Implementing the Levels of Service (LoS) Approach: Level IV—Services for a Few Students

This document describes one of the four principal components of the Levels of Service (LoS) approach to talent development. “Talent development” and “programming for talent development” refer to efficient ways of summarizing the full message: “all of the efforts made—at home, in a classroom, in a school, in a school district, and in a community—to recognize, nurture, and celebrate the many and varied strengths, talents, and sustained interests of all students.” The LoS approach involves four interrelated levels, each of which is a unique way of differentiating instruction and programming activities in response to students’ personal characteristics.

Level IV Case Study

This case study illustrates the implementation of LoS Level IV programming services, exploring a collaborative approach to help a teacher respond to the challenge of meeting the needs of a few students whose strengths and talents have outstripped the services that can be provided in the classroom. Level IV services respond to the exceptional needs demonstrated for time-to-time by a few students, rather than a certain prescribed set of activities offered to a pre-determined or fixed percentage of students. In some years a teacher may not have any students in his or her class(es) who require Level IV services. Level IV services are unique, tailored to a student’s personal profile that documents evidence of sustained high ability and passion. They are designed to provide a highly specialized and individualized response to a student’s blossoming expertise in a specific domain or talent area. Emphasizing creative productive thinking, Level IV activities provide high-level, complex, and challenging learning experiences, and extend students to engage in first-hand research and original inquiry in their area of interest. In some circumstances, they may emerge from or be initiated by the students themselves, based on previous or ongoing involvement in activities relating to their strengths, talents, and passions for learning. Level IV opportunities require the design of individualized plans that culminate in authentic products or performances.

Ms. Beasley and Colleagues: Level IV at the Happy Valley School District

I am Judy Beasley, and I am in my ninth year as the gifted coordinator of the Happy Valley Community Unit School District (HVCUSD). Our school district includes schools that serve students in rural, urban, and suburban settings. East Happy Valley Elementary (EHVE) is one of the schools I serve. EHVE is a rural school that serves 400 students enrolled in grades K through 5. EHVE has a population that is roughly one-third rural children, one-third children who live in an upscale subdivision, and one-third Latino children whose parents work in a factory that was constructed within the last five years. A wide range of student performance exists. Several years ago, EHVE adopted the LoS approach to meet the needs of all learners and to meet our commitment to recognizing and developing students’ talents and “gifts.”
Last week I received a telephone call from Patricia Friedman, a third grade teacher at EHVE. Mrs. Friedman was calling with some questions about how best to serve Marisol Martinez, a student in her class. I suggested stopping by at EHVE Tuesday afternoon, which is an early-release day to allow for teachers to engage in collaborative planning. After grabbing a cup of coffee, Patricia and I met in her classroom where we could discuss Marisol and examine some of her work to date. Patricia’s room is warm and inviting, with numerous bulletin boards displaying student work. Posted for all visitors to the room to observe, for example, are students’ essays in response to language arts prompts and projects from a science investigation, some of which had been entered in a competitive inventing program for students. Patricia had assembled a variety of data related to Marisol, and we sat at a table and looked through it, pausing occasionally so that Patricia could explain what some of the artifacts represented.

Marisol is enrolled in the third grade, and is the older of two children. Both of her parents have college degrees. Her father works as an engineer for a nearby power plant, and her mother is a stay at home mom. Both parents are very supportive of Marisol and her teacher, as evidenced by her mother routinely volunteering to help in the classroom and her father hosting a field trip to the power plant for Mrs. Friedman’s class. I was struck immediately by Marisol’s achievements. Her grade reports consisted of all “A”s, from pre-school on, always accompanied with teacher comments that marveled at how advanced her performance was. The portfolio of written work indicated mastery of writing far beyond that of most third grade students. When asked to compose a five-paragraph essay regarding an historical event, for example, Marisol wrote a 56-page novella, divided into chapters, describing the Underground Railroad. Marisol’s achievement test scores all show her performing in the 99th percentile, with perfect scores for the social studies portion of the examination. Evaluation of Marisol’s aptitude was conducted via administration of the Wechsler Intelligence Scale for Children-IV (WISC-IV). This assessment demonstrated that Marisol is functioning in the well-above average range of ability in all areas. She performed above average on tasks requiring visual-attention to detail and short-term visual memory. Her skill with tasks requiring abstract reasoning and part-whole relationships, however, were exceptionally high. Marisol also participated in a competitive inventing program for students, taking first place in a category where all of the other entrants were from Grades 6 – 8.

After Patricia and I looked through a portfolio of Marisol’s work, reviewed her standardized test score data, and discussed her experiences in class, we both decided Marisol needed a highly individualized Level IV opportunity. In order to best serve Marisol, Patricia and I decided to focus our efforts on two of the four keys to success in implementing Level IV programming described in Enhancing and Expanding Gifted Programs (2004) and in the Talent Development Planning Handbook (2008).

For Key 2: Plan authentic and real opportunities that stimulate and enable students to reach new levels of creative products or performance, we realized that Marisol needed opportunities that would allow her to learn how to analyze, evaluate, and make decisions about ideas, particularly those that center around discovering and attacking problems of interest to her. Marisol’s work both in and out of the classroom has evidenced an affinity and passion for history and the interconnectedness of history to other disciplines. Since EHVE serves a K-5 population, it seemed that we might want to
look for these opportunities outside of the school setting. For **Key 3: Provide an environment that supports and encourages students to self-initiate and self-direct inquiry into ideas and topics based on their personal interests**, we decided we needed to work with Marisol and other stakeholders from within and outside the school so that she could develop a positive identity, a sense of purpose, and a positive view of her future. As Level IV activities often require a great deal of interaction and cooperation with individuals outside the school setting, we also decided to be proactive by including some administrative and central office personnel in our process so that these issues could be addressed early and so that all appropriate accommodations could be made.

**Level IV Activity: IWWM . . .**

In the LoS approach, Level IV programming seeks to provide services to those students we meet occasionally with unique needs, especially needs that cannot be met within the school’s general education curriculum. When Patricia and I first attempted to come up with some ideas for possible Level IV activities, they seemed inadequate and forced. To help us come up with better ideas, Patricia and I decided to use IWWM . . . (in what ways might . . .), a phrase we had both used as part of Creative Problem Solving (CPS). We created the following template to help us generate some ideas:

<table>
<thead>
<tr>
<th>IWWM (or How might . . .)</th>
<th>Who?</th>
<th>Do?</th>
<th>What?</th>
</tr>
</thead>
<tbody>
<tr>
<td>IWWM</td>
<td>Marisol</td>
<td>Engage</td>
<td>In independent research</td>
</tr>
<tr>
<td>How might</td>
<td>Our faculty</td>
<td>Assist</td>
<td>Connections with scholars</td>
</tr>
<tr>
<td>How might</td>
<td>Patricia</td>
<td>Facilitate</td>
<td>Level IV activities</td>
</tr>
<tr>
<td>IWWM</td>
<td>Faculty from the university</td>
<td>Involve</td>
<td>Marisol in their work</td>
</tr>
<tr>
<td>IWWM</td>
<td>Marisol’s parents</td>
<td>Transport</td>
<td>Marisol to weekend and summer activities</td>
</tr>
</tbody>
</table>

Although Patricia had stated before beginning the IWWM... activity that she did not know where to start with Level IV programming, it soon became clear that she was contemplating some sort of a research project to discuss with Marisol that would involve individuals and resources from outside EHVE. We recognized that this approach would require buy-in and support from a variety of other stakeholders—Marisol’s parents, other EHVE teachers, the principal, outside experts, and other district administrators—and of course, it had to represent a challenge that would be exciting and engaging to Marisol. After some thought, we decided it would be advantageous to gather interested stakeholders together to help identify potentially appropriate Level IV activities for Marisol.

**Level IV Activity: ALoU Focusing Tool**

Realizing that we would need the acceptance and approval of other stakeholders, we asked several others to join us in the next step of planning: Bill and Tammy Martinez, Marisol’s parents; Gerald Swanson, the EHVE principal; Sam Foster, a history
After some coordinating of schedules, we met after school at EHVE one afternoon to review the results from the IWWM.... We reviewed the information we had regarding Marisol’s academic background. Having Bill and Tammy present was especially helpful, as they were able to tell us a bit more about her interests. Marisol has a deep love of history, and also enjoys collecting dolls manufactured by a company that produces these as well as a line of books and accessories that focus on various chapters of American history. Marisol also enjoys playing with her friends on local T-ball and soccer teams, which her father volunteers to coach.

Then, Patricia and I explained that we wanted the group to assist us by joining us in another activity to help focus upon the most promising possibilities that might spring from the ideas we had generated. We introduced the ALoU Focusing Tool (Treffinger & Nassab, 2011), which is especially helpful when, as in the current situation, there are a number of promising possibilities that share the same dominant theme. Although relatively simple, ALoU facilitates positive and constructive analysis, refinement, and development of options. Before beginning to apply the tool, Patricia and I reviewed some ways to use ALoU most effectively, including:

• Beginning with the advantages column to prevent the common response of attacking new ideas by focusing on what is “wrong” with them;
• Looking at limitations constructively or affirmatively so that we also remember to attempt to devise ways of overcoming those limitations; and
• Remembering that the unique features are the reasons an option might really stand out and open up some new directions in our thinking.

After discussing these procedures, we put up some chart paper and began working on the ALoU activity. The following Table represents the way we organized the material on a large sheet of chart paper during our meeting.

<table>
<thead>
<tr>
<th>Options to be examined using ALoU:</th>
<th>Limitations (“How might…?” or “How to …”) o = overcome</th>
<th>Unique Features</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marisol engaging in a research project;</td>
<td>HM new projects be planned through the combined resources of various groups</td>
<td></td>
</tr>
<tr>
<td>Marisol collaborating with projects or scholars outside of EHVE;</td>
<td>HM we assist outside specialists</td>
<td></td>
</tr>
<tr>
<td>EHVE faculty collaborating with projects or scholars to ensure quality programming</td>
<td>HM planning between EHVE faculty and outside specialists be arranged</td>
<td></td>
</tr>
<tr>
<td>• Marisol would be engaging in work that is appropriate for her demonstrated talent and skills</td>
<td>• Marisol would be able to understand the nature of the discipline of history and possible career options</td>
<td></td>
</tr>
<tr>
<td>• EHVE does not have programming that is appropriate for Marisol</td>
<td>• Access to many and varied resources not otherwise available</td>
<td></td>
</tr>
<tr>
<td>• The combined resources of EHVE and others would be greater than individual efforts</td>
<td>• Collaboration would occur both between school and experts as well as Marisol and experts</td>
<td></td>
</tr>
</tbody>
</table>
As the process proceeded, the excitement of the participants became palpable. Susan, who had initially been skeptical, stated, “I think this could work!” Although Dr. Foster is not a specialist in American history, he has a colleague, Marla Hedrick, who is and he telephoned her midway through the process to see if she might be willing to assist in developing programming for Marisol. Dr. Hedrick was willing to take on the project, if support from Dr. Foster and the EHVE faculty was forthcoming. Patricia, Susan, Gerald, and I all agreed to work with Dr. Foster, Dr. Hedrick, and, of course, Marisol, to create a research project that would be appropriate for her. Marisol’s parents were pleased with this plan. We set up a meeting date to review our progress.

The Rest of the Story

Shortly after our ALoU session, we reviewed the plans with Marisol—whose excitement and enthusiasm could hardly be contained. “Do you really mean that I can do something like that,” she exclaimed. Marisol met and began working with Dr. Hedrick. Patricia assisted by helping conduct an interest inventory for Marisol. Dr. Hedrick and Marisol decided to begin a project that explored the Underground Railroad, which had been active in the area, and also to investigate how the education of African Americans was dealt with in area schools throughout much of the twentieth century. For the part of the project dealing with the Underground Railroad, Marisol was able to use the Special Collections at the university library, while she also conducted oral histories with older members of the Happy Valley community, including former teachers, students, and parents.

Marisol continued to work on the project for the remaining two and a half years she was enrolled at EHVE. She produced a website that presented the results of her research. It included an interactive map that showed locations that had served as Underground Railroad stops, photographs of the properties then and now, and information from her research and interviews. Marisol also was interviewed by the university radio station regarding the history of African American education in the Happy Valley community. These interviews were later posted on her website as podcasts, along with the selections from the oral histories she conducted.

Time to Reflect and Respond

Think about yourself as Judy Beasley. In this role:

- How will you handle students who need and would benefit from Level IV activities?
- What sort of other opportunities might you envision being appropriate for Marisol?
- How will you determine if the Level IV activities pursued are appropriate and sufficient?
- How might you communicate with central office personnel about the Level IV activities being offered to some students?
• What might the next steps be as the EHVE faculty and Dr. Hedrick meet to plan Level IV activities for Marisol?

Did your reflection on the case study and responses to the questions above lead you to consider any of the following elements of the LoS approach to talent development?

• Programming for a Few Students (Only selected students participate in an activity);
• Differentiated services (those that respond to the student’s unique personal strengths and talents through individual or group experiences);
• Self-assessment and reflection (teachers and students tabulate, organize, and analyze results of interest inventory);
• Learn and use critical thinking tools (learn, practice, and apply IWWM . . . and ALoU focusing tools for selecting and evaluating targeted experiences).

**Resources Referred to in Case Study**


**Learning More About the LoS Approach**

To learn more about the LoS approach, visit the Center for Creative Learning website (http://www.creativelearning.com). We offer PDF files that provide an overview of the model, a “Frequently Asked Questions” document, case studies of each level, and a variety of other electronic and print resources. The Center also offers workshops and consultation on new program development, restructuring existing programs, and program evaluation.

**Center for Creative Learning**

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