Colette Forrest works with her fourth-grade son, Bobby Forrest, at the Beatties Ford Library. She started looking for alternatives to his high-poverty Charlotte school as soon as she got pregnant.

Diedra Laird | charlotteobserver.com

Why have smart, low-income NC students been excluded from advanced classes?

BY JOSEPH NEFF, ANN DOSS HELMS AND DAVID RAYNOR
jneff@newsobserver.com, ahelms@charlotteobserver.com, draynor@newsobserver.com

About this time every year, roughly 5,000 North Carolina 8-year-olds show they’re ready to shine. Despite the obstacles of poverty that hobble so many of their classmates, these third-graders from low-income homes take their first state exams and score at the top level in math.

With a proper push at school, these children could become scientists, engineers and innovators. They offer hope for lifting families out of poverty and making the state more competitive in a high-tech world.

But many of them aren’t getting that help, an investigation by The Charlotte Observer and The (Raleigh) News & Observer reveals. Thousands of low-income children who get “superior” marks on end-of-grade tests aren’t getting an equal shot at advanced classes designed to challenge gifted students.

In elementary school, bright children from low-income families are much more likely to be excluded from the more challenging, enriched classes than their peers from families with higher incomes, the analysis shows. The unequal treatment during the six years ending in 2015 resulted in 9,000 low-income children in North Carolina being counted out of classes that could have opened a new academic world.

This occurs in school districts across the state, in rural and urban areas. And the disparities for bright but impoverished students continue and accumulate as they move to middle and high school.

Cathy Moore, deputy superintendent for academic achievement in Wake County, called the Observer/N&O analysis “a sobering punch in the gut.”
Colette Forrest helps her son Bobby Forrest with homework. Forrest feared her gifted son wouldn’t get the push he needs in a Charlotte-Mecklenburg school where most students are poor and score below grade level.

Diedra Laird | charlotteobserver.com

James Ford, a former North Carolina teacher of the year who is now a Charlotte-based staffer for the Public School Forum of North Carolina, says bright but poor students are held back by an array of systemic barriers, from failure to recognize giftedness in different cultures to a shortage of advanced classes and top teachers in high-poverty schools.

“We tend to teach the way we were taught. I don’t think we’ve shifted our mindset yet,” said Ford, who once taught in Charlotte-Mecklenburg’s Garinger High. “The majority of kids in public schools are kids of poverty. The majority of kids are kids of color. That has never happened before. I don’t think we have properly respected how much that must change our approach to education.”

More stories

Former state senator Howard Lee works to make these Durham schools ‘challenging enough’

Advocate for your child

Diminished opportunity for bright but impoverished students is especially troubling in Mecklenburg County, which has more low-income students than any district in the state and which is grappling with the shame of a last-place ranking from a Harvard study on economic mobility.

Leaders of Charlotte-Mecklenburg Schools are aware of the problem. They’ve experimented with ways to get more poor and minority students into gifted programs, but have never closed that gap. They’ve pushed high school administrators and counselors to track each student’s schedule to ensure that they get the challenges and credits they need, and are expanding advanced magnet programs in some schools with high poverty levels.

But some CMS board members say the efforts continue to fall short, especially for talented students in neighborhood schools where the most disadvantaged students are concentrated.
Charlotte-Mecklenburg school board member Ruby Jones says some schools provide only “bare bones” classes for top performers.

Observer file photo

Charlotte-Mecklenburg school board member Ruby Jones says some schools provide only “bare bones” classes for top performers.

“They don’t get taught in an enriched environment. They get taught in a bare-bones one,” CMS board member Ruby Jones said of high-poverty schools where most students score below grade level.

The sorting of bright students starts early, and it consistently works against children from low-income homes:

- In 2015, one of every three low-income students with superior math scores was labeled gifted, compared to one out of two high-scoring students whose family income was too high to qualify for federal lunch subsidies.
- In 2015 several large districts, including Wake, Guilford, Gaston and Durham, placed more higher-income fourth-graders with average end-of-grade math scores into gifted classes than low-income students with superior math scores. CMS was not among them.
- These high-potential, low-income students are less likely to take high school math in middle school, an important step toward the type of transcript that will open college doors. Only half of low-income third-graders who scored above grade level in 2010 took high school math in middle school, compared with three-fourths of more affluent students with the same scores.
- And even those low-income students who start high school math in middle school are far less likely to take Advanced Placement math classes in high school than classmates with similar scores but more family income.

Kids who need ladders

Often, the discussion of poverty and education focuses on failing students. But bright young people need ladders rather than nets.

They’re students such as fourth-grader Bobby Forrest, a gifted student whose mother started looking for alternatives to his high-poverty Charlotte school as soon as she got pregnant. Or eighth-grader Victor Guevara, whose parents don’t speak English but whose math skills lend substance to his dream of becoming an engineer.

The benefits of rigorous and challenging classes begin early and build over time. The effects are cumulative, since success in earlier grades leads to more opportunities and benefits in later years. Poor students with potential need help the most, and have the most to lose if they fall off the honors track.

“Schools need to see their promise and push them into more rigorous classes early so they aren’t being left behind and left out,” said Keith Poston, executive director of the Raleigh-based Public School Forum of North Carolina, a nonpartisan advocate for better schools.

The Observer/N&O investigation analyzed seven years of records of the roughly 1.2 million students in North Carolina public schools each year. State education officials gather the records and use them to produce annual reports on the state’s 115 school districts.

Even so, school officials have not harnessed the broad information in the data to track children over time to check on disparate treatment. Many educators had never seen the data analyzed by income and achievement level, and many said the results confirmed their suspicions.

Who’s gifted?

The investigation found a web of barriers to smart students from impoverished homes.

The first step in sorting bright students comes when school districts decide who’s gifted. Each district designs its own method, which the state must approve. CMS, for instance, identifies students in second grade for placement in third grade. In Wake, the process starts a year later.

The “gifted” label funnels bright students into challenging classes with veteran teachers and high-performing classmates.
Berryhill School, a high-poverty CMS school, has rearranged staff to make sure high-scoring students get more time with Dana Mumaw, who's certified to teach gifted students, than they'd get based on the small number of students actually labeled gifted.

Diedra Laird | charlotteobserver.com

In many urban areas, including Charlotte and the Triangle, low-income students are often clustered in schools where the focus is on helping students master basic skills. Some top students flee to magnet or charter schools, but those who are left find themselves with few high-scoring classmates and a dearth of advanced classes.

That’s why Colette Forrest, a single mother who lives in Charlotte’s Wesley Heights neighborhood, vowed her son Bobby wouldn’t go to a school where most students are poor and score below grade level. Ashley Park, their neighborhood school, had only three gifted students in grades 3-8 last school year.

“There was no way in hell he was going there,” said Forrest, a community activist who runs a marketing and events planning group. “He would have been bullied and beaten up and his spirit would have been broken.”

She got Bobby into a magnet elementary school where he has more than 250 gifted classmates.
Poverty, as measured by eligibility for federal lunch subsidies, is used nationwide as a measure of educational disadvantage. There are plenty of parents like Forrest, who has qualified for the aid but provides strong advocacy and support for her son.

But some aspects of poverty can limit parent advocacy. Families who are struggling for survival, don't speak English well or don't feel confident challenging authority may leave their children’s education in the hands of their school – or multiple schools, if the family moves frequently.

“I just wonder how many of those children who started at the third grade equal in terms of their potential didn’t have the social capital, didn’t have the family structure that could support them when life became more difficult in school,” said Dr. Ophelia Garmon-Brown, who co-chaired a Charlotte-Mecklenburg task force seeking paths out of poverty. “And then the teachers may not have seen in them what the potential was … and did not help to set them up.”

Shelagh Gallagher, a Charlotte-based consultant on gifted education who has worked with Charlotte-Mecklenburg Schools for decades, says it’s too easy to shift the burden to parents.

“I think it’s incumbent on the districts to seek out and inform parents” about gifted programs, Gallagher said. She’s looking for grants to train teachers in CMS’ highest-poverty schools to recognize and encourage outstanding potential.

**Is screening valid?**

While state exams are supposed to reveal what students have learned, the test used to identify gifted students in CMS, Wake and most other school systems is touted as revealing raw potential.

Screening generally begins with teachers identifying standout students, who are given a test known as the CogAT, or cognitive abilities test. The test, which requires children to identify patterns and make sense of pictures and shapes, is supposed to measure intellectual ability, rather than what children have been taught at home or in school.

But the man who invented that test says results are shaped by exposure to sophisticated language and all the other advantages – or disadvantages – that children bring from home. That is why, critics say, gifted programs that screen using aptitude tests consistently shortchange low-income, black and Hispanic students.
Commonly-held beliefs about the power to separate ability from achievement are much closer to folk theories than to scientific theories, David Lohman, a retired University of Iowa professor who designed the CogAT, has written.

Sugar Creek Charter School, which serves mostly African-American students from low-income homes, doesn't use screening tests that have consistently underidentified such children as gifted.

Using two different words – achievement and ability – doesn't mean the tests measure two distinct things, he wrote in a 2005 paper. “The two scores overlap much more than they differ,” Lohman wrote.

Children with very high scores on such tests – including Bobby Forrest, who ranked in the 98th percentile – are automatically classified as gifted.

In theory, such things as race, culture and family background shouldn’t limit a child’s likelihood of being labeled gifted. In reality, the results of “intelligence” tests consistently yield the same advantage for white, Asian and non-poor students as traditional academic exams do. In 2015-16, for instance, CMS identified roughly 30 percent of white and Asian students in grades 3-5 as gifted, compared with about 4 percent of black and Hispanic students in those grades. The district doesn't report that data based on income, but black and Hispanic students have significantly higher poverty rates.
Specialists in gifted education, in CMS and across the country, long have been aware that these screening tests don’t produce the racially and economically diverse results one would expect if they truly measured potential. In the 1990s CMS experimented with a “multiple intelligences” screening, which looked for such things as spatial ability or people skills, in hopes of getting more low-income and minority students into gifted programs. It was abandoned as too expensive and time-consuming.

“We’ve been working on this for decades. It’s an incredibly entrenched problem,” said Gallagher, the consultant who is also a former UNC Charlotte professor of gifted education.

Intelligence testing also has a history of being associated with racism, with 19th century IQ tests used to argue for white intellectual superiority. Cheryl Turner, director of Charlotte’s Sugar Creek Charter School, says she sees no value in using such tests for students like hers, most of whom are African-American and come from homes of poverty.

“Our theory is African-American kids are underidentified. We just accelerate (all students) as fast as we can,” Turner said.

**More paths to gifted**

For students who show potential but don't make the first cut for gifted programs, there are more routes, set by each district.

In CMS, for instance, landing in the top 4 percent on theCogAT earns an automatic gifted label. Students who are ranked in the 87th to 95th percentile are given the Iowa Test of Basic Skills. Points are awarded for high scores on that test, as well as for teacher observations and a portfolio of work submitted by parents or teachers. Students who score extremely high in math but not reading, or vice versa, can be certified as gifted in only one subject.

Family background comes in when parents push for their children to be identified, and even pay for private testing to bolster their argument. In Wake and Mecklenburg, private psychologists advertise testing for giftedness. In Charlotte, basic IQ tests run around $250 to $300 for young children and a full panel of tests is much higher.
“A lot of parents feel the schools' testing doesn't capture their child's potential,” said Dr. Kristen Wynns, a Cary psychologist. Wynns and her colleagues administer the tests in a one-on-one setting, using blocks, patterns, oral questioning and the like. Schools generally use a fill-in-the-bubble test in group settings.

Wynns said the gifted classes are a godsend for many students: “It keeps them from getting bored and it meets their intellectual needs.”

Wake and Mecklenburg say they don't track the number of students who are accepted into advanced classes after private testing. A study of gifted students in one Florida county suggests it could be substantial. Laura Giuliano, an economist at the University of Miami, said her research found that 25 percent of the gifted students who weren't poor were admitted through private testing.

The state exams

At the end of third grade, students take their first North Carolina reading and math exams.

Those scores, which are marked on a five-point scale, label each student as below grade level, at grade level or “college and career ready.” They're also used to rate educators’ effectiveness and grade the quality of public schools.
N BIG DISTRICTS, A BIG GAP

1. Each of the state’s 10 largest school districts, a larger proportion of superior* students from more affluent families were placed in math classes for gifted students than their classmates from low-income families. Guilford County, where administrators have placed a priority on accepting more children into gifted classes, has the widest gap.

<table>
<thead>
<tr>
<th>County</th>
<th>Higher Income</th>
<th>Lower Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wake County</td>
<td>0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50% 55% 60% 65% 70% 75% 80% 85% 90% 95% 100%</td>
<td></td>
</tr>
<tr>
<td>Charlotte-Mecklenburg</td>
<td>0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50% 55% 60% 65% 70% 75% 80% 85% 90% 95% 100%</td>
<td></td>
</tr>
<tr>
<td>Forsyth County</td>
<td>0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50% 55% 60% 65% 70% 75% 80% 85% 90% 95% 100%</td>
<td></td>
</tr>
<tr>
<td>Cumberland County</td>
<td>0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50% 55% 60% 65% 70% 75% 80% 85% 90% 95% 100%</td>
<td></td>
</tr>
<tr>
<td>Harnett County</td>
<td>0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50% 55% 60% 65% 70% 75% 80% 85% 90% 95% 100%</td>
<td></td>
</tr>
<tr>
<td>Johnston County</td>
<td>0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50% 55% 60% 65% 70% 75% 80% 85% 90% 95% 100%</td>
<td></td>
</tr>
<tr>
<td>Durham County</td>
<td>0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50% 55% 60% 65% 70% 75% 80% 85% 90% 95% 100%</td>
<td></td>
</tr>
<tr>
<td>Gaston County</td>
<td>0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50% 55% 60% 65% 70% 75% 80% 85% 90% 95% 100%</td>
<td></td>
</tr>
<tr>
<td>Cabarrus County</td>
<td>0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50% 55% 60% 65% 70% 75% 80% 85% 90% 95% 100%</td>
<td></td>
</tr>
</tbody>
</table>

Percentage of third graders who scored the highest level (5) on math end-of-grade test in 2014 and were placed in math classes for gifted students the following year. Low-income students are those receiving free or reduced-price lunch.

Source: N&O analysis of N.C. Department of Public Instruction data (Get the data)

The top score is 5, or superior, a sign that the student is above grade level. In CMS and Wake, higher-income students who earned that math score in 2014 were twice as likely as their low-income counterparts to be labeled gifted. In CMS, 26 percent of the low-income students who scored a 5 in math were in gifted programs, compared with 59 percent of students from higher-income families.

Wake County officials point out that just as an A on a report card can range from 90 to 100, an end-of-grade score of 5 covers a range of scores.

The N&O examined those specific scores. At almost every score within the top level, Wake County placed a lower percentage of low-income students in gifted classes. If low-income students were admitted at the same rate as their more affluent classmates, Wake County would have placed 83 percent more low-income gifted children. In 2015, that would have funneled 74 more low-income fourth-graders into advanced classes.
Unlike Wake, CMS does look at end-of-grade scores for gifted placement, even though many students have already been placed in gifted programs at the start of third grade. A very high math score at the end of that year can push a student into the gifted math program for fourth grade.

Matthew Makel, researcher at Duke University’s Talent Identification Program, agrees with that approach. His program recommends a gifted label for any student scoring 95 percent or higher on any achievement test, whether the CogAT or state end-of-grade tests.

**Smaller gap in Guilford**

There’s one large district that shows a much closer match between math scores and acceptance into gifted programs than CMS, Wake and most other North Carolina districts: Guilford County.

**DISPARITY AT MOST EVERY LEVEL**

Just as an ‘A’ can range from 90 to 100, there’s a span of scores within the ‘superior’ level on end-of-grade tests. At each score, except for the top score, across North Carolina, a greater proportion of higher-income students were placed into math classes for gifted students than their low-income classmates.

*Percentage of third graders in 2014 who scored the highest level (5) on math end-of-grade test and were placed in math classes for gifted students the following year. Low-income students are those receiving free or reduced-price lunch.*

Source: N&O analysis of N.C. Department of Public Instruction data [Get the data]

For third-graders who scored above grade level in math in Guilford County in 2014, 79 percent of low-income students were labeled gifted in math, and 87 percent of the other students. That is a policy choice, albeit one that’s still evolving, said Dibrelle Tourret, the head of gifted programs for the school district.

Students take screening tests in the second half of third grade. Under current policy, those scoring 90 percent or higher on either the CogAT or the Iowa Test of Basic Skills get into the gifted program. That’s a more generous standard than the one used in CMS and most other districts. But it’s tighter than the one Guilford used in 2014, when the top 15 percent were labeled gifted. After facing complaints that they were admitting some students who weren’t ready, the district adjusted the cutoff point.

And when end-of-grade scores come in at school year’s end, Guilford’s teachers automatically re-evaluate all students who score 5. Most are admitted, Tourret said.

Tourret said the gifted classes are especially effective for math students. The goal is to place all qualified students into accelerated math classes in middle school so they can begin high school math in eighth grade.

“You have to be careful with accelerated math in middle school because it doesn’t work for everyone,” she said. “But we really want our bright students to take an AP math class, a college math class, as a junior.”

The data shows that Guilford is getting results. Looking at the graduating class of 2015, Guilford had more than twice as many low-income middle-school students labeled gifted as CMS, even though CMS is twice the size of Guilford. In Guilford, 80 percent of those students took an AP class in high school, compared to 74 percent in CMS.

**Protecting the program**

In most districts, opening the door to more gifted students can be controversial – especially among parents whose kids have already qualified and don’t want their children’s classes watered down.

“People get very, very defensive. They get angry,” said Gallagher, the former UNCC professor.
Low-income students excluded from NC advanced classes | Charlotte Observer

Colette Forrest, Bobby’s mother, is among those who worry about diluting classes for the gifted—and who agrees that teachers of color are essential. Her son is at Irwin Academic Center, an uptown Charlotte magnet school that admits students in kindergarten, before anyone has formally been labeled as gifted, but also accepts newly certified gifted students in third grade.

Forrest says being surrounded by high-achieving peers is especially important for black male students. Across the country, black males are more likely to be labeled as discipline problems and face increased risk of academic failure.

Had Bobby gone to Ashley Park, he’d have been among less than 1 percent of all students who are gifted. At Irwin, three quarters of his classmates are gifted, including more than 60 percent of those who are African-American.

“It’s not uncool to be black and to be smart,” Forrest said. “Most of his friends are smart black boys.”

Yet Forrest says Bobby has struggled in fourth grade. She blames that partly on a teacher who isn’t the right match for her child.

“Even if you are the parent of a gifted child at a high-performing school,” she says, “you still don’t have it in the bank.”

Ann Doss Helms: 704-358-5033, @anndosshelms

*A percentage of third graders who scored the highest level (5 in 2014; 4 in prior years) on math end-of-grade test and were placed in math classes for gifted students the following year. Low-income students are those receiving free or reduced-price lunch.

Source: N&O analysis of N.C. Department of Public Instruction data [Get the data]

A CONSISTENT PATTERN

From school years 2009-10 through 2014-15 across the state, a lower proportion of low-income students with superior* scores on end-of-grade scores were placed in math classes for gifted students the following year than their classmates from higher-income families.

<table>
<thead>
<tr>
<th>Year</th>
<th>Low Income</th>
<th>Higher Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009/10</td>
<td>27</td>
<td>46</td>
</tr>
<tr>
<td>2010/11</td>
<td>22</td>
<td>46</td>
</tr>
<tr>
<td>2011/12</td>
<td>23</td>
<td>44</td>
</tr>
<tr>
<td>2012/13</td>
<td>27</td>
<td>47</td>
</tr>
<tr>
<td>2013/14</td>
<td>38</td>
<td>60</td>
</tr>
<tr>
<td>2014/15</td>
<td>36</td>
<td>55</td>
</tr>
</tbody>
</table>

*Percentage of third graders who scored the highest level (5 in 2014; 4 in prior years) on math end-of-grade test and were placed in math classes for gifted students the following year. Low-income students are those receiving free or reduced-price lunch.

Source: N&O analysis of N.C. Department of Public Instruction data [Get the data]

If CMS’ administration/board had an ounce of common sense and a modicum of compassion, it would be spending its money identifying all kinds of kids with college potential in all its schools—not just magnets—and “constantly reinforcing their ambitions.”

But it doesn’t. And apparently it won’t. Far more important to spend $25 or so extra million to please King and Kahlenberg and quiet a few loud voices.

End of conversation.