is highly recommended that the administrator be the district gifted and talented coordinator. The team may also include a guidance counselor and a community-related person whose training and expertise qualifies him or her to appraise the special competencies of students. Districts may choose either to have one team for the district as a whole or to have a team at every school. If the latter choice is selected, one team member should serve on all teams in order to ensure consistency within the district.

The evaluation and placement team is responsible for interpreting and evaluating student data in such a way that appropriate placement in the gifted and talented program is ensured (24 S.C. Code Ann. Regs. 43-220.2(B)(8)(b)). The team may require additional testing of a student before determining his or her placement in the gifted and talented program.

In addition, the evaluation and placement team must develop appropriate written procedures for removing a student from the gifted and talented program (24 S.C. Code Ann. Regs. 43-220.2(B)(8)(c)). The probation and removal policies of the district must conform to the state guidelines, which will be available January 1, 2005, from the Office of Curriculum and Standards. Appropriate counseling with the student, as well as conferences with the student's parents/guardians and teachers, must precede his or her removal from the program. Records of any assessment and evaluative measures and other student information must be maintained in a confidential manner.

Appendix

CRITERIA USED IN THE ASSESSMENT PROCESS	
DIMENSION A Reasoning Abilities	<p>Nationally normed individual or group aptitude test:</p> <ul style="list-style-type: none"> a score at the 93rd national <i>age</i> percentile or higher on verbal/linguistic, quantitative/mathematical, nonverbal, and/or a composite of the three <p>Students may be eligible for placement on the basis of their <i>aptitude scores alone</i>:</p> <ul style="list-style-type: none"> a composite score at the 98th national age percentile or higher for students entering grades one and two a composite score at the 96th national age percentile or higher (S.C. Code Ann. Regs. 43-220.2(B)(5)(c)) for students entering grades three through twelve
DIMENSION B High Achievement	<p>Nationally normed achievement test:</p> <ul style="list-style-type: none"> a score at the 94th national percentile or higher on approved subtests (reading comprehension and/or mathematical concepts and problem solving) <p>If the approved subtests are unavailable, use the <i>total</i> reading and/or <i>total</i> mathematics score.</p> <p>PACT:</p> <ul style="list-style-type: none"> <i>advanced</i>-level score on the reading portion of the PACT English language arts test and/or mathematics test
DIMENSION C Academic Performance	<p>Project STAR, for students entering grades three through six:</p> <ul style="list-style-type: none"> primary verbal or nonverbal: 16 or higher for students entering grade three; 18 or higher for students entering grade four intermediate verbal: 16 or higher for students entering grade five; 18 or higher for students entering grade six intermediate nonverbal: 22 or higher for students entering grade five; 25 or higher for students entering grade six <p>Grade point average (GPA) in the academic disciplines, for students entering grades seven through twelve:</p> <ul style="list-style-type: none"> 3.75 GPA or higher on a 4.0 scale

Students who meet the eligibility criteria in *two* of the three dimensions are eligible for gifted and talented services. Aptitude test results alone can qualify a student for placement (see Dimension A, above). No single criterion can eliminate a student from consideration (24 S.C. Code Ann. Regs. 43-220.2(B)(7)(c)(4)).

Referral-Screening-Assessment Student Profile Sheet

S.C. State-Funded Academic Gifted and Talented Program

Student's name: _____ SSN: _____
First Middle Last

Sex: male female Ethnicity: American Indian or Alaska Native Asian Black or African American
 Hispanic or Latino Native Hawaiian or Pacific Islander White Other

Parent/guardian: _____ Home phone: _____
area code

Mailing address: _____

District: _____ School: _____ Current grade: _____

Homeroom teacher: _____ Referred by [name]: _____

Relationship: teacher/administrator parent self
 other

Date screened: _____

Date referred: _____

Evaluation team decision: eligible ineligible reassess Date : _____

DIMENSION A Reasoning Abilities	DIMENSION B Academic Achievement	Dimension C Intellectual/Academic
Aptitude Measure	Nationally Normed Achievement Measure	Project STAR (Grades 3–6)
Name of aptitude measure used:	Name of achievement measure used:	Date administered:
Date administered:	Date administered:	
Student's national age percentile: <ul style="list-style-type: none"> • composite: _____% • verbal/linguistic: _____% • nonverbal: _____% • quantitative: _____% 	Student's national percentile: <ul style="list-style-type: none"> • reading comprehension: _____% • math concepts/problem solving: _____% If unavailable, then use <ul style="list-style-type: none"> • total reading: _____% • total math: _____% 	Student's scores: verbal: _____ nonverbal: _____
Indicate criterion met. <input type="checkbox"/> 98th or higher national age percentile composite score (grade 1 or 2) <input type="checkbox"/> 96th or higher national age percentile composite score (grades 3–12) <input type="checkbox"/> 93rd or higher national age percentile composite score (grades 3–12) <input type="checkbox"/> 93rd or higher national age percentile verbal/linguistic score (grades 3–12) <input type="checkbox"/> 93rd or higher national age percentile nonverbal score (grades 3–12) <input type="checkbox"/> 93rd or higher national age percentile quantitative score (grades 3–12)	Indicate criterion met. <input type="checkbox"/> 94th national percentile or above in reading comprehension <input type="checkbox"/> 94th national percentile or above in math concepts/problem solving	Indicate criterion met For students entering grade 3: <input type="checkbox"/> primary verbal 16 or above <input type="checkbox"/> primary nonverbal 16 or above For students entering grade 4: <input type="checkbox"/> primary verbal 18 or above <input type="checkbox"/> primary nonverbal 18 or above For students entering grade 5: <input type="checkbox"/> intermediate verbal 16 or above <input type="checkbox"/> intermediate nonverbal 22 or above For students entering grade 6: <input type="checkbox"/> intermediate verbal 18 or above <input type="checkbox"/> intermediate nonverbal 25 or above
Aptitude Retesting	Palmetto Achievement Challenge Tests	GPA Assessment (Grades 7–12)
Name of aptitude measure used:	Student meets <i>advanced</i> achievement level on the PACT:	Student's GPA in academic disciplines: _____
Date administered:	<input type="checkbox"/> reading <input type="checkbox"/> mathematics	At the end of what grade? <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11
Student's national age percentile: <ul style="list-style-type: none"> • composite: _____% • verbal/linguistic: _____% • nonverbal: _____% • quantitative: _____% 		<input type="checkbox"/> Student meets GPA criterion of 3.75 or higher on a 4.0 scale.
Indicate criterion met. <input type="checkbox"/> 98th or higher national age percentile composite score (grade 1 or 2) <input type="checkbox"/> 96th or higher national age percentile composite score (grades 3–12) <input type="checkbox"/> 93rd or higher national age percentile rank score (grades 3–12)		

NONDISCRIMINATION STATEMENT

TO BE INCLUDED IN WRITTEN NOTIFICATION REGARDING THE GIFTED AND TALENTED PROGRAM

[*Name of school district*] does not discriminate on the basis of race, color, national origin, sex, or disability in admission to, treatment in, or employment in its programs and activities. Inquiries regarding the nondiscrimination policies should be made to [*name of contact person, address, phone number*].

Works Cited

- Alvino, James, Rebecca C. McDonnel, and E. Susanne Richert. 1981. "National Survey of Identification Practices in Gifted and Talented Education." *Exceptional Children* 48: 124–32.
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