

**Using Case Studies to Develop Equity-Driven Professional Learning for Gifted Educators**

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This manuscript is the *accepted version* of the article, which is allowed to be shared per SAGE guidelines. The final published manuscript is available from SAGE. “Using Case Studies to Develop Equity-Driven Professional Learning for Gifted Educators” is now published in Volume 43, Issue 4 of *Gifted Child Today*. The permanent link for the article is <https://doi.org/10.1177/1076217520940736>

Please note, there are likely changes from this accepted version to the final, published version. Most changes are slight, editorial changes.

### Abstract

Carefully crafted professional learning has the potential to positively impact teacher perceptions of culturally diverse gifted learners. Case studies provide an opportunity to objectively examine scenarios that teachers of gifted students may encounter in the classroom. Embedding the seven guiding principles of equity-driven professional learning in the discussion of a case study fosters change in teacher perceptions and beliefs. This article presents the benefits of using case studies in multicultural professional learning for gifted teachers overlaid with the seven principles of equity-driven professional learning; offers an example of a case study, a boy named Raul; and shares two examples of the case study in practice.

*Keywords:* professional learning, case study, gifted, culturally responsive, equity

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### Using Case Studies to Develop Equity-Driven Professional Learning for Gifted Educators

Life-long learning has long been the unofficial motto of educators. Recognizing that true understanding and knowledge is a process that cannot be achieved in one lesson, day, month or year, teachers have been champions of cultivating ongoing learning in their students and in themselves. Teachers experience, first-hand, the impact of student growth when implementing a new idea and experiencing a change in attitudes or beliefs. But, even for teachers who see the impact and importance of change, it is not an easy concept. Change takes time; change is hard. Cultural change; deep-rooted beliefs? Those changes are even harder and can take even longer. But change is essential, and in many cases, it is long overdue. Generally speaking, when trying to move the dial on cultural change, individuals with deep-rooted beliefs may double-down in their opinions rather than alter them, or if there is change, the effects may not last, with the intervention quickly forgotten.

Broockman and Kalla (2016) conducted a study on changing public beliefs regarding support for a non-discrimination law in South Florida. While the topic was not specifically related to K-12 education, the outcome of the experimental design was promising: they found that “a single approximately 10-minute conversation encouraging actively taking the perspective of others can markedly reduce prejudice for at least 3 months” (p. 220). To accomplish this change, in their door-to-door canvassing, participants viewed videos showing different perspectives on the law (transgender rights). The participants were then asked to recall and share a time when they had experienced prejudice or judgment. Finally, the participants were asked to relate their personal experiences to those of the transgender population, such as in the videos they viewed (Broockman & Kalla, 2016). Participants were provided different perspectives, then

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asked to share a personal story, and finally asked to relate or make a connection; this was the researchers' formula for change.

Similarly, professional learning in K-12 education can involve sharing perspectives of students and teachers using case studies, then asking teachers and administrators to provide personal stories, and then making personal connections. Case studies encourage participants to walk a metaphorical mile in the shoes of another, and use their emotions to make connections, and dig into concepts during training sessions.

We presented seven guiding principles related to professional learning and national standards in a previous issue of *Gifted Child Today* (Novak et al., 2020). This article applies these seven guiding principles using case studies in equity-driven professional learning for teachers of gifted students (see Table 1). We present an example of a case study about a boy named Raul along with two examples of the case study in practice.

### **Seven Guiding Principles for Developing Equity-Driven Professional Learning**

Culturally responsive pedagogy is a necessary element in education, embedded and infused, not as an “other”, added in when there is an issue to address. When designing professional learning driven by a goal of equity, it is important to consider essential practices in both of these fields. In creating the principles, Lewis and colleagues strove to do just that, while also focusing specifically on educators of gifted students as the audience (Lewis, 2017; Lewis, Novak & Weber, 2018). The Seven Guiding Principles enable all stakeholders to experience meaningful professional learning by creating an environment where teachers can experience growth ultimately resulting in a change in beliefs. Table 1 offers an explanation of each of the principles in practice.

Table 1

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*Guiding Principles in Equity-Driven Professional Learning for Educators of Gifted Students*

| Guiding Principle                           | Description   |
|---|---|
| Taking a Pulse                              | <ul style="list-style-type: none"> <li>● Pre-assess the faculty to determine prior knowledge and areas of strengths and weakness</li> <li>● Use the data to guide the professional learning sessions</li> <li>● Use ongoing formative assessment</li> </ul>   |
| Individualizing Professional Learning Plans | <ul style="list-style-type: none"> <li>● Use the pre-assessment data, create individualized professional learning plans for teachers and staff</li> <li>● Vary the length and speed of the learning sessions for teachers and staff</li> </ul>  |
| Establishing a Safe Zone                    | <ul style="list-style-type: none"> <li>● Establish guidelines for the professional learning sessions</li> <li>● Develop trust and ensure confidentiality by setting appropriate boundaries</li> </ul>   |
| Going Beyond the Tip of the Iceberg         | <ul style="list-style-type: none"> <li>● Examine cultures and the importance of cultural awareness in the classroom</li> <li>● Focus on characteristics of giftedness within the cultural context</li> </ul>  |
| Bridging the Gap between School and Home    | <ul style="list-style-type: none"> <li>● Establish ways to engage parents and communities in the school, especially regarding information and support for gifted learners</li> <li>● Build teachers' cultural awareness of the parental and community perceptions towards gifted education</li> </ul>   |
| Identifying Grows and Glows                 | <ul style="list-style-type: none"> <li>● Invite teachers to share what works well for them (strategies and tips); help make connections to cultural competency and best practices for gifted learners</li> <li>● Encourage teachers to share areas where they have room to improve their craft and understanding of CLED gifted students</li> <li>● Engage with teachers to move beyond misconceptions</li> </ul> |
| Engaging in Courageous Conversations        | <ul style="list-style-type: none"> <li>● Ask the tough questions- growth occurs when one is challenged to question understandings</li> </ul>  |

- 
- Be respectful of others
  - Allow time for processing; changes in beliefs and practices occur over time
- 

Gorski (2018) highlights the importance of focusing beyond quick fixes and strategies, but on addressing the underlying systemic prejudice and inequities that are impacting our students. In addressing equity issues, too often precious time is spent trying to “fix” the child to meet the system, rather than redressing the biases in the system itself. In designing professional learning, it is imperative to be intentional about goals, outcomes, methods, and practices in order to stay on course. The seven guiding principles, explored in depth by authors (Novak, et al., 2020), are designed to help curate successful professional learning experiences for the benefit of students and the goal of systemic change, but they do not provide the content or topics.

### **The Benefits of Using Case Studies in Professional Learning**

While hands-on practice is often seen as the ideal way to provide opportunities for teachers to analyze and reflect on various situations they may encounter when educating gifted youth, facilitating such diversity of experiences is not always easy or at times even possible (Weber, Boswell, & Behrens, 2014). Burkman (2012) studied the challenges for novice teachers and evaluated the availability of professional development for identified issues, along with the preferences of novice teachers for delivery of professional development. She found that in working with novice elementary teachers participants ranked teaching gifted and talented students in the top 25% when asked about challenges in the classroom. In addition, these novice teachers also ranked interactive and cooperative learning as a method of presentation that would be most meaningful or appealing for professional development. Using case studies in professional learning can support these criteria--interactive and cooperative learning-- and

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address gifted and talented students, which are a particular challenge for novice elementary teachers.

The use of case studies also aligns with the tenets of Professional Learning Standards (Learning Forward, 2017), which focus on improving educator practice and student results. They encompass topics related to learning communities, leadership, resources, data, learning designs, implementation, and outcomes, which are necessary to address through effective professional learning. Case studies develop the teachers' knowledge, skills, practices, and dispositions to help their students be successful in learning. As the Every Student Succeeds Act (ESSA) recommends [S.1177, §8002 (42)], collaborative and job-embedded practicum occurs with case studies by intentionally engaging participants in race conscious discussions, integrating those conversations within teaching and learning models, and coupling the discourse with an opportunity to integrate new insights into the classroom (Lewis, Novak, & Weber, 2018). Professional learning strategies such as mentoring, coaching, and demonstration lessons as well as a variety of issues can easily be incorporated within case studies and used for analyzing and improving classroom practices.

Considering best practices from ESSA and national professional standards in gifted education (see National Association for Gifted Children and Council for Exceptional Children-The Association for the Gifted) along with the sensitive nature of becoming culturally responsive educators, one should be deliberate in selecting the type of professional learning to be implemented. Case studies can provide opportunities for educators to explore how a collective and collaborative responsibility regarding equity and access can help meet the diverse academic and affective needs of their students. Case studies provide an opportunity for teachers to imagine themselves in settings they might not have encountered, have yet to encounter, or have encountered and are not sure how to proceed. Similar to the research cited earlier by Broockman

and Kalla (2016), the use of case studies, personal stories, and connections can be integral in changing personal beliefs, which is an important step in systemic change (Gorski, 2018).

### **Crafting Professional Learning Using Case Studies**

This case study (see Weber et al., 2014, 2016) or cases developed by individuals themselves provide a less intimidating way to discuss the issues of equity and culturally responsive teaching and other important topics related to identifying and serving gifted children with educators and other stakeholders, including parents by removing the focus on a specific individual or group of individuals. Specifically, those who would benefit include:

- Preservice teachers enrolled in general and special education coursework.
- In-service teachers enrolled in advanced and/or graduate level coursework.
- All educators (teachers, administrators, counselors, psychologists, support staff) enrolled in Gifted and Talented Endorsement, Certification, and/or Professional development coursework.
- Practitioners at any level of professional development, responding to cases through discussion, may refine understanding, explore more in-depth, reflect on current practices, and extend his or her perspective.
- Parents and community members who wish to learn more about students who are gifted and talented. (Weber et al., 2014, p. 3)

It is important that the facilitator of the professional learning experience be well versed in the topics that arise or could arise as a result of an honest discussion among participants and be prepared to provide a nonjudgmental focus for an in-depth discussion and continuous feedback which may include follow-up meetings and mentorships for teachers. Some guiding questions that have been used with this case and others include:

- Who is the focus of the case study?



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- What is the primary issue to be addressed?
- Is there a secondary issue?
- What cultural factors impact this case study? (e.g., socioeconomic status, limited language proficiency, ethnicity, traditions, values/beliefs, family setting, community norms)
- What other factors are relevant to the case study? (e.g., evidence of special abilities, mental and physical health limitations or concerns, safety, learning differences, learning style, access to services, motivation, engagement, achievement)
- With whom could you collaborate to resolve the issue(s)?
- What course of action would you recommend?
- What research supports your recommendation?
- What additional information or resources would be helpful? (Weber, et al., 2014, p. 8)

Weber et al. (2014, 2016) also provide steps to help the facilitator run an effective professional learning session and suggest a format for a session agenda.

### **Case Study Exemplar: Raul**

One particular case developed by Weber et al. (2014) that explores at risk learners and special populations of gifted students is “Raul”. Raul’s case study raises questions about cultural competency, equity, teacher preparedness, and more. As previously recommended, educators need specialized training and support to understand, acknowledge and respect the hidden rules of culture that exist for students from diverse backgrounds, *bridging the gap between school and home*. Providing a *safe zone* is imperative in order for these *courageous conversations* to occur. As education professionals it is our obligation to ensure these systems exist. Using “Raul”

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provides a springboard to *go beyond the tip of the iceberg*, discuss cultural competency and other related issues such as personal competence and dispositions, including self-awareness, and self-efficacy (see National Association for Gifted Children Standard 4, 2019).

As the needs of different groups may vary, whoever leads the case study analysis can *individualize* the process, determining which discussion questions, activities, extensions, and suggestions for additional readings would be most helpful. Creating a needs assessment or *taking a pulse* before beginning a reading of the case may also provide further guidance on how to structure the study. Although the cases are one to two pages in length, they provide enough information for a rich discussion. Answers are not provided in order to allow for differences in thoughts, feelings, and attitudes and for developing and/or refining educational philosophies. Additional questions may emerge as a result of in-depth discussions or a need to find out more, and can be a starting point for *courageous conversations*. An application of what was learned and/or a willingness to try something new or different is an outcome of such an approach, which can be shared in ongoing sessions as *grows and glows*. “Raul” is shared to better help understand the scope of using case studies as a professional learning strategy for developing cultural competency along with implementing the seven guidelines previously outlined in Table 1.

**Raul**

Box off

**Introduction**

*The United States is an increasingly diverse nation. Preparing the education professional to recognize and respond to the needs of students from diverse, at-risk populations is critical to student achievement, post-secondary success, and ultimately, the future of the United States. For*

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*diverse learners living in poverty, the issue takes on a special poignancy. The cruel reality is that these learners are most likely to receive instruction from teachers with the least training in schools with the most severely limited resources. Sadly, all too often, students in these circumstances are victims of the soft bigotry of low expectations where little is expected, and little is encouraged. Although more than half of the growth in the total population of the United States between 2000 and 2010 was due to the increase in the Hispanic population (U.S. Census Bureau, 2010), many educators remain unaware of diversity's impact on their students and classrooms. Cultural competency, the ability of people to successfully interact with and understand others whose culture differs from their own, is an increasingly important skill for all educators. For educators the gifted cultural competency is the skill set necessary to support and assist in the identification of underrepresented populations. Gifted learners from diverse backgrounds may need complex support in which the hidden rules of culture are acknowledged and respected. As education professionals, it is our obligation to ensure these systems exist. Raul's case study introduces the professional to a high school student who appears to lack the motivation and engagement to attend class.*

End box

The town of Maryville, located in the southern part of the state, was once a stable community. In recent years, several factories have closed, and the unemployment rate has increased to 23%.

Once a town with a population of more than 23,000, Maryville now counts 18,502 residents and a K–12 school population of 4,728. The district reports to the state that the students are 3% Asian, 9% Black, 16% Latino, and 72% White. The school's population consists of 18% Limited English Proficient students, 28% special education students, and 72% recipients of free and

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reduced lunch. Resources are almost nonexistent; technology and textbooks are outdated, and the roof leaks. Administrators spend the majority of their time addressing disciplinary, facility, and budgetary issues. The district has not made adequate yearly progress (AYP) in either math or reading in any of the buildings, and school restructuring within 2 years is almost certain. Class sizes are large, and morale among the staff has remained low since the third attempt to pass a referendum, in which a proposal to raise taxes to fund building repairs failed.

Raul's parents are immigrants who work several jobs to provide for their five children. His father works during the day at a meat packing plant, sleeps a few hours, and then cleans offices for a local bank. Raul's mother cleans rooms at a local motel before heading to her other job at a fast food franchise. When she arrives home, late at night, she is exhausted and often collapses on the couch. Each morning Raul, age 15, helps his siblings of 5, 9, 11, and 12 years get ready for school. After school, he supervises homework, prepares supper, and puts the younger siblings to bed before beginning his homework. Raul has few friends and prefers to eat his lunch alone. Raul's parents cannot afford to miss work to care for the children if they are ill. Therefore, he stays home from school if his siblings are ill or running late. Consequently, he misses a lot of school and is tardy more often than not.

Box off

### **Things to Consider**

- Culture impacts students every moment of every day.
- Family and community are core values in the Hispanic/Latino culture.
- Hispanic/Latino families value self-sufficiency and are unlikely to request or depend on assistance from outside of the family.

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- Attendance issues are often more complex than they appear.
- Generational poverty impacts what students think about themselves, school, and aspirations for the future.
- End box

Raul's math teacher, Mrs. Smith, is tired. Her expectations are low, and she has grown accustomed to students sleeping through class. She rarely wakes them, circumventing confrontation and dealing with the shortage of textbooks. Although Raul likes math, he is often unable to complete his homework. He has no calculator and too much pride to borrow one. Mrs. Smith believes Raul listens in class but can't understand why he doesn't turn in his assignments. After Raul scores in the 95th percentile on the state Graduation-Required Assessment for Diploma (GRAD) math test, she reads his cumulative file. Much to her surprise, Mrs. Smith discovers a history of high test scores, low attendance, and poor grades. Armed with the data, she meets with the dean to support Raul's placement in next year's honors math class. When she learns Raul has refused to register for the class, Mrs. Smith becomes aggravated and determines that it's the last time she will spend time advocating for a student.

**Discussion Questions**

1. Why is Raul reluctant to register for the honors math class? What environmental factors may have influenced his decision?
2. *NAGC Standard 4: Learning Environment...* references personal competence. Students with gifts and talents demonstrate growth in personal competence and dispositions for exceptional academic and creative productivity. Does Raul exhibit self-awareness, self-advocacy, self-

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efficacy, confidence, motivation, resilience, independence, curiosity, and/or risk taking? What evidence supports your decision?

3. Would Raul benefit from identification as a gifted learner? Is assessment of potential appropriate or inappropriate for high school students? Explain why.
4. Is Raul at risk? Why or why not? What systems of support would benefit Raul?
5. Cultural competency is the ability of people to successfully interact with and understand others whose culture differs from their own. Does Mrs. Smith display cultural competency in her understanding of Raul's situation? Why or why not?

### **Activities**

1. Research the concept of a "Forced Choice Dilemma" and prepare a short presentation to share with your colleagues.
2. With colleagues, role-play a conversation with Raul's parents.
3. Research organizations that support promising learners, like Raul, who come from impoverished environments. Create a list of local resources for at-risk students.

### **Extensions**

1. Research *NAGC Standard 6: Professional Development*...and design a cultural competency workshop for Mrs. Smith and the teachers at her school.
2. Select a journal article on diverse gifted learners to read and discuss with your PLC. Identify questions for the discussion.
3. Create a gap analysis tool that building-level teams can use to identify culturally sensitive professional development needs.

### **Additional Readings**

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[https://www.nagc.org/sites/default/files/key%20reports/Overlooked%20Gems%20\(final\).pdf](https://www.nagc.org/sites/default/files/key%20reports/Overlooked%20Gems%20(final).pdf)

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[1] From *Exploring Critical Issues in Gifted Education: A Case Studies Approach* (pp. 76–79), by C. L. Weber, C. Boswell, and W. A. Behrens, 2014, Waco, TX: Prufrock Press. Copyright 2014 by Prufrock Press. Reprinted and adapted with permission.

### **The Case of Raul and the Seven Equity-Driven Principles**

In order to address the Seven Guiding Principles for Raul, consider the following suggestions for facilitating professional learning opportunities.

*Taking a Pulse:* Create a needs assessment. Chances are, that could be what led you to choose Raul, but if not, break down what’s happening with Raul, and determine what aspects of the case might best be served by a “deep dive” by your faculty:

- Culture, specifically Hispanic/Latinx (use what is represented in your community)
- Generational poverty
- Teacher’s perspective- “tired”
- Identification

Use the data you gathered to guide the professional learning sessions, from grouping to discussion questions. If you have not settled on a case, this is a great way to choose or design a case study.

*Individualizing Professional Learning Plans:* Using the pre-assessment data, create individualized professional learning plans for teachers and staff. Case studies led as a whole group will still often have small group breakout and discussions. Much like students travel to differentiated centers, faculty can address different questions in intentionally crafted groups,



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from equity to gifted identification. Where can teachers grow? Where can teachers lead, as the facilitator can't be in all groups at once?

*Establishing a Safe Zone:* Establish guidelines for the professional learning sessions. You may create group norms at the beginning. This will also be informed by your pre-assessment as well as by your knowledge of your faculty. P. Gorski (personal communication, January 29, 2020) indicates, “we shouldn't be debating whether inequity or racism exists in our schools. That's a failure of leadership. We need to answer: How is racism defined in our schools?” Set up a ground rule not to debate whether or not the prejudice exists, whether or not racism exists, but how it exists at your school, and how to address it. In the context of Raul, the ground rule is that we do not debate the systemic biases in place--we discuss them. Beyond establishing guidelines for professional growth is the importance of establishing trust and confidentiality by setting appropriate boundaries. “There must be a commitment to understanding the different cultures, experiences and perspectives that co-exist in a community and to giving every participant an opportunity to tell this or her story in a respectful and mutually supportive setting” (Wenger, 2012, p. 13). This includes not only establishing boundaries at the onset, but also an understood protocol to follow when tensions rise, lines are crossed, and words are spoken in anger, fear, or ignorance. Discussing the emotions of Raul and his teacher has the potential to bring up raw feelings from teachers.

*Going Beyond the Tip of the Iceberg:* Examine cultures and the importance of cultural awareness in the classroom. In Raul's case the cultural example is Hispanic/Latino, however it is generalized to be a case that can be used in a variety of locations: Maryville is in the southern part of “the state” but not a specific state, which allows for flexibility to adapt the culture more specifically to the community served by your population. Rather than generalize to

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Hispanic/Latinx, focus specifically on the communities and cultural groups served, e.g., Puerto Rican, Ecuadorian, or Mexican. The facilitator should research and focus the training first on broad cultural understandings, and then on specific characteristics of giftedness within the cultural context.

*Bridging the Gap between School and Home:* Establish ways to engage parents and communities in the school, especially regarding information and support for gifted learners. Building a strong support of community and cultural understanding is essential in this step. Is the school or a local church or community space a more comfortable meeting space for families? Consider childcare options, time of day, space constrictions, travel restrictions, and so on. The focus on parental and community engagement should be facilitated through an asset-based lens; equity can not exist in the same space as deficit ideology. The body of work on ‘funds of knowledge’ (see Moll, et al., 1992; González, et al., 2005), particularly Norma González and Luis Moll’s work focused on Latino communities (see González, et al., 1995) would be beneficial as an additional resource for the facilitator in this step.

*Identifying Grows and Glows:* Invite teachers to share what works well for them, from strategies of how they’ve overcome the “tiredness” in the teacher’s case, or how they’ve helped a student similar to Raul. As teachers share, the facilitator can guide and make connections to cultural competency, equity, and best practices for gifted learners. Teachers can also be encouraged to share areas where they have room to improve their craft and understanding of CLED gifted students, perhaps sharing an example of a student similar to Raul, that can be a discussion point for shared growth and strategy-building among the teachers, and modeling on the part of the facilitator of a funds of knowledge or asset-based approach, and/or equitable gifted best-practices.

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*Engaging in Courageous Conversations:* Throughout the case study discussion, the facilitator must ask the tough questions. Growth occurs when one is challenged to question understandings. Bell & Lindberg (n.d.) recommend four steps for educators to prepare themselves to have difficult discussions with students; these hold true for facilitating conversations with faculty: assess your comfort level, find a measure of comfort in the discomfort, allow yourself vulnerability, and be prepared to address strong emotions. Keeping the ground rules from “Safe Zone” in mind, discussion Question 4 does not ask if Raul has experienced bias or prejudice, but is he at risk? The facilitator must also challenge the thinking of the faculty, considering discussion Question 3, would Raul benefit from identification? Throughout the discussion, it is important to allow time for processing; a first thought or response may not be a final one, after contemplation and thoughtful dialogue. Changes in beliefs and practices occur over time.

### **Putting the Case Study “Raul” into Practice**

As indicated earlier, case studies can be used in a variety of settings; the authors have put Raul into practice several times. One such use was a modified version of Raul’s case as a class assignment for graduate-level students in an online gifted endorsement series course. A second use was during an in-person three-day professional learning institute focused on cultural responsiveness for gifted educators. Online or in-person, through the lens of instructional practices or multiculturalism, the use of the case study was impactful for participants and aligned with the principles for effective cultural proficiency professional learning.

### **Graduate Assignment**

As part of an assignment in a masters-level gifted endorsement series course, students were asked to reflect on Raul’s case in written form. Prior to choosing the case of Raul, the

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instructor used formative assessment to determine which case study to use. The goal of the assignment was to create an advocacy plan; through the formative assessment, *or taking a pulse*, the instructor specifically chose Raul's case in order to also build in the equity focus. The instructor worked throughout the semester to establish a *safe zone* in the discussion boards, by creating norms and guidelines for the boards where *courageous conversations* were held, and by developing a relationship with the graduate students, encouraging their engagement in this discourse. This reflection assignment on Raul's case was divided into three sections: My Observations, My Recommendations, and My Approach:

- My Observations: they were asked what they noticed and thought about the situation and asked to connect to the literature from class.
- My Recommendations: they were asked to consider recommendations from a variety of perspectives, Raul, the educator, administration, and additional perspectives of their choice.
- My Approach: students were asked to project into their future potential role as a gifted resource teacher or pull-out teacher, and their role of advocate for the gifted. Looking through the lens as an advocate, students were asked to focus on the importance of communication and collaboration. Their task was to specify how they would tackle one of their recommendations, step by step.

Additional readings were provided in the course module on understanding cultural aspects of giftedness, helping students to *go beyond the tip of the iceberg*. The following student responses to the My Recommendations assignment, in particular, represent how they focused on the importance of cultural knowledge:

- *One important strategy she needs to learn more about is how to study her students' cultures. Raul's story is an example of how his culture is having some effects on his schooling. If Mrs. Smith understood why he has some absences, for example, she may be able to talk to him about it and find ways she can differentiate assignments for him. She could implement the use of dialogue journals... This may allow for Raul to communicate some of his needs/concerns to Mrs. Smith without feeling like everyone in the class knows what he may have going on. (Student 7)*
- *Mrs. Smith has several opportunities to change the environment into a more positive one. She should start by studying the cultures of the students in her class. She needs to find out and understand what is valued in the student's world. (Student 5)*
- *It is important to remember that when there are students who are from a culture that is different from the majority, teachers should try to learn about their culture in order to understand how to meet the needs of those students. Had someone were willing to do this for Raul, his perceptions and attitudes towards school may have been different. (Student 1)*

Table 2 provides a sample of short quotes taken from gifted endorsement student responses to the third aspect of this task, My Approach, along with an analysis of the responses. The analysis is written by the professor, an author on this paper, addressing the seven equity-driven principles as well as the opportunities for feedback, coaching, and next steps.

Table 2

*Selected Graduate Student Assignment Quotes and Analysis, My Approach (February 3, 2019)*

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| Graduate Student Responses to Raul’s Case Study, “My Approach” Prompt   | Analysis of the 7 Principles and Potential Next Steps  |
|---|--|
| <p>By just reviewing the case study, I’m gathering Mrs. Smith may not take to hearing ways she needs to improve. With that in mind, as the resource teacher, I don’t feel it would be as effective for just myself to approach her. I would fear she would not listen and brush off any recommendations I may share. I feel the better approach may be to plan a PLC meeting that I would attend. I think it would also be a great follow up idea to ask administration if I could hold a school wide training on supporting our students, potentially gifted students facing challenges such as Raul. We don’t want to let these students “slip by” but ensure we are meeting their needs. A school wide training of ways to support these students so they can go on to be successful is necessary. If there is one Mrs. Smith, there may be another. If there is one Raul, I’m sure there could be a few more. (Student 7)</p> | <p>Student 7 seems to be considering a training that would <i>go beyond the tip of the iceberg</i>, “supporting our students, potentially gifted students facing challenges such as Raul.” She recognizes that there may be others in this situation, and looks to a PLC or schoolwide training to bring others in, rather than an individualized learning approach, indicating a fear of being ineffective with a personal approach. There is perhaps a lack of self-efficacy on the part of this teacher in terms of her ability as a teacher leader/facilitator, or concern about the teachers’ willingness to change. The professor (or PL leader) could take this focus for next steps.</p> |
| <p>I feel that my first goal would be to address the lack of resources available to the teacher. As a gifted resource teacher, I would offer to support the teacher and students by offering additional resources and books, if I had them available, push in our pull out services to address the student needs for differentiated work, and a check out system for books and calculators for students that lack the resources. (Student 2)</p>  | <p>Student 2 seems to be using an <i>individualized learning plan</i> approach, offering specific resources that the teacher needs, books, and push in/pull out services that are specific to the teacher/students. She doesn’t share how she will know what is needed (<i>taking a pulse</i>) but she seems ready to jump in and support. The professor (or PL leader) might first want to guide student 2 by asking “how do you know what is needed?” as well as support the student in a dynamic rather than deficit viewpoint.</p>   |
| <p>The school reports that 72% of students are recipients of free and reduced lunch. Based on this statistic we can assume that a majority of the school’s population may be of low socioeconomic status. Therefore, I would begin with a school-wide book study using the book <i>Engaging Students with Poverty in Mind: Practical Strategies for Raising Achievement</i> by Eric Jensen (or something similar). Teachers</p>   | <p>Student 6 uses demographic data, taking a pulse, in order to guide a somewhat <i>individual professional learning plan</i> decisions (school-based; more individualized than district-based, but not as individualized as a single grade level or PLC). The learning plan includes opportunities to <i>identify grows and glows</i>, when they meet biweekly and “share the strategies learned....[and] set a goal to try one</p>   |

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|---|--|
| <p>could read a few chapters every other week and meet as a whole school every other week. Each time they met we could share the strategies learned from the readings and teachers could set a goal to try one of the strategies in their own classroom. (Student 6)</p>  | <p>of the strategies in their own classroom.” She incorporates several of the equity-driven principles in her plan. The professor (or in similar PL situations, the PL leader) might next focus on the intersectionality of ethnicity and poverty, redirecting the student to the specifics of Raul’s case: the book chosen was specific to poverty, rather than focusing on the cultural (Hispanic/Latino) aspects.</p>   |
| <p>To help Mrs. Smith, I would start a book study with some other faculty about the book, <i>The Wild Card</i> by Hope and Wade King. I would use this book because of a central quote from the book that I think would be beneficial for her to hear. This quote is, “Because in the game of life, children have no control over the hand they are dealt. You, as a teacher, are the wild card that can make a difference in your students’ lives.” (King &amp; King, 2018 [sic]) As a group, we would discuss our feelings towards this quote and if we feel we are living up to being a ‘wild card’ to our students. I would be hoping for Mrs. Smith to open up during this. (Student 4)</p>                            | <p>Student 4 seems to indicate that she is hoping to create an environment that is a <i>safe zone</i>, in which she and a small faculty group can have <i>courageous conversations</i>, “we would discuss our feelings towards this quote...I would be hoping for Mrs. Smith to open up during this.” Her description focuses on the book and the quote to be used. The student would benefit from direction from the professor (or PL leader) with regards to her plans in how she will establish a safe zone and facilitate these courageous conversations. Additionally, she may need guidance in how she will connect the book to specifics (such as cultural aspects or equity aspects) prevalent in Raul’s case.</p>   |
| <p>We will discuss student needs and ways for teachers to respond. During the training, we will point out that the learning environment is one way to support and respond to their needs. I will make sure to bring in the importance of bringing in aspects of cultural backgrounds into the classrooms and how this will affect student needs. Part two training will be more scenario based and role play. This will allow the teachers to see some clear and true examples. Within the scenarios, I would include some examples seen around the school. However, I would not put names or identifying information into the scenarios. Them [sic] scenarios would be relatable to the school’s dynamics. (Student 3)</p> | <p>Student 3 shares a plan to discuss “student needs and ways for teachers to respond;” this is a way of <i>taking a pulse</i>, a needs assessment, in the form of a discussion. During the second part, the role play, student 3 is able to <i>individualize</i> the role play PL based on the first discussion: what the participants said, and what they didn’t say. By using examples around the school, there is the potential to identify grows and grows, but the professor, or in a PL environment, the PL coach, might have a conversation with Student 3 about potential outcomes of using recognizable situations, even if names are omitted. Student 3 doesn’t discuss the establishment of a safe zone, but it is an important step in this work, and utilizing real examples, while teachable moments, are also potential opportunities for a variety of negative emotions, including perpetuating racist ideas.</p> |

While student responses varied, the cultural attributes from the case, highlighted in “Things to Consider” were acknowledged by all students in some form, in observations, recommendations or approach, and the students made efforts to go *beyond the tip of the iceberg* in their cultural understandings. Their approaches varied but showed a respect for the balance of communication and collaboration between teachers and recognizing that some teachers would be ready to *identify glows and grows*, whereas some may be more resistant to the ideas of change. Some graduate students wanted to forage ahead with *courageous conversations* via book studies, where others took a more *individualized* approach. Raul’s case is helpful for bridging the gap between school and home; the students had different approaches and reactions to this aspect. Some viewed Raul and his family and culture through a deficit lens; in this way the assignment and the case itself were methods of *taking a pulse* in class content: next step for the class, understanding the deficit ideology and the roadblock it creates to equity (Gorski, 2019).

### **Summer Institute**

This same case study was utilized during a three-day summer professional development institute focused on developing culturally responsive gifted educators. About 40 teachers of the gifted and administrators participated in this institute. The seven principles were used throughout the three days; an online survey, to *take the pulse*, was administered prior to the start of the institute to understand the starting point of participants and help plan the three days of sessions, as well as specifically choose Raul to use as a case study. Thus, the 3 days of professional learning were crafted intentionally, *individualized* for the districts represented, so that the content reflected their communities.



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The three days were organized into 6 half-day sessions: first, an overview of culture, identity, and equity followed by three “deep dives” on cultural groups and giftedness, those most represented in the districts taking part in the training. During the first session, the facilitators established ground rules, *the safe zone*, engaged participants in *courageous conversations* while pushing their cultural knowledge *beyond the tip of the iceberg*. The fifth session focused on parents and community, *bridging the gap between home and school*, and the closing session brought together topics such as bias, fairness in assessment, curricular support, strategies, and the case study of Raul, again engaging in intentional *conversations*, digging down into the cultural *iceberg* of knowledge, and guiding participants in *identifying glows and grows*. Each day featured smaller case studies, brief discussions, but Raul encapsulated the three days of work, as well as provided directions forward, a *pulse*, for the organizer of the institute, as they continued to meet throughout the year in book studies, district visits, and online groups.

On the final day, the participants were presented with the case and provided a time to individually reflect on a response or reaction to Raul and/or the teacher via a Padlet post (online discussion board tool), prior to a group discussion. They were provided the prompt “What are next steps for Raul or for the Teacher,” though not all focused on next steps, many just reacted to the case itself (see Table 3 for these responses, arranged by themes).

Table 3

*Selected Padlet Responses by theme from a Professional Learning Institute, July 31, 2019*

| Themes Found in the Responses | Responses to the Case  |
|-------------------------------|--|
| Systemic Changes              | “Can we offer childcare after school for [Raul] to have extra time to work? Can we offer him a free calculator? I understand why he would refuse; he is embarrassed to fail in an honors class because he is embarrassed to ask for a calculator in the regular ed class. Can I show him his scores and prove to him his ability?” Administrator A |

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|--------------------|--|
|                    | <p>“I wish [Mrs. Smith] would take the time to understand what I do each day. I could use support from school. Lunch is the only time I have to myself.” Teacher D, from Raul’s perspective</p>  |
|                    | <p>“I think Raul needs grace. He needs some intervention from a counselor. He needs a time-out. This is a child living like a father. Although unfair, this is not uncommon.” Teacher F</p>  |
|                    | <p>“Perhaps the teacher needs to find some community resources that could help Raul and others like him. Arrange a co-op to allow students to attend classes after school hours. Establish alternative assignments to allow him and others to still be part of learning.” Teacher B</p>  |
| Empathy            | <p>“[Raul] probably sees this Advanced class as more work. He can barely keep up with the regular classroom work and he is too embarrassed to even ask for a calculator. He is putting his family first.” Teacher C</p>  |
|                    | <p>“I can understand where this teacher is coming from. She feels worn down. The morale is low and she isn't experiencing any success. She's assuming that the students feel the way she does and she has given up. She notices Raul's potential and attempts to help but feels rejected when Raul refuses.” Teacher A</p>   |
|                    | <p>“I can understand [Raul] not wanting the extra.” Teacher M</p>  |
|                    | <p>“[Mrs. Smith] isn't looking beyond her own feelings. She isn't reaching out and trying to understand where he is coming from. This is a case of miscommunication. There is definitely a disconnect between the teacher and the student. If she would ask him why, maybe she would be able to help him more.” Teacher A</p>  |
| Cultural Awareness | <p>“The teacher needs to understand the cultural implications for Raul. He is necessary for his family's survival and family is his priority. His refusal to register for the honor's math class is not personal against her, but rather a reflection of his life. He doesn't have time to do his current assignments so a more challenging workload would also fall to the side.” Teacher B</p> |

“I know [Mrs. Smith] is trying to help him, but she shouldn't give up...she should be persistent and keep trying to help him.

Culture

Family is first with him...

It's not his fault...”

Teacher E

Small groups, based in districts, had individual discussions, reflecting on their individual reactions, making connections to their students and schools, and sharing their thoughts and reactions within a smaller, comfortable group of colleagues. Then the facilitators led the whole group, representative of districts across a mid-western state, in a discussion of the case, pushing the discomfort level a bit higher, stretching participants to think and challenge each other, and reflect on the past days of training. Selected quotes from the whole-group discussion, arranged by themes, are included in Table 4.

Table 4

*Selected Quotes by theme from the Whole-Group Discussion at a Professional Learning Institute, July 31, 2019*

| Themes                      | Selected Quotes  |
|-----------------------------|--|
| Personal Connections        | “These are <i>our</i> kids.”<br>Administrator C  |
|                             | “We live the tired that Ms. Smith feels. We’ve all felt that tired. You give until you have nothing left.” Teacher K |
|                             | “Give the teacher some grace.” Teacher I   |
|                             | “I’ve been a Mrs. Smith.” Teacher H  |
| Frustration with the System | “Teacher needs support... why did she give up on him?”<br>Administrator E  |

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|----------------------------|--|
|                            | “I’m not sure she’s giving up on the child, she’s giving up on the system.” Teacher F  |
|                            | “I ask before I refer to AP/Advanced. I never refer without asking. If she asked he may have replied that he doesn’t want to put in the extra time.” Teacher L |
| Need for Community Support | “It takes community and collaboration. This family has slipped through the cracks.” Teacher G  |
|                            | “He’s tired and defeated- no matter what I do, I can’t get ahead so why try? The teacher feels the same.” Teacher J  |
|                            | “Our district has a daycare for students that have kids.” Administrator D  |

In using Raul’s case within the context of the three-day institute, the teachers immediately connected with the student, and the teacher, as evidenced by the quotes, “These are our kids” and “I’ve been a Mrs. Smith.” The choice of the case was *individualized* for the institute, carefully selected based on the needs of the professional learning and the *pulse* of the district. These immediate connections provided the *safe space*, allowing the facilitators to dig deep into the cultural norms, and to question and facilitate meaningful *courageous conversations* around the teachers’ suggestions of “the system failed the child” versus the cultural norm and that Raul may consider it an honor and a privilege to help provide for his family in this way. Participants in the institute spoke about the importance of community, whether it was where there were failures of the system, or where support structures were in place in their communities, as potential areas to *bridge the gap between school and home*. Participants in the 3-day institute particularly embodied the use of Broockman and Kalla’s (2016) change formula, by first reading Raul and Mrs. Smith’s story, and then sharing their own stories, “I’ve been a Mrs. Smith”, and

“These are *our* kids”. Relating to Raul’s case and making connections came naturally through reflection and discussion of the case study.

### **Reflections**

Reflecting on the delivery methods of professional learning shared in these anecdotal examples (see Tables 2-4), it is interesting to note similarities and differences in the experiences. Positive effects on the growth of the participants’ mindsets were observed in both environments. Utilizing the carefully crafted assignment discussion questions, participants were able to reflect on the case study and draw connections to Raul as well as themselves, through an online class environment. Students’ comments showed growth in their approach and response to differentiation, cultural context, and communication/collaboration strategies.

At the beginning of the three-day institute, participants’ discussions evoked deficit-focused mindsets, and expressed the need to help the student to adapt to the system, rather than change the system to meet the needs of the student. While the deficit ideology still existed by the end of the institute, it was less prevalent, and there was some focus on systemic change. When participants were presented with the Raul case study on the final day of the 3-day workshop, the following themes emerged from the participants reflections (also see Table 3):

1. **Systematic Changes.** Responses from the participants focused on the struggles of both the teacher and student as a result of failures within the school system. These participants called for changes in the system in order to facilitate the success of the student in the gifted programming.
2. **Empathy.** This theme emerged from responses where the participants recognized the struggles of the teacher/student and were able to understand the context of the

situation for the teacher/student and feel for their struggles. This empathy was couched in a deficit mindset with some participants.

3. Cultural Awareness. Participants recognized a need for a greater understanding of the student's culture in order to support the student in the classroom.

The growth of the teachers and administrators shown by the anecdotal evidence in discussion quotes and padlet responses has implications for the positive use of case studies combined with the equity-driven principles in professional learning for gifted educators.

Similarly, the graduate students' responses overwhelmingly showed an understanding for the need for cultural understanding, not previously recognized in class discussion boards. Student responses to My Approach (see Table 2) and the subsequent analysis show where these students grew along the continuum of the seven equity driven principles. The analysis also shows significant room for next steps and individualized growth for the students, a strength of the online graduate class, one that the professional learning institute opportunity, given its three-day limitation, did not provide.

Following the Guiding Principles for Equity-Driven Professional Learning enabled participants to connect and thoughtfully reflect on the case study, thus initiating a change in mindset. Common themes in the whole-group discussion of Raul's case at the 3-day institute (see Table 4) were personal connections, frustrations with the system, and the need for community support. Both groups showed a tendency towards a deficit ideology when approaching Raul's case; the different implementation methods led to varied ways to redress these responses. In the online class, comments were made on assignments and it was added as a topic to the next module, where as in the institute, facilitators were able to react by questioning and asking for more information, and in some cases, directly reminding participants of the content covered

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previously, such as the funds of knowledge (Moll, et al., 1992; González, et al., 2005) approach. This is an example of *taking a pulse* as an ongoing activity; it is formative assessment, not a pre-assessment.

Though the delivery methods varied, each was a successful implementation of the case study, using the principles as a guide. Online methods could be a viable tool for delivering effective professional learning through case studies as indicated by the success of the assignment. The 3-day workshop participants evidenced personal and professional growth as a result of the case study approach to professional learning. For these educators, the case study was delivered face-to-face at the institute through written reflection and oral discussion.

Due to the delivery methods of the professional learning and the case study, there were some notable differences in using the method, as well as the outcomes and experiences. The length of time spent analyzing the case study varied between environments. While the Summer Institute participants had less time and space to individually process and respond than those in the online environment, their personal connections to the case study were immediate and visceral (see Tables 3 and 4). The impact of the face-to-face case study implementation could be due in part to the role the facilitators played during the discussion, asking questions and pushing back on ideas, as well as the opportunity for colleagues to share ideas and collaboratively process information, fostering a change in beliefs. The face-to-face setting provides an intimate context where the facilitators are able to guide conversations and read the readiness of the participants through verbal and nonverbal cues. In contrast, the online environment gave ample personal reflection time on Raul's case study, without the collaborative experience. The background information on culture was provided through readings and discussion board discourse, rather than the previous two days of training. Feedback was not instantaneous, but delayed through the

asynchronous online environment of discussion boards and assessment of student products by the instructor.

The authors share these examples of the case study of Raul in practice as anecdotal examples of theory-to-practice. Raul's case has been used by more individuals, in more contexts, than what has been shared, as it is available as a published case study. It is important to tie in the guiding principles of *taking a pulse* and *individualization* when implementing case studies in professional learning plans in order to structure an environment encouraging meaningful *courageous conversations*.

### **Conclusion**

For this article, the case of Raul was described in two different contexts: locations, populations, participants, and goals all varied. Shared context was the case and the Seven Guiding Principles for Equity-Driven Professional Learning for Educators of Gifted Students. Case studies lend themselves to *individualize professional learning plans* where the content can be easily differentiated according to the needs of the teachers informed by the data collected during the *taking a pulse* survey. Teachers and other participants can work together in pairs, triads or small groups, investigating and analyzing the scenarios and determining a path of action. Furthermore, case studies provide an opportunity for discussion about these and other questions related to student outcomes such as, what barriers do we encounter when identifying underserved populations of gifted students, how do we build a *bridge between school and home*, and what changes have the greatest impact on underserved gifted students. Thus, case studies as professional learning tools engage teachers in reflection of their *glows and grows* and evaluation of their pedagogical practice regarding this population of students. Case studies set the groundwork for *courageous conversations*, which go *beyond the tip of the iceberg* as the process



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of analyzing cases may empower educators to critically think (Weber, Boswell, & Behrens, 2014) as well as to make personal connections to the cases and open the door for change.

It is our responsibility to craft meaningful professional learning opportunities for our educators in order to reverse the disheartening trend of underrepresentation of minority youth from gifted programs. Case studies provide an ideal opportunity to explore culture and understand the perspectives of culturally diverse gifted youth and their families. Changing mindsets is a daunting task, but it is not impossible. Providing meaningful professional learning experiences that are framed around the seven guidelines for equity-driven professional learning, and that encourage participants to actively listen to different perspectives, share personal stories, and make connections between their own experiences and case studies. Change, though slow, can happen. Through effective and impactful culturally responsive, equity-grounded professional learning such as the use of case studies, educators work to make systemic change in the recruitment, identification, and retention of culturally, linguistically and economically diverse learners in gifted programming.

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