

Note from the Iowa Talented and Gifted Association (ITAG): ITAG asked for advice from the Iowa Department of Education on how to evaluate a gifted and talented program and how to then use that evaluation when considering how to plan a budget with categorical gifted and talented funding. ITAG shared this write-up in the Spring 2018 ITAG newsletter. ITAG is providing copies to assist others as they look for direction in developing or evaluating a gifted program. This handout is intended for initiating conversations. The suggested process is for consideration only. It is NOT a requirement for school districts as part of their gifted programming or for their use of gifted funding.

How to Budget for Gifted Programming: A suggested process
Rosanne Malek, Iowa Department of Education
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CHAPTER 98
FINANCIAL MANAGEMENT OF CATEGORICAL FUNDING
DIVISION I GENERAL PROVISIONS

98.20(1) Appropriate uses of categorical funding. Appropriate uses of the gifted and talented program funding include, but are not limited to:

- a. Salary and benefits for the teacher of gifted and talented students. If the teacher is a part-time gifted and talented and a part-time regular classroom teacher, then the portion of time that is related to the gifted and talented program may be charged to the program, but the portion of time that is related to the regular classroom shall not.
- b. Staff development for the gifted and talented teacher.
- c. Resources, materials, software, supplies, equipment, and purchased services that meet all of the following criteria:
 - (1) Meet the needs of K through 12 identified students,
 - (2) Are beyond those provided by the regular school program,
 - (3) Are necessary to provide the services listed on the gifted students' individualized plans, and
 - (4) Will remain with the K through 12 gifted and talented program.
- d. Student transportation exclusively for approved gifted and talented program field trips or other educational activities.

98.20(2) Inappropriate uses of categorical funding. Inappropriate uses of the gifted and talented program funding include, but are not limited to, indirect costs or use charges, operational or maintenance costs, capital expenditures other than equipment, student transportation other than field trips exclusive to this program, administrative costs, or any other expenditures not directly related to providing the gifted and talented program beyond the scope of the regular classroom.

[ARC 8054B, IAB 8/26/09, effective 9/30/09; ARC 1967C, IAB 4/15/15, effective 5/20/15]

Chapter 12
General Accreditation Standards

12.5(12) Provisions for gifted and talented students. Each school district shall incorporate gifted and talented programming into its comprehensive school improvement plan as required by Iowa Code section 257.43. The comprehensive school improvement plan shall include the following gifted and talented program provisions: valid and systematic procedures, including multiple selection criteria for identifying gifted and talented students from the total student population; goals and performance measures; a qualitatively differentiated program to meet the students' cognitive and affective needs; staffing provisions; an in-service design; a budget; and qualifications of personnel administering the program. Each school district shall review and evaluate its gifted and talented programming. This subrule does not apply to accredited nonpublic schools.

Suggested process outline:

1. Consider creating a team of educators, administration and or parents and students who are interested in redesigning the current gifted program to an exemplary gifted program.
2. Articulate in writing the vision and important components of an exemplary elementary, middle school and high school gifted program for your school district.
3. Implement an evaluation process of your current program.
4. Identify the programming gaps between your current reality and exemplary program.
5. Categorize the gaps according to elementary, middle school, and high school level.
6. Prioritize the gaps for elementary, middle school, and high school needs.
7. Identify the cost to close the current gaps towards the exemplary program you envision. Keep in mind, to close some gaps, there may not be a financial cost, but perhaps a commitment of time, expertise, or sharing of materials, resources, and expertise through collegial collaboration or formal professional development activities.
8. Create a timeline for urgent response to needs (react), a response to ongoing needs (sustainability), and response to anticipated needs as the program develops to the exemplary design (proactive growth). This may be a plan that spans 1-4 years.
9. Present the desired program, the current reality and plan to administration through professional dialogue to determine level of support for timeline and budget expenditures.
10. Move forward as a team of education professionals, revising the needs and priorities as needed to meet the needs of gifted students and the teachers that serve them.

Below is a detailed process to the above suggested outline containing suggested resources embedded into the step-by-step guidance. The reason to first identify program gaps and student needs, and then identifying the cost is to follow categorical funding compliance in maintaining the focus on providing services that align with identified student needs.

Suggested Process to Create a Multi-year Budget Request/Priority List

1. Implement a gifted program needs assessment
 - a. A gifted program review/evaluation is required (Chapter 12)
 - b. Consider the Gifted Programming Self-Audit and Reflection Tool available to all school districts on the Heartland AEA website: <http://www.heartlandaea.org/instructional-services/cia/gifted--talented/self-audit--reflection-tool/>
 - c. *Program Evaluation in Gifted Education* by Carolyn M. Callahan and Sally M. Reis (Essential Readings in Gifted Education Series, Corwin Press, 2004)
2. Use program data from the evaluation to determine areas of weakness, gaps, and need that moves the district towards an exemplary gifted program (Chapter 12 gifted program accreditation requirement categories):
 - a. total school population identification
 - b. qualitatively differentiated services (cognitive student needs and affective student needs)
 - c. gifted staffing provisions (need more staff, realignment of current staffing, need secondary staff)

- d. professional development design for preparing/assisting classroom teachers (about gifted students, instruction expectations, advanced learner strategies)
3. Determine priorities to develop an exemplary gifted program
 - a. **For students**
 - i. Classroom materials (K-12) that extend current lesson topics, units, standards (creative thinking prompts/projects, problem-based projects, upper-level textbooks, software packages for research)
 - ii. Secondary program development (flexible scheduling for identified students, complex problem-based projects for students, college prep support for first-generation college applicants)
 - b. **For classroom teachers**
 - i. Knowledge about artifacts and tools to support your district student identification process and services (K-3, middle school, high school, transition grades, new students to district, English Learners, low-income)
 - ii. Professional development delivery design (PLC, book/topic study, building/district professional development time, during personal planning)
 - iii. Classroom resources of extended lessons and professional development to learn how to write extended lessons that are meaningful and aligned to classroom instruction/content standards (A Teacher's Guide to Using the Common Core State Standards with Gifted and Advanced Learners in English Language Arts, in Mathematics, Next Generation Science)
 - iv. Classroom strategies and professional development for instructional delivery of gifted students (pre-assessment to instruction, inquiry methods, creative thinking, higher level questioning)
 - v. Classroom strategies for instructional management (flexible grouping, acceleration)
 - c. **For gifted endorsed teacher**
 - i. Professional development needs to serve identified gifted students
 - ii. Professional development needs to serve classroom teacher
 - iii. Time or professional development needs to re-design gifted programming services towards the desired exemplary district program.
 - d. **Staffing for delivery of program services**
 - i. Additional gifted endorsed staffing (part time/full-time)
 - ii. K-3 focus for reading and mathematics compacting and acceleration (part time/full-time) or middle school transition (part-time/full-time)
 - iii. Secondary school staffing for to develop individual programs of services for identified secondary students (professional development for faculty, college prep support for first-generation college applicants,
 - iv. Staffing to support social, emotional, affective, and at-risk needs
4. **Create** lists of program needs for each category (identified student need, classroom teacher need, endorsed teacher need, program staffing need)

5. **Prioritize** needs within each of the four categories (student, classroom teacher, endorsed gifted teacher, program staffing)
6. **Create a master** priority list from all the categories combined as highest priority to least priority
7. **Identify** the cost of each priority. Do this after setting priorities so the cost does not bias the urgency for the need. Some priorities may require an allotment of time and no money.

Suggested Resources:

Great Potential Press <http://www.greatpotentialpress.com/>

Free Spirit Publishing <https://www.freespirit.com/>

Hickory Grove Press - an Iowa publisher located in Bellevue, Iowa. <https://www.hickorygrovepress.com/>

Corwin-SAGE Publishing https://us.sagepub.com/en-us/nam/product/?f%5B0%5D=field_disciplines%3A366595&f%5B1%5D=field_disciplines%3A366691&sort field=field_custom_publish_date us&sort_order=desc

Iowa Acceleration Scale <https://www.accelerationinstitute.org/Resources/IAS.aspx> -

Resources for affective learning, consider:

"The Survival Guide for Gifted Kids" by Judy Galbraith

"When Gifted Kids Don't Have All the Answers" by Judy Galbraith and Jim Delisle

8. **Share** you priorities and budget needs with an appropriate administrator, and PTA/Academic Club President so program needs are known and understood when action is taken.
9. **Check** with administrator or business officer about school district funding balance to determine the funding available for top priorities. Check with administration about being given time for priorities to be met.
10. **Proceed** with meeting the needs on priority list for next year with the funding available.
11. **Create** a multi-year list of budget priorities to plan for the future and for when additional budget opportunities arise.
12. **Continue** evaluating and revising the priority list.

Remember: Moving forward slowly and intentionally is **making a decision** toward implementing and developing an exemplary gifted program. Doing nothing is **making a decision** to deny supportive materials for students and denying classroom teachers the resources to understand gifted student needs. Doing nothing is **making a decision** that supports intellectual decay and dismantles gifted programming.

Funding questions can be directed to Tom Cooley, School Finance, at tom.cooley@iowa.gov

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