



Development and Implementation of
Written Education Plans (WEPs) Grant
Final Report

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PROJECT BACKGROUND

The purpose of the Written Education Plan (WEP) grant was to:

- Review the literature and research regarding the effective implementation of WEPs;
- Review other state policies on gifted WEPs;
- Conduct surveys and focus groups with multiple constituencies on the appropriate use of WEPs;
- Conduct case studies on three partner districts on current and future policies and practices involving WEPs;
- Develop a draft WEP toolkit for use in districts, and
- Develop recommendations for policy changes necessary to address the gap between current and best practice of WEP development and implementation identified within the project.

The grant team utilized four sources of information to clarify issues for Ohio for Written Educational Plans (WEP). The first was a review of the literature, the second was a review of policies by states that had either recommended or mandated WEPs for gifted students, the third was a survey of interested parties in the education of the gifted in Ohio (parents, students, administrators, and gifted professionals), and the fourth was a series of focus groups in three selected districts identified by the Ohio Department of Education that have either had success in implementation of WEPs or that had identified this task as important for improvement. The results of these efforts are synthesized in the project summaries below. In addition, the Project includes an outline of a Toolkit for districts to develop a set of policies; procedures and documents that will match district demographics and needs divided into a set of recommendations for basic, effective, and exemplary practices and additional modifications for elementary, middle school and high school programs. The recommendations will provide guidance on how to meet both the minimal requirements of best practices as defined by the literature review as well as a set of guidelines defined by the recommendations and limitations identified through surveys and case study procedures.

Other toolkit recommendations will include how districts that are rural, suburban and urban might want to modify forms and procedures. Some recommendations are provided for districts with high numbers of identified gifted students. The full contents of the toolkit are under separate cover.

The project identified four elements of the WEP that are germane to district policy development:

- The format of the WEP
- The process used to develop the WEP
- The process of implementing the WEP
- The evaluation of the effectiveness to the document and its process

SUMMARY OF THE RESEARCH AND LITERATURE REVIEW

The research and literature review examined both empirical research as well as recommendations by theorists and experts in the field. The review concentrated on the need for a WEP, the nature of gifted students and their educational requirements, current support for individualization, independent learning needs, preferences of gifted students for individual learning and pacing, and documentation of effectiveness for WEPs and independent learning. In addition, implications for the district development of WEPs are provided in summary. (Please see **Appendix A** for the full research and literature review.)

Findings reveal that there is strong history of support for the use of WEPs in provision of programs for students. The literature is nearly universal in supporting using the guidance of WEPs in provision of service, using assessment of current functioning in the area of giftedness, providing indications of the type of services required, using a collaborative process in developing WEPs, including student choices in learning, and developing independence. This history of theoretical support does not have a strong research based underpinning. Studies of the effectiveness of individualization of programming, independent learning and the effectiveness of the WEP itself have been relatively rare. In some areas, in the effectiveness of independent study for example, the have been mixed. This may be the result of the way effectiveness is gauged, the degree to which independent study is defined, fidelity of treatment, the inadequacy of instruments used to measure content growth, or the difficulty in measuring all the effects of that learning. It is the conclusion of the review that opportunities for independent learning should be a part of the WEP for gifted students, but that it should not be the sole mechanism for delivery of services.

The review also made recommendations in the form of five tables (included in **Appendix A** outlining:

Table 1. Grouping Options That May Be Specified in the WEP

Table 2. Acceleration Options That May Be Specified in the WEP

Table 3. Provisions That Develop Self-Direction and Independence in Gifted Learners

Table 4. Differentiated Instructional and Curriculum Adaptation Strategies for Gifted Learners.

Table 5. Examples of Data Sources to Document WEP Effectiveness

SUMMARY OF THE REVIEW OF STATE WEP POLICIES

Data Collection Procedures for WEP Policy Analysis

Policy language and relevant guidelines regarding Written Education Plans (WEP's) for gifted students were analyzed based on a national survey conducted by the state of Tennessee. (Please see **Appendix B** for the full review of State WEP Policies.) Data analysis occurred at two levels. The first level was the examination of a national survey regarding gifted education. Instead of initially examining each state's WEP policy individually, The Tennessee Initiative in Gifted Education Reform (TIGER, 2002) served as a secondary source to guide the initial analysis. This particular report was selected based on the pragmatic organization and detailed outline with narrative comments from states regarding Written Educational Plans. The TIGER report required states to respond to whether or not gifted students were entitled to Written Educational Plans (WEP's). Eleven states listed that all students were entitled to WEP's; 13 states reported that some gifted students were entitled to WEP's; 10 states were reported as a mixed response; and the remaining states either reported that WEP's were not required or they did not respond.

After examining the TIGER report, a second level of analyses was conducted based on the state responses. State WEP policies from those that reported that "some", "all" or "mixed response" on the TIGER survey were automatically examined. A sampling of policies from randomly selected states that reported "none" or did not respond to the survey, were also examined to ensure accuracy. Policies and administrative guidelines were submitted during a national state director's meeting or retrieved via Internet searches.

Findings

A review of the state policies pertaining to WEP's for gifted students ranged from no evidence of written educational plans required to very detailed plans and processes, similar to Individual Education Plans (IEP's) for special education students. **Table 1 of Appendix B** illustrates the findings from the analysis with relevant policy language, links to websites, and caveats as needed. Contrary to the TIGER report listings, nine states had evidence policy language that required WEP mandates; three states suggested WEP's but did not require them, and 1 state required WEP's for served students only. Eighteen states (many that reported "some" or "mixed response" from the TIGER survey) suggested that district local district plans were required to be submitted to the Ohio Department of Education (ODE) and might include WEP's; however, policy analysis did not require nor suggest WEP's for ODE Approval. It is believed that Written Education Plan question on TIGER was interpreted by some state representatives to be a local district plan, which could explain the discrepancy between the TIGER findings and the actual policy analysis.

Of the nine states with WEP mandates for gifted education, five of the states were explicitly under special education rules and guidelines. All nine of the states with mandated WEP's include a systematized process and detailed information in their

policies and guidelines for WEP implementation. Five states, those under special education guidelines, also refer to or display a standard WEP form for all districts.

Generalizations were derived from the nine states with explicit mandates and systematized processes as well as the three states that suggested WEP's. **Table 2** of **Appendix B** outlines the commonalities among the majority of the state policies regarding WEP expectations and policy language. As listed, key features of policies focused on the rights of the students and parents as well as the processes required of school districts to write and implement WEP's. Although WEP forms vary among states, most suggest the inclusion of student goals, measurable progress data, placement options matched to the student identification needs, and options for re-evaluation.

Conclusion

Those states that require a WEP are linked to special education rules and procedures. States require a systematized process in place for implementation, form standardization, and a detailed progress guideline for reporting WEP goals and outcomes. Even though the majority of states do not require a WEP, many do suggest or allow districts create one. When considering policy for WEP's states should ensure that there are systematized processes in place that outline the district responsibilities, the rights of the students and parents, appropriate placement issues, and procedures for re-evaluation.

SUMMARY OF DISTRICT WEP FORM ANALYSIS

The research team reviewed 536 Written Education Plans (WEPs) submitted by Ohio public school districts in response to the District Self-Reports requested in July, 2004, by the Ohio Department of Education (ODE). There were several aspects of the reports that were reviewed, and all districts had at least one common form that was utilized for gifted students in the district. (Please see **Appendix C** for a full report of the district WEP form analysis.)

Many of the districts used one of the four WEP forms that are on the ODE website, with either no changes or minor changes. Others seemed to follow a format from a common site or a published source. Six types of WEPs were found to exist at this time:

1. WEPs that used the ODE format, especially forms 1 and 4.
2. WEPs that were more service specific, with a listing of many options.
3. WEPs with a checklist of selected options, along with both affective and cognitive goals selection.
4. WEPs that utilized the forms from the R. Belt and B. Penfield (2000) guide.

5. WEPs that were similar to each other, and originated from a common source, such as an Educational Service Center.
6. WEPs that were highly individualized and very extensive in detail.

With the focus on the individualized WEP that Ohio requires, it was interesting to note that such WEPs were in the minority. Many of the WEPs were skeletal by design, and did not overtly seek parent or student input or approval. Student and program effectiveness data were often not recorded, and follow-up meetings for WEP update and revision were not mentioned. There seemed to be no common focus or direction for Ohio WEPs, although there were some selected examples of exemplary practices in many areas on some of the WEPs. It was evident that more guidance would be helpful for districts seeking to create a working document that would reflect their programs and practices, and allow them to have an excellent, individualized WEP for gifted students who are served.

SUMMARY OF THE SURVEY RESULTS

The survey was developed and distributed via the Worldwide Web using a data collection program called “Survey Monkey.” Members of the Ohio Association for Gifted Children along with interested parties were solicited for response in their roles as parent, teacher, coordinator administrator, or gifted student. In addition, the three partner districts were asked to disseminate the survey URL to constituents in these districts. (Please see **Appendix D** for detailed survey results.)

305 respondents returned the survey with parents and coordinators being the modal group (N= 94 and 90 respectively). Of 261 respondents, 140 indicated they came from suburban districts, 80 from rural, and 29 from urban schools. The modal number of students in the districts was from between 2000 and 5000 students. The survey results indicated that the most essential elements in a model district WEP are Opportunities for differentiated curriculum (81.8%), Opportunities to accelerate beyond the class curriculum (77.3%), and Areas of identified giftedness and link to service (77.3%). The least important were Recommended contact time with the GIS (10%), Performance benchmarks to stated goals (14%), and Parental involvement (16%). The parts of the WEP considered most relevant (combining responses of essential and highly relevant) were remarkably similar to those identified above with opportunities for differentiated instruction and accelerative curriculum ranked first and second again.

Most of the respondents were either unaware of or did not feel there was a stated connection between WEP goals and Ohio Academic Content Standards. 178 of 214 answering indicated that the person most involved with the WEP was the GIS with 116 indicating it was the Gifted Coordinator. Only 49 and 21 said parents and students (respectively) were involved. Responses were well divided about whether the WEP consisted of a checklist of services, a narrative of intervention strategies, both or other. Fully 3/4 of the respondents did not feel that the existing WEP was useful in assessing the

effectiveness of gifted services. When asked how the WEP could be improved for this purpose, 69.2% advocated measuring annual growth in achievement, 60.4% indicated a progress report on WEP goals, and 50.3% suggested use of a portfolio for assessment. Open-ended responses included notes that this was not possible given current staffing. Others pointed out that in their district the WEP was a planning document, not a document for evaluation. Still others responded that the document was of a quality too deficient to provide evaluation data. When asked what evaluation data is collected for the current WEP, report cards and test scores were the most frequently mentioned. A large number of respondents (111) skipped this question. A majority indicated that results of effectiveness should be reflected in the district self-report. (55.2% to 44.8%).

When asked with whom the WEP is shared, the highest number was accorded to the GIS with coordinators and parents receiving the next greatest numbers. About 30% indicated the principal. And when asked what the greatest barrier to effective WEPs, 75% indicated that it was a lack of time. 59% checked an inability to fund or deliver services. The question of signatures required suggested that the GIS, the Gifted Coordinator and the Parent should do so (in descending order). Some did cite a concern that a signature would have a binding effect and was not done in their district. 64% indicated that the student's identification/assessment information is included in the WEP and 24% indicated that they did not know. WEPs are written for accelerated students in 40% of the cases, 35.5% did not know. Asked if there was a connection between acceleration processes and WEPs, 73.3% said no or I don't know.

Queried about the impact of the rule which deleted specific time guides in Ohio Administrative Code, 35.6 % said it decreased time for service, 7.9% said it increased time, and 22.7% said it had no effect. Open-ended responses reflected the split as well.

The next section concentrated on parents. Most (82.4% of 102 parents) said they knew what a WEP was. Most also indicated that the purpose of the WEP was to individualize student instruction and curriculum. Most (73.8%) said that they were not involved in the process of development. Those that were involved (N=25) most said they signed the document. The WEP was not shared with 27.5% of the parents at all, while the same percentage indicated it had been shared in a conference. Parents were fairly evenly split about whether the WEP is valuable (49% said yes, 48% said no. Open-ended responses concerning the purpose of a WEP fell into several categories. A large number of parents did not know what a WEP was and reported they had never seen one. Another portion of respondents expressed the opinion that WEPs should have the force of law and to make them effective a mandate to serve would be needed. Still others indicated that the process was too cumbersome and took too much time. In a related vein, some felt that the current WEP was pro forma and was not adhered to by teachers involved. Some respondents pleaded for simplicity, local control of the form, and flexibility. An approximately equal number, however, said it should be a state mandated form with provisions similar to the IEP. In response to the question concerning local provisions for improving the WEP, open-ended responses included increased funding and release time for persons to fill out the WEP and for conferencing with parents. A large number cited accountability of teachers for the provisions of the WEP. Another theme that emerged

was cooperation of teachers and professional development that would facilitate this. Several respondents also mentioned administrator responsibility and training. Another theme that emerged is that the form itself does not lend itself to individualization. Several respondents complained that the form did not provide student goals that were measurable and that parents and students were not involved. This latter finding is probably related to an emerging theme in the entire survey, a lack of communication that appears to trouble a good many districts in the survey. When asked what provisions at the state level should be made to make the WEP more effective, the overwhelming majority of respondents cited funding and/or a mandate for service.

The survey revealed that the WEP is a potentially valuable document, but that it is not currently as helpful as it might be in many locales. The survey responses seem to indicate that it could be a guideline for providing differentiated service and accelerative learning. However, parents do not receive a large amount of useful information from it, and indeed often aren't informed about them. The imposition of a large amount of paperwork would seem to frighten both parents and teachers. The largest barriers to implementation were time and money. But almost as problematic was the lack of district/administrator/teacher training and support for gifted education. The poor quality of the WEP and the lack of utility could in many instances be traced to this cause.

SUMMARY OF THE OAGC FOCUS GROUP

Background and Focus Group Description

The Ohio Association for Gifted Children Board of Directors is composed of a diverse membership of teachers, parents and coordinators who work with gifted children and advocate for appropriate identification and services. They are elected to represent their various geographic areas of Ohio, as well as their interest areas. The Board discussion of the WEP Focus Questions occurred during the regular Board meeting on March 16, 2005, at the OAGC offices. 18 Members of the current Board were present.

Summary of Major Discussion

The WEP as currently used is not generally seen as the useful tool it is meant to be. It is often a bookkeeping instrument or even a barrier to wide-ranging services. It is not always a positive communication tool between parents and schools. There are four areas related to the WEP that seemed to emerge: the document format; the WEP development process; the implementation of the WEP; and the measures of both student and program effectiveness. Coordinators and parents experienced many of the same positives and negatives related to WEPs, with some varying insights.

The format needs to be different and more extensive than the current ODE models. There is a need for the student information to be varied, complete, and historical. The data needs require that districts incorporate the WEP form into district data systems. Longitudinal data and program history need to be maintained for each

individual student. Other format ideas included a need for forms useful for different service options, grade levels, and depth of services.

The process needs to be scripted but allow for district determination of the focus of the WEP. While the document is intended to address individual student needs, many districts limit the document to reiteration of current services in general. Further, districts will need to have internal discussions about the contract requirements for time spent in WEP development as well as determining a position regarding the legal implications of having signatures required (or not) as part of the process..

Implementation is seen as occurring in multiple settings for each student to be fully served. Again, contract requirements related to time for teacher involvement must be addressed by each district. In addition, the continuum of services needs to be considered, with the WEP for individual students addressing more than one kind of service at a time.

To provide an environment where the teacher and program may be evaluated as effective and where students make progress, there are issues that each district must also address. The number of students “served” with a WEP must be defined within the limits of the Rule, and the meaning of “periodic” needs to be locally addressed. The measures used to assess effectiveness must be chosen to reflect the goals of the services in each district, and which are appropriate for the student so served.

There are local and state policy issues which will need to be addressed to allow the WEP to be the integral part of the learning experience for each identified and served gifted student that is was designed to be. The tool kit developed should address the WEP in its entirety, and the issues inherent in format, process, implementation, and assessment of effectiveness.

SUMMARY OF THE DISTRICT CASE STUDIES

For a full report, please the full WEP Development and Implementation Grant Case Study included under separate cover.

Benjamin Logan Local School District

This WEP Case Study was conducted in the Benjamin Logan Local School District located in Logan County, Ohio. The district is rural in nature with approximately one fourth of the district designated as agricultural property; however, the district has a median household income of \$34,729, which places it higher on the income scale than most rural school districts in the state.

The district is designated as an “Effective” school district by the Ohio Department of Education, has an overall performance score of 91.3% and most recently has met its established AYP (adequate yearly progress).

The district currently uses a WEP that was developed several years ago by the educational service center in the county. Until this school year (2004-2005) the district received gifted coordination service from the educational service center. This past school year the district hired its own gifted coordinator and plans to hire an additional gifted teacher for the 2005-2006 school year. Currently the district employs one gifted teacher to work with identified students in grades 3-11.

The case study involves two focus groups, an administrative / teacher focus group and a parent focus group. Each focus group met for approximately seventy minutes to discuss the nature of WEPS in the district and methods and means for developing and implementing new WEPS in the district.

Each focus group maintained the need for WEPS to guide the gifted service provided by the district to those students receiving service in grades 3-11. Both groups agreed the WEP should be an easy to use teacher friendly document that contained specific instructional goals for students. The administrative / teacher focus group emphasized the following be included in the WEP: identification information, specific abilities, learning goals, assessment measures, specific indications of enrichment, acceleration or differentiation and a time frame for delivery of service.

Both groups agreed gifted personnel in the district should develop the WEP with input from classroom teachers, parents and students. Both groups felt the WEP development should be the responsibility of the district to insure service for identified gifted students in the district.

The administrative / teacher focus group stressed the importance of measurable goals in the WEP in order to measure student academic growth and to measure the overall effectiveness of the district's gifted program. Both focus groups agreed the WEP should contain specific instructional goals aligned with the state's academic content standards. Both groups stressed the need for proper professional development for teachers and administrators in the implementation of WEPS and gifted education in general in the district.

Cleveland Heights – University Heights School District

The Cleveland Heights-University Heights school district is comprised of two inner-ring suburbs of Cleveland. There are 7, 236 students in grades K-12 housed in eight elementary schools, three middle schools, and one high school. The district is 81.8% minority, predominantly African-American, with 49.2% of the total population on free or reduced lunch. Approximately 20% of the students in grades K-12 are identified as gifted and of these, approximately 44% are African American.

This case study included review of documentation provided by the district, conferences with the Gifted Coordinator, review of comparison district data, and three focus groups including parents, administrators and teachers (gifted and general education). Representatives from the teachers' union and special education services were

included. Overall key questions addressed included: the purpose of WEPS, relevant information to be included, how to share WEPS and with whom, and measurement of effectiveness. Revision of WEPS is part of an ongoing effort of the Cleveland Heights-University Heights School District to improve and expand its services to gifted and talented students and their families.

The current WEP was deemed inadequate by everyone involved, being limited in usefulness and scope. The new proposed WEP provided a useful and comprehensive outline for revision discussions and further planning. All participants agreed that the purpose of a WEP is to identify general needs of gifted students as well as specific individual needs and goals. It should be a “living, working” document that is created by the Gifted Coordinator and Gifted Intervention Specialists, shared with parents and classroom teachers and revised as necessary, but at least annually. Particular attention should be given when students move from building to building. It should be a valuable and useful communication and planning tool among all stakeholders: administrators, counselors, classroom teachers, gifted intervention specialists, parents, and students.

Areas to be included and addressed in the new WEP should include: present levels of achievement (including perhaps state academic benchmarks), areas of gifted identification, goals, individual student needs (particularly in areas of study skills and organization, behavior, and/or social/emotional development) and services. Profoundly gifted students, those who were grade-accelerated, and pre-school/kindergarten gifted students may need particular individualized attention in WEP creation and monitoring as well as planning appropriate services.

The WEP process should be streamlined to maximize efficient use of teachers’ time by including as much computer-generated information as possible and using the district data base for annual updating. For most gifted students, no WEP parent conference is necessary and WEPS can be shared with classroom teachers by groups of students in their class rather than by individual. For occasional individual students, these conferences may be necessary and when they occur, the participants (which should include classroom and gifted teachers, counselor, parent, and gifted coordinator) and outcomes should be documented in the WEP. For twice-exceptional students, well-written IEPs can include gifted services but clarification is necessary that these are not legally binding or mandated as are the other special education services in the plan. The building level gifted intervention specialist should attend the IEP meeting.

Plans to finalize review of the new WEP based on this research grant should proceed this spring and support implementation of the new WEP for the 2005-2006 school year for all identified gifted students who are served. Which pages of the proposed WEP should be included and organized and how detailed the information needs to be for groups of students as well as individuals should be included in this final review. A survey at the end of the year to parents, administrators, counselors, middle and high school students, and teachers (gifted and classroom) will contribute to continuous improvement of the WEP and the WEP process and document its effectiveness.

Lincolnview Local School District

Lincolnview Local is a small rural district in Van Wert County. The smallest of the partner districts, it has an average daily membership (ADM) of 874 housed in two buildings in one complex - elementary and high school. Free/reduced lunch percentages are 23% district-wide and 13% for gifted students. Access to resources outside the district is limited, and students interested in post-secondary enrollment options (PSEO) must travel to attend any college courses. Few clubs or after school activities for gifted students exist. The gifted staff consists of one .47 FTE Intervention Specialist who is shared with another district, and one .225 FTE coordinator who shares 4 districts: both are employed by the Western Buckeye ESC.

With a total of 111 identified gifted students, 22 are directly served by the GIS in grades 4-6 and 12 are directly served by the Coordinator in grade 7. Criteria for direct service are clearly identified. Gifted services are provided indirectly to other students in grades 4-12, with the highest concentration of ongoing service at the 4th-6th-grade level. Grades 7 and 8 have only sporadic service. High school service consists primarily of Honors and Advanced Placement classes. WEP's are prepared by the GIS for all of the 53 students who are served in grades 4-12, as well as for most of the remaining 58 identified students.

The Gifted Coordinator, Sandra Freeman, selected all focus groups which included:

1. Administrators (3): superintendent, elementary and secondary principals Administrators were very supportive of the WEP, but see many practical barriers to further implementation. They are interested in improving communication and establishing better low-cost procedures. They value their gifted students and the successful programs and have confidence in their staff.

2. Gifted staff (2): Coordinator (GC) and Intervention Specialist (GIS). While the GIS time is limited, they are a very dedicated staff that get to know each child individually and prepare all reports themselves. They are forward thinking and have already drafted a revised WEP.

3. Students (5): a class of gifted seventh graders who are working on a 10-week Challenger project The students clearly saw themselves as gifted beyond the confines of the school environment. They talked about how they want to be seen, what people influence their lives, and what things they feel are important to observe in their learning.

4. Parents (7): all except one have students in the district, representing elementary and secondary. One parent formerly had a student in the gifted program but is now home schooling. These parents are thoughtful and caring about both their children and the community as a whole. While they were frustrated about the lack of enough service for their children they showed no open hostility toward the administration and respected the expertise of teachers.

5. Teachers (5): two 4th grade and two 5th grade, with students in the pullout resource room classes. The Gifted Intervention Specialist participated as well. They did not recall having seen a WEP before. They thought the information was good, but not detailed enough to be helpful for teachers in the classroom. These teachers are clearly dedicated and just as clearly frustrated by the huge amount of paperwork they already have. They are committed to serving the children, but realize they cannot do it themselves and are looking for collaborative strategies.

Lincolnview has both the advantages and disadvantages of being a small district. Gifted staff get to know each students personally, yet teachers and parents feel left out; gifted staff are working hard with few resources; and administrators are busy with many things so trust the staff they have hired to do their job. Understanding of the WEP content and process was limited among all parties except the gifted staff. Communication problems notwithstanding, this district has a strong foundation for developing a model WEP. They have dedicated staff, thoughtful and understanding administration, concerned parents, and most importantly, a willingness to work for improvement. Resources of time and money are needed to help bring these parties together. With good leadership, they could develop additional service options and more effective procedures that would satisfy most needs.

The revised WEP document is more detailed than the original, and contains many of the suggestions already made by focus groups. The WEP should be immediately understandable by a layperson; self-contained in providing all the information needed to understand it; Place for both parent and teacher comments on child's strengths and interests. This should include: learning styles; learning and behavior challenges; any learning disabilities, whether diagnosed or suspected; a section for suggestions of follow up outside the school day – community resources, summer programs, family activities, resources to develop within the home, etc.; include performance-based assessments in instructional strategies, as well as arts-oriented differentiation strategies for arts-gifted students; include short-term and long-term goals; put goals/outcomes near the beginning so parents/teachers are thinking long-term.

WEPs are currently developed by the GIS with input from teachers when she asks them. Teachers, parents, and students all want some part in the creation of the individual document. Some ways to approach this might be: group parent meetings to go over the WEP process and solicit parent input; in-services for teachers to learn about WEP, and paid time for them to provide input on each student identified as well as make referrals for identification; include other school staff such as specials teachers, psychologist, counselor, etc.; brochure and power point presentation for teachers and administrators; process for non-school personnel to provide input on students: community members, outside teachers or tutors, etc.; WEP team meetings for each student (not time-efficient); student meetings to discuss WEPs and have them fill out relevant information about their strengths and needs; with representatives from parents, teachers, administration and students, work out a process to best meet the needs of the student.

Currently there is no accountability before the implementation of the WEP except within the gifted staff. The district should develop a process for implementation that will include all stakeholders, such as: provide teachers with professional development on differentiated instruction in each area of identification (including the arts); facilitate collaboration between teachers and GIS to prepare lessons for regular classes; help teachers develop a process for clustering students based on their own best teaching styles; create format for teachers to provide ongoing feedback to GIS on the progress of individual students; provide some compensation for teacher planning time.

Measures of student progress are seen primarily by gifted staff. The district could enhance measures of student effectiveness that incorporate feedback from all parties, such as: opportunities for student self-assessment; performance based-assessments, especially for arts-gifted students; classroom observations of self-regulatory behavior; ongoing communication between teachers and GIS; quarterly joint evaluations from both teachers and GIS including arts and specials teachers, if applicable; reports sent to parents who include their signature and an evaluation of the student's progress.

The district should generate timely reviews of the program by a group that includes: administration, teachers, gifted staff, parents, and auxiliary staff. It should include program goals, strategies, and evaluation in School and District Continuous Improvement Plans. Aggregate data generated by the WEPs could be reported to parents, administrators, school board, and teachers.

RECOMMENDED POLICY CHANGES BASED ON GAPS BETWEEN BEST AND ACTUAL PRACTICE IN OHIO DISTRICTS

Gaps Between Best Practice and Actual Practice

As the grant team reviewed other state policy, national research and literature as well as conducted state and district surveys/focus groups, a number of gaps were identified between best and actual district practice with regard to WEP development and implementation. These gaps were identified as the project team condensed best practice into five underlying elements driving by the following assumptions:

1. The WEP should be a tool that “drives” services for identified gifted students.
2. The WEP should be a “living document” and revised as necessary.
3. The WEP is a communication tool between students, teachers, and parents.
4. The WEP is an individual gifted student planning document, based on need.
5. The WEP should be used to measure the effectiveness of services provided.

For a full review of best practice WEP elements, please see Development and Implementation of Written Education Plans (WEPs) Grant Toolkit under separate cover. Also see **Appendices A – D** of this document for a full review of best and actual practices determined through this grant.

While there are clearly pockets of developing excellence in the use of gifted WEPs in Ohio districts, the majority of districts fall short of best practice. The gaps between the best practices identified and actual practice in the majority of districts emerged as follows:

<u>Best Practice</u>	<u>Actual Practice</u>
<i>The WEP is used as a tool that drives services for identified gifted students.</i>	Many, if not most, districts use the WEP as a tool to document students in a prescribed district program. Very clearly, district programs, largely dictated by funding and time limitations, continue to drive gifted services in Ohio districts.
<i>The WEP should be a living document and revised as necessary.</i>	In most districts, WEPs are generic in nature. The lack of participation by all necessary parties needed to fully realize the potential of the WEP document renders the WEP a document of record versus as a document that drives service.
<i>The WEP is a communication tool between students, teachers, and parents.</i>	The lack of communication and participation between gifted staff, administrators, classroom teachers and parents, is perhaps one of the most striking findings in the study. For a variety of reason (funding and time leading the list) the WEP continues to be a stand-alone document in many districts, with very little awareness and input from the appropriate parties.
<i>The WEP is an individual gifted student planning document, based on need.</i>	As indicated by the survey results, analysis of district WEP forms, and the case studies, the WEP in many districts tends to be “cookie cutter” in nature with very little attempt at individualization. The WEP largely in Ohio is used to document placement in current district programs rather than a documentation of services driven by individual student need.
<i>The WEP should be used to measure the effectiveness of services provided.</i>	The lack of true evaluation of services on both the district and student level was apparent in all areas reviewed by the grant team. Ohio appears to be moving with greater emphasis toward data driven educational policy decisions. Evaluation of WEP effectiveness needs to be included in this movement.

Recommended Policy Changes Based on Gaps Between Best and Actual Practice

While significant gaps are apparent between best and actual practice with regard to WEP development and implementation, changes in policy and practice at both the state and district levels can significantly close these gaps.

The underlying issues creating the gaps have both state and local implications for policy change. While many issues were quite minor and could be handled on a district basis, others would require a major shift in current practice and have implications at both the state and local levels.

Accountability

The movement to the WEP as the accountability mechanism was a major shift in accountability for gifted services. Prior to this change, the Rule required that students who were reported as served by districts, have at least five hours of contact time with gifted intervention specialists. While the movement to the WEP reflected a need for greater flexibility in providing service options, it is clear that there is concern across the board that the rigor provided by abandoning the time requirement may have weakened service in some districts. This is most evident in the results of the survey question, which asked about the impact of the elimination of the time requirement on service. Tellingly, less than 8% of respondents believed that the elimination of the time requirement resulted in increased service time to students. While many indicated that opening up the time requirement could result increased awareness of gifted students on the part of other staff aside from the gifted intervention specialists, it is clear that due to budget pressures at the local levels that others are concerned that districts service are being diminished. One respondent in the OAGC focus group indicated that service had dropped to ten minutes per week. While we do not recommend an outright return to the five hour contact time requirement, we do believe that other accountability measures need to enacted to ensure that services are rigorous:

- **District Report Card Indicator** – Districts should be rewarded for effective service to gifted students. The recommendation from the report Gifted in the 21st Century, which discusses the need to develop an indicator on the district report card should be implemented to ensure that gifted students are fully part of the accountability system. The indicator should include but are not limited to such measures as percentage of identified gifted students served, service contact time, annual performance growth measures, access and performance on higher level courses including Advanced Placement (AP), International Baccalaureate (IB), and PSEO (Post Secondary Enrollment Options), training levels of classroom teachers. Other measures of program effectiveness are outlined in the draft District WEP Toolkit. The Ohio Department of Education (ODE) may wish to incorporate these into an evaluation of district programs. **Primary Level of Policy Change: STATE**

- **Service Reporting** – From the case studies and focus groups, it is clear that reported levels of service often are misleading. Districts are reported as served students who are only served in one area of identification or who only served for a partial year. True levels of full service need to reflect how these services relate to identified areas of student need. Services provided on a partial year basis need to be reflected as well. The current reporting requirement allows for only two options of service levels: Served or Not Served. In order to fully examine what is truly happening at the district level, ODE should develop a system of service level options. This becomes increasingly more important as the value-added assessment component is incorporated into the state accountability system. In order to fully examine the performance of gifted students at the local level, it is critical that levels of service are clearly identified. **Primary Level of Policy Change: STATE**
- **Caseloads of Gifted Coordinators and Gifted Intervention Specialists** – Many gifted intervention specialists and gifted coordinators expressed, through the focus groups and surveys, the pressure of increasing student caseloads. While the current Rule is fairly explicit in terms of GIS to gifted student ratios (60:1), it is not as explicit with coordinator to GIS or coordinator to student ratios. Many gifted intervention specialists believed that districts under financial pressure are interpreting the caseload ratios very loosely. As this area was outside the WEP grant, we do not have specific recommendations as to how to address this issue. However, as a matter of accountability, we strongly recommend that ODE address this issue through review of best practice and current district practice. **Primary Level of Policy Change: STATE**

Classroom Teacher Training and Involvement in the WEP

Two issues emerged in the review of classroom teachers utilized as primary service providers to gifted students. While more districts are clustering gifted students in classrooms and using classroom teachers as the primary service providers, there is no set criteria for the level of training classroom teachers should have prior to taking on this role. Many respondents in the focus groups and survey indicated that classroom teachers often were not part of the WEP development even when they were expected to be the primary service provider. These are both very serious issues with major implications for service delivery.

- **Classroom Teacher Involvement in WEP Development** – We strongly recommend that classroom teachers who are involved in service delivery to gifted students be part of the WEP development process. Without input or buy-in from the service provider, the likelihood of appropriate service delivery decreases significantly. While we recognize that the development of the WEP is often an issue of collective bargaining in some districts, classroom teacher involvement is critical to the successful implementation of student WEPs. **Level of Policy Change: STATE and LOCAL**

- **Classroom Teacher Training** – The lack of appropriate training for classroom teachers serving as primary service providers is detrimental to the successful implementation of student WEPs. It was apparent from the partner district case studies, the OAGC focus group, and the survey that many classroom teachers who have taken on the primary responsibility of implementing student WEPs are woefully unprepared to do so. As more districts are moving toward an inclusion model of gifted services, the issue of training must be addressed. We recommend that state policy be developed to, *at the very least*, provide some levels of recommended training in specific areas for classroom teachers who are primarily responsible for implementing gifted WEPs. Perhaps, it is worthwhile to look at other states, where policies have been developed to include minimal clock hours of gifted education training for classroom teachers (eg. Texas requires 20 hours of gifted education for educators who work with gifted students). **Level of Policy Change: STATE and LOCAL**

Parental Involvement in the Development of the WEP

A very clear theme that emerged from the survey along with the case studies is the lack of communication with parents as well as overall involvement in the WEP process. While the importance of parental involvement is often stressed at both district and state levels, there is little evidence that districts encourage the input or even the review of gifted student WEPs. This lack of involvement can, in part, be explained by a reluctance to turn the WEP into a process approaching that of a special education Individual Education Plan (IEP). But it is clear that parents can and should play a role in the WEP process. The grant team has provided recommended levels of parental involvement within the Draft District WEP Toolkit. State policy makers should review whether it is appropriate to include within the Rule increased the role of parents in the WEP process as other states have done. **Level of Policy Change: STATE and LOCAL**

Guidelines for Evaluation of Effectiveness and Periodic Reporting

Through the case studies, the survey, and focus groups, the grant team observed a consistent disconnect between the expectation that student progress and district services should be evaluated on both a quantitative and qualitative basis and typical district evaluation. In fact, while survey respondents (almost 70%) overwhelmingly believed the student achievement gains should be measured annually, only 15% of districts reported using quantitative data to evaluate the success of student and program success. Survey respondents as well as individuals in focus groups also strongly felt that student progress should be measured against the goals of the individual WEP. Districts primarily report student progress through student report cards, which may include no measure of WEP goals. The grant team has prepared a number of more effective student and program options in the draft District WEP Toolkit, which is included under separate cover. We recommend that model policies be developed for use at the district level and that ODE

require more comprehensive evaluation requirements within the annual district gifted self-reports. Districts are becoming increasingly more oriented to the use of data-driven decision-making tools. Requiring districts to use data to drive gifted service decisions is a reasonable policy.

We also recommend that ODE provide more guidance to districts as to the appropriate types of reporting that should be required on a student basis. At this time, the majority of districts tend to use the WEP as documentation of a district level plan documenting a student's placement in a standard district service. Effective use of a WEP would detail individualized student services driven by unique student needs. ODE may wish to consider two levels of district documents to outline services. One document would merely describe district level services. The second document would reflect true individualized student WEPs. **Level of Policy Change: STATE and LOCAL**

Development of Electronic Tools to Support the WEP Process

A majority of district personnel indicated through focus groups and the survey, that the time was a major barrier to the effective development of the WEP. To a certain extent, the development of an effective WEP must necessarily take time. However, it was clear that some districts are much better able through electronic databases and other tools to take decrease the level of clerical work often imposed on gifted coordinators, intervention specialists, and other staff in the development of WEPs. We recommend that ODE develop some of these time-saving electronic tools to provide to districts who are unable to develop their own. Any database or tool developed should meet the EMIS data requirements for gifted student reporting. **Level of Policy Change: STATE**

Development of a Tool to Link Gifted Services to the Ohio Academic Content Standards

Feedback from the case study districts on the draft WEP Toolkit, overall, was quite positive. However, district staff indicated that the recommendation to tie gifted student differentiation goals to the Ohio Academic Content Standards was beyond the ability of most districts in Ohio. If Ohio is to make best use of these standards to ensure they are relevant for all students in Ohio, we recommend that ODE develop a tool to allow districts to appropriately modify the content standards through depth, breadth, and pacing. This will help to ensure that the standards are relevant for gifted students throughout the state. This is particularly important for districts that do not have the staff or time to modify the standards to fit the needs of gifted students. **Level of Policy Change: STATE**

Appendix A

Written Education Plans (WEPs)

A Research and Literature Synthesis

Written Education Plans A Research and Literature Synthesis

Dr. Karen Rogers, Principal Investigator

An exhaustive search of the ERIC, PsychInfo, and Dissertations Abstracts International electronic databases was conducted in order to locate all research studies and literature with a focus on written educational plans (WEP), from 1965 to the present. This search resulted in 402 written documents that were categorized into four aspects of written education plans. This review is complemented by a separate review of state policy included in the next section. The first category included the *literature* (including theoretical pieces, persuasive pieces about the importance of WEPS, and descriptions, and descriptions of what a unique plan for a gifted learner should contain) and *research studies* (that is, systematic data collection and analyses) on *individualization* with gifted learners. The second category contained the literature and research on systematic opportunities to provide opportunities for the gifted learner to *work independently* or individually. The third category included policy development from the literature and research on the WEP. Each of these will be summarized and synthesized below.

It is important to provide some definitions as they relate to the WEP. Individualization means to vary the pace or content of the curriculum to meet an individual student's need. Much of the literature points to the use of the WEP to accomplish this task. Independence means that the student is working on tasks in which the content of learning, the processes of learning, the product of learning, and or the evaluation of the product are selected by the student (e. g. Treffinger, 1986). Independence is one mechanism for individualization and a potential option on the WEP.

Independence may include options in which the student engages in individual or small group investigations. Individual learning refers to the preference of many gifted students to work by themselves controlling the pace or direction of learning. It may be reflected in the WEP as a learning style, or if it is socially maladaptive, as a target on the WEP for change.

Individualization for Gifted Learners

The Literature

Although many journal articles either begin or end with a call to “individualize” for either “all” or “gifted” learners, the actual literature on how to develop an individualization program or set of strategies for doing this for gifted learners is sparse. In a theme issue of *Understanding Our Gifted*, Gilman and Greene (1994) described the individualized programming of one highly gifted child’s school program, with specifics on talent identification, curriculum modification, course and grade acceleration. Even as a case study, however, no data describing actual effects were included. Finally, Butterfield, Kaplan, Meeker, Renzulli, Smith, and Treffinger (1979) edited a book of readings, *Developing IEPs for the Gifted/Talented*. In this book, IEP was the acronym for Individualized Education Programs, analogous to the WEP, and most of the chapters focused on how to set up an individualized program for large groups of gifted learners. Butterfield’s chapter argued that Public Law 94-142 covered gifted children as well as those with other special needs and therefore the gifted had a legal right to an individualized, appropriate, free public education in the least restrictive environment; this right was safeguarded through due process of law. This position has not been successfully litigated, however (Karnes &Marquart, 2000). Renzulli and Smith

reiterated their model of compacting and implementation of the Enrichment Triad Model based on initial assessment of a high ability student's strengths, task commitment, and creativity. Meeker applied the Guilford Structure of the Intellect model using her instrument of assessment to diagnose specific areas of remediation for individual gifted learners. When individualization has been the central topic of an article, it has focused on either a specific talent area such as mathematics (e.g, Follis & Krockover, 1982) or foreign language (e.g., Whitton, 1998; Hooker, 1968), or on how individualization will meet the extraordinary needs of a special population, such as American Indian (Cohen, 1987), the culturally diverse (Spartanburg College, 1968), or the twice exceptional child (Whitmore, 1987). One extraordinary article described the eight steps of scaffolding a student's learning environment to facilitate student independence, arguing that this scaffolding will generalize to other contexts readily (Larkin, 2002).

The Research

Nasca (1981) studied the verbal interactions of trained and untrained teachers to determine the quality of their response patterns and willingness to individualize for gifted students, finding trained teachers more likely to engage in these behaviors in a positive manner. Callahan and Smith (1990) used the Keller model of personalized instruction with a small group of junior high students and found that the experimental group completed the units of study more quickly and were more successful on the final test. In using self-instructional creativity materials with gifted 4th – 6th graders, Huber (1978) reported enhanced divergent thinking abilities but no achievement score gains in comparison to the controls. In viewing individualization as the provision of a mentor who helps guide a gifted student through a unique course of study, Gladstone (1987) reported

gains in motivation among gifted mentees, but no other direct academically-related gains. Finally, Parke's use of self-instructional mathematics tasks with 22 K-2 gifted students showed gains in achievement when compared with a high achieving control group (1983).

Summary

The need for individualizing both a gifted child's curriculum, that is, what s/he will learn, and the child's instructional delivery has been talked about, mostly in some standard phrase (e.g., "we must consider individualizing for the child with gifts") or structure (e.g., description of a mentoring program or compacting curriculum as "individualizing for the child") quite widely, but arguments for individualization that are in-depth are few and far between. When research was conducted on self-instructional programs or materials, some gains in a specific area of achievement were reported, but in general attitudinal gains may be the only by-product thus far documented when individualization is operationalized as self-instruction or mentorship. It is clear much needs to be developed in this area and as Ohio considers individualization as a centerpiece of a WEP, documentation of outcomes of the strategies incorporated in the WEP as a gifted student's individualization must be undertaken.

Even so, the literature does indicate elements of a WEP that probably are essential to employ. It also indicates some of the persons who should participate in the process as well as the skills and attitudes of those responsible for developing and implementing them. A full discussion is included in the Practical Implications and guidelines below.

Opportunities for Independent Learning or Independent Study for Gifted Learners

The Literature

The literature recommending the use of independent study and opportunities for independent learning was very rich, but in most cases did not detail the specifics of how these opportunities should be shaped for maximum growth. Nor was there a consistent prediction of what the outcomes for gifted learners should be. Among the 130 articles on independent study, many were guides for setting up such a program, complete from identification through evaluation of outcomes (n= 37). Two articles recommended independent study for reading/language arts (n=8), or no mentioned subject domain (n=36), or science (n=15), math (n=3), or across several subject areas (n=20) or in general creativity (n=1) and art (n=2) or foreign language (n=3) or social studies (n=9). Three articles dealt with how successful these opportunities can be for very young gifted children, but the majority described programs in the junior or senior high years. The models of Betts, Renzulli, Feldhusen, and Treffinger tended to provide the most structure to the setting up of a program of independent study, with Treffinger having the greatest number of supporting articles. The efficacy of independent study with underserved groups was also a topic of four articles. The “best evidence” in this subsection of literature about independent study was a chapter by Johnsen and Goree (2005) in which they specify not only the importance of having such a program and its benefits for gifted learners, but how to actually set up one, monitor it, and determine if outcomes for individual learners have been achieved.

Eleven articles described the preference for independence and independent learning opportunities among gifted learners. Haensley (1980) reported on means for

assessing the task commitment of gifted students, a critical element if an individualized program is set up. She argued that task commitment can be accurately assessed as early as kindergarten on through middle school. Jeter & Chauvin (1982) argued that the independence-seeking learning style of gifted learners lends itself to considerations for individualization and that independent study is the “most effective” method for providing that individualization. Shore (2000) argued that independent study can be quite effective for gifted learners within a regular classroom setting, but it must be structured and differentiated to address these students’ conceptual and higher order thinking needs. The concept of independence was defined by Bernstein (1969) to suggest that it is a mix of habits of thought, ability, attitude, and behavior that produce a person willing to structure his/her own learning activities. He believed that participation in independent learning will improve these “habits of mind” (i.e., self-reliance) if the child is fairly independent to begin with, but other instructional methods must be considered for dependent learners. Rogers (1986) reviewed extant research drawing several conclusions about the need for independence and its connections with locus of control among gifted learners. McClain and Andrews (1972) argued that the need for independence among gifted learners is excessive and often thwarts their capacity to live rewarding intellectual, aesthetic, and social lives. Strop (2002) considered the difficulties gifted children confront with their need for independence, low frustration tolerance, and heightened sensitivities, making it difficult for them to maintain healthy interpersonal relationships. Franks and Dolan (1982) established the distinctive characteristics of gifted learners, their persistence, need for independence, and fragile self-concept, suggesting that traditional schooling makes it difficult to match these students’ styles with their learning environments. Three articles

linked independence or its lack to gifted children who are underachieving (McHolland, 1971), having learning difficulties (Scott, 1988), or culturally “at risk” (Runco, 1993). Independence appears to be the variable underpinning the child’s lack of success: the underachiever who refuses to produce when the demand comes externally, the learning disabled who needs to learn how to become independent and persistent, and the “at risk” student who has difficulty tolerating conformity, rigid structure, and reliance on verbal materials and rewards.

The Research

The search located 29 studies that evaluated programs in which independent study was the primary service provided to gifted learners or that measured the impact of experimentally providing gifted learners with an independent study program. Among the evaluations, achievement, attitudinal, and self-efficacy outcomes were assessed. Bernstein (1969) reported that for the University of Chicago Laboratory School’s program of “teaching for independence”, only those gifted learners who were already self-reliant seemed to grow in that kind of behavior. Other outcomes, such as academic interest, conceptual skill, locus of control, and divergent thinking did not change significantly. However, Pentelbury (2000) found growth in independent learning skills as a result of an independent study program in Calgary, Canada. In a qualitative case study of 10 gifted 9th grade students, it was discovered that only three could identify a clear focus for their respective studies, perhaps because there was little collaboration between the teacher, the librarian, and the community library system (Bishop, 1999). In a comparative study of the effects of independent study in a private Illinois school, mathematics and reading/language arts did tend to allow more opportunity for

independent study and independent projects; these two domains were reported by students and teachers as more likely to focus on thinking processes and incorporate both content mastery and process/product models of curriculum development (Villani, 1998). The use of independent study in the teaching of foreign language at the University of Illinois's University High School found that using microcomputers to facilitate these studies resulted in greater levels of self-direction, greater discovery of the patterns of the language studied, and greater awareness of the target culture (Curtin & Shinall, 1987). Craig (1988) reported that computer-assisted, individualized instruction in music notation with gifted primary children resulted in high achievement test scores on a test of note reading and better preparation and presentation of a recital piece. Schack (1989) examined the relationship of self-efficacy and independent investigations with 294 gifted grades 4-8 students, finding substantial improvement in self-efficacy and creative production after the use of mini-courses designed to teach the children to pursue an independent study in their area of interest. Use of the Purdue Three-Stage Model with gifted students in pursuing independent studies resulted in no differences in self-concept for those participating and their controls, although those in the program showed greater creative thinking (Kolloff & Feldhusen, 1984). A career exploration program using independent study coupled with an internship found this effective with junior high gifted students in focusing their career interests and planning and in improving critical thinking (Owens, 1980). Whittaker (1974) reported that two gifted students allowed to pursue mathematical investigations on their own showed remarkable advanced content and skill as a result of their studies. In a 4-year evaluation of a special independent study program in which high school gifted students were released from other classes to pursue their

interests showed gains in school satisfaction, study habits, and library skills, but no difference in academic achievement when compared with controls (Lodato, 1968). Lapp (1972) in the final evaluation of a program of independent study for 56 gifted high school students reported that these students had strong independent study skills and were more likely to engage in critical thinking and conceptual discussions of what they had learned than their controls. Purkey (1967) evaluated a special independent study program for gifted underachievers in California, finding no difference in achievement or self-estimated (awareness) characteristics. In a second study (1968), Purkey found modest evidence that this program for underachievers made affective gains for them in self-confidence, self-discipline, positive feelings toward others, and effective interpersonal relations.

Among the remaining research studies on independent study, the findings were fairly similar. Simmons (1971) reported that there were no differences in achievement in biology between students in a conventional teacher-directed class and in a combination independent study and teacher-directed class. Clasen (1983) compared four different instructional methods teaching the same content with random student assignment to the four delivery methods: independent study, lower-order questioning, higher-order questioning, and divergent production questioning. No lasting differences in achievement were noted, but the independent study group were more self-directed, even though they scored lower on one achievement measure. Campbell's (1985) descriptive study of 14 of the most successful schools in the New York metropolitan area showed that these schools used "phantom classes" (no texts, no tests, just independent study time) in order to challenge their brightest students. In a comparison of third grade curriculum units

between students taught the content by a teacher or learning it independently, Carter (1986) found inconclusive results for the independent learning unit. Two studies involved surveys: Weber (1981) surveyed 586 Canadian school boards, finding that independent study was the most popular type of gifted program except for the province of Alberta, where part-time gifted classes are more widely used. Alexander (1966) found in his survey of secondary schools in Florida that teachers are more likely to talk about using independent study and to consider it for students of higher ability, but little evaluation of its effects had been conducted.

Twenty-four studies were located that attested to the inclinations of intellectually or academically gifted learners for working individually or independently. Two studies characterized the learning environment in which gifted learners are more likely to thrive, indicating that an emphasis on independence was more often found in classrooms with gifted students in them (House, 1971; Steele, 1970). For the 13 studies that investigated the attitudes and preferences of gifted students, the personal preference for independence was measured by survey (Albert & Runco, 1989; Childs, 1981; Lundy, 1978; Midgett & Olson, 1983; Renzulli & Gable, 1976; Rizza, 1999; Stewart, 1981) and by causal-comparative designs (Chan, 2001; Kerr & Colangelo, 1988; Pederson & Askins, 1983; Ristow, 1985; Saurenman & Michael, 1980; Titus & Terwilliger, 1990). In general these studies suggested that the difference in independence was in degree, not kind. In studies of the characteristics and attitudes of various ages and kinds of gifted individuals, independence was also the key difference, whether between gifted and regular kindergarteners (Perez, 1982), preschoolers (Kitano, 1985), career-focused and homemaker adult women (Rodenstein & Glickauf-Hughes, 1977), high school seniors

(Powers, 1982), college honors and regular students (Friedlander & Watkins, 1984), achievers and underachievers (Rimm & Lowe, 1988), or elementary age high ability and average ability readers (Henderson & Long, 1966). The singular difference between the first named comparative group and the second named group was their desire for independent or personal learning and their expressed need to receive an individualized education. The final two studies on the penchant for independence among gifted learners utilized the Guglielmino *Self-Directed Learning Readiness Scale* to measure this trait. Self-direction was reported as qualitatively different among the samples tested, when engaged in a gifted program (Straka, 1995; Mourad & Torrance, 1979).

Summary

Both the research and the literature on opportunities for independent study or independent learning are broad and varied. This type of program service has been provided for almost every subject area as well as across many subject areas at one time. Although the direct influence of independent learning upon achievement is not validated, there are improvements in attitude toward learning, attitude toward a specific subject area, and self-efficacy as tangible gains of such programs. For anyone wishing to set up a program of independent study or learning for gifted children the help guides are numerous and detailed, although not a single one of them suggests how many gifted students one teacher of the gifted can feasibly manage in a week's work. It is clear that when schools have a goal to "individualize" for their students with gifts, independent study is a rich avenue to explore. The key, however, is in how the supervisory structure and the process of independent investigation is set up; a model such as Treffinger's Self-Directed Learning matrix or Renzulli's SEM Type III component are necessary to make

this type of learning work with a larger number of gifted learners, who are not necessarily born with the knowledge and skills to pursue independent investigations fruitfully or fully.

Research and literature on the natural inclinations and preferences of gifted learners for independence, for personalized learning, and independent study are rich and varied. Across different age group, gender differences, achievement levels, choices for study, and with disability as a moderator, it is clear that gifted learners strongly desire to be “left alone” to do their learning, not only for choice of topic but for pacing and complexity reasons as well.

Across all these studies, it is clear that gifted students tended to want opportunities to work independently and to self-direct the content or pacing of activities. There is a strong research support for this conclusion. Moreover, gifted students will tend to react positively to the experience in terms of self-perceptions of efficacy, attitudes toward school and programs, and to the content area in which they are operating. What is less clear, despite the overwhelming support for the notion of independent learning (Shore, Cornell, Robinson, & Ward et al. 1991), is the extent to which they learn more content in comparison to other programming options. This is demonstrated by the mixed results of empirical results. There are several potential reasons that this may be so. First, the structure of independent learning is often unstructured. If students control the content, pacing, methods, and products, there can be less articulated content covered or students may limit the scope of study through a lack of insight or through intent. Second, there is a major difficulty in analyzing and evaluating all the things that might have been learned. This kind of research is limited by what the experimenter decides to test. The

evaluation may miss important elements that the student learned in the process that might be as valuable or more so than the content of the instruments. Fidelity of treatment is very difficult to verify in these types of situations. One reason why the more structured programs for independence have more consistent results it's that they provide strong guidelines for similar treatment across students. Finally, one of the major reasons that studies show consistent positive affective outcomes is that this is the easiest kind of data to collect. Asking students how they feel about their independent learning and how it affects their attitude is easily accessible data. In many studies (as in school evaluations of gifted programs), this is the only data that is collected. We do not easily and routinely collect academic growth data.

It is indubitable that independence is a desirable goal for students. It may, however, not be suitable as a sole goal for WEP services. Other methods, such as accelerated content, AP classes, novel problems, seminars, etc. should also provide access to individually appropriate activities.

The Impact of the WEP Upon Gifted Learners

The literature on the use and effectiveness of the educational plan developed for a gifted learner is very rich in three areas: (1) how to write a plan; (2) what a plan should include; and (3) the importance of having a plan for an individual gifted learner.

How to Write a Plan. Rogers's (2002) book, *Re-forming gifted education: Matching the program to the child*, addresses the "how tos" of plan development comprehensively. She describes a system that begins with collecting ability, achievement, motivational, personality, preference/interest/attitude data on the child and then systematically making a match with instructional management, instructional delivery, and

curriculum adaptation strategies. The options that can be potential matches are those with research to support their appropriateness of use with gifted learners, but the actual “how to” is descriptive only at this point. In subsequent work (2004) Rogers has been able to substantiate the outcomes for at least some of the students matched to services, when schools have acted upon the plans provided to them by parents. Montgomery County Schools (1978) in Blue Bell, Pennsylvania produced a very complete manual for developing IEPs for gifted learners. It contained possible goals and expected behaviors, codings for these goals and terminal behaviors and incorporated four cognitive areas as a part of the recommended options and services: opportunities for independent learning, creativity development, critical thinking development, and communication. An affective section was also appended. A second document was developed for this in 1979 that focused on how teachers can implement the options presented in the previous “GEMINI” manual. Specific curriculum resources and units were a part of this manual. Bucks County in Pennsylvania compiled a similar set of guides in 1975-1976. The state of Oregon developed a series of 10 booklets on program development and the potential elements that should be part of an individualized program plan for gifted learners. A handbook was produced by the North Carolina Department of Public Instruction (1988) that provides possible forms for individual planning and monitoring and also outlines the essential service delivery components of program models that can be selected by North Carolina school units. The listing is very comprehensive and would serve as a good set of guidelines for any state engaging in the initial stages of education plan development. Idaho has developed a similar guide as of 1999. Harrisburg Schools in Illinois produced a guide complete with forms and structure in order to produce an individual plan of

“independent study” for gifted learners. Although this is concerned only with independent study as the planned option, it is very complete in the structuring of it and could be easily applied to a plan that would encompass a more varied menu of services for a gifted learner. In the book, *Developing IEPs for the Gifted/Talented*, Butterfield, Kaplan, Meeker, Renzulli and Smith, and Treffinger shared models for developing an IEP for a gifted student (1979). Kaplan’s model for the IEP is perhaps the most generalizable. She outlines a series of steps in order to develop the IEP, complete from awareness of the set of commonly held goals and objectives for all gifted learners, to the development of specific individualized goals and objectives for the individual gifted learner. She identifies four principles for guiding the writing of a plan: (1) IEPs should be developed with reference to a statement of philosophy or rationale that governs the curriculum or program, in addition to the learner’s data; (2) IEPs can be individualized from a set of commonly held goals and objectives for the generally recognized characteristics of all gifted learners (see the next section of this paper for the specifics); (3) IEPs must be a joint school-home enterprise; and (4) the IEP should articulate the relationship between the differentiated curriculum of the gifted program and the basic curriculum of the regular program. In other chapters of this book, the specifics of how to pre-assess and compact, diagnose and prescribe are provided. Treffinger’s chapter is key, however, in ascertaining how the plan develops as well as what it should contain. This probably has great application for the current WEP enterprise in Ohio. Loftus (1980) describes in great detail how to write a WEP, including the forms, charts, letters and instructions used in her California school district, again a source rich in the actual “how tos” of WEP development. One last article of note is Colanagelo and Zaffrann’s (1975)

guide for providing counseling and guidance for gifted students. The paper is rich with resources, implementation strategies, forms needed to develop and monitor skills outcomes for socio-affective areas but focuses only on those aspects rather than the more general academic and curricular focus of the other articles in this section.

Other articles that are more general about education plans, but without the overview to the subject include Roth's (1977) description of the plans used in a gifted program to monitor gifted children's course of independent study and Cardellichio's (1980) program for gifted LD students in middle school to aid in the development of independent learning skills through an individual educational plan. Moller (1984) also describes the use of IEPs with twice exceptional children as does Traylor (1988), a report replete with the actual forms, the sources for gathering student information, and the actual options provided for gifted LD students in Norwich, Connecticut. Perryman is specific about how the individual plan can include various curriculum differentiation elements within it. The use of media specialist to develop and monitor individual plans is discussed and described by Flack (1986). How to use technological tools in the preparation and communication of WEPs is discussed by Barr (1990).

What a Plan Should Contain. Coleman (1997) has described the essential options for gifted high school students, noting particularly the need for flexible pacing and guidance support. Feldhusen (1983) describes the individualization of services for secondary students provided through the GERI Center at Purdue. In a similar vein, Nidiffer and Moon (1994) argue that Purdue's Three Stage Model addresses the extraordinary needs of gifted learners with its foci on higher order thinking, creativity, and independent, self-directed learning. Uresti, Goertz, and Bernal (2002) argue

similarly for Betts' Autonomous Learner Model with Hispanic primary children. Burnette (1999) outlines the components needed to meet the needs of culturally diverse gifted students with a similar focus on building autonomy and self-direction in them. Morse and Nottage (2001) outline a seven-step process to teach research skills, an "essential" component of the ideal plan for gifted learners. The Ohio State Department of Education describes how to interview school leaders to find out about the individualization of instruction and portfolio assessment (1993). Tittle (1984) describes how individualization and individual planning are provided within a Montessori approach to education.

In looking at singular elements that must be included, Cramond (1993) argues for expanded opportunities for self-selection, personal evaluation, and individualization in teaching speaking and listening skills to gifted children, while Chasteen (1981) discusses the importance of including within a plan the components of independence in thinking and individual conferencing to explore resources, feelings, and support. Roedell (1982) focuses on the ideal components of a "guided" program to develop the independence of young children, while Wallace (1986) examines the requirements of independent learning skills, experiential and inquiry learning, and efficiency in learning skills as part of the ideal plan for gifted children. Perryman (1985) and Maker (1988) discuss the need for differentiation in curriculum for gifted learners, particularly the modifications to learning environment that will promote independence in gifted learners. The value of LOGO programs for gifted learners is seen as a necessity in a plan, according to Flickinger (1987), but more generally, Strot (1998) offers many suggestions for how computers can individualize instruction for gifted learners and outlines the kinds of elements that should be part of this individualization. Dowling (2002) argues for the need to include

autonomy, imagination, time for deep thinking, self-reflection, and challenge as part of the plan for developing giftedness in young children, ages 5-8 years. Of the remaining articles pertinent to this section of the literature review, 18 described the range of services that should be included (many of them state or district handbooks outlining necessary options to include), 13 described very specific services (such as independent study, acceleration, or mentorship) that should be included, and 7 described the necessary inclusions for special populations, such as the culturally diverse, economically disadvantaged, rural children, or those with a disability in addition to their giftedness.

Importance of Having a WEP. Every article reviewed in the previous two sections argued for this point. Only one article was devoted completely to the importance of the plan (Clifford, 1988). Through her description of the “MAP” program of learning enrichment and mentoring services for gifted adolescents, Clifford argues for the importance of the joint development of this plan between the adolescent and the adult educator. Care is given to identifying all potential resources for learning in four “learning” environments: special programs for the gifted, community, regular classroom, and enrichment talent pool. Not a single article reviewed argued that IEPs were *not* important for developing talent in gifted learners fully and completely.

The Research : Fox and Stanley (1972) describe the outcomes of an individually prescribed program to facilitate mathematics and scientific talents, finding no difference in general academic benefits whether students were engaged in this program or who were participating in other more structured programs for gifted education, but substantial progress was found in the talent area focused upon in this prescriptive program. Elk Grove School District in Pennsylvania (1968) described the results of a “Individually

Prescribed Instruction” program, finding that the children with this program were substantially further academically than those in control schools. Memphis schools (1973) reported on the outcomes of a program for 600 gifted elementary children subjected to progressively greater levels of individual planning, finding that the academic and motivational effects were significant. Belcastro (1995) studied the record of program provision in Iowa schools, using the Richardson Study (Cox & Daniel, 1985) as the external criteria. Although he found Iowa schools lacking in 13 areas that Cox and Daniel found must be part of a program of gifted services, Belcastro found the list of services generalizable across Iowa and other states as well. This listing would be of import in Ohio’s consideration of the contents of the WEP. An interesting study by Sheehan (2000) compared an American Studies program for 11th graders, which had been reported as lacking potential for gifted students. When the students were put on an individualized plan of study, the post-intervention data showed substantial changes in student perceptions about the level of challenge. McNamara (1985) surveyed 515 award winning students about the experiences they pursued as extracurriculars. Results found that a wide range of extracurriculars are considered necessary in order for these students to learn leadership skills, develop maturity, and become independent. McNamara concluded that such experiences must be systematically “written in” to any plan for the education of gifted adolescents. In an interesting cross-case study of two gifted students with disabilities, Willard-Holt (1994) traced the impact the individual plans of these two learners had on their academic, social, and emotional development; through the plan process. She was able to identify those critical periods in which their planned interventions could be most effective. Finally, Gray and Gray (1982) used mentorship as

the means for individualizing a plan for middle school gifted students with limited English proficiency. The results suggested substantial gains in student planning, student achievement, and student communication clarity.

Despite the fact that several states have implemented WEPS for several years, the research emanating from these widescale efforts is not reported or accessible at this time. It will be important for Ohio to investigate whether or not systematic, comprehensive records have been kept by states, such as Pennsylvania, to determine what academic impact these WEPs have had on students. Rogers's qualitative follow-up (2004) of 251 gifted and highly gifted children with individual education plans and their consequent implementation in a state without a program mandate, let alone a mandate for education plans, has shown that those children who do have their plans implemented report improved perceptions of academic progress, more happiness with school, greater self-efficacy, and higher levels of motivation to learn. Unfortunately, the majority of the written plans have not been implemented; hence, no generalizations about the impact of the WEP upon gifted learners can be made.

Summary

The literature and research on the written education plan is rich in literature and sparse in research. The literature describes in great detail how a plan should or could be written and many, many articles describe what should be a part of the plan. The research, however, describes only small, specific attempts for a single domain or for a special population. No research has been reported on the impact of WEPs when there is a mandate for them, a discrepancy that must be rectified by Ohio if they continue with the idea to develop this benefit for gifted learners in the state. Rogers's study is limited to a

state that does not mandate gifted services, let alone a WEP, and hence the few positive results she has found cannot be generalized.

Practical Implications and Conclusions

It is clear that a WEP is needed for children with gifts and talents in order to see their talents fully developed. The literature, both philosophical/persuasive and descriptive, as well as the few research studies that focus on some aspect of the WEP process, its effectiveness, and the elements that might be included in a WEP, all point to this need. The qualitatively different nature of gifted children generally may be reason enough to argue for the WEP. As this review has clarified, one strong qualitative difference in gifted learners' preferences is their drive to be independent and learn independently. The other consistent finding across this literature base is their need for challenge of two different kinds: (1) daily, structured challenge in the child's specific talent area or areas; and (2) consistent (but not daily) challenge in all academic (and some non-academic) areas. It is clear that these two demonstrated needs (independence, challenge) necessitate advanced, individualized planning if they are to be satisfied.

A large number of the articles reviewed for this research summary argued for what the WEP should contain, each article touting its own "set" of these program elements. The sum across all the articles represents a wide variety of options to be included. The content analysis across this body of literature suggests that the following four elements are critical provisions that should be specified in a WEP for a gifted or talented child.

ELEMENT ONE: *Opportunities on a daily basis to learn and socialize with like peers*

There are a variety of research-supported grouping practices to address this need, all of which contribute in and of themselves to the academic progress of gifted learners. When appropriate curriculum differentiation and instructional delivery are added to this management menu, the effects range from 1/3 year's growth in a single academic area to 4/5's of a year's additional growth, when compared to gifted learners who remain in mixed ability classrooms. Hence, the WEP should specify the type of grouping strategy for what subject, and the duration of this management option if a child's educational needs for *daily, direct challenge* in an area of talent and *frequent challenge/complexity* in all other academic areas are to be addressed fully. The most direct provisions are shown in the table below.

Table 1. Grouping Options That May Be Specified in the WEP

<u>DAILY CHALLENGE IN TALENT AREA</u>	<u>CONSISTENT CHALLENGE IN OTHER ACADEMIC AREAS</u>
Placement in a special school for giftedness or talent, a magnet school program, or a full-time gifted program	Placement in a special school for the gifted, a magnet school, or a full-time gifted program
Cluster grouping by performance level	Cluster grouping by ability
Cross-graded grouping in talent area	Multi-age or multi-grade classrooms
Cross-graded grouping in talent area	Pull-out or send-out program
Regrouping by performance level for advanced or accelerated instruction	Regrouping by ability level for advanced or accelerated instruction
Advanced Placement, International Baccalaureate classes in talent area(s)	Advanced Placement, International Baccalaureate classes
Within class achievement level grouping	Within class ability level grouping
Peer tutoring (like performance levels) dyads	Like ability cooperative grouping
Mentorship (expert-novice dyad)	Peer tutoring (like ability) dyads

ELEMENT TWO: *Opportunities to “accelerate” when the regular curriculum has been mastered*

Among the variety of options that would allow the gifted learner to move ahead when regular curriculum outcomes have been mastered are two categories of acceleration

options, subject-based and grade-based. Subject-based acceleration, that is, the exposure/access to curriculum in advance of expected age and grade level, has potential for the development of talent as well as giftedness (see **Table 2**). As an element in the WEP, it can be prescribed for either daily challenge in a child’s talent area or for the consistent challenge in all academic areas. Grade-based acceleration, defined as shortening the number of years in the K-12 system, has greatest potential for addressing the gifted learner’s needs for consistent challenge in academic areas. Hence, the list of options that would be considered for addressing the two forms of challenge needs is longer in this latter category.

Table 2. Acceleration Options That May Be Specified in the WEP

<u>Daily Challenge in Talent Area</u>	<u>Consistent Challenge in All Academic Areas</u>
Credit for prior learning/testing out	Early entrance to kindergarten or 1 st grade
Compacted curriculum in talent area – replacement of “bought time” with more advanced, complex content	Group compacting plans in academic curriculum areas – replacement of “bought time” by applications for this learning
Concurrent enrollment in talent area	Concurrent enrollment in some academic area
Talent Search for talent area	Talent Search for interest
Correspondence course in talent area	Correspondence courses
Distance learning in talent area	Distance learning
College-in-the-school program in talent area	College-in-the-school program
Post-secondary options in talent area	Post-secondary options
Subject acceleration in specific talent area	Grade skipping, Grade telescoping

ELEMENT THREE: *Opportunities to be independent and work effectively in self-directed study*

For this element, the difference between direct, daily challenge in a student’s area of talent and his/her need for consistent challenge in other academic areas depends more upon the frequency with which the opportunity is provided and in which subject areas it

will be planned. For the child with strengths in an area, perhaps less time will be specified for that area when the consistent challenge provision is being implemented and more time will be spent on an opportunity which appears weaker in the child’s profile. In Table 3, therefore, the opportunities that have shown significant academic gains for gifted learners are listed and defined, but not categorized within the daily or consistent provision columns seen in the previous two tables.

Table 3. Provisions That Develop Self-Direction and Independence in Gifted Learners

<u>Opportunity</u>	<u>Definition</u>
Discovery learning, inquiry learning	Active practice in finding problems, solutions, and answers for self
Independent study	Management of research without teacher direction
Self-instructional materials	Programmed units of study through which student progresses at own pace
Flexible project deadlines	Negotiation of time needed to complete project or task
Flexible task requirements	Negotiating of time needed to complete project or task
Individual projects	Teacher-structured projects or tasks to develop individual accountability
Real audiences	“Expert” provides realistic feedback to child’s product
Open-ended problems	Provision of projects that encourage divergent thought and products
Communication skills	Training on how to express self appropriately and accurately
Creative problem-solving	Practice in the process for solving ambiguous and ill-defined problems
Early content mastery	Provision of foundations of subject domain earlier than prescribed in school
Individualized benchmark setting	Negotiation of learning goals between teacher/expert and child
Critical thinking skills	Training in skills such as analysis, evaluation, and problem solving
Organization, time management	Training in how to accomplish projects, goals within appropriate and adequate timelines
Personal goal setting	Training in identification of personal goals

	and priorities
Planning techniques	Training in how to carry out projects, tasks, and plans
Problem-solving skills	Training in problem and solution finding skills
Self-direction training	Provision of experiences to learn autonomy and independent skills
Service learning projects	Provision of experiences in learning how to contribute to the community at large
Systematic feedback	Provision of regular, honest monitoring of student work and progress

ELEMENT FOUR: *Opportunities to differentiate the instruction and curriculum of the child specific to the child’s academic needs*

As with the third element, when considering the need for daily versus consistent challenge, the lines between them are fuzzy. It will be the time devoted to each strategy and the scope (breadth/depth) of the provision that will determine its efficacy for the type of challenge required.

Table 4. Differentiated Instructional and Curriculum Adaptation Strategies for Gifted Learners

<u>Opportunity</u>	<u>Definition</u>
Organization of content presentation	Whole-to-part sequencing of content, especially in mathematics and science
Arts-infused curriculum	Training in art history, aesthetics, and criticism of all art domains integrated within other curriculum areas
Intuitive expression	Practice to develop empathy and sensitivity to others through role playing and guided imagery
Social issues discussion	Integration of current events, social, political, and philosophical issues within curriculum areas
Self-concept development	Understanding of own strengths and talents
Literary “classics”	Foundations of literature to expand foundations of thinking
“World’s great ideas”	Foundations of philosophy, psychology, sociology, history, humanities to expand foundations of thinking

Abstract content	Content that goes beyond surface detail and facts to underlying concepts, generalizations, and symbolism
Accelerated pace of content presentation	Substantial increase in tempo of content presentation and acquisition, especially in mathematics, science, and low level fact learning (grammar, foreign language)
Complexity of content	Exposure to intricacies, details of a content area or to its more difficult concepts, skills, and ideas
Conceptual discussion	Integration of big ideas and concepts within curricular areas
Creative skills training	Training and practice in various creative thinking skills such as fluency, flexibility, elaboration, risk-taking, SCAMPER, synectics, morphologies, analogies, imagination
Critical skills training	Training in higher order thinking such as cause and effect, sorting of relevant data, induction, deduction, generalization, etc.
Open-endedness	Provision of tasks, questions, etc. without single right answer or outcome; tasks with timelines and sequence of activities to be accomplished but outcomes will vary for each student
Problem-based learning	Provision of unstructured problems or situation for which student must discover answers, solutions, concepts, draw conclusions and generalizations in order to solve the problem
Proof and reasoning	Requiring students to cite their evidence to support ideas or concepts they generate
“Real audience” feedback	Using out-of-school experts to evaluate student work in an area of study
“Real-life/real world” learning experiences	Provision of projects and problems that relate to current issues and problems in society or students’ own world
Study of people	Relating of content to the important people, careers people hold in content area, and social issues and problems related to area
Methods of inquiry	Relating content to the methods related to area, the ways things are done in the content field, and the methods or practicing professionals in the field or area –“the way things work”

Transformational products	Development of a product that uses a nontraditional medium, that makes an idea visual, or uses what has been learned rather than summarizes the learning
Visualization techniques	Ways to make ideas, abstract concepts, concrete experiences visual –expression of learning in a visual medium
Subject integration/”thematic” approach/multi-disciplinary/interdisciplinary curriculum	Connection of disciplines by a common idea that elaborates the learning in the separate disciplines more fully

Finally, the WEP should contain elements that provide for evaluation of effectiveness. As noted above, there is a dearth of literature that documents the effectiveness of the WEP despite the extensive recommendations for it in the literature. It is difficult to document that one is meeting the individual needs of the gifted student if assessment isn’t conducted. It is essential for the development of effective approaches to individualization that we do so. There are several systematic ways of doing so. Data can be gathered in several areas. It is important to assess how constituents view the challenge and effectiveness of the plan. It is also desirable to assess the level of independence and task commitment evidenced by students. Since many programs include process skills such as divergent and critical thinking, critical thinking, research skills, and communication, some measures of these will be required. Assessment of academic progress is important, so benchmarks for assessment are needed. Finally, it is possible to assess the effectiveness of the WEP by looking at overall student performances. Table Five provides some examples for each area.

Table Five: *Examples of Data Sources to Document WEP Effectiveness*

<u>Area for Assessment</u>	<u>Potential Sources of Information</u>
Perceptions of Effectiveness	Parent surveys Student surveys School satisfaction ratings

Degree of Independence and Motivation	<p>Teacher ratings of student independence</p> <p>Student self ratings of independence</p> <p>Teacher ratings of student study habits</p> <p>Parent ratings of student study habits</p> <p>Student self rating ratings of study habits</p> <p>Parent/student/teacher rating of task commitment</p> <p>School attendance changes</p>
Process Skills	<p>Creativity ratings</p> <p>Creativity ratings of student products</p> <p>Divergent thinking tests</p> <p>Teacher ratings of critical thinking</p> <p>Critical thinking tests</p> <p>Product sampling</p> <p>Student portfolios</p> <p>Performances in competitions that emphasize process skills (Science fairs, Odyssey of the Mind, etc)</p>
Academic Skills	<p>Nationally normed achievement tests</p> <p>Ohio Achievement Test (OAT)</p> <p>Taking OAT out of level</p> <p>Number and performances on out-of-level tests</p> <p>AP courses taken</p> <p>AP examination scores</p> <p>Locally derived Pre-Post testing</p> <p>Assessment of performances above grade level in the area of identification</p> <p>Product ratings of mentorships</p> <p>Product ratings of individual/small group outcomes</p> <p>Advanced standing in content instruction</p> <p>Mastery tests</p>
Individual Achievements	<p>Grade advancements</p> <p>Concurrent enrollment in middle/high school</p> <p>Achievement of International Baccalaureate Degree</p> <p>Post Secondary Educational Options credit attained, grades in these</p> <p>National Merit Scholar semifinalist/finalist</p>

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Appendix B

Review of State Written Education Plan (WEP) Policies

Review of State Written Education Plan (WEP) Policies

TABLE 1

State Written Education Plan Policies Analysis

State	Status	Code or Regulations	Comments
Alabama	Required	<p>SUPP. 290-8-9-.14 (6) (a-e)</p> <p><i>“Each gifted student must have a written plan that describes the services to be provided. (a) GEP’s may be developed on an individual basis, group basis, or both. (b) School officials must provide prior notice to parents regarding the date, time, and location of the GEP meeting. (c) The GEP must be developed within 30 calendar days after the student has been determined eligible for gifted education services. (d) GEP Meeting Participants. The participants must include the gifted education teacher, the parents, the student (when appropriate), and other persons at the discretion of the parents or local education agency. When parents cannot attend the GEP meeting, the meeting can be conducted with the teacher and the student. (e) GEP Content. A GEP for gifted students must contain the following information: Name of student, Implementation to and from dates; Individualized goals or program description; Placement; Transportation, if appropriate; and Dated signatures of each GEP member. (f) GEP Review. The GEP Committee must meet at least once each year to review and revise the GEP, if appropriate. If the parents or the student’s teacher have reason to believe the GEP needs revision prior to the annual meeting, either party may request a GEP meeting to consider a revision. When a GEP Committee meeting has been requested,</i></p>	

		<i>the LEA must conduct the meeting within 30 calendar days. (g) A copy of the GEP must be provided to parents upon request.</i>	
Florida	Required	<p>6.030191 Development of Educational Plans for Exceptional Students who are Gifted.</p> <p>Educational Plans (EPs) are developed for students identified solely as gifted. Parents are partners with schools and school district personnel in developing, reviewing, and revising the educational plan (EP) for their child. Procedures for the development of the EPs for exceptional students who are gifted, including procedures for parental involvement, shall be set forth in each district's Policies and Procedures for the Provision of Specially Designed Instruction for Exceptional Children.</p> <p>(2 pages of guidelines are listed. See Comments for website with information.)</p>	<p>The entire list of rules (2 pp.) can be found at:</p> <p>http://www.firn.edu/doe/rules/final6.pdf</p>
Kansas	Required	<p>Statute 72-987 (Previous sections outline gifted as part of the special education definition)</p> <p><i>(a) (1) Except as specified in provision (2), at the beginning of each school year, each agency shall have an individualized education program in effect for each exceptional child. (2) In the case of a child with a disability aged three through five and for two year-old children with a disability who will turn age three during the school year, an individualized family service plan that contains the material described in 20 U.S.C. 1436, and that is developed in accordance with this section, may serve as the IEP of the child if using that plan as the IEP is agreed to by the agency and the child's parents. (b) The IEP for each exceptional child shall include: (1) A statement of the child's present levels of educational performance, including: (A) How the child's disability or giftedness affects the child's involvement and progress in the general curriculum; or (B) for preschool children, as appropriate, how the disability affects the child's participation in appropriate activities; (2) a statement of measurable annual goals, including benchmarks or short-term objectives, related to: (A) Meeting the child's needs that result from the child's disability or giftedness, to enable the child to be involved in and progress in the general</i></p>	<p>Chapter 4: Regulations for IEP's (under Special Education)</p> <p>http://www.kansped.org/ksde/ph01/ch4.html</p>

		<p><i>or advanced curriculum; and (B) meeting each of the child's other educational needs that result from the child's disability or giftedness; (3) a statement of the special education and related services and supplementary aids and services to be provided to the child, or on behalf of the child, and a statement of the program modifications or supports for school personnel that will be provided for the child: (A) To advance appropriately toward attaining the annual goals; (B) to be involved and progress in the general curriculum in accordance with provision (1) and to participate in extracurricular and other nonacademic activities; and (C) to be educated and participate with other exceptional and nonexceptional children in the activities described in this paragraph; (4) an explanation of the extent, if any, to which the child will not participate with nonexceptional children in the regular class and in the activities described in provision (3); (5) (A) a statement of any individual modifications in the administration of state or district-wide assessments of student achievement that are needed in order for the child to participate in such assessment; and (B) if the IEP team determines that the child will not participate in a particular state or district-wide assessment of student achievement or part of such an assessment, a statement of why that assessment is not appropriate for the child and how the child will be assessed; (6) the projected date for the beginning of the services and modifications described in provision (3), and the anticipated frequency, location, and duration of those services and modifications; (7) (A) Beginning at age 14, and updated annually, a statement of the transition service needs of the child under the applicable components of the child's IEP that focuses on the child's course of study, such as participation in advanced-placement courses or a vocational education program; (B) beginning at age 16 or younger, if determined appropriate by the IEP team, a statement of needed transition services for the child, including, when appropriate, a statement of the interagency responsibilities or any needed linkages; and (C) beginning at least one year before the child reaches the age of majority under state law, a statement that the child has been informed of the child's rights, if any, that will transfer to the child on reaching the age of majority as provided in K.S.A. 2001 Supp. 72-989; (8) a statement of: (A) How the child's progress toward the annual goals will be measured; and (B) how the child's parents will be regularly informed, by such means as periodic report cards, at least as often as parents of nonexceptional children are informed of their children's progress, of their child's progress toward the annual goals; and the extent to which that progress is sufficient to enable the child to achieve the goals by the</i></p>	
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		<p><i>end of the year. (c) In developing each child's IEP, the IEP team shall consider: (1) The strengths of the child and the concerns of the parents for enhancing the education of their child; (2) the results of the initial evaluation or most recent evaluation of the child; (3) in the case of a child whose behavior impedes the child's learning or that of others, strategies, including positive behavioral interventions and supports to address that behavior; (4) in the case of a child with limited English proficiency, the language needs of the child as such needs relate to the child's IEP; (5) in the case of a child who is blind or visually impaired, provide for instruction in Braille and the use of Braille unless the IEP team determines, after an evaluation of the child's reading and writing skills, needs, and appropriate reading and writing media, including an evaluation of the child's future needs for instruction in Braille or the use of Braille, that instruction in Braille or the use of Braille is not appropriate for the child; (6) the communication needs of the child, and in the case of a child who is deaf or hard of hearing, consider the child's language and communication needs, opportunities for direct communications with peers and professional personnel in the child's language and communication mode, academic level, and full range of needs, including opportunities for direct instruction in the child's language and communication mode; and (7) whether the child requires assistive technology devices and services. (d) The regular education teacher of the child, as a member of the IEP team, to the extent appropriate, shall participate in: (1) The development of the IEP of the child, including the determination of appropriate positive behavioral interventions and strategies and the determination of supplementary aids and services, program modifications, and support for school personnel consistent with this section; and (2) the review and revision of the child's IEP under subsection (e). (e) Each agency shall ensure that the IEP team: (1) Reviews the child's IEP periodically, but not less than annually to determine whether the annual goals for the child are being achieved; and (2) revises the IEP as appropriate to address: (A) Any lack of expected progress toward the annual goals and in the general curriculum, where appropriate; (B) the results of any reevaluation conducted under this section; (C) information about the child provided to, or by, the parents, as described in subsection (g) of K.S.A. 2001 Supp. 72-986, and amendments thereto; (D) the child's anticipated needs; or (E) other matters. History: L. 1999, ch. 116, § 12; July 1.</i></p>	
Kentucky	Required	KRC 157.196	

		<p><i>(3) Beginning with the 2001-2002 school year, local district policies and procedures SHALL ensure that the school personnel report to a parent or guardian the progress of his child related to the gifted and talented student services plan at least once each semester.</i></p> <p><i>(6) Beginning with the 2001-2002 school year, a local school district SHALL implement a procedure to obtain information related to the interests, needs, and abilities of an identified student from his parent or guardian for use in determining appropriate services. A parent or guardian of an identified student SHALL be notified annually of services included in his child's gifted and talented student services plan and specific procedures to follow in requesting a change in services.</i></p> <p><i>Section 1. (18) "Gifted and talented student services plan" means an educational plan that matches a formally identified gifted student's (Grades 4-12) interests, needs, and abilities to differentiated service options and serves as the communication vehicle between the parents and school personnel.</i></p>	<p>Full requirements listed below:</p> <p>http://www.education.ky.gov/NR/rdonlyres/ecpwc4o2lwlpauctcdvhfqbnqgqh546bl7smvdo3niajo56xj45nr45tu37xupj3a2gxzv42yj37gtwhgz4f5zgy4f/GTFAQ.pdf</p>
Louisiana	Required	<p>Section 1945 C(1)</p> <p><i>Local Education agencies, state or nonpublic agencies, or schools receiving public funds participating in the delivery of special education services to children with exceptionalities shall maintain a written record of an IEP for each child according to the format furnished by the Department of Education, with approval of its governing authority. These IEPs shall be periodically reviewed and updated at least annually. Information</i></p>	<p>Under Special Ed Guidelines</p> <p>IEP Form http://www.doe.state.la.us/lde/uploads/959.pdf</p> <p>IEP Handbook (32 pages) http://www.doe.state.la.us/lde/uplo</p>

		<p><i>contained in the IEP or evaluation shall not be available to the public and shall be available to the professionals in need of such information in connection with the educational program and evaluation of the child subject to existing federal and state laws governing such information.</i></p> <p>C2-4 also describes the procedures, definitions, team outlines, and inclusions. See the websites listed for the documentation and language. (3 pages)</p>	<p>ads/1416.pdf</p>
Mississippi	Suggested	Power for any requirement regarding gifted is left to the state board. IEP not mentioned in state rule but is listed in the regulations.	The Instructional Plan requires a scope and sequence of process skills included in the reporting.
Montana	Suggested loosely	<p>See Comments. No regulations other than local control and plans submitted to the state department of education.</p> <p>Checklist within the regulations suggests a WEP.</p>	Non-competitive grants with “in-kind” district funds are to be matched within the district, based on a district proposed plan approved by the state department. There is a guidebook of examples of what might be included in the plan to be submitted for grant funds. See the Regulations column for the lifted language that relates to the IEP. Common understanding is that these are suggested and not required. It’s locally controlled.
New Mexico	Required	<p>B. Individualized Education Programs (IEPs)</p> <p>(1) Except as provided in 34 CFR Secs. 300.450-300.462 for children enrolled by their parents in private schools, each public agency (1) shall develop, implement, review and revise an individualized education program (IEP) in compliance with all applicable requirements of 34 CFR Secs. 300-340-300.350 and these or other SBE rules and standards for each child</p>	Sample IEP’s and a Handbook for Implementation are included (Gifted under special education regulations)

		<p>with a disability served by that agency; and (2) shall ensure that an IEP is developed, implemented, reviewed and revised in compliance with all applicable requirements of 34 CFR Sec. 300.340-350 and these or other SBE rules and standards for each child with a disability who is placed in or referred to a private school or facility by the public agency.</p> <p>(2) Each IEP or revision shall be developed at a properly convened IEP meeting for which the public agency has provided the parent and, as appropriate, the child with proper advance notice pursuant to 34 CFR Secs. 300.345 and paragraph D(1) of 6.31.2.13 NMAC and at which the parent and, as appropriate, the child have been afforded the opportunity to participate as members of the IEP team pursuant to 34 CFR Secs. 300.344, 300.345 and 300.501 and Subsection C of 6.31.2.13 NMAC.</p> <p>(3) Each IEP or revision shall include the signature and position of each member of the IEP team and other participants in the IEP meeting to document their attendance. Written notice of actions proposed or refused by the public agency shall also be provided in compliance with 34 CFR Sec. 300.503 and paragraph D(2) of 6.31.2.13 NMAC and may be provided in whole or in part at the close of the IEP meeting. Informed written parental consent must also be obtained for actions for which consent is required under 34 CFR Sec. 300.505 and Subsection F of 6.31.2.13 NMAC.</p>	http://www.ped.state.nm.us/seo/iep/index.htm
North Carolina	Required	<p>Article 9B</p> <p>Looking for official language. The pages online are no longer available. No hard copies available.</p> <p>According to those familiar with NC regs: A DEP is required for identified students and may be individual or group. Parents may request an IEP (like a 504 Plan) for those students who do not meet gifted requirements but may still be in need of some type of differentiation. See Q&A guidelines</p>	<p>Q&A Guide States: The Differentiated Education Plan (DEP) is the document which outlines the program service option(s) appropriate for a student at specific grade configurations (K-3, 4-5, 6-8, 9-12), and lists the learning environment, content modifications and special programs available to the student during those grade configurations. A DEP should be completed for each student during each of the four</p>

			<p>educational phases. (<i>Guidelines</i>, p. 4)</p> <p>An Individual Differentiated Plan (IDP) should be developed for meeting the needs of a student who clearly demonstrates outstanding intellectual gifts, but does not meet the criteria for the Differentiated Education Plan. (<i>Guidelines</i>, p. 4)</p>
OH	Required in Part	<p>Section 3301-51-15</p> <p><i>Instruction shall be based on the individual's needs and be guided by a written educational plan. The district shall provide parents with periodic reports regarding the effectiveness of the services provided in accordance with the gifted child's educational plan.</i></p>	<p>Plans written only if the child is served. Controlled by the local school board plan submitted to the state department.</p>
Pennsylvania	Required	<p>§ 16.31. General</p> <p><i>(a) A GIEP is a written plan describing the education to be provided to a gifted student. The initial GIEP shall be based on and be responsive to the results of the evaluation and shall be developed and implemented in accordance with this chapter.</i></p> <p><i>(b) If a gifted student moves from one school district in this Commonwealth to another, the new district shall implement the existing GIEP to the extent possible or shall provide the services and programs specified in an interim GIEP agreed to by the parents until a new GIEP is developed and implemented in accordance with this section and § § 16.32 and 16.33 (relating to GIEP; and support services) or until the completion of due process proceedings under § § 16.61—16.65 (relating to procedural safeguards).</i></p> <p><i>(c) Every student receiving gifted education provided for in an IEP developed prior to December 9, 2000, shall continue to receive the gifted education under that IEP until the student's GIEP is developed. For a student also eligible under Chapters 14 and 342 (relating to special education services and programs), the student will continue to receive gifted education under that IEP until revised.</i></p> <p><i>(d) Every student receiving gifted education prior to December 9, 2000, shall continue to receive gifted education until the student one of the following conditions exists:</i></p> <p><i>(1) The student graduates from high school.</i></p>	<p>Under Special Education</p> <p>Regulations and Guidelines – See pp. 16-20 of the handbook http://www.pde.state.pa.us/gifted_ed/lib/gifted_ed/Gifted_Guidelines_3.pdf</p>

		<p>(2) <i>The student is no longer of school age.</i></p> <p>(3) <i>A GIEP team determines that the student no longer needs gifted education.</i></p>	
Washington	Suggested	<p>WAC 392-170-095 District records. Districts shall keep such records as are necessary to demonstrate compliance with this chapter and shall make such records available to authorized state personnel</p>	Listed in TIGER as required but no language could be found.
West Virginia	Required	<p>Policy 2419 126-16-1</p> <p><i>Purpose and Intent of the IEP. Individualized Education Program (IEP) requirements describe two components: a process and a document. This policy emphasizes that the process is fundamental and that the document must reflect the full and complementary involvement of parents and educators. The overall IEP requirement, as described in the IDEA 97, has the following purposes and functions:</i></p> <p><i>1.8.1. The IEP meeting serves as a communication vehicle between parents and school personnel and enables them, as equal participants, to jointly decide the student's educational needs, what services will be provided to meet those needs, and what the anticipated outcomes may be.</i></p> <p><i>1.8.2. The IEP process provides an opportunity for resolving any differences between the parents and the public agency concerning the special education needs of an exceptional student; first, through the IEP meeting; and second, through the procedural protections that are available to the student and the student's parents.</i></p> <p><i>1.8.3. The IEP sets forth in writing a commitment of resources</i></p>	Gifted included under special education requirements.

		<p><i>necessary to enable an exceptional student to receive needed special education and related services.</i></p> <p><i>1.8.4. The IEP is a management tool that is used to ensure that each exceptional student is provided special education and related services appropriate to the student's special learning needs.</i></p> <p><i>1.8.5. The IEP is a compliance/monitoring document that may be used by authorized monitoring personnel from each governmental level to determine whether an exceptional student is actually receiving the free appropriate public education agreed to by the parents and the school.</i></p> <p><i>1.8.6. The IEP serves as an evaluation device for use in determining the extent of the student's progress toward meeting the projected outcomes.</i></p>	
Alaska Arizona Arkansas California Colorado Connecticut Iowa Mass. Missouri Nebraska North Dakota	No Language or Evidence of the Requirement of a WEP Some districts do utilize plans		States reported on TIGER that some districts do require WEP's. However, there is no language to mandate such. In most of the instances a local plan is required but in all instances WEP's are not required within the LEP guidelines. Iowa had a rule but it was repealed. Many districts still require an IEP but it is not state

Oklahoma South Carolina Tennessee Texas Utah Virginia Wisconsin			mandated. Texas has levels of exemplary programming but only minimum levels (with no WEP required) are required. Upper levels do list individual plans as options.
New Jersey New York Oregon Rhode Island Vermont	Not Required		Reported as Not Required (TIGER)
Nevada New Hampshire South Dakota Wyoming	No data available		

TABLE 2***Commonalities Among Leading States Requiring WEP's or IEP's for Gifted***

Policy and Administrative Language	WEP Requirements
Definitions of Those Required to Have a WEP	Measurable, Annual Goals and Potential for Growth Gains
Promise of Least Restrictive Environment	Statement of Current Levels of Performance and How Those Levels Affect the Child's Curricular Experiences
Description of WEP Team Members and Responsibilities	Listing and Explanation of Needed Curricular Services and Modifications to Grow from Point of Entry (What is needed to meet the annual goals?)
Appeal Processes and Requests for Changes or Meetings Regarding the WEP (Rights of Individuals Involved)	Extra-Curricular Options Available and Suggested for Student Participation Based on Needs
Requirements of the Components of the WEP	Section for Documentation of Goals Met and Services Employed
Requirements for deadlines to write and implement a WEP (either beginning school year or within 30 days of identification)	Listing and Explanation of Placement Options Required
Caveats for educators, if parents cannot attend the WEP meeting	Identifying Information: Standardized Test Scores, Student Information, Anecdotal and Performance-Based Assessments
Reporting Mechanisms for communicating the WEP information including confidentiality statements	Signatures and Dates of the WEP Team (including parents and child as applicable)
Re-Evaluation Guidelines, Timeline, and Requirements	Re-Evaluation Date, Timeline, and Persons Responsible for Oversight of Required Actions
Statement of Specially Designed Curricular Experiences Matched to Child Needs	Section for Student Interests

Appendix C

Analysis of District Written Education Plan (WEP) Forms

Analysis of School District WEP Forms

Dr. Susan R. Amidon

A review of 536 Written Education Plans (WEPs), submitted by Ohio public school districts in response to the District Self-Report requested in July, 2004, by the Ohio Department of Education (ODE), revealed many similarities and differences that will be discussed. Districts were asked to submit a copy of the format the district used at that time for their WEPs. Different forms for different services and/or grade levels were also requested. These WEPs are required for all identified gifted students who are receiving services, according to OAC 3301-51-15 (D) (3). Since districts currently have great latitude in how the WEP is implemented, the ODE sought to collect information about district practices related to the WEP, evaluate how the requirement is being implemented around the state, and consolidate information on WEP best practice within Ohio. These submissions were reviewed and categorized with the following results:

Formats Utilized

All of the districts reviewed had at least one common form that was used by the district for student WEPs. As an organizer, many used the four sample WEP forms which appear on the ODE web site. Others seemed to follow a format developed and distributed through a common site, such as an area Educational Service Center (ESC), or used a format gathered from a published source. The WEPs were of six types in general:

1. The first were those that used an ODE suggested format either directly or with very minor adjustments. Most often, the formats that were used by this group of districts were Forms 1 and 4, which include a place to check the areas of

identification, list the conference participants who worked with the development of the WEP, and a place for a parent to indicate agreement or disagreement with the services and/or placement of the student. On Form 1, the program goals, objectives, activities and persons responsible for the services are listed.

Somewhat differently, Form 4 includes a listing for differentiating characteristics, teaching/learning needs, and related needs. Both forms include service delivery setting, dates of service, and evaluation. A line for reporting the dates of periodic progress reports is included, as well as a comment section. This form allows for both some checklist information, and more detailed written specifics for each child. The other two ODE forms were used very seldom, since they had a much less directive format.

2. Many districts used a second format which listed subject areas, grading periods, and a place to indicate the type of service being delivered. The service options were described in an expanded list (at the bottom of the page or on a separate page), and the box with an abbreviation for the service was to be checked off when it applied. The team and parent signatures were often not included on these forms.
3. A third format used by many other districts included a checklist for service delivery setting, and two large boxes to contain lists of Instructional Goals/Objectives and Affective Goals/Objectives. Included were small spaces for listing differentiation strategies, persons responsible, evaluation procedure, and semester reviews of the student progress toward the goals. Team members were to be listed, and parents could sign the form as well.

4. As a fourth organizer, there were also many districts that used, directly or with adaptation, one or many of the forms from Belt, R. & Penfield, B. (2000). *Using Written Education Plans and Student Profiles to Differentiate for Gifted Learners*. Keys to Knowledge. There were different materials from this source that were used by various districts including the entire portfolio, the goals checklists (content areas, process skills, products created, social-emotional skills, career planning) and open-ended plans in various subject areas for individual students. Others used the Kingore Learning Characteristics Plan (2004). There may be copyright issues with some of these uses and adaptations.
5. There were many WEPs of the fifth kind, that were identical in format if the districts were clustered and served by a coordinator or coordinators from one of the Educational Service Centers. The form would be the same, just the name of the district would change.
6. The sixth type consisted of WEPs that were highly individualized and had adaptations to fit the interpretation of the local districts. Some were copyrighted by the districts or developers. These adaptations will be discussed in more detail later.

There were several areas of concern that arose from this initial review of the district WEP forms. The major area of concern was the fact that the instruction shall be based the individual student needs, and be guided by the written education plan (OAC 3301-51-15 (D) (3)). It was apparent that most of these district plans were skeletal by design, consisting of the reporting of student data and then including a checklist of provisions from a pre-determined list of services and instructional strategies. Many did not include

team development, parental signature options, and periodic evaluation. As a matter of fact, student evaluation and progress reporting was not apparent, and it was even stated that the regular grades from classes would suffice. Follow-up meetings for redirection of the WEP were seldom referenced. It was often the case that the same WEP was to be used for all gifted students in one type of service option (i.e., resource room) and grade level without further individualization. A policy question that needs to be explored would be the “time” factor necessary for gifted intervention specialists to develop such individualized plans, conference multiple times with students and parents, assess appropriately and often, and still be able to teach the students. The Rule limits the number of students that an Intervention Specialist may serve to either a maximum of 20 in a full-time, self-contained classroom, or 60 in setting where they provide less than full-time instruction and/or support. The interpretation currently held in the field is that the time allocated for services may be variable, so that an Intervention Specialist may serve only 60 students at one time, but many more than that over the course of a year. Appropriate WEPs for so many students would be prohibitively time intensive, so that the logistics of current service delivery options seems to limit the full and individualized development of student WEPS in many instances.

Another area of concern was the lack of consistency and professionalism demonstrated across many of the WEPs reviewed. At least one-fourth of the WEP forms had no district logo or name on them as identifiers. Many did not refer to the document as a Written Education Plan, but other names such as the Skill Enhancement Plan. Many also only required the name of a teacher, not a team and often no administrator at all. Lists of goals, services, and strategies were used that were clearly adapted or used in

whole from a source that was copyrighted, and not cited. Parent signatures and involvement were not documented on many forms, so must be seen as peripheral, and not an inherent part of WEP development and implementation.

A third area of concern involved the use of standards in the development and implementation of the WEP activities. Less than ten of the districts reviewed offered evidence in their WEPs of direct correlation to state curriculum standards, as required in the Rule, where it is stated that the depth, breadth, and pace of instruction, based on the adopted course of study in appropriate content areas shall be differentiated.

Other WEP document issues seemed evident from the review. Those that need to be addressed through this study include the role of students, parents, Gifted Intervention Specialists and classroom teachers in WEP development and evaluation; progress reports and appropriate indicators of success; the sufficiency of one WEP for multiple services; confidentiality; matching the WEP to the area of identification ; need for parental signatures; and appropriate WEPs for varying services and grade levels. Additionally, indicators of effectiveness were not apparent on many WEP forms, with regular grading for coursework being used most often.

Appendix D

Summary of Written Education Plan (WEP) Survey Results

Results Summary

Show All Pages and Questions

[Export...](#) [View Detail >>](#)

Filter Results

To analyze a subset of your data, you can create one or more filters.

[Add Filter...](#) **Total:** 306
Visible: 306

Share Results

Your results can be shared with others, without giving access to your account.

[Configure...](#) **Status:** Enabled
Reports: Summary and Detail

2. Demographic Information

1. Please indicate your primary role in the WEP process. (Please select only one choice.)

		Response Percent	Response Total
Gifted Intervention Specialist		23%	70

Gifted Coordinator		29.5%	90
Regular Classroom Teacher		9.2%	28
Parent		30.8%	94
Principal		1%	3
Other Administrator		2%	6
Gifted Student		0.3%	1
View Other (please specify)		4.3%	13
Total Respondents			305
(skipped this question)			1

2. If you are in one of the WEP grant districts, please indicate which district. Please note that no personal information is collected or distributed in this survey.

		Response Percent	Response Total
Benjamin Logan Local School District		100%	44
Cleveland Heights/Universtiy Heights School District		0%	0
Lincoln View Local School District		0%	0
Total Respondents			44
(skipped this question)			262

3. If you are not in one of the WEP grant districts, please choose the best description of your district:			
		Response Percent	Response Total
Rural		30.7%	80
Suburban		53.6%	140
Urban		11.1%	29
view Other (please specify)		4.6%	12
Total Respondents			261
(skipped this question)			45

4. If you are not in one of the WEP grant districts, please indicate the approximate size of your district:			
		Response Percent	Response Total
Under 500 students		2.3%	6
Between 500 and 1,000 students		5.4%	14
Between 1,000 and 2,000 students		21.1%	55
Between 2,000 and 5,000 students		33%	86
Between 5,000 and 10,000 students		23.8%	62

Between 10,000 and 25,000 students		11.9%	31
Greater than 25,000 students		2.7%	7
Total Respondents			261
(skipped this question)			45

3. Survey questions

5. In your opinion, what are the essential elements of a model district Written Education Plan (WEP)? (You may select more than one answer.)

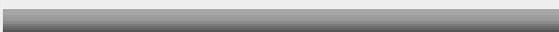
		Response Percent	Response Total
Description of instructional setting and placement		49.8%	112
Area of identified giftedness and link to service		77.3%	174
Goals and objectives of service		66.2%	149
Recommended contact time with GIS		32.4%	73
Parental involvement		50.2%	113
Student involvement		51.6%	116
Performance benchmarks to stated goals		29.3%	66
Evaluation of performance to stated goals		53.8%	121
Persons responsible for WEP implementation		59.1%	133
Opportunities for interaction with like peers		56.9%	128
Opportunities to accelerate beyond class curriculum		77.3%	174

Opportunities for differentiated curriculum/instruct.		81.8%	184
Opportunities for self-directed study		50.7%	114
Training level of person responsible for WEP		28.4%	64
Process for planning, approval, and review		42.7%	96
Community resources		13.8%	31
Description of specific area of art ID (dance, music, theater, visual arts)		30.7%	69
Contact time with service provider		28.4%	64
Tie to Ohio Academic Content Standards		32%	72
View Other (please specify)		8.4%	19
Total Respondents			225
(skipped this question)			81

6. What parts of a model district WEP do you consider to be the most relevant? (You may respond to each element.)

	Not relevant	Somewhat relevant	Relevant	Highly relevant	Essential	Response Average
Description of instructional setting and placement	1% (3)	17% (38)	38% (85)	24% (52)	19% (43)	3.43
Area of identified giftedness and link to service	0% (0)	3% (6)	16% (35)	30% (66)	52% (115)	4.31
Goals and objectives of service	0% (1)	2% (5)	21% (47)	32% (71)	45% (101)	4.18
Recommended contact time with GIS	2% (5)	17% (38)	41% (90)	29% (64)	10% (22)	3.27
Parental involvement	3% (6)	19% (43)	36% (82)	26% (59)	16% (36)	3.34
Student involvement	3% (6)	9% (20)	26% (58)	29% (66)	33% (75)	3.82
Performance benchmarks to stated goals	4% (9)	13% (28)	35% (78)	34% (74)	14% (31)	3.41

Evaluation of performance to stated goals	2% (5)	8% (17)	33% (74)	33% (74)	24% (54)	3.69
Persons responsible for WEP implementation	1% (2)	6% (13)	27% (61)	29% (64)	37% (83)	3.96
Opportunities for interaction with like peers	2% (4)	11% (25)	20% (45)	34% (75)	33% (73)	3.85
Opportunities to accelerate beyond class curriculum	1% (3)	3% (6)	15% (33)	39% (87)	42% (95)	4.18
Opportunities for differentiated curriculum/instruct.	1% (2)	1% (3)	14% (31)	32% (72)	52% (118)	4.33
Opportunities for self-directed study	1% (2)	8% (18)	26% (58)	40% (89)	25% (55)	3.80
Training level of person responsible for WEP	6% (14)	18% (40)	32% (70)	25% (56)	19% (42)	3.32
Process for planning, approval, and review	1% (2)	12% (26)	45% (100)	23% (52)	19% (42)	3.48
Community ResourcesDescription of specific area of art ID (dance, music, theater, visual arts)	8% (18)	27% (57)	48% (103)	11% (24)	6% (12)	2.79
Contact time with service provider	3% (7)	17% (36)	41% (90)	26% (57)	13% (28)	3.29
Tie to Ohio Academic Content Standards	8% (17)	19% (41)	38% (81)	24% (51)	12% (26)	3.13
Other	5% (1)	18% (4)	18% (4)	18% (4)	41% (9)	3.73
Total Respondents						222
(skipped this question)						84

7. Is there a stated connection between the academic goals/objectives in existing WEPs and the Ohio Academic Content Standards?			
		Response Percent	Response Total
Yes		30%	69
No		35.2%	81

I don't know		34.8%	80
		Total Respondents	230
		(skipped this question)	82

8. Who is currently involved in the formulation of the WEP? (You may select more than one answer.)

		Response Percent	Response Total
Gifted Intervention Specialist		83.2%	178
Gifted Coordinator		54.2%	116
Classroom Teacher		38.8%	83
Principal		9.8%	21
Other Administrator		5.6%	12
Parent		26.2%	56
Student		22.9%	49
View Other (please specify)		9.8%	21
		Total Respondents	214
		(skipped this question)	92

9. Which of the following options best describes the existing WEP in your district?

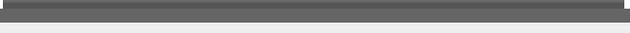
		Response Percent	Response Total
Checklist of service options		32.4%	71
Narrative of specific intervention strategies		16.9%	37
Both		29.7%	65

View	Other (please specify)		21%	46
			Total Respondents	219
			(skipped this question)	92

10. Is the existing WEP in your district useful for assessing the effectiveness of intermittent or limited services provided to a particular student?

		Response Percent	Response Total	
Yes		13.6%	29	
No		74.6%	159	
View	If yes, please explain how this is accomplished and skip to question 11.	11.7%	25	
			Total Respondents	213
			(skipped this question)	98

11. If you answered no to the previous question, please describe how you believe a model WEP could be used as tool to gather information on the effectiveness of services? (You may select more than one answer.)

		Response Percent	Response Total
Tie individual objectives to performance measures		47.8%	76
Collect portfolio of work		50.3%	80
Collect student impact data		39.6%	63
Measure annual growth in student achievement		69.2%	110
Require a progress report on the WEP goals		60.4%	96
Student survey		47.2%	75

Parent survey		39%	62
View Other (please specify)		7.5%	12
Total Respondents			159
(skipped this question)			147

12. How is the "periodic report on effectiveness of service" as stated in the Rule currently interpreted in your district? (You may select more than one answer.)

		Response Percent	Response Total
Student Report Card		48.7%	96
District services evaluated quantitatively		15.2%	30
District services evaluated qualitatively		32.5%	64
Student performance measured against WEP goals		25.4%	50
View Other (please explain)		23.9%	47
Total Respondents			197
(skipped this question)			109

13. What evaluation data is collected to determine the effectiveness of the current district WEP? (You may select more than one answer.)

		Response Percent	Response Total
Portfolio of work		22.6%	44
Test scores		35.4%	69
Report card (grades)		41%	80
Measurement of actual performance to WEP goals		23.6%	46

Standardized test growth measurements		33.8%	66
Staff surveys		13.3%	26
Parent surveys		17.4%	34
Student surveys		17.9%	35
Students pre and post performance data		24.1%	47
View Other (please specify)		26.7%	52
Total Respondents			195
(skipped this question)			111

14. Should these results be included in the district Self-Report? The Self-Report is a district self-assessment of the effectiveness of gifted services required by the Ohio Department of Education.

		Response Percent	Response Total
Yes		55.2%	112
No		44.8%	91
Total Respondents			203
(skipped this question)			109

15. With whom is the WEP currently shared? (You may select more than one answer.)

		Response Percent	Response Total
Gifted Intervention Specialist		81.8%	171
Gifted Coordinator		74.2%	155
Regular Classroom Teacher(s)		56.5%	118
Parent		65.6%	137

Principal		29.2%	61
Other Administrator		8.6%	18
Student		40.2%	84
View Other (please specify)		16.7%	35
Total Respondents			209
(skipped this question)			97

16. Which of the following do you identify as current barriers to developing meaningful WEPs? (You may select more than one answer.)

	Response Percent	Response Total
Expertise in the nature and needs of the gifted	34.8%	73
Appropriate data for generating options	26.7%	56
Lack of interaction with parents or the student	26.7%	56
Time	75.2%	158
Inability to fund or deliver appropriate services	59%	124
District policies	22.4%	47
Union restrictions	7.1%	15
Lack of expertise in differentiating content instruction	44.8%	94
Other resources	11.4%	24
View Other (please specify)	21.4%	45
Total Respondents		210
(skipped this question)		96

17. What local provisions would need to be instituted or revised in your district to make the WEP process more effective?		
View	Total Respondents	143
	(skipped this question)	163

18. What provisions would need to be instituted or revised in the state regulations to make the WEP process more effective?		
View	Total Respondents	124
	(skipped this question)	182

19. Who currently signs off on the WEP? (You may select more than one answer.)			
		Response Percent	Response Total
Gifted Intervention Specialist		81%	166
Gifted Coordinator		39.5%	81
Regular Classroom Teacher(s)		33.2%	68
Parent		45.4%	93
Principal		9.8%	20
Other Administrator		4.4%	9
Gifted Student		19%	39
View	Other (please specify)	14.1%	29
Total Respondents			205
(skipped this question)			101

20. Is the student's gifted identification/assessment information included in the WEP?		
--	--	--

		Response Percent	Response Total
Yes		63.8%	139
No		12.4%	27
I don't know.		23.9%	52
Total Respondents			218
(skipped this question)			94

21. Are WEPs written for accelerated students?

		Response Percent	Response Total
Yes		40%	88
No		24.5%	54
I don't know		35.5%	78
Total Respondents			220
(skipped this question)			92

22. Is there a connection between the acceleration process and the existing district WEP process?

		Response Percent	Response Total
Yes		26.7%	59
No		33.5%	74
I don't know		39.8%	88

	Total Respondents	221
	(skipped this question)	91

23. Prior to the requirement for the Written Education Plan, Ohio Administrative Code (or the Rule) required specific gifted intervention specialist contact time with students. What has the impact of the elimination of this time requirement been on the level of service to gifted children in your district?

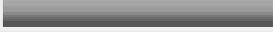
		Response Percent	Response Total
Increased service time to individual students		7.9%	17
Decreased service time to individual students		35.6%	77
No Change in service time to individual students		22.7%	49
No Opinion		18.1%	39
View Other (please specify)		15.7%	34
	Total Respondents		216
	(skipped this question)		95

24. Please use the space below to share any additional thoughts you may have on gifted WEPs.

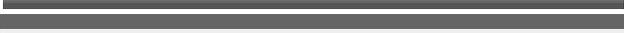
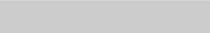
	View Total Respondents	96
	(skipped this question)	210

4. Survey Questions for Parents Only

25. Do you know what a written education plan (WEP) is?

		Response Percent	Response Total
Yes		82.4%	84
No		17.6%	18
Total Respondents			102
(skipped this question)			205

26. In your opinion, what is the purpose of the WEP? (You may select more than one answer.)

		Response Percent	Response Total
Individualize student instruction and curriculum		58.6%	51
Outline specific individual students goals		47.1%	41
Describe district gifted service options		28.7%	25
Document student progress toward goals		40.2%	35
Document student's participation in district services		39.1%	34
I don't know		13.8%	12
View Other (please specify)		13.8%	12
Total Respondents			87
(skipped this question)			219

27. Were you involved in the WEP process for your child?

		Response Percent	Response Total
Yes		26.2%	22

No		73.8%	62
Total Respondents			84
(skipped this question)			223

28. If you answered yes to the preceding question, please indicate how you were involved.

		Response Percent	Response Total
Parent survey of student's needs		12%	3
WEP conference		24%	6
Provided input into service delivery for student		16%	4
Sign-off on WEP		68%	17
Provided update on progress of goals in WEP		12%	3
View Other (please specify)		28%	7
Total Respondents			25
(skipped this question)			281

29. Was the WEP shared with you?

		Response Percent	Response Total
Yes, by mail.		29%	20
Yes, by conference.		27.5%	19
No		27.5%	19
View Other (please specify)		15.9%	11

Total Respondents		69
(skipped this question)		238

30. Do you think the WEP, overall, is valuable? If, no, please indicate why not.			
		Response Percent	Response Total
Yes		49.3%	34
No		2.9%	2
<input type="button" value="View"/>	If no, please explain 	47.8%	33
Total Respondents		69	
(skipped this question)		238	

31. What role do you see yourself playing in implementing a more effective WEP process?		
<input type="button" value="View"/>	Total Respondents	53
(skipped this question)		253

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