

GIFTED HISPANIC IDENTITY: EXPLORING RELATIONSHIPS AMONG  
RESILIENCE, GOALS AND ACADEMIC ORIENTATION

by  
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Liberty University

A Dissertation Presented in Partial Fulfillment  
Of the Requirements for the Degree  
Doctor of Education

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## **ABSTRACT**

The purpose of this phenomenological analysis was to explore the identity development of gifted Hispanic male students in the middle school setting. The study used a survey, multiple interviews and observations, along with focus group data to acquire data in four principle areas: academic orientation, ethnic identity, resilience and goals. Results indicate the importance of resilience as an interactive element in the process of identity development, as well as the importance of ethnic identity exploration and long-term goal setting in formulating a high achieving academic orientation. Other emergent themes such as language use and discrimination are also discussed in light of identity development.

Descriptors: Latino, Hispanic, identity development, ethnic identity development, resilience, giftedness, goal setting, Interpretive Phenomenological Analysis

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## CHAPTER ONE: INTRODUCTION

Hispanic students are dropping out of high school at a faster rate than any other ethnic group (Behnke, Gonzalez & Cox, 2010; Flores-Gonzales, 2002; Heckman & LaFontaine, 2007; Lee et al., 2011). The Hispanic dropout rate is an issue that extends into several levels of schooling, including the levels of advanced and academically gifted students. The foundations of what causes advanced Hispanic students to drop out of school or to drop out of advanced or gifted classes are not strictly formulated during the high school years. The seeds of academic success or academic surrender are planted long before this time, and often planted in middle school during the process of ethnic identity formation.

Identity formation is a multi-layered process with a Janus-face. The process simultaneously reinforces the current self-image while also presenting the individual with an idealized image that serves as a guide into higher realms of self-realization (Erickson, 1968, 1980). A struggle throughout the identity formation process is finding the balance between the current façade and the more idealized face of the future. Within the school setting amongst the varying curricula, clubs, athletics, and more informal social cliques, lay a myriad of opportunities for adolescents to find places where their identity will be both reinforced in its current state and nurtured to greater heights. A school climate can establish an environment that either nurtures a positive academic orientation through encouragement and direct communication about college options or neglects this responsibility, promoting a more negative academic orientation (Lee et al., 2011). Along with this negative orientation comes a desire to search for identity in decidedly non-academic settings (Flores-Gonzalez, 2002).

For the gifted adolescent schooling can provide a ready-made niche of academic achievement, which may come early and often for this learner. Academic success often becomes central to the developing identity of the gifted adolescent, solidifying what Flores-Gonzalez (2002) terms a “school-kid” identity. However, even given the relative ease of academic success for many gifted learners of diverse ethnicities, questions of identity still loom large for these learners, especially gifted learners who are Hispanic.

As gifted Hispanic learners journey through the process of identity development, they often encounter different obstacles; some related to culture issues within the school, others from individuals who may not support their sense of ethnicity, while other obstacles may emanate from within the learner. Often issues of ethnic identity must be reconciled within the larger framework of overall identity in Hispanic gifted learners before a clear orientation toward academic achievement can be established. Questions such as “where do I want to go in life?” remain unanswered until more fundamental questions of “who am I?” can be resolved (Herbert & Kelly, 2006; Zou & Tao, 2001).

### **Background**

Pahl and Way (2006) suggested that a large part of the Hispanic disconnect from school, which eventually leads to student drop-out, is initiated during the adolescent period of identity formation. Flores-Gonzalez (2002) painted a dichotomous picture of this disconnect for Hispanic students, suggesting that adolescence is a time when many Hispanic students adopt either a “school-kid” or “street-kid” identity. The former leads the Hispanic adolescent to the eventual completion of school while the latter identity leads the Latino adolescent to search for affirmation outside the school walls.

Given the academic proclivity of many gifted learners, the school kid identity of the gifted Hispanic learner could be easily assumed; however, it remains to be determined how much these often high performing students have been affected by the overall, documented, Hispanic disconnect from school (National Council of Educational Statistics, 2003). The level to which Hispanic students have resolved their identities with regard to ethnicity and academics has implications across all levels of schooling for the recruitment and retention of gifted Hispanic learners.

Moreover, Hispanic students, especially Hispanic males, remain significantly underrepresented in gifted and advanced classes (Ford, Grantham & Whiting, 2008). Renzulli and Park (2000) reported that gifted Latinos are the most likely of all ethnic groups represented in gifted programming to drop out of school. Ford et al. (2008) indicated that Hispanic students may withdraw from advanced or gifted programs because of feelings of isolation, suggesting the school-kid identity may decline in intensity for Hispanics during adolescence. While researchers are developing more culturally sensitive screening tools to address the underrepresentation issue (Conoley & Meimei, 2007; Umana-Taylor & Bacama, 2004), the issues of retention for Hispanics in gifted programming remain largely unaddressed (Ford et al., 2008).

Intensifying both identification and retention issues for gifted Hispanic learners is the issue of language and associations at school. While many gifted Hispanic learners are bilingual, McHatton, Brice, Hughes, Ratliff, and Shaunessy (2007a) found that these learners often alter or inhibit their language use and friendship patterns depending upon treatment they may be receiving from teachers. McHatton et al. (2007a) also reported that gifted Hispanics changed their behavior, choice of friends, and use of Spanish around

teachers to better accommodate their environment. Gifted Hispanics seem to suppress their ethnicity in certain academic settings, while consciously elevating their academic giftedness within these same settings, suggesting an either/or orientation with regard to ethnicity and academic environments. McHatton et al. (2007a) suggested that gifted Hispanics seem to feel the need to strike a delicate balance between their ethnic identity and their academic identity.

That Hispanic adolescents as a whole are experiencing the process of schooling differently than other learners is a phenomenon revealed by recent research (Behnke et al., 2010; Heckman & LaFontaine, 2007; Lee et al., 2011; National Center for Educational Statistics, 2010, 2003). The National Center for Educational Statistics (NCES; 2010) reported that as many as one in five Latinos left high school before graduation, with Rumberger and Lym (2008) contributing that academic achievement and test scores at the elementary and middle school levels contribute to later dropout rates.

In 2003 the NCES reported that Latino students were being retained at a rate of 13%, as opposed to 9% for White students, and that their high school completion rate (64%) was significantly lower than the completion rate for Whites (92%) and African-American (84%) students. Heckman and LaFontaine (2007) combined NCES data with census data and data from a census sub-section entitled the Integrated Public Use Microdata Series, and concluded that “minority graduation rates are still substantially below the rates for non-Hispanic whites” (p. 3). Behnke et al. (2010) substantiated these data on low graduation rates specifically for Latinos and added that “despite many studies reporting on factors associated with not finishing school, much is unknown” (p. 386). The data on Latino graduation rates continually suggest that Latinos disconnect from school at

a significantly higher rate than their White or African-American counterparts (Behnke, Gonzalez & Cox, 2010; Heckman & LaFontaine, 2007; Lee et al., 2011; NCES, 2010, 2003).

### **Resilience and Goal Setting**

In order for gifted Hispanic students to succeed academically, the construct of resilience becomes a necessary tool for building success (Bland & Sowa, 1994; Herbert, 1996; Kitano & Lewis, 2005; Lopez & Sotillo, 2009). Resilience is a quality that enables Hispanic students to succeed despite adversity and limiting circumstances (Herbert, 2006), and is significantly informed by cultural, and contextual elements (Ungar et al., 2007). Herbert (2006) discovered the importance of supportive family structures for the development of resilience in gifted Latino males, while Lopez and Sotillo (2009) suggested that giftedness and its intellectual attributes may also strengthen resilience and can serve as an additional protective factor for gifted Hispanic students. As a part of identity exploration, this study examined the role of resilience in the academic achievement of gifted Latino students.

Another promising avenue to promote the retention of gifted Latino learners in advanced programming is the use of specific kinds of goal setting to promote academic achievement (Pajares, Britner & Valiante, 2000; Witkow & Fuligni, 2007). Students who set mastery goals, which focus on mastering the subject matter and improving skills, demonstrated more persistence in the face of difficult academic material, which may have implications for increasing overall resilience in addition to academic achievement (Witkow & Fuligi, 2007).



Another type of goal explored by Witkow and Fuligni (2007) were performance goals, which tend to focus more on extrinsic motivators, both positive and negative, to promote achievement. The researchers found that performance goals resulted in less overall achievement than mastery goals, but appear to be more prevalent among Hispanic students. As to the reasons for this predilection, Witkow and Fuligni (2007) maintained that Hispanic students overall seem to place a greater emphasis on extrinsic motivators, such as teacher and peer affirmation, than do other groups.

This study examined the goal setting behaviors of gifted Hispanics to determine how academic goal setting may contribute to both the resilience and the overall achievement orientation of these learners. The type of goal setting behaviors expressed by the gifted Latino male provides more direct insight into how these learners approach academics and what motivates their achievement.

### **Definitions**

To better clarify the terminology of this study, the following definition of terms are presented.

***Gifted.*** There is variance nationally in what defines a gifted student (Plucker & Stocking, 2001; Renzulli & Park, 2000); however, many definitions or qualifications for giftedness derive from guidelines published in a Congressional report by Marland (1972). In accordance with both national and local guidelines established in a study conducted by Marland (1972), students identified as gifted for the current study consisted of those who tested in the 90<sup>th</sup> percentile on at least three out of four possible criteria: academic achievement, motivation, creativity, and cognitive abilities. To qualify under the

motivation criterion, a grade point average of at least 3.5 or better should have been maintained for a period of two years or more.

***Hispanic.*** The use of Hispanic in the current study refers to students who meet one or both of two primary criteria. The first primary criterion is that Spanish is either a primary or secondary language in the home. The second primary criterion is that the student may have immigrated to the United States from another Spanish speaking country. According to the Publication Manual for the American Psychological Association (2010), other preferred terms, aside from Hispanic, are Latino and Chicano. Other names originating from the region or country of origin may also be used, and due consideration of these names were taken into account during the study, with the ethnic designation of Hispanic chosen in accordance with the wishes of the participants.

***Gifted programming/setting.*** For purposes of this study, references to gifted programming or gifted settings refer to classrooms where the instruction is tailored specifically to gifted students. These classrooms were comprised of either all or a majority of gifted students, with instructors who were certified gifted instructors.

### **Problem Statement**

Hispanics are dropping out of gifted programming at a higher rate than other groups of students and are also underperforming at high rates (Ford et al., 2008; Renzulli & Park, 2000). Alfaro, Umaña-Taylor, and Bámaca (2006) noted that during the last four decades the Hispanic population has grown rapidly, while consistently remaining the lowest achieving of all ethnic groups in the United States. Additionally, these same researchers later found that reduced academic motivation has been a contributing factor

to Hispanic underachievement and eventual dropout from high school. (Alforo, Umana-Taylor, Gonzales-Braken, Bamaca & Zeiders, 2009).

Because of the exodus of Hispanics from gifted programming, and reduced academic motivation, a great deal of identified talent is left underdeveloped. The issue of underdeveloped talent is especially prevalent for gifted Hispanic males. Potentially, many of these underdeveloped students are left with little alternative but to acquiesce from a school-kid to a street-kid identity (Flores-Gonzalez, 2002), thereby removing or severely delaying the potential for further academic development. Along with the underdeveloped academic abilities come the additional consequences of underdeveloped leadership abilities, and the potentially powerful inspiration these gifted Hispanic males could provide to others of similar ability and orientation.

### **Purpose Statement**

The purpose of this Interpretive Phenomenological Analysis (Smith, Flowers & Harkin., 2009) was to explore the academic orientation, ethnic identity and goal setting behaviors of gifted Hispanic adolescent male students in the middle school setting. Given that issues of ethnic identity loom large in the research on Hispanics and academic achievement (Flores-Gonzalez, 2002; Ford et al., 2008; Herbert & Kelly, 2006; Huguet, et al., 2009; Umaña-Taylor, Gonzales-Backen, & Guimond, 2009), this study examined how gifted Hispanic adolescents are formulating answers to basic identity questions such as “who am I?” alongside basic academic orientation questions such as “how do I approach my learning?” Informing these two foundational questions and other related questions were examinations of participant goal setting behaviors alongside the interactions of resilience within their identity formations. Recent literature defines

resilience as “positive adaptation, or the ability to maintain or regain mental health, despite experiencing adversity” (Herrman et al., 2011 p. 259). The study examined how resilience interacts with the academic orientations, ethnic identities and goal setting behaviors of the participants.

### **Significance of the Study**

The body of research specifically targeting gifted Hispanic males is currently limited, other than to note their underrepresentation in gifted programming (Ford et al., 2008; Herbert, 1996; McHatton et al., 2007b), or outright abnegation by means of dropping out of a gifted program (Renzulli & Park, 2000). There are researchers endeavoring to develop new tools for identifying minority gifted learners (Conoley & Meimei, 2007; Umana- Taylor, Yazedifian & Ba’maca-Gomez, 2004), so that Hispanic participation in gifted programming will expand.

Other research on Hispanics has focused on the possible motives for dropping out of school (Flores-Gonzalez, 2002; Rumberger & Lym, 2008) or the role of ethnic identity development as it relates to the development of self-esteem and the implications for school-aged children (Umaña-Taylor et al., 2009; Umaña-Taylor, Vargas-Chanes, Garcia & Gonzales-Backen, 2008). Additionally, there has been research examining the role of resilience in the Hispanic learner (Herbert, 1996; Lopez & Sotillo, 2009). Although many researchers studying Hispanic students have documented evidence regarding the nature of the academic achievement of Hispanics as a whole, recent literature searches revealed only one study by McHatton et al. (2007b) that documents a phenomenological exploration that included gifted Hispanic males.

Given the call of previous research (Flores-Gonzalez, 2002; Renzulli & Park, 2000; Ford et al., 2008), a further examination of the inner attitudes of gifted Hispanic males, especially the attitudes they may be forming in middle school toward their own giftedness and academic achievement, was warranted. Data collection methods allowed the rarely heard voices of gifted Hispanic males to express how resilience and the affirmation of their ethnic identities strengthens their academic orientations as they work toward clear goals for a distant future. Participants also characterized the placement of giftedness within their identities and how the way they use English at school and Spanish at home may be indicative of an identity defining dichotomy during the middle school years that places giftedness in the forefront.

### **Critical Years**

The well documented dropout rate of Hispanics in high school (Heckman & Lafontaine, 2007; Lee et al., 2011; NCES, 2010, 2003) is an issue that may have its roots in the early adolescent years. In analyzing an array of dropout data, Lee et al. (2011) reported that students are “the most likely to drop out of school in ninth grade” (p. 57), making an examination of the years just prior to this key year in school all the more necessitous, as they be a prelude to later, more tragic movements.

Adding to the critical nature of these years, recent research indicates that middle school is a time of particular significance for gifted students (Van Tassel-Baska, Chandler, Feng, Quek & Swanson, 2009; Zabloski, 2010). Zabloski (2010) identified a “middle-school event,” which was an occurrence during the middle school years that later influenced the participant’s decision to drop-out of school. During the course of interviews with adult participants who had dropped out of school, Zabloski noted issues

of pressure, isolation, and rejection from a number of different sources expressed by the participants as motivation for their exodus from gifted programming.

With two of the gifted Hispanic male participants undergoing significant changes in their academic status at the conclusion of data collection, this study captured potential “middle school events” and allowed participants to portray how familial and learning challenges brought them to critical junctures in their academic lives. Moreover, the phenomenological nature of the study allowed the nuances of the difficulties to be expressed and examined.

### **Research Questions**

The following questions guided this study:

1. How do gifted Hispanic male middle school learners describe the collectivist aspects of Hispanic culture and the individualist aspects of academic achievement prevalent in gifted programming?

Research documents the difficulties that Hispanic students experience with individual success (Flores-Gonzalez, 2002; La Roche & Shriberg, 2004). These difficulties are often tied to a strong sense of collectivism within Hispanic culture that can deter individual accomplishment, especially if it means moving beyond the familial structures and ideals about school (LaRoche & Shriberg, 2004). The prevalence of this issue has not been explored on the individual level and bears further examination, especially given the retention issues of Hispanics in gifted programming (Ford et al., 2008).

2. How do gifted Hispanic male middle school learners describe their ethnic identity, especially as it relates to their academic orientation?

There is an established connection between the resolution of ethnic identity within a learner and the degree to which that resolution can affect academic orientation (Phiney & Org, 2007; Pijares, Britner, & Vilante, 2000; Supple et al., 2006; Umana-Taylor et al., 2008). The resolution of ethnic identity within the gifted Hispanic male may have significant bearing on his future academic achievement and warrants further examination on the individual level.

3. How do gifted Hispanic male middle school learners describe their academic resilience and how it relates to their achievement orientation?

The role of resilience in the gifted Hispanic male is a rarely explored subject within existing literature (Herbert, 1996; Lopez & Soto, 2009), especially as it relates to his academic achievement. Although resilience has been shown to have positive effects on academic achievement (Bland & Sowa, 1994; Kitano & Lewis, 2005), questions remain about the manifested nuances of resilience in the gifted Hispanic male.

4. How do gifted Hispanic male middle school learners describe their mastery and performance goals and how those goals relate to their academic orientation?

Research documents that Latinos tend to favor performance goals over mastery goals (Whitkow & Fuligini, 2007); however, research also shows that higher achieving students tend to favor mastery goals (Pajares, et al., 2000; Whitkow & Fuligini, 2007). The exploration of this question with gifted Hispanic males will help determine the types of goals these learners are setting for themselves and how these goals relate to their academic achievement.

## **Research Plan**

I collected, analyzed and reported data using Interpretive Phenomenological Analysis (IPA; Smith et al., 2009). Methodologically, IPA examines participant experience in detail to determine “what sense this particular person is making out of what is happening to them” (Smith et al., 2009, p. 3). IPA also recommends small sample sizes to gain more in-depth understanding of participant experiences. This approach is well-suited to the unique accounts of how ethnicity, giftedness, and gender manifest and influence the lives of gifted Hispanic males.

For this study a purposive sample of six gifted Hispanic males was selected at the middle school level. Upon securing all appropriate permissions and approvals, participants were given the Ethnic Identity Scale (Umana- Taylor, Yazedifian, & Ba'maca-Gomez, 2004) to determine initial levels of ethnic identity. After administration of the identity scale, a semi-structured interview was conducted with eight to ten open-ended questions (Smith et al., 2009) regarding ethnic identity, academic orientation and resilience. The initial interview was followed with two observations of each participant in gifted classroom settings. The observations followed a protocol developed from procedures set forth by Lofland, Snow, Anderson, and Lofland (2006) to further explore the manifestations of the expressed levels of ethnicity, resilience and academic orientations discovered in the initial interviews.

Given the recommendation of researchers in the field that in-depth understandings of participants require multiple interviews (Larkin & Griffiths, 2002; Seidman, 1998), along with the emphasis in IPA methodology on capturing the essence of experience through details (Smith et al., 2009), a second interview schedule was developed and



conducted with participants. This second interview schedule was developed using the initial results and thematic analysis of survey, interview and observational data. Memos and initial analysis yielded initial themes and categories.

Using these initial categories, a focus group was conducted for further clarification of emergent themes. Adhering to recommendations in the research specific to Hispanics (Umana-Taylor & Bamanca, 2004), the focus group procedures were tailored to the expressed ethnicity of the participants. The data collection process spanned five months. Throughout data collection and analysis, memos were kept and two other parties triangulated the data. Though both parties involved in triangulation had extensive experience with Hispanic students, one was of Hispanic origin and spoke Spanish as her native language.

As survey, observational, interview and focus group data were collected; I categorized the data through coding, and thematically analyzed it for connections among identity, resilience, and academic achievement. All interview data were professionally transcribed. Once the data had been transcribed, I continued coding to categorize and describe the phenomena being expressed by the participants in the study, as well as exploring thematic connections across grade levels and those connecting identity to achievement. Additionally, the participants were asked to review collected data via member checks to ensure greater accuracy. Throughout the entire process of data collection and analysis, I utilized rich description in reporting the data.

### **Delimitations**

The study focused only on the middle school experiences of the gifted Hispanic male because his is a voice so rarely heard in educational literature. Given the well

documented dropout rate of Hispanics in high school (Heckman & Lafontaine, 2007; NCES, 2003), this research focused on this earlier stage of middle school to more proactively determine what inner attitudes may be shaping the academic orientations of these learners. This purposive sample examined a group of gifted Hispanic males currently enrolled in middle school in the Southeastern United States.

## **CHAPTER TWO: LITERATURE REVIEW**

### **Introduction**

Gifted Hispanic adolescents are faced with all of the identity resolution issues that any adolescent must face, and during the integration process they are also faced with reconciling their ethnicity, their giftedness and even their self-esteem into a notion of themselves that guides their decisions. This literature review examines the foundations of identity development and the various identity components with which gifted Hispanic adolescents are faced during integrating. This review also examines how the integration and interaction of these identity components can change over time and how these changes affect academic orientation.

### **Theoretical Framework**

At the heart of identity formation is reconciliation. As an individual's identity becomes reconciled the often disparate familial, societal, cultural and social roles converge into a more integrated sense of self (Erickson, 1959, 1980). This integrated self is influenced by the expectations of all the aforementioned roles, while maintaining a decided independence. In a reconciled identity, an inner resolve to cultivate a uniquely integrated sense of self supplants the desire to fulfill the expectations or demands of any singular role (Erickson, 1968, 1980).

Understanding the gifted Hispanic male and his personal and academic journey through middle school begins with understanding the degree to which his identity is resolved. Moreover, understanding the gifted Hispanic male journey requires understanding the nuanced tensions involved in his balancing and reconciling the often competing roles he faces. But before the nuanced ladder of identity formation can be

ascended, a firm foundation must be established, and it is the works of theorists Erickson (1968, 1980) and Marcia (1993, 1994) that constitute the *locus classicus* of identity formation theory.

During the process of identity formation, many formidable challenges and barriers can arise, potentially upsetting the balance of the emerging identity. Resilience is an inner attitude that increases the buoyancy and vibrancy of the emerging identity by protecting it from potential threats (Herbert, 1996). The level of resilience demonstrated in response to potential identity threats can have a profound effect on the speed at which an identity becomes reconciled, which is why it is important to consider how resilience may be interacting with identity formation.

### **Identity Formation**

Erickson (1968, 1980) theorized that identity as a whole is formulated through a series of crises during the lifecycle, with each crisis causing a deeper exploration and clarification of an individual identity. Erickson (1980) noted that the life cycle begins with an initial sense of self-love or self-absorption. Over time, the self-love of children becomes influenced by a want or need to imitate familial and societal models. The tension between the inner expectations children have of themselves and the outer expectations of family and society remains throughout a child's upbringing and often develops into crisis of identity, which tends to resolve in either a better defined sense of identity or a diffusion of identity.

Successful identity formation comes as a result of the reconciliation of what individuals have mastered for themselves and how congruent those mastery experiences are with the expectations of the groups to which the child belongs. Erickson (1968) found

that adolescence was a crucial time or stage, among seven other stages, for establishing an identity that would carry forward into adulthood. During adolescence “accruing ego identity gains real strength only from wholehearted and consistent recognition of real accomplishment, that is, achievement that has meaning in their [the adolescent] culture” (Erickson, 1968, p. 95). Given the importance of meaningful accomplishment during adolescence, school performance can become a significant factor in shaping the identity of the individual.

Building on Erickson’s (1968, 1980) work, Marcia (1993, 1994) focused on adolescent identity development and, like Erickson, found that crisis played a central role in identity development. Marcia (1993, 1994) saw crisis in adolescence as a time when adolescents reevaluated their values and choices. Marcia (1993, 1994) followed this exploration of development with an equally important and eventual commitment on the part of an individual to more clearly defined concepts of self and a certainty of group membership. Identity achievement describes individuals who have undergone the processes of exploring differing ideologies, values, and even occupations and have made a commitment to their values, their roles within their groups, and a high sense of moral development.

The identity formation process that Erickson (1968, 1980) and Marcia (1993, 1994) identified is the process that overlaid this examination of the gifted Hispanic male. More specifically, the study examined the degree to which the gifted Hispanic male identity has been resolved in terms of the influence of ethnicity, academics, family, friends, spirituality, and societies in his life. Identity acts as a focal point or an axis that

he continually balances and re-prioritizes to establish equilibrium among an array of influences.

Using these seminal works of Erickson (1968, 1980) and Marcia (1993, 1994), Marsh and Shavelson (1985) ordered this construct into a hierarchy of different levels. Ultimately, these divisions were not meant to relegate the study of identity to an analysis of separate compartments, rather these divisions were meant to be eventually reintegrated to develop a deeper understanding of the construct as a whole. As understandings of identity development have deepened, it has become clear that the desired outcome of identity exploration is an identity achievement (Marcia, 1993). Identity achievement is marked by an integration of family, cultural, spiritual and academic components into a resolved whole (Erickson, 1968; Marcia, 1993). Once achieved, a resolved identity acts as a foundation for choices that affirm this achieved or integrated whole as opposed to affirming one particular aspect of identity.

### **The role of resilience**

As adolescents work toward identity resolution, they often experience a range of difficulties and barriers. The ability to deal successfully with these difficulties is commonly known as resilience (Bland & Sowa, 1994; Cabrera & Padilla, 2004; Herbert, 1996). In an overview of resilience among gifted students, Bland and Sowa (1994) noted that resilience consisted of behaviors such as task commitment, goal setting, and adaptability. Bland and Sowa (1994) also noted that these resilience behaviors could be taught to students who had previously demonstrated deficiency.

Later studies (Cabrera & Padillo, 2004; Kitano & Lewis, 2005; Lopez & Sotillo, 2009) noted other aspects of resilience, such as intelligence, self-esteem, internal locus of

control, and independence. Much like identity achievement, resilience becomes authentically effective when several varied aspects of self become reconciled into a balanced whole (Bland & Sowa, 1994; Kitano & Lewis, 2005). In a similar manner to the successful integration of several factors for identity achievement, resilience requires the integration of several behaviors, including adapting to various environments, setting goals, and dealing with criticism and pressure constructively.

Researchers have also noted the interactive nature of resilience (Davydov, Stewart & Ritchie, 2010; Herrman, et al., 2011), proposing that resilience arises from complex interactions of forces at a variety of levels, including genetics, life experiences, along with social and cultural settings. Ungar et al. (2007) placed an emphasis on the role of cultural relevance in accessing resilience, asserting that the resilience of an individual is more likely to come to fruition if it is accessed in a culturally relevant environment.

Cabrera and Padillo (2004) noted that the development of resilience is continuous throughout the schooling experience from kindergarten through college. The role of resilience in the current study was its influence and mediating effect on the identity resolution process in gifted Hispanic males in middle school. If resilience is teachable, as Bland and Sowa (1994) noted, then it holds potential for positively influencing both the identity resolution process and the academic achievement orientation of gifted Hispanic males.

### **Review of Literature**

How gifted learners may differentiate from other learners with regards to identity development and intellectual orientation has long been a topic in the research. Terman (1925), a pioneer in gifted research, published a landmark volume of work documenting

his longitudinal studies of 1,500 gifted children whom he examined for unique characteristics, especially characteristics distinguishing them from children of average intelligence. Terman (1925) closely examined the intelligence, heredity, home life, and academic habits and tendencies of these gifted children, whom he later concluded were more emotionally stable than their non-gifted counterparts.

### **Developing a Gifted Identity**

Zou and Tao (2001) took Terman's (1925) interview data with 1,500 children and analyzed it, using the lens of Marcia's (1993, 1994) stages of identity commitment, and found the more a child had committed to an identity, the more likely they were to have high achievement. Commenting on Zou and Tao's (2001) analysis, Herbert and Kelly (2006) noted "with identity in place, a gifted adolescent will more readily adopt an achievement orientation" (p. 46).

Research shows that resolving identity can be a complex issue for those in a gifted program. For many high ability and gifted students, Wigfield and Eccles (1991) found that advanced learners tended to experience a decrease in their academic self-perceptions because of grouping with other equally advanced students. They referred to this drop in self-perception as the Big Fish Little Pond Effect or BFLPE. They found this effect to be prevalent as advanced students transitioned into middle school classes with other equally or more advanced students. For gifted Hispanic adolescents, BFLPE can often be exacerbated by having to simultaneously make significant cultural or ethnic identity adjustments as they enter middle school.

Zabloski (2010) also documented the importance of middle school as a potential watershed for identity development. In a series of interviews with seven adults who had previously been enrolled in gifted programming and later dropped-out of school, many of



the participants recounted what Zabloski termed a “middle-school event” where a personal or in-school experience during middle school later influenced the participant’s decision to drop out. As participants described these middle school events, peer pressure, isolation and outright rejection from teachers, parents and other students, were common threads. These common threads may also be woven into the stories of the gifted Hispanic male, which underscores the importance of a phenomenological examination of these students during this critical juncture of middle school (Zabloski, 2010).

For Hispanic adolescents, identity development becomes a multi-layered phenomenon as they transition into and through the middle school years. Culturally, gifted Hispanic adolescents may be exploring the personal meanings of their ethnicity (Phinney, Lochner & Murphy, 1990), while also adjusting their academic self-perceptions about their own abilities in comparison with other gifted students. The effort required during each layer of the process can serve as a detractor from the often strenuous academic demands of a middle school gifted program.

Recent research indicates that choosing a role model within the class can have mediating effects on academic identity development (Huget et al., 2009). However, Huget et al. (2009) did not explore how much ethnicity factored into the choosing of a student role model. Given the overall low number of gifted Latinos (Ford et al., 2008), the choice of role models for these students may be somewhat limited. Other researchers suggest that simply participating in the gifted program may also have a positive effect on both the cognitive and affective domains of minority and low socioeconomic status (SES) learners (Van Tassel-Baska et al., 2009).

### **Gifted identities in classrooms**

Research has highlighted that even if there were an absence of ethnic or gender difference in a gifted classroom, there would still be a great deal of variation (Reis & McCoach, 2000; Reis & Renzulli, 2004; Tomlinson, 1995). Not only can underachievement result from not addressing the often accelerated needs of the gifted learner, but emotional issues can develop because of “a mismatch with educational environments that are not responsive to the pace and level of the gifted students’ learning and thinking” (Reis & Renzulli, 2004, p. 128). To better address the needs of gifted learners for variation in pace, instructional strategies involving the differentiating and compacting of the curriculum have been developed (Reis, Burns, & Renzulli, 1992; Tomlinson, 1995). These strategies have provided meaningful ways to individualize instruction that better address the independence that developing gifted identities often require.

### **Developing an Ethnic Identity**

With dual emerging and overlapping identities, both as an academically gifted and ethnic minority student, it is beneficial to examine the processes involved in the development of an ethnic identity. Phinney et al. (1990) examined the development of ethnic identity, which applied Marcia’s (1993, 1994) earlier work on stages of identity specifically to ethnic identity. Phinney et al. took the ideas of identity exploration and commitment and developed a three-stage framework for the construct of ethnic identity development. Just as Marcia (1993, 1994) highlighted the stages of exploration and commitment as important stages in overall identity development, Phinney et al. (1990) adopted the stages into the process of ethnic identity development. In the exploration

stage individuals learned the history and practices of their culture and examined its personal meaning and significance in their lives. In applying the commitment stage of identity development to ethnic identity development, Phinney et al. (1990) noted the development of positive feelings toward one's ethnic group while also developing a sense of belonging and ownership to the group.

As the Phinney et al. (1990) definition was revised; it resulted in a portrayal of ethnic identity development as rooted in a "sense of peoplehood within a group, a culture, and a particular setting" (Phinney & Org, 2007, p. 272). Phinney and Org (2007) also extended ethnic identity beyond a mere understanding of a more static stage progression to a more dynamic process of actions, choices, and experience, including both personal and social aspects.

The initially identified stages of Phinney et al. (1990) have evolved into a more multi-dimensional construct of ethnic identity development. Contributing to the ongoing revision of this construct, Umana-Taylor, et al. (2004) defined ethnic identity development using an exploration stage and a commitment stage, which they termed as resolution. Umana-Taylor et al. (2004) added in an additional affirmation stage, which is highlighted by the positive feelings one may have about the ethnic group to which one belongs. For the gifted Hispanic adolescent journeying through these stages, it is imperative that they reach a place where they can self-affirm their own identity in any context. The ability to affirm their own identity may provide these students with the resilience to succeed academically in spite of any real or perceived obstacle.

Supple, et al. (2006) looked at the influence of contextual factors on adolescent Hispanic ethnic identity and noted that the areas of exploration, commitment and

affirmation in ethnic identity development should be considered more distinctly as stages for purposes of research. They suggested that the grouping of stages together for an overall identity score may distort the important subtleties within each distinct stage. In their analysis of the exploration, resolution, and affirmation stages of ethnic identity development, only affirmation showed a positive effect on school performance (Supple et al., 2006), suggesting the more affirmed an ethnic identity the more improvement one sees in academic performance. These results also suggest that ethnic identity may serve as a protective factor for Hispanic adolescents against negative school outcomes such as low grades. Identifying where Hispanic adolescents may be in the stages of ethnic identity development can assist educators in helping these learners progress to later stages where the likelihood of higher academic achievement may be greater (Supple et al., 2006).

### **Communication and Ethnic Identity Development**

Since the 1980s researchers have identified trends in first and second language use by immigrant families (Grosjean, 1982; Hansson, 2006; Portes & Schaffer, 1996; Sole, 1982). Grosjean (1982) highlighted a trend in immigrant language evolution indicating that first generation immigrants tended to remain monolingual in the home, while the second generation developed bilingual abilities both at home and in the language of society. Though there are variations in time span, often by the third generation Grosjean indicated that the speakers are monolingual in the dominant language of society. This gradual shift toward English, especially by second and third generation Hispanics, is a trend that has been substantiated in other research

incorporating other Hispanic groups and time spans including from the 1990s into the present (Hansson, 2006; Portes & Schauffer, 1996; Sole, 1982).

### **Acculturation**

As researchers examine the phenomenon of generational language use, it is often placed under the larger research umbrella of acculturation (Lopez, 2011; McHatton et al., 2007a; Ruiz, 2009; Xiaohui, Suarez-Morales, Schwartz, & Szapocznik, 2009). Berry (2003) defined acculturation as the adaptation, or lack of adaptation, that occurs when contact is made between individuals or groups of different cultural backgrounds.

Hanson (2006) surveyed 202 Hispanic undergraduates, 90.6% of which reported Spanish as their native language with English learned at the mean age of 4.6 years. Survey results showed that undergraduates in the 90.6% reported that thinking, watching television, praying, dreaming and talking to siblings was done more in English than in Spanish, and both Spanish and English were used for listening to music and talking to parents and friends. The remaining 9.4% of undergraduates in the study who reported acquiring Spanish and English simultaneously indicated that thinking, watching television and dreaming were done primarily in English. When combining the results, 100% of over 200 Hispanic undergraduates were using English as the primary language for decidedly individualized activities such as thinking and praying, which provided further indication of a generational shift toward English. Furthermore, the researchers found that sustained secondary Spanish studies were not a pursuit of most participants, further indicating the shift toward English dominance.

In a recent study of Hispanic youth language and acculturation, Lopez (2011) reanalyzed data from a previous study and found that language preferences attenuated

emotional experiences; however, students whose primary language was Spanish fared worse in their emotional states while at school compared to when they were with family. Spanish dominance seemed connected to inferior emotional experiences at school, suggesting a need for better acculturation methods for those Hispanic students who are Spanish dominant, while also suggesting an emotional component for the previously reported shift toward English dominance (Hansson, 2006). English use may not be limited to its increased communicative abilities but also have value in its better emotional outcomes.

Taking a more empirical approach, Xiahui et al. (2009) analyzed four trial samplings using the BIS-S, a 24-item scale used to examine Hispanic and American orientations in adolescents from ages 11-18 and their guardians. The first trial consisted of 720 participants, including adolescents and guardians, with the three other trials sampling 1,053 participants. The researchers found that both generations (adolescents and guardians) appreciated Hispanic cultural activities, and Hispanic culture was perceived as largely preserved through these activities. The adolescents indicated a growing appreciation of American cultural activities and English, while still retaining spoken Spanish and Hispanic culture in their formative *vade mecum*s of cultural understanding. In their final analysis the researchers identified a bidimensionality with regard to acculturation in the Hispanic participants, so that receiving newer cultural practices, including language, did not dissuade retention of the practices from their Hispanic heritage.

## **Communication styles**

In an effort to distinguish how certain communication styles may contribute to greater school performance, McHatton et al. (2007a) conducted video interviews and focus groups with 16 Hispanic middle school students who were grouped according to their school designation as either regular education or gifted education students.

McHatton et al. (2007a) conducted five days of videotaped discussions with the students, addressing language acquisition, expression, and cultural experiences in regular and gifted education groups. The researchers noted that gifted Hispanic students were immediately more at ease with each other, despite having just met, and used more formalized language structures in both Spanish and English than their non-gifted counterparts. The gifted Hispanic students also viewed their bilingualism as a tool that would win them future occupational advantages, whereas the non-gifted Hispanics saw their Spanish skills more as tools to aid in translating for others. With regard to language, both the gifted and non-gifted students in the study reported feeling less intimate with Spanish than they did with English.

McHatton et al. (2007b) took the data from their initial research (2007a) and further examined it to deepen their understanding of Hispanic adolescents in both the gifted and general education settings. This deeper evaluation of the data uncovered differentiated views of ethnic identity, native language use, and self-concept between the gifted and non-gifted Latinos. Gifted Hispanic adolescents were more detached in their descriptions of their academic environs, whereas the non-gifted Hispanic adolescents shared a greater volume of experiences, especially regarding specific teachers and reports of discrimination.

## **The Role of Self-Concept in Ethnic Identity**

Another attribute to academic and social success in adolescents is a healthy self-esteem or self-concept. A general view taken of self-concept in the literature is represented by Plucker and Stocking (2001), who define self-concept as “an idea or set of ideas one has about oneself” (p. 536). Beyond this view of self-concept, the literature has also expanded the construct of self-concept to a conception that is multi-dimensional (Bandura, 1997; Cole et al., 2001; Harter, 1986; Marsh & Shavelson, 1985; Twenge & Crocker, 2002; Valentine, Cooper & DuBois, 2004). According to the multi-dimensional understanding of self-concept, as students journey through school they establish a specificity with regard to the dimensions of their self-concept. For example, students may develop particular facets of their self-concept (e.g. math or verbal self-concepts) that will exert a greater influence on their academic achievement than more generalized self-beliefs (e.g. overall feelings of self-worth).

The implications of this multi-faceted view of self-concept imply students can become more differentiated and even compartmentalized regarding academics and how it relates to their overall sense of self. As a recent meta-analysis shows, for many Hispanic students the overall self-concept is much higher when the academic components of self-concept are not considered (Twenge & Crocker, 2002). Hispanic students often expressed an overall sense of high self-worth while compartmentalizing their academic performance away from their overall view of themselves; school performance was treated as a non-factor in evaluations of self-worth. Twenge and Crocker (2002) also suggested that Hispanic adolescents may be using compartmentalization as a protective device to



either distance their self-perception away from any academically oriented views or to retaliate against a school culture they perceive as hostile towards them.

In examining how self-concept may be affecting ethnic identity development, Umaña-Taylor, Vargas-Chanes, Garcia, and Gonzales-Backen (2008) discovered in a longitudinal analysis of over 300 Hispanic learners that the ethnic identity stages were not predictive measures of self-esteem. However, they did find that the resolution stage of ethnic identity was able to predict the ability to proactively cope with difficult situations over time. They also found that the ability to proactively cope affected self-esteem, and the reverse effect of self-esteem on coping was also true. Umaña-Taylor et al. (2008) also suggested there may be ongoing, long-term associations between ethnic identity and self-esteem. This research underscores the importance of continuing to examine how crucial a role self-concept may be playing in interfacing with ethnic identity development, especially during the early stages of adolescence.

Some of these same researchers conducted a longitudinal study of 323 Hispanic adolescents and used latent growth curve models to examine the stages of ethnic identity in Hispanic learners (Umaña-Taylor et al., 2009). They discovered that all three of the ethnic identity stages (exploration, resolution and affirmation) increased for girls from middle to late adolescence; however, only boys showed a significant increase in the affirmation stage. This differentiation between genders in ethnic identity development is an area for further study. Umaña-Taylor et al. also found that of all the aspects of ethnic identity, only a strong sense of exploration was predictive of a growth in self-esteem. Taken as a whole, the findings of Umaña-Taylor et al. suggest that the role of ethnic

exploration in the identity formation of the gifted Hispanic male may play an important role in the formulation of self-esteem.

### **Ethnic Identity and Discrimination**

As the immigration of Hispanics into the United States has grown, patterns of group interaction, including discrimination have emerged. The U.S. Bureau of Labor Statistics (2008) indicated that Hispanics experience significant discrimination in the labor force and other institutional settings. Another pattern of immigrant group engagement and incorporation was first examined by Tyler and Blader (2003) and given additional credence in an 8-year investigation of 293 immigrants by Jasinskaja-Lahti, Liebkind, and Solheim (2009).

Jasinskaja-Lahti et al. (2009) found that as a whole, immigrant identity formation depends largely on the messaging they receive from the larger group, and a favorable, integrated identity is possible to the degree the incoming immigrant group perceives fairness, group engagement, and support from the larger group. A lack of these qualities from the larger group or worse, outright discrimination, can result in disengagement or a “disidentification” from the larger group. These results suggest what other research has portrayed as an “ecology” of ethnic identity development (Rivas-Drake, Hughes & Way, 2009). Just as interaction with any environment can significantly influence the development of self (Marcia, 1994), research is showing the importance of group to group interactions on the development of perceptions about discrimination.

Given the foundations of ethnic identity development within the family structure (Marcia, 1994; Phinney & Org, 2007) research indicates that these understandings are intentionally and unintentionally passed to children in the home through ethnic-racial

socialization within the family (Hughes et al., 2006). As students carry their formative ethnic identities from these familial socializations into the school environment, perceptions of discrimination are further informed by the context and experiences of school.

Rivas-Drake, et al. (2009) studied 379 ethnically diverse sixth graders and found that where students found their best fit ethnically was greatly influenced by the nature of the interactions and messages they received at school regarding race and ethnicity. The way students perceived or authentically experienced these messages had a significant influence on their perceptions of discrimination. The authors portrayed discrimination perceptions as shaped by “ecologies” where students were embedded. As a primary ecology of influence, families that were stressing ethnic and cultural positives to students had a significantly more positive influence on students’ own regard for their ethnicity than did preparing them for possible discrimination. In other words, accentuating the best of culture and ethnicity did more to protect students than did preparing them for the worst. Studying students at the sixth-grade level, the researchers also found the process of integrating the variety of racial and ethnic cues was more intense at this age than in later stages.

Rivas-Drake et al.’s (2009) research was complemented by Davidio et al. (2010), who also noted the significant effects of several different contexts on perceptions of discrimination. Davidio et al. saw a formulated perception of discrimination as cumulative, or a culmination of both the overt and salient experiences of discrimination, as well as the more consistent and subtle experiences with the phenomenon. The authors cautioned against direct comparisons of Latino discrimination experiences to those of

African-Americans, in part because of the significant role foreignness can play in discrimination against Latinos.

McHatton et al. (2007a) reported that all Hispanic study participants expressed an experience with discrimination. Alongside this reported discrimination, all the Hispanic students expressed a duty to assert their culture within the school setting. Regarding discrimination, one gifted Hispanic student summed up his experience:

Different teachers show you different respect depending on the group you are with. Sometimes I am with an entirely Spanish group, and the teachers just like yell at us for absolutely no reason. But when I am with the [gifted] class group . . . [teachers] show me respect because they know what I am really like. But since the other teachers don't know who I am and don't work with me like daily, they go with the stereotypes and just have no patience. (McHatton et al., 2007a, p. 15)

As gifted Hispanic students develop an awareness of the differentiated treatment they may be receiving from teachers depending upon group associations, their behavior may change to accommodate the environment and avoidance behaviors may ensue. For example, McHatton et al. (2007a) reported the gifted Hispanic students often chose not to speak Spanish in school and not to have Hispanic friends. The focus of the gifted Hispanic identity in school seemed to be one based on academics, especially on giftedness, with ethnicity relegated to a more secondary role.

Despite the previously documented sense of duty the gifted and non-gifted Hispanic students felt to assert their culture, McHatton et al. (2007a) reported that the gifted Hispanic students searched for ways to retain and assert their Hispanic culture while simultaneously assimilating the majority culture of the school. The gifted Hispanic

students were not as disenfranchised as their non-gifted counterparts, and the gifted Hispanics retained a sense of detachment, even from the discrimination directed at them. The collective research from McHatton et al. (2007a, 2007b) highlights a possible tension between the assimilation of the school culture and the retention of an inherent ethnicity identity for gifted Hispanic adolescents. This research indicates that gifted Hispanic students have to find effective ways to balance or even integrate the school culture into their own ethnic identity. Understanding the processes involved in the balance and integration between ethnic identity and school culture seems to be a key to understanding why some Latino students are experiencing more school success than others.

### **The Trajectory of Ethnic Identity**

Given the noted significance of adolescence within the life cycle (Erickson, 1968), it is also important to consider ethnic identity development of adolescents in a broader context of trajectory over time. Two recent longitudinal studies (Azmitia & Syed, 2009; Pahl & Way, 2006) traced the trajectories of ethnic identity in minority learners through the college years. Azmitia and Syed (2009) examined indices of ethnic identity, which included ethnic identity exploration and commitment, along with other factors, such as self-esteem. Their research showed that ethnic identity commitment increased over time; however, during the overall increase, identity exploration seemed to fluctuate during transition periods in schooling, such as moving from elementary to middle school.

Using multi-level modeling, Azmitia and Syed (2009) concluded that early adolescents tended to increase in their commitment to an ethnic identity while not increasing their exploration. This finding suggests that adolescents may be committing to their ethnicity without prolonged periods of education or exploration about it. The

researchers documented how the increase in commitment to an identity quickened and exploration slowed as early adolescence gave way to middle adolescence. Azmita and Syed indicated that this pattern may differentiate depending upon the ethnicity of the participant, which further highlights the need for studies focused specifically on one ethnic group, such as Hispanics, or studies comparing ethnic groups of distinct identity stages.

Pahl and Way (2006) conducted a similar longitudinal study of 135 African-American and Hispanic students for trajectories of ethnic identity exploration and affirmation from middle to late adolescence. Pahl and Way theorized that the school transition periods of elementary to middle and middle to high would trigger periods of identity exploration that would be resolved in later adolescence as students became more secure in their identities. In accordance with their proposed theory, the researchers did find a decrease in ethnic identity exploration during late adolescence.

The idea of an ethnic identity settlement and resolution in late adolescence posited by Pahl and Way (2006) contradicts an important finding of the longitudinal study of Azmita and Syed (2009), who posited that ethnic identity continues to be explored and developed into late adolescence and beyond. For Azmita and Syed, ethnic identity is more of a life cycle trend than a strictly adolescent trend. However, both studies agree that transitional schooling periods such as elementary to middle and then middle to high are periods when the exploration of ethnic identity increases (Azmita & Syed, 2009; Pahl & Way, 2006).

Duration of identity development matters for the gifted middle school Hispanic learner because of the importance it places on achieving identity resolution. If ethnic

identity development is viewed as a life cycle phenomenon, then resolving ethnic identity during the early and middle stages of adolescence becomes less significant, given the later opportunities for continued development (Azmita & Syed, 2009). However, if the exploration of ethnic identity is confined to adolescence, then achieving some sense of identity resolution during this time period takes on a heightened importance. Regardless of the given time frame for resolving an identity, an emphasis in both studies was that a greater resolution in ethnic identity held greater potential for academic success. Conversely, prolonged identity diffusion can breed academic difficulty (Azmita & Syed, 2009; Pahl & Way, 2006).

In accordance with both of the aforementioned longitudinal studies (Azmita & Syed, 2009; Pahl & Way, 2006), another study by French, Allen, Aber and Siedman (2006) also noted the transition periods of elementary to middle to be significant times of adolescent identity development. French et al. revealed exploration to be low for Hispanics in early adolescence and noted its increase during middle adolescence. French et al.'s findings indicate that the affirmation of identity occurring in middle adolescence is a trajectory of development, which concurs with the work of Pahl and Way (2006).

French et al. (2006) also suggested that early adolescents in homogeneous ethnic environments do not seem to engage in exploration as much as middle adolescents. The identities of these adolescents remain untested until middle adolescence, when exposure to other ethnicities and ideas is higher. The findings suggest that gifted Hispanic adolescents living in more homogeneous environments may find their participation in more heterogeneous settings such as gifted programming to be an impetus for increased identity exploration.

## **Resilience and Identity Development**

As the gifted Hispanic adolescent continues to reconcile the various aspects of identity, resilience can become a significant mediating factor in identity development. Recent literature has portrayed resilience as a positive orientation or adaptability, which regains mental health, despite experiencing adversity (Herman et al., 2011). The literature also portrays the significant interactions of resilience with other contexts, such as familial, cultural, and social (Malindi & Machenjedge, 2012). While resilience definitions retain the components of positive adaptability (Cabrera & Puadillo, 2004; Herbert, 1996; Herrman et al., 2011) recent research also integrates the significance of the evolutionary, interactive process of resilience formation within the individual (Davydod et al., 2010; Malindi & Machenjedge; Ungar et al., 2007).

Davydod et al. (2010) analyzed resilience studies from a variety of perspectives including neuroscience, behavioral science, individual, group, and cultural examinations. Highlighted in their work is the layered interactivity of resilience and its continuing evolution within several human capacities, including genetics, positive and negative life experiences, and social and cultural group settings. Given the dynamic nature of these interactions, they assert that the building of resilience mechanisms results from forces broader than current research has characterized, and they suggest a wider perspective of international studies be undertaken.

Ungar et al. (2007) conducted an international qualitative study of 89 people encompassing 11 countries, which examined resilience among 12-23 year olds. The researchers asserted that resilience entails more than just the capacity of the individual to overcome adversity. They maintain that the capacities of the environment to provide



“health-enhancing resources in culturally relevant ways” (p. 288) be integrated into existing notions of resilience. These researchers highlighted the importance of environmental tensions among individuals, families, communities and culture and how these tensions act upon resilience formation to render it a more constant, dynamic, and lifelong process, rather than an end or permanent state achieved during childhood. They characterized resilience as significantly shaped by individual context; a course of life where layered ideas and ideals about identity, relationships, power, and control are continually revised as they interact with one another.

For the gifted Hispanic male, resilience may result from several factors. Herbert (1996) conducted three case studies of gifted Hispanic high school aged males using both school and home participant observations along with semi-structured interviews. With all three participants reported as high-achieving, Herbert (1996) noted that all three shared high aspirations or goals for the future, along with an inner determination to overcome obstacles, and additional spiritual and familial support. All of these factors bolstered each young man’s sense of resilience.

Lopez and Sotillo (2009) examined the social adjustment of 50 Spanish speaking gifted students through a comparison with 50 non-Spanish speaking, non-gifted students and reported little overall differences between groups on global measures of adjustment. The researchers found that high levels of cognitive ability, as demonstrated by the Spanish speaking gifted students, mitigated obstacles such as the perceived discrimination of teachers and peers resulting from differences in language and heritage. Lopez and Sotillo also noted that high cognitive ability seemed to provide only moderate

protection from perceived obstacles, suggesting there may be other factors at work in the manifestation of resilience.

Cabrera and Padillo (2004) explored the role of resilience utilizing in-depth interviews of one female and one male Stanford University student of Mexican heritage to examine their successful school experiences retrospectively. Highly supportive familial structures, especially maternal support, along with personal goals and an inward motivation to succeed were important factors to the success of these students. Both students had acquired “the culture of college,” which is a set of tools and knowledge that predominantly middle class parents use to navigate their children to college. Though both study participants expressed their resilience uniquely, familial support, inner determination, and some measure of acquiescence to the predominant culture played important roles in their academic achievement.

### **Middle and high school resilience**

Just as Cabrera and Padillo (2004) highlighted the importance of participants’ culture acquisition as it pertains to their respective colleges, two recent studies of middle school Hispanic students also highlighted the importance of cultural adaptation in relation to school success (Lee et al., 2011; Lys, 2009; Ruiz, 2009).

Ruiz (2009) studied 173 Hispanic seventh- and eighth-grade students who self-reported on questionnaires. The researcher found that when Hispanic students identified with their school positively and had personal relationships and connections to school, a higher level of participation and grade average were likely. Ruiz also found that parent involvement contributed positively to increased school involvement, but not necessarily to higher achievement. These findings place an emphasis on the important role the school

has in establishing more meaningful connections with Hispanic students, which not only builds resilience but promotes higher academic achievement as well. The school itself becomes a growth agent for acculturation and resilience through intentional relationship building with Hispanic students.

In related findings highlighting the ability of schools to mediate and strengthen resilience, Malindi and Machenjedge (2012) found that schools promoted a multi-faceted resilience, even when students had experienced significant trauma. Lee et al. (2011) found that Hispanic high school students who were engaged in the context and extra-curricular activities of their schools were “more likely to graduate from high school and transition to college” (p.60). Lys (2009) supports this intentionality in connecting with Hispanic students through an additive model of acculturation. This additive model simultaneously reinforces the ethnic identity of Hispanic students through an acceptance (or addition) of culture and language, into the existing school culture.

Lys (2009) investigated the perceived likelihood of graduating from high school among 74 male and female Hispanic eighth graders. Aside from underscoring how pivotal middle school can be in the academic life of a Hispanic student, Lys (2009) found that gender plays a major role in predicting a student’s perception of possible high school completion. Male Hispanics were reported to worry significantly more about not graduating from high school than female participants, with the author suggesting that Hispanic males may be in greater need of increased levels of support during the transition to high school.

## **Goal Setting**

At their most basic and dichotomous level, goals are either oriented toward attaining success or avoiding failure (Dweck, 1986; Pijares, et al., 2000). In keeping with this dichotomous orientation, researchers have classified goals into two categories: performance and mastery (Elliot et al., 2001; Pijares, et al., 2000; Witkow & Fuligni, 2007). Performance goals are goals that have the underlying orientation of avoiding failure. Consequently, students with performance goals tend to choose easier assignments and lack perseverance in the face of adversity (Dweck, 1986). In contrast to performance goals, mastery goals have the underlying orientation of attaining success. Mastery goals tend to be more intrinsic and include the notion of learning for the sake of learning (Witkow & Fuligni, 2007). Consequently, those with mastery goals tend to choose more challenging tasks, and show a high degree of perseverance and persistence when faced with adversity (Dweck, 1986; Elliot et al., 2001).

With continued examination, these classifications of goal orientations have become more nuanced. Researchers have further divided performance goals into performance avoidance and performance approach goals (Elliot et al., 2001; Witkow & Fuligni, 2007). At their foundation, performance avoidance goals avoid failure and have been shown to function poorly over time, while performance approach goals do not necessarily avoid failure as much as they promote achievement for extrinsic rather than intrinsic reasons (Midgley et al., 2001; Witkow & Fuglini, 2007). Students with performance approach goals want to do well but mainly for reasons outside of themselves. While still not as beneficial as mastery goals, performance approach goals

have been shown to be effective in certain circumstances (Midgley et al., 2001; Witkow & Fugligni, 2007).

Through administering a questionnaire, examining diaries, and analyzing the GPA of 686 high school students of varying ethnicity, Witkow & Fugligni (2007) found that when Hispanics reported having performance approach goals it was a significant predictor of a research category entitled “not understanding something taught in class” (p. 590). The implication was that Hispanic students who were focused on extrinsic rewards for motivation (performance approach goals) were less likely to authentically comprehend some class work. Qualitative exploration of the gifted Hispanic male and his goals may reveal more of their intrinsic and/or extrinsic nature.

The exploration of gifted Hispanic male goals in relation to ethnic identity may also reveal more about the influence of culture on motivation. Elliot et al.’s (2000) cross-cultural explorations of performance approach and avoidance goals noted that cultural collectivism is associated with higher levels of negativity and a more pronounced fear of failure. Previous research has noted the collectivism present in Hispanic culture and its relation to academics (LaRoche & Shriberg, 2004; Supple et al., 2006).

### **Summary**

Regardless of setting, ethnicity, or academic designation, every adolescent is involved in the process of identity exploration with the eventual goal of reaching identity achievement. Identity achievement is the resolution within an individual that has a bi-directional congruity with internal aspects of self-concept and external aspects of expected norms (Marcia, 1993). As gifted Hispanic adolescents progress through the stages of ethnic identity development (Phinney et al., 1990) under the larger umbrella of

overall identity development (Erickson, 1980; Marcia, 1993, 1994), they are subject to certain nuances of identity development specific to their co-designations as both Hispanic and gifted. Exploration of these nuances through interpretive and qualitative means provides insight into why many gifted Hispanics are not staying in gifted programming and why they are achieving or underachieving (Ford et al., 2008; Renzulli & Park, 2000).

Compelling among these nuances in the identity development of gifted Hispanic adolescents is how these learners negotiate and integrate potentially competing or dichotomous identities such as the street kid versus school kid identities (Flores-Gonzalez, 2002) into more holistic identity frameworks that incorporate facets of these competing personas into an authentic self. Equally compelling is the role resilience plays in the lives of these gifted Hispanic adolescents and how resilience mediates the inclinations of these learners toward academic or non-academic identities.

Examining what inner processes or attitudes shape both academic success and failure deepens insights into Hispanic adolescent self-concept and how they link to academic orientation. Qualitative examination of these attitudes reveals internal hurdles specific to gifted Hispanic males during middle school and how Hispanic culture, school culture, or the culture at large may be shaping those hurdles. More specifically, examining the rarely documented perspective of the gifted Hispanic male adolescent during middle school clarifies how these hurdles shape identity as a gifted student, a Hispanic, and a young man.

Ford et al. (2008) and Renzulli and Park (2000) noted that the retention of Hispanic learners in gifted programming warrants further examination. That more Hispanics leave gifted programming than in any other participating group (Renzulli &

Park, 2000) may have a connection to the overall poor school completion rates for Hispanics (Flores-Gonzalez, 2002; Heckman & La Fontaine, 2007; NCES, 2003), as well as provide insight into what exactly being gifted means for the Hispanic learner.

The ideas of dropping out or consistently underperforming are not ones that suddenly blossom at a given age. The seeds of academic success or academic surrender are planted long before high school. Given Zabloski's (2010) findings about the potentially damaging events that may occur during middle school, understanding the internal effects of possible academic, ethnic or social hurdles may help more students surmount them. Identity examination of the male gifted Hispanic adolescent while still in middle school illuminates how educators can help nurture the identities of these students, build self-concepts, and help these young men achieve to their potential.

## **CHAPTER THREE: METHODOLOGY**

### **Introduction and the Research Questions**

The purpose of this Interpretive Phenomenological Analysis (Smith et al., 2009) was to explore the ethnic identity and academic orientation of gifted Hispanic adolescent male students in the middle school setting. Resilience was also examined within the contexts of ethnic identity development and academic orientation to determine its role in mediating and informing issues of identity and academic orientation. The theoretical approach to the data collected was based in Interpretive Phenomenological Analysis (Smith et al., 2009) because of its ability to explore the essence of the gifted Hispanic male learner's experiences within the given contexts.

Though research has documented that Hispanic learners drop out of both gifted and regular programs at higher rates than other groups (Flores-Gonzalez, 2002; Heckman & LaFontaine, 2007; NESC, 2003; Renzulli & Parks, 2000), the literature reveals little in the way of phenomenological explorations of the ethnic identities or academic orientations of gifted Hispanic learners. The interpretive, phenomenological design of this study allowed a more nuanced exploration of the experiences and perspectives of the gifted Hispanic males within their particular gifted contexts. The study was guided by the following questions:

**Research Question 1:** How do gifted Hispanic male middle school learners describe the collectivist aspects of Hispanic culture and the individualist aspects of academic achievement prevalent in gifted programming?



**Research Question 2:** How do gifted Hispanic male middle school learners describe their ethnic identity, especially as it relates to their academic orientation?

**Research Question 3:** How do gifted Hispanic male middle school learners describe their academic resilience and how it relates to their achievement orientation?

**Research Question 4:** How do gifted Hispanic male middle school learners describe their mastery and performance goals and how those goals relate to their academic behaviors?

### **Design**

On a macro-level the design and order of the research explored the essence of being a gifted Hispanic male in middle school. Exploring a human essence requires a nuanced approach that captures the experience of the participants alongside the motives and effects of their experiences. In describing Interpretive Phenomenological Analysis (IPA), Smith et al. (2009) specified that IPA is best used in research with small sample sizes in settings where the focus is on “personal meaning and sense-making in a particular context, for people who share a particular experience” (p. 45). Given the research questions for this study, an IPA approach was best for examining a small group of students who shared the experience of being gifted within a larger ethnic context of being Hispanic, and the even larger context of being male in middle school.

### **Research Steps**

The research design began with the administration of the Ethnic Identity Scale (Umana-Taylor et al., 2004), (see Appendices A, C). The scale had a two-fold purpose. Its research-based purpose was to place participants along a continuum of ethnic identity development consisting of three major elements: affirmation, exploration, or resolution.

The scale also allowed participants to bring to consciousness ideas and notions about ethnic identity, which later served as gateways for freer expression during the interview process.

Once students completed the scale, each participated in a semi-structured interview, which progressed through an interview schedule of 8-10 open-ended questions (see Appendix D). These questions were designed in accordance with IPA guidelines (Smith et al., 2009) to address the role of ethnic identity garnered from the Ethnic Identity Survey in greater depth, while simultaneously addressing the roles of academic orientation, resilience, and goal setting in the participants' lives.

Participants were then observed twice in gifted classroom settings for approximately 20-30 minutes each using a research-based (Lofland, Snow, Anderson & Lofland, 2006) observation protocol (see Appendix E) to further explore expressions of ethnic identity, resilience and academic orientation in a gifted classroom context. Conducting two contextual observations established a congruency with the depth required by IPA methodology (Smith et al., 2009). These observations determined how previously expressed levels of identity, resilience and academic orientation matched demonstrated classroom levels, as well as provided additional clarity to other emerging themes.

These observations were followed by a second semi-structured interview schedule (see Appendix F), which factored in emerging themes from the previous data collections. This second interview schedule was developed inductively during data collection in order to more accurately capture emerging themes (Larkin & Griffiths, 2002; Seidman, 1998). Developing a second interview schedule from previously collected data also allowed for

the development of questions specific to certain participants to better capture the detail within their experiences.

Lastly, a focus group was conducted, bringing all participants together to clarify thematic findings in the areas of academic orientation, ethnic identity, resilience, and goal-setting (Umana-Taylor & Bamaca, 2004). The overall research design incorporated a focus group because of the prevalent and somewhat unique cultural role of collectivism for Latinos (LaRoche & Shriberg, 2004; Umana-Taylor & Bamaca, 2004; Witkow & Fuligni, 2007). Utilizing individual interviews and a focus group allowed for a more complete exploration of collectivism within the context of being a gifted Hispanic middle school male.

### **Language Use during Data Collection**

Issues of participant language use at school and at home emerged as a theme during the course of data collection and analysis. An interesting finding of the study was the expressed comfort level participants felt with the nuances of English, and in two cases the lack of comfort participants felt with the nuances of Spanish. Because of this expressed level of comfort with English, each participant elected to use English during each phase of data collection. However, at each step in the data collection process the option to communicate in Spanish in writing for the initial survey and with a translator for interviews and the focus group was offered, but subsequently declined by each participant. Though language was not the initial focus of the study, it was noted that all participants seemed to view English as the language of school, and each had a demonstrated fluency with English prior to admittance into gifted programming.

## Sites

As discussion of specific sites, participants, and outside readers continues, it is important to note that pseudonyms have been utilized for all of these entities. The two middle school sites encompassing grades 6-8 for the Morristown school district (pseudonym) were chosen because the research goals of the study also aligned with the overall research priorities of the district. Morristown district places a priority on advanced learning options for all students, such as gifted programming, and the capability of advanced programming to meet student needs, especially the needs of minority students. I also am employed by this system, which granted a greater likelihood of access to the individuals to be studied. According to demographic statistics noted on the state Department of Education's website, the school system as a whole reports the following demographic information: 45% Black, 30% Hispanic, 19% White, 3% Multi-racial and 2% Asian. The number of students receiving free or reduced lunch in the system is reported as 64% of the student population. The pool of gifted learners within the Morristown middle school settings is approximately 14% of the overall student population. According to school records, of the 239 gifted learners, only 5-6%, or 16 students could be designated as both gifted and Hispanic.

Grades 6-8 in the Morristown school district are housed in two separate facilities, a sixth- grade site and a site for the seventh and eighth grade. Both sites have similar demographics. According to available state report card data at the time of writing, the sixth- and seventh/eighth-grade sites report the following demographics for the 2009-2010 school year: 49% Black, 29% Hispanic, 15% White, 3% Asian, 3% Multi-racial, and 1% Native American/Alaskan Native.

## **Participants**

The participants for this study were a purposive sample of six gifted Hispanic male learners currently enrolled in two sites within the Morristown school district, in a large metropolitan area in the southern United States. The ethnic designation of Hispanic was chosen after discussing the options and preferences with participants. The use of Hispanic in this study refers to students who meet one or both of two primary criteria. The first criterion stated that Spanish was either a primary or secondary language in the home. The second criterion was that the student may have immigrated to the United States from another Spanish speaking country. All participants in the study met the first criterion. According the Publication Manual for the American Psychological Association (APA, 2010), other preferred terms, aside from Hispanic, are Latino and Chicano, as well as other names originating from the particular region or country of origin. All participants in the study were also designated as gifted learners.

For the particular school district and participating sites in this study, gifted designation is granted to students who have met district standards on three of four criteria: academic achievement, cognitive ability, motivation and creativity. For academic achievement the participant must have scored at the 90<sup>th</sup> percentile or better in the areas of mathematics and reading on the Iowa Test of Basic Skills (Hoover, Dunbar & Frisbie, 2001) or an equivalent nationally normalized measure. To qualify in the area of cognitive ability students must have scored at the 96<sup>th</sup> percentile or better on the Cognitive Abilities Test (Lohman & Hagen, 2001) or the Naglieri Non-verbal Test of Cognitive Abilities (1996). For creativity students must have scored in the 90<sup>th</sup> percentile or better on the

Torrance Test of Creative Thinking (Torrance, 1990). Motivation was determined by a consistently high grade point average of 3.5 or better for two consecutive years.

All of the participants in the study had met these criteria previously and had been designated as gifted students by their third-grade year. All participants had a minimum of two years' experience in gifted programming, with all study participants placed in the Morristown Advanced Academy for advanced and gifted students by the 2009-2010 school year. Additionally, though not placed in a strictly gifted environment, Roberto skipped kindergarten and was moved to first grade, while Guillermo skipped first grade and was moved to second.

Three of the study participants (Guillermo, Jose and Carlos) were sixth-grade students, and two of the study participants (Jaime and Fredrico) were seventh graders, while Roberto was the sole eighth-grade participant (see Table 1). All six of the participants were enrolled within the Morristown school district and all of them were enrolled in the middle school Magnet program. Morristown's Magnet program is a Science, Technology, Engineering and Mathematics (STEM) program, spanning across sixth, seventh and eighth grade, and catering to both gifted and non-gifted students who qualify according to math and reading scores on the Iowa Test of Basic Skills. Magnet students at each grade level are grouped together in academic classes and in a separate area of their respective buildings throughout the school day. Because all participants were enrolled in the Magnet program at their respective grade level, those participants within the same grade level knew each other and often had one or two classes together throughout the day.

Table 1

*Participants by Age, Current Grade Level, Grade Level of Gifted Program Entrance, and Years as a Gifted Student*

<i>Participant</i>	<i>Age</i>	<i>Current Grade Level</i>	<i>Grade Level of Gifted Program Entrance</i>	<i>Years as Gifted Student</i>
Carlos	11	6	3	3.5
Jose	11	6	4	3.5
Guillermo	11	6	4	3.5
Jaime	12	7	3	4.5
Fredrico	12	7	3	4.5
Roberto	12	8	3	5.5
<i>Mean</i>	11.5	6.7	3.1	4.1

### **Participant selection**

Participants were initially selected through contacting gifted teachers at both sites to ascertain qualifying participants. All teacher contact was made with both central office and building administrator approval. Upon locating initially qualified students, I spoke with each potential candidate and contacted their parents about study participation. Both parent consent and student assent were obtained for each participant in the study (see Appendices H and I).

### **The Researcher's Role**

As the researcher who conducted this qualitative inquiry there are several important biographical factors to note. I am currently a teacher of gifted students at the sixth-grade site described in the Sites section, and have been since 2006. Previous to this teaching assignment I held a teaching position at the seventh/eighth grade site. Though I am a gifted instructor in the district, none of my former or current students were selected to participate in the study.

I currently coordinate the testing and administration of the gifted program at the sixth-grade level. In overseeing the program during the last several years, I noticed a discrepancy between the overall population of Hispanics in the school, which according to state report card data was 30% and the percentage of the Hispanic population in gifted programming, which was in the range of 5% to 6% of the gifted students. This discrepancy between overall population and gifted program participation accurately reflected the discrepancies noted in the literature concerning gifted students (Ford et al., 2008). Having 20 years of teaching experience but still within my first five years of teaching gifted students, this discrepancy within the field fueled my curiosity. This curiosity, in turn, motivated my research.

With the recent implementation of a magnet program across all middle school levels in my district, there had been enough of an increase in the prevalence of gifted Hispanic males to create an opportunity to conduct the study. The research priorities of my school district also indicated a need for the study of how gifted and advanced programming could better meet the needs of all students, especially minority students. With a suitable district population of gifted Hispanic males and support from the district



for the research, the feasibility of the study increased. When I teamed this feasibility with my own research and saw a gap in the literature related to gifted Hispanic males, all factors aligned to support a qualitative examination of gifted Hispanic males.

It is important to note that I am not of Hispanic heritage nor is anyone in my immediate family, and while I have a working knowledge of Spanish; I do not speak it fluently. Though I have taught many Hispanic students, it is accurate to state that what I brought to this research is a great deal of cultural ignorance.

I addressed the language/culture limitation within the study through my own research and reading about Hispanic language and culture and the utilization of an outside party of Hispanic origin to review the research as part of the triangulation process in data analysis. Aside from the reviewer of Hispanic origin, the third party to review the research within the triangulation works daily with Hispanic students and has a demonstrated familiarity with this student population.

Aside from the knowledge I gained from research and participants, the major gaps in my cultural education were filled by several colleagues of Hispanic origin, who learned of the study during the early stages of data collection. As knowledge of my study topic increased at my own work site, Hispanic colleagues came forward to offer not only their support of the study but their own stories of growing up Hispanic in an American academic climate. They shared their stories of balancing their own culture with the more American cultures they acquired at school. They shared stories of discrimination within their own culture and outside of it, as their academic prominence rose. They also shared stories of family and their perceptions of the wholeness and connectedness of family that extended across borders and did not acknowledge concepts such as “extended family.”

They also shared how language and culture were handled in their homes. One colleague shared that pure English or pure Spanish was to be spoken at home, but a mix of the two was banned. Another colleague shared how their formal language training at an early age left them feeling like an outcast in early friendships because of their more formal usage of Spanish. These Hispanic colleagues extended me the honor of listening as I listened and even used their perspectives to help pilot and tailor participant questions. They gave me a necessary, albeit incomplete, cultural education that proved invaluable during the course of the study.

### **Data Collection**

Data collection commenced in September of 2011 and concluded in February of 2012. Given the two separate sites of data collection (sixth-grade site and seventh/eighth-grade site), group or individual meetings were set up with students to inform them about study procedures and conduct data collection. Interviews and focus groups took place in areas designated by the school administration, usually during non-academic periods such as study hall or advisement. All data collection procedures were implemented with student, parent, school district, administrative, teacher, and Liberty University Institutional Review Board approval.

### **The Ethnic Identity Scale**

Official data collection began with the administration of the Ethnic Identity Scale (Umaña-Taylor et al., 2004) (see Appendices A and C), for which written permission was obtained (see Appendix B). The scale was administered to participants in two small groups at each site. All participants finished the scale in one 20-30 minute setting. The scale is a 17-item Likert scale assessment containing three subscales that measure the

identified stages of ethnic identity development: exploration, resolution and affirmation. The scale produced results indicating an established construct of ethnic identity designation: exploration, affirmation or resolution (Phinney et al., 1990).

The scale was utilized in part because of its validity and reliability. Umana-Taylor et al. (2004) indicated the scale has shown preliminary validity and reliability with high school and university students, and they recommend further study with younger populations, which was the case with this study. The authors report coefficient alphas for the internal consistency of determining exploration, affirmation and resolution at .91, .86 and .92, respectively (Umana-Taylor et al., 2004). Given the statistical insignificance of a sample size of six, the scale was also utilized because of the initial consciousness raising and tone setting around issues of ethnicity and ethnic identity for students prior to commencing the interview process. During the focus group at the conclusion of data collection, I also saw the benefits, especially in the participants' rapport with each other, of having brought the participants together in groups during this initial stage.

### **Semi-Structured Interview 1**

The first individual interviews were conducted individually with each participant at their respective school site. Interviews were conducted in an administratively approved location and were recorded via one microphone shared between interviewer and participant.

The IPA model suggests that the semi-structured, in-depth interview serves “as an event which facilitates the discussion of relevant topics, and which we allow the research question to be answered subsequently, via analysis” (Smith et al., 2009, p. 58). The questions designed for this interview follow suggested IPA guidelines for length, which

suggest 6-10 open-ended questions (Smith et al., 2009). IPA guidelines also suggest prompting for narration, description, analysis and evaluation, while also building in a progression toward abstraction during the course of the interview (Smith et al., 2009), which these questions incorporated (see Appendix D).

I designed nine open-ended questions for the first interview, with each interview question taking into account the age and gifted designation of the participants, along with pertinent research associated with each question. Following is a brief discussion of each question from the first semi-structured interview, along with its basis in the research.

### **Questions 1 and 2**

When did you realize that you were gifted or when were you first identified as gifted? What's it like to be identified as gifted? The first two questions address the participant's identity as a gifted learner (Plucker & Stocking, 2001; Zou & Tao, 2001).

### **Question 3**

What was the gifted program like in elementary school? This question continues to address the gifted identity issue from Questions 1 and 2, while also addressing the experience of gifted Latinos in gifted programming (Ford, Grantham & Whiting 2008; Herbert, 1996).

### **Question 4**

What kinds of activities or subjects in school do you feel are your best and why? Which activities do you feel are unproductive or even a waste of your time? These questions assess the degree to which the participants are assimilating school culture. (Brice et al., 2007a, b; Ford et al., 2008; NCES, 2003), while also testing for any expressed academic goal-setting behaviors (Huget et al., 2004).

### **Questions 5, 6 and 7**

What is it like knowing how to speak Spanish? How do you feel this helps you at school? Can you describe for me a time or times when knowing how to speak Spanish or even just being Latino has not helped you or maybe even hurt you at school? Given the gravity of the connections among language use, achievement and identity, Questions 6 and 7 also ask the participant to narrate, analyze and evaluate their language use at school and connect that to their academic achievement (Brice et al., 2007a, b; Herbert 1996; Phinney & Ong, 2007; Umana-Taylor et al. 2008, 2009).

### **Question 8**

What is it you like best about being Hispanic/Latino? And what is it you like least? These questions are directly related to the placement of the participant along the continuum of ethnic identity development (French et al., 2006; Pahl & Way, 2006; Umana-Taylor et al., 2009).

### **Question 9**

Why do you think there are not more Hispanics in gifted classes? And what has been hard or challenging for you as a gifted Hispanic and how have you overcome it? These questions, asked in succession, lead in with the issue of gifted programming and its general appeal or lack thereof to Hispanic students (Brice et al., 2007b; Cabrera & Padillo, 2004; Ford et al., 2008). The second question addresses more pointedly the issue of resilience and what awareness the participant may have of his resilience characteristics (Herbert 1996; Kitano & Lewis, 2005).

**The role of the interviewer.** It is also important to note, for both trustworthiness and overall effectiveness, the role I played as interviewer during the interview processes.

IPA theory strongly emphasizes the importance of “showing empathy, putting the participant at ease, recognizing interactional difficulties, and negotiating the intricate power-play where research expert may meet experiential expert” (Smith et al., 2009, p. 180). One of the explicit goals of the first interview was to effectively establish these positive qualities in the interview procedures and to establish the participant as the “experiential expert.”

The establishment of the participant as the experiential expert was a multi-faceted phenomenon. This establishing of the participant as expert began in the initial participant meetings, informally in both individual and in small groups, during small informational and touch-base meetings, as well as formally, during the administration of the Ethnic Identity Scale (EIS; Umana-Taylor, 2004). Though valuable in its own right, the EIS administration also allowed an additional meeting and the establishment of a greater comfort level between initial introductions and the first interview.

Though each participant brought their own unique personality to the interviews, in general I worked on putting the participant at ease through an acknowledgement of our differences in culture and language, while building a common purpose of helping Hispanics reach the highest possible levels of achievement.

The interview process was designed to move the participant from more concrete expressions of their experiences to more abstracted expressions of their experiences, all the while establishing their expertise as primary to the study as a whole. Moving participants to abstraction was done in part by acknowledging the value of all participant responses, which allowed the participant to move toward abstraction (or away from it) as the interview progressed (Smith et al., 2009). I would often validate participant

responses through use of simple techniques such as reminders of the absence of right and wrong in their answers and encouraging them to take their time in responses. These simple cues often resulted in deeper, more thoughtful responses from participants.

### **Observations in Gifted Settings**

The observations in gifted settings for each participant occurred on two separate days and always in gifted classes. Conducting observations between Interview 1 and Interview 2 allowed the expressed ethnic identity of the participants, discovered in the initial survey and interview, to be confirmed through observed behaviors. Clarke (2009) noted that observational methods can illuminate day to day realities of behavior, which may have been obscured during the interview process. Larkin and Griffiths (2002) posited that IPA research, though designed for the analysis of transcripts, can be applied in both principle and practice to observational data. They also noted that observational transcripts and field notes similar to what the current study incorporated, were “cruder” than interview transcripts; however, they were “well-suited to the purpose of identifying broad themes” (Larkins & Griffiths, 2002, p. 308).

Under the larger, interpretive umbrella of IPA, data collection for observations followed more specific, qualitative observation procedures established by Lofland et al. (2006). With a focus on the manifestations of the previously expressed ethnic identities and academic orientations of these learners, I made an initial round of observations for each student for 20-40 minutes in a gifted classroom setting.

I used a two-tiered approach to this initial observation, making jotted notes during the observation utilizing a pre-constructed observation protocol (see Appendix E). In keeping with suggested observational guidelines from Lofland et al. (2006), these jotted

notes focused on sensory details, my own impressions and feelings of the observed events, with an avoidance of “evaluative assertions” (p. 110). Within eight hours, I used the first-tier jotted notes to develop the second-tier field notes.

From these second-tier field notes, I aligned the observation data with all the previously expressed data, along with the research questions including ethnic, academic, and resilience views. I also related the data to the practices of the participants taken from the initial survey and the first semi-structured interview.

After taking the field notes through this phase of initial analysis, I conducted a more targeted set of second observations, where I continued to use the two-tiered approach of jotted notes and subsequent field notes suggested by Lofland et al. (2006) to further focus the data, identify themes, and continue the research at the depth suggested by IPA (Smith et al., 2009).

## **Semi-Structured Interview 2**

One interview created a set of data from which to draw conclusions; however, two interviews established what Seidman (1998) refers to as a context for interpretation. The IPA approach (Smith et al., 2009) concurred with this notion of establishing context because of the given expertise of the participants under consideration. The more the participants were allowed to expand on their experience, the closer the interview moved to capturing “the thing itself” (Smith et al., 2009, p. 58). The “thing itself,” in this case, was the expressed essence of being a gifted Hispanic male. This second semi-structured interview was conducted because of the agreement among qualitative researchers that multiple interviews are the best route to the essence of an experience (Griffiths & Larkin,



2002; Siedman, 1998; Smith et al., 2009), and to further establishing participants as the experiential experts.

To better target the essence or “thing itself,” the schedule of the second interview incorporated previously discovered themes from the surveys, interviews and observations. Prior to the second interview, the collected data were examined to ascertain the degree to which the participant responses to interview questions served to address the study’s overall research questions. Employing Maxwell’s (2005) interactive approach to initial data analysis, some initial categorizing of data within the confines of the research questions had already occurred. Following both Maxwell (2005) and IPA’s (Smith et al., 2009) interactive and proactive approaches to data allowed the second semi-structured interview to proceed more strategically toward answering the research questions and to individualize certain participant questions based on previously collected data (see Appendix F).

I designed seven open-ended questions for the second interview and four participant-specific questions. Following is a brief discussion of each question from the second semi-structured interview, along with its basis in the research.

### **Question 1**

Can you define what it means to you to be successful? This question was designed to open the interview and open the participants to speaking about what values may be behind their view of success. The research indicated that views of success were often tied to views of self and self-esteem, as well as providing insight into longer term views of self (Wigfield & Eccles, 1991; Valentine, et al., 2004).

### **Question 2**

In thinking about this year, what have been or what are your goals for the remainder of this school year? What do you feel you need to do to achieve these goals? This question was targeted specifically at identifying the short-term goal setting behaviors of participants and to better discover the nature of their overall goal setting behaviors. Research has shown that successful students tend to set long-term goals in light of their longer term goals and visions (Analysis/Evaluation: Elliot et al., 2001; Midgley, C., Kaplan, A., & Middleton, M., 2001; Pajares et al., 2000; Witkow & Fuligni, 2007).

### **Question 3**

Where do you want to be in 10-15 years when you are in your 20s? What do you need to do to get to this place you describe? Designed to work in conjunction with the previous two questions, this third question set specifically targeted the long-term vision of the participants. Additionally, previously collected data had shown that participants had expressed some elements of long-term goals and visions, and I wanted to allow participants the opportunity to clarify their earlier commentary. Research indicates that academically successfully students tend to demonstrate greater clarity in terms of their long-term goals (Elliot, et al., 2001; Midgley et al., 2001; Pajares et al., 2000; Witkow & Fuligni, 2007).

### **Question 4**

In our last interview you mentioned that there has not been a time when you felt being Hispanic was a disadvantage to you at school. Why do you think this has not been a problem? In comparison to your friends or even what you see outside of school, do you feel you are treated any differently by teachers, principals or authority figures because of

your giftedness or participation in advanced programs like the Magnet school? Why do you think this is? Each question of this set all addressed the same area of focus, and sought clarity from earlier collected data from all participants, which indicated a lack of discrimination experienced in school. These questions were designed to be recursive in nature with questions from the first interview, because the lack of discrimination reported during Interview 1 contrasted with the previously reviewed literature (Ford et al., 2008). The second half of the question set addressed another type of discrimination gifted students experience, which is the perception of those in authority of both intellectual and behavioral superiority of the gifted student, resulting in preferential treatment (Herbert, 1996; Kitano. & Lewis, 2005).

#### **Question 5**

You are sure to face challenges as you go through school, both academic and otherwise. What is it about you specifically, or what strengths do you feel you possess, that you believe will help you overcome these challenges? These questions asked participants to evaluate and express the nature of their resilience and asked them to identify the specific factors that constitute their resilience. Research has shown resilience to be influenced from factors or inner fortitude and also from outside forces such as family (Herbert, 1996; Kitano & Lewis, 2005).

#### **Question 6**

If you could advise another student like yourself, gifted, Hispanic and male, about what they could do to succeed, what would you tell them? This question was intended to allow participants the opportunity to tie together areas of ethnic identity, academic orientation, goal setting and resilience in their response (Bland & Sowa 1994; Cabrera &

Padillo, 2004; Flores-Gonzalez., 2002; McHatton et al., 2007b). The question also probed where participants may have learned from their mistakes.

#### **Question 7**

How much support do you get from your friends regarding school and school work, grades, etc.? Can you describe a friend or time(s) when a friend was unsupportive of your efforts to do well in school? Do you have someone (friend, adult, family member) that you consider to be a role model to you? The research indicates that friends and role models are significant factors in the academic success and resilience of minority gifted students (Flores-Gonzalez, 2002; Herbert, 1996; Huguet et al., 2009; LaRoach & Shriberg, 2004). Additionally, this same research has indicated that gifted minorities can feel unsupported and somewhat isolated as they surpass many of their friends academically.

#### **Question 8**

Recently, you've mentioned that your grades have dropped lower than you, your mom/dad and your teachers would like them to be. How are you addressing these grades/concerns of your mom/dad and your teachers? This question was directed at Jose because of data collected on him from Interview 1, indicating low grades. Not only was the question designed to capture more of Jose's experience at this juncture in time, but to also capture some sense of the noted underachievement present in the literature concerning gifted minorities (Ford et al., 2008; Kitano & Lewis, 2005).

#### **Question 9**

You've mentioned the importance of your family before in our conversations. In what ways do you feel your family influences your school performance? Though all

participants made mention of family factors in Interview 1, three participants, Roberto, Guillermo, and Carlos, placed more emphasis on this area, hence the further exploration. With regard to the research, family factors seem to loom large in the area of resilience (Cabrera & Padillo, 2004; La Roche & Shriberg, 2004).

#### **Question 10**

During my classroom observations of you, you seemed to be really engaged in your learning, always talking, trying to answer the teacher, etc. Why do you think you are so involved in your own learning? What is it about you or the class, the teacher, the environment that makes you want to answer and participate in class so much? This question was designed especially for Roberto, whose level of engagement during the first set of observations was extremely high, especially in comparison to the other participants. He was a little more disengaged during the second observation, so I wanted to focus on the more positive aspects first, holding any questions about the observed disengagement in reserve based on his initial response. This was also an excellent opportunity to explore the interaction of Roberto's gifted traits and personality traits, and where those might intersect (Herbert, 1996; La Roche & Shriberg, 2004; López & Sotillo, 2009; Zou & Tao, 2001).

#### **Question 11**

I noticed in the first classroom observation of you that the teacher had pulled you aside and was talking to you about some missing work. Can you tell me a little more about this conversation and what it was about? Fredrico showed a significant level of disengagement in the observations, and I had noted an interaction with the teacher about some missing work. I had also received information by this point that he had gone on

academic probation for his grades, so I wanted him to recall and expound on the conversation to see if he would express more insight into his own levels and disengagement and underachievement (McHatton et al., 2007b; Renzulli & Park, 2000; Supple, et al., 2006; Van-Tassel Baska et al., 2009)

### **Question 12**

You mentioned in our previous interview that learning Spanish has been something you want to pursue because you feel you don't know it as well as you would like. Can you describe for me what it's like for you or what happens because of your not knowing Spanish as well as you would like? Follow-up questions: What about language issues at school with your friends? ...or at home with family? Are there any places or environments where you feel a lack of acceptance for any reason, language use or other(s)? The research on language use, which emerged as a theme during the study, has indicated that there are differing patterns with regard to specific settings (Ford et al., 2008; Herbert, 1996; López & Sotillo, 2009; McHatton, et al., 2007b; Phinney et al., 1990). These final questions, intended specifically for Jose and Fredrico, were intended to allow participants to express their patterns of language use at home and at school. I especially wanted them to further express how their admitted lack of nuanced Spanish affected communication patterns at home and at school with friends who may be more fluent.

### **Focus Group**

As researchers strive to expand the principles and practices of IPA to non-interview forms of data (Griffiths & Larkin, 2002; Smith et al., 2009), the idea of context becomes increasingly important in determining what data collection procedures to use.

Maxwell (2005) also noted the importance of customizing the research design to best meet the contextual needs of the study. I chose a focus group to conclude the data collection process because it complemented the collectivist aspects of Hispanic culture revealed in the literature (Cabrera & Padillo, 2004; Herbert, 1996; Pahl & Way, 2006; Supple et al., 2006; Umana-Taylor et al., 2008, 2009). As participants came together after having progressed through the previous steps of data collection, there was an affirming sense of community and camaraderie, which research has shown to positively impact school performance (Cabrera & Padillo, 2004; Supple et al., 2006; Umana-Taylor et al. 2008).

Umana-Taylor and Bamanca (2004) published guidelines for working specifically with Latino focus groups. In keeping with these guidelines, I attended to cultural matters, such as making clear, respectful distinctions among the exact ethnic origins of the participants and offering hospitality to the participants in the form of little gifts, which participants had selected as honorariums for their work in the study. As with the semi-structured interviews, the suggested IPA skills of empathetic listening, establishing participant comfort and safety, avoiding power-plays, and recognizing and respecting differences were employed to the fullest extent possible.

The focus group combined all six participants, with direction for the topics emanating from previous data collection. The focus group also served as a rare opportunity to extract from a collected group of middle school gifted Hispanic males viewpoints on many research-based topics and topics rooted in their individually expressed experiences. The questions designed were often intentionally recursive with regard to earlier interview questions in an attempt to discern any contrast in response

from previous responses, and to provide additional clarity as to essence of meaning that IPA research pursues. What follows are the designed questions asked of focus group participants and a brief discussion of the rationale for each question along with its basis in the research.

### **Question 1**

What's the best thing about middle school so far? What are the parts of middle school that you like the best? What are the parts you like the least? These first questions were designed as both general opening questions and questions to gain individual and group perspectives on the middle school experience as a whole (Ford et al., 2008; Huguet et al., 2009; LaRoche & Shriberg, 2004; McHatton et al., 2007b).

### **Question 2**

Can you describe what it was like to move from the elementary gifted experience to the middle school gifted experience? Describe for us how your experience as a gifted student has changed since elementary school? What are some differences you have noticed between the elementary and gifted middle school classes? All study participants had indicated gifted placement by third grade, so these questions were aimed at encouraging participant description and evaluation as to the nature of their middle school experience in comparison to their elementary gifted experience. The questions were designed to gain additional gifted Hispanic male perspectives on changes in perception of elementary versus middle school gifted work (Ford, Grantham & Whiting 2008; Herbert, 1996).

### **Question 3**



If you needed help in school or with your school work where or who would you go [to] for help? These questions served as probes for participant perspectives on outside sources of resilience and support. Research indicates that having a solid base of support, especially familial, aids student resilience (Conoley & Meimei, 2007; Ruiz, 2009; Supple et al., 2006; Zabloski, 2010).

#### **Question 4**

Describe your ideal classroom environment. What kind of classroom structures seem to work best for you? What types of activities do you prefer to work on in groups? And what type of activities do you prefer to work on individually? Why? These questions were specifically designed to garner additional group and individual perspectives on academic orientation, especially as it relates to classroom settings oriented toward the individual versus more group/collectivist settings (Description/Analysis; Conoley & Meimei, 2007; Ruiz, 2009; Supple et al., 2006; Zabloski, 2010).

#### **Question 5**

Given your experience in middle school so far, what are the ways that you would like to see it improve? This question sought gifted Hispanic male experiences and perspectives on current middle school practice, searching both for strengths and areas of improvement (Conoley & Meimei, 2007; Ruiz, 2009; Supple et al., 2006; Zabloski, 2010).

#### **Question 6**

What are the ways middle school could be improved particularly or specifically for Hispanic students? Building from Question 5, this question specifically addressed the

gifted Hispanic male perspective on middle school educational practice on others of similar ethnicity (Ford et al., 2008; Lys, 2009; McHatton et al., 2007b; Ruiz, 2009).

#### **Question 7**

In thinking about your gifted and advanced classes what should schools do to get more gifted Hispanic students into their gifted and advanced classes? Hispanic students sometimes drop out of gifted classes later in their school life. What do you think schools should do to hold onto the gifted Latino/Hispanic students that they already have in gifted classes? These questions probed potential shortfalls or perceived systemic discrimination(s) within gifted programming with regard to addressing the needs of other Hispanic students. (McHatton et al., 2007b; Ruiz, 2009; Supple et al., 2006).

#### **Question 8**

What does it take to be successful in gifted classes? What keeps people from being successful in gifted classes? Having a range of participant performance around the table by this point in the study, with some participants making straight A's and two participants on academic probation for their grades; these questions asked for both proven methods of success and potential acknowledgments of regret. Simultaneously, these questions also probed for specific classroom applications of both academic orientation and resilience (Conoley & Memei, 2006; Ford et al., 2008; LaRoche & Shriberg, 2004; Renzulli & Park, 2000; Zabloski, 2010).

#### **Question 9**

You've each talked in our individual interviews about the importance of family in your lives. Can you speak specifically about how your family helps you with school? Having heard the role of family individually from each participant and how central it was

to each, either negative or positive, I was intentionally recursive in this line of questioning in order to hear answers within the group dynamic (Flores-Gonzalez, 2002; Kitano & Lewis, 2005; Lopez & Sotillo, 2009; Plucker & Stocking, 2001; Ruiz, 2009).

### **Question 10**

Discuss with the group some specific things your family does that teach you or have taught you about what it means to be Hispanic. Given the previous question on family, this question specifically probed for participant perspectives on ethnic identity building within their respective families and the intentionality around ethnic identity building. I also planned to connect the responses to Question 10 back to earlier responses around academic orientation and performance (Cabrera & Padillo, 2004; French et al., 2006; Herbert, 1996; LaRoche & Shriberg, 2004; Pahl & Way, 2006; Ruiz, 2009; Umana-Taylor et al., 2009).

### **Question 11**

Please finish these sentences: Being a male means... Being Hispanic means.... Being Gifted means.... Being Gifted and Hispanic and a male means....

These statements were culminating statements building from one to the other as indicators of ethnic identity resolution, and more generalized overall identity for each participant and for the group as a whole (French et al., 2006; Herbert, 1996; McHatton et al., 2007b; Pahl & Way, 2006; Umana-Taylor et al., 2008, 2009).

### **Question 12**

You've each expressed to me a goal that you have for yourself regarding your future. All of you have said that you wanted to go to college and have a career afterwards. Why is it important for you to have goals? What does having goals do for

you? Having garnered basic notions of long and short-term goals in previous interviews, I wanted the group to re-visit the topic of goals in order for participants to provide further clarification as to the nature of their goals (achievement versus performance) and the motives behind their goals (Elliot et al., 2001; Midgley et al., 2001; Pijares et al., 2000; Witkow & Fuligni, 2007).

### **Data Collection Synopsis**

Data collection spanned six months, beginning in September of 2011 and concluding in February of 2012. Collectively, data collected included six Ethnic Identity Surveys, 12 interviews, 12 observations and one focus group. Individually, the data for each participant included one Ethnic Identity Survey, two interviews, two observations and participation in one focus group session.

### **Data Analysis**

As data collection concluded, a professional transcriber was contracted with a confidentiality agreement, and the interviews and focus group recordings were professionally and discreetly transcribed. Transcripts were sent electronically and password protected, and hard copies of the transcriptions were provided by the transcriber as well. Given its pre-established protocol format (Lofland et al., 2006), the observation data could be analyzed without further transcription, and Ethnic Identity Survey data were analyzed according to procedures outlined by its authors (Umana-Taylor, et al., 2004).

### **Initial Approaches**

Toward providing additional rigor and innovation, and prior to reaching the formal stages of IPA analysis, a preliminary data analysis approach (Maxwell, 2005) was

adopted. Maxwell's (2005) methodologies provided a solid initial structure prior to formal analysis, while maintaining an organization consistent with the principles of the formal IPA analysis. In effect, the Maxwell (2005) methodologies served as a congruent springboard to the later IPA stages of data collection and analysis.

Maxwell (2005) advocates an interactive approach to the data, which includes the use of memos and preliminary coding throughout the data collection process and the establishing of preliminary organizational categories for data storage. All of these methodologies serve to create an ongoing active dialogue with the data, which continued throughout the data analysis process. As data collection concluded, a formal analysis of all data was completed using the methodologies outlined by IPA, which utilized codings and note-takings that produced the themes discussed in Chapter Four.

### **Preliminary Frames: Research Questions**

Maxwell (2005) suggested the establishment of preliminary, organizational categories or topics, which serve as functional "bins" or "frames" for storing and viewing data without necessarily assigning definitive meaning. To this end, the initial categories of data were aligned with the research questions and were identified as follows: *academic orientation*, *ethnic identity*, *resilience* and *goals*. More categorical than interpretive, these designations helped sort and identify the surface nature of initial data without dissuading the emergence of other themes.

The strength of an IPA design relies heavily on the alignment of the research questions and the data collection procedures (Smith et al, 2009). IPA's suggested alignment also concurred with Maxwell's (2005) establishment of preliminary frames, which in this case were the research questions. Because of the emphasis and importance

of the relationship between the research questions and analysis procedures in IPA research, the following section briefly discusses strategic connections between the two areas and the establishment of the questions as the initial frames.

**Research question 1.** How do gifted male Hispanic middle school learners describe the collectivist aspects of Latino culture and the individualist aspects of academic achievement prevalent in gifted programming?

The literature on identity formation highlights the resolution of identity as a final stage in the formation process (Erickson, 1959; Phinney, 1990). Smaller reconciliations of tensions between competing identity aspects form the pathway to identity resolution. An important aspect of Hispanic identity can be the resolution tension between the inherent drive for individual success and the collectivist aspects of the culture (LaRoche & Shrieberg, 2004). From the initial administration of the Ethnic Identity Survey (Umana-Taylor et al., 2004) through the interviews and observations, the way in which participants were expressing this tension became a preliminary topic or frame for viewing the data. This frame later expanded as more data were collected to include more generalized aspects of the academic orientations of the participants, such as their perspectives on how they approached their classwork, especially in gifted settings. Upon reaching the focus group, this frame expanded again in a meta-analytic direction to include the additional perspective of participants discussing collectivist aspects of their academic achievement within the collectivist context of a focus group.

**Research question 2.** How do gifted male Latino middle school learners describe their ethnic identity especially as it relates to their academic orientation?

The Ethnic Identity Scale (EIS; Umana-Taylor et al., 2004) established a baseline level of expressed ethnic identity, which was further explored in the remaining data collection steps. The use of this frame began as a storage element for the numerical results of the EIS, but gradually expanded to include expressed experiences of familial culture building, and the expressed nature of family interactions. The use of Interpretive Phenomenological Analysis (Smith et al., 2009) allowed for an exploration of the extent to which the expressed level of ethnic identity manifested in several academic areas for participants. The examination process also searched for patterns within participant responses and what those patterns revealed about the role of ethnic identity in academic orientation.

**Research question 3.** How do gifted male Latino middle school learners describe their academic resilience and how it relates to their achievement orientation?

Given the overall positive effects of resilience on academic achievement (Bland & Sowa, 1994; Kitano & Lewis, 2009), the establishment of this frame seemed particularly significant in its own right as well as its ability to undergird and strengthen the other frames. During the multiple interviews each participant was asked directly to identify resilience elements within themselves. The methodological depth of repeated interviews interspersed by classroom observations allowed for deeper inter-connections among this and other frames. In part because of its ability to strengthen and undergird the other frames, resilience never expanded to include many outside aspects; however, resilience connected strongly with ethnic identity and academic orientation. Ethnic

identity and its resolution showed early analytic signals as a strengthening element of resilience, and in a somewhat reversed orientation, a well-articulated resilience proved to be the foundation for a strong academic orientation.

**Research question 4.** How do gifted male Latino middle school learners describe their mastery and performance goals and how those goals relate to their academic behaviors?

Tied most closely to academic orientation, though echoing strongly across ethnic identity, an essential component of any personal orientation is determining its direction and anticipated destination. Because of this frame's focus on destinations, it also connected to each of the other frames, serving as both a yet to be reached top layer and as a long-range ideal providing motivation for current behaviors. Using IPA (Smith et al., 2009) guidelines, the participants were given multiple opportunities to express their goals, which allowed for multiple opportunities to illuminate their nature. In the initial analysis the goals expressed have already been pre-designated by previous research (Pajares et al., 2000; Whitkow & Fuligni, 2007), as either *mastery* (long-term, learning for the sake of learning) or *performance* (focused on the now, avoiding negative consequence) oriented goals.

These two designations of mastery or performance served as sub-frames within this larger *goal* frame work. As data collection progressed, this already well-defined area did not expand beyond its designated parameters. What did emerge were clear initial connections between long-range goals and high academic performance orientations, as well some connections between established familial success and expressed long range and/or mastery goals by participants.



## **Memos**

Both IPA (Smith et al., 2009) and Maxwell (2005) espouse the analytical value of keeping memos throughout the data collection and analysis process. Upon first meeting the participants, regular memos were initiated and kept through each phase of the data collection process. Memos were always written the same day as data sets were collected to capture initial analysis and reflections in as timely a manner as possible (see Appendix J). Additional memoing was done in between data collections to further clarify initial reflections.

## **Active Dialogue**

Established in these initial processes was a continuous and active dialogue with the data. Essentially, data analysis began the day I first met with the participants and was continually revised and refined throughout the study. Through memoing, frequently revisiting the data, formally and informally meeting with participants, meeting with participant parents, Hispanic colleagues, and returning to the literature, the contours of later thematic elements began to take shape. As these preliminary structural lineaments were established, they provided direction as to how further inquiry should proceed. They often pointed to the need to revisit certain elements of the research questions, such as familial influence and goal setting to ascertain greater clarity in these areas. However, given their lack of formal delimitation, these preliminary structures remained supple enough to allow for the emergence of newer themes outside the bounds of previously established frames

### **Formal Data Analysis**

Formally, analysis was conducted using the processes and principles of Interpretive Phenomenological Analysis (Smith et al., 2009). As outlined in sections that follow, I analyzed the collected data by following Smith et al.'s (2009) suggested analysis procedures. Directionally, the IPA process takes the personal and expressed views of the participants and through analysis, moves these views into a larger realm of shared and interpretive understandings (Smith et al., 2009). IPA continually moves toward the establishment of the participants as “experiential experts,” maximizing the participant role in the research process. To reach this end, IPA provides a framework that establishes a deep understanding of participant points of view within personal and meaningful contexts. Though focused on process and principle to maximize the participant role, IPA is also decidedly flexible in its approach and offers no one method for data analysis. To this end, the authors provide guidelines for analysis but encourage pliability and innovation in their application.

### **The Ethnic Identity Scale**

Given its quantitative nature, data analysis for the Ethnic Identity Scale (Umaña-Taylor et al., 2004) included standard statistical analysis including mean and standard deviations. However, given the small sample size ( $N = 6$ ) and overall qualitative nature of the study, the statistical results of the EIS mediated more phenomenological ends: first was the establishment of ethnic identity awareness among participants and researcher with regard to the affirmation, exploration and resolution of ethnic identity. In turn, the increased awareness promoted a freer expression of ethnic identity components during the interview process.

## **Interpretive Phenomenological Analysis**

Having established an open dialogue that was categorized but still unconfined, Maxwell's (2005) active dialogue was carried forward into formal data analysis. Using the Interpretive Phenomenological Analysis framework recommended by Smith et al. (2009), the previously collected and preliminarily analyzed data were incorporated into Smith et al.'s more formal approaches.

The IPA approach is undergirded by three major supports: phenomenology, hermeneutics and idiography. The phenomenological aspects of IPA focus on participant experience and perception, based on the notion that humans are immersed in a context about which they are trying to make sense. In this study gifted Hispanic males were trying to make sense of middle school gifted settings.

IPA's second major underpinning is hermeneutics, or the theory of interpretation. Smith et al. (2009) view phenomenology as a hermeneutic undertaking, which relies on a circle of connected perspectives encompassing extracted pieces of data and revolving around to more encompassing views. Never lost in this hermeneutic view of the data is the holistic connectedness of the data. Incorporating the hermeneutic circle into this study was not a vacillation between data parts and data whole but more of a consistent consideration and valuing of the individual statements and observations from participants, and how these statements and observations fit into a holistic view of the participant and the even larger interconnectedness of all the individuals within the study. At its essence and at the essence of this study, using Interpretive Phenomenological Analysis (Smith, 2009), I established a double hermeneutic. I conducted an eisegesis on

gifted Hispanic males, who were conducting an eisegesis on their experiences of being gifted learners in middle school.

As for the third major underpinning, the idiographic aspects of IPA place emphasis on the details of the experience and the details of an individual within a particular context. This ideographic perspective invites the exploration of what nuances may lay within the data, especially the nuances of participant personality, experience, and context. For this study, applying the idiographic aspects meant close examination of the details, expressed and observed, of the gifted Hispanic male experience. The ideographic aspect of IPA encouraged a depth of immersion into the particulars of being a gifted Hispanic male in a middle school context, which later allowed any theoretical and thematic applications to emerge more inductively during the course of analysis.

Balancing these three major aspects of IPA in order to present a valid interpretation presents a formidable challenge, especially for a novice researcher. To address this issue, IPA builds into its analysis a rigorous framework that establishes not only trustworthiness for data analysis but also a gateway to more insightful interpretation within the analysis. IPA allows for flexibility within its analysis structure but never wanes in its attention to diligence. As a novice researcher, I chose to move step by step through the recommended procedures outlined in the following sections.

**Reading and re-reading.** IPA suggests multiple readings and playbacks of collected data, especially transcripts and recordings, to achieve the proper level of immersion with the original data. Additionally, multiple readings and listening to interview/focus group audio move the participant(s) to the center of the analysis, as opposed to the research questions or my interpretations being at the center. In keeping

with these procedures, these initial stages of my formal analysis were straightforward re-readings and re-listens to transcribed and recorded data, occurring three to five months after initial listening and memoing. These initial re-reads also helped develop concentration on the content and nuances of the interview in question, and away from the more daunting task of establishing larger, connected themes. These initial re-visits to the data also helped clear the interpretive palate so that coding could begin, free of any *partis pris*.

**Tri-level noting.** Smith et al. (2009) recommend three levels of noting or coding for transcriptions and suggest that all three levels be approached in an exploratory fashion by the researcher while maintaining the primary goal of immersion within the experience.

***Descriptive noting.*** The *descriptive* comments serve to describe the content of the participant's responses, taking them at face value. *Descriptive* noting also searches for what the participant highlights as important within their given context. During the descriptive and linguistic noting, I would often place comments in the first person, writing as the participant, as it helped with placing the participant experience at the center of the interpretation.

***Linguistic noting.*** Linguistic noting focuses on how the participant is using language. In keeping with IPA recommendations, I coded this section for aspects of language such as speech patterning, tone, pauses and the use of figurative language. As I conducted these first two types of note-taking, both transcripts and observations were arranged with wide margins to the left and right of the text. Both descriptive and linguistic noting were done within the right hand margins, often in conjunction with listening to the interview. Often some additional underlining of pertinent text was done

in accordance with the noting. This same procedure was conducted on the observation data, with text arranged in margins. Upon moving into the *conceptual* comments, described in the next section, the left hand margin was utilized to signify this more abstract level of noting.

***Conceptual noting.*** When moving to the left hand column for *conceptual* noting, many of the comments made were questions. These questions were often about tie-ins to previous statements or questions about thematic emergence. When not writing questions, conceptual noting was done in shorter, more condensed statements, where the focus was on capturing not only an emerging theme, but the conceptual essence of the participant's comment. At Smith's et al.'s (2009) suggestion, deconstruction was used to further analyze certain passages by reading them backwards to get a feel for certain words. Below is a quote from Carlos during the second interview when he gives hypothetical advice to another gifted Hispanic male student.

Well, exactly to keep on studying, doing everything you can to actually graduate from a college or university and be a nice person. If you're a really bad, stubborn person, I don't think you'll get a lot of friends or get a good career. So, to be a nice person and finish all you school.

Initially, when I coded this quote *descriptively* I noted the two major strands of his advice; going to college and being a nice person. In coding *linguistically* I noted his soft spoken manner in delivering this advice, as with much of his speech, it reminded me of a member of the clergy talking to someone in the congregation. In coding it *conceptually*, I noted among other more goal oriented concepts, the value Carlos always places on relationships, "you'll get a lot of friends." Each time Carlos defined success for

himself or someone else there was always a relational component to it. Additionally, when I conceptually coded this quote, I questioned whether having many friends also tied into Carlos' previous comments about keeping options open. He liked to do well in all his school subjects and had also stated several career options for himself, so perhaps he wanted many friends not just for relational purposes but also as additional insurance against isolation or because the more expanded his relationships were, the safer he felt. When I read the quote backwards, this method of deconstruction showed the emphasis Carlos placed on personhood as a key element in a successful life.

All participant transcripts were taken through these three types of noting and the observation data were also taken through these same steps. Observation data, more behavior than dialogue, were also arranged with two columns and coded in the same manner as previously described. The only major difference in analyzing observation data was that where linguistic coding focused on the tone or pauses in speech, I focused on the tone of participant movement. For example, when in class, Carlos was still and stable, and often intently followed the teacher with his eyes. The tone of his movement or lack of movement was an obedient and focused tone, hence supporting his statements about doing well in school, being a "nice" or "good" person (obedient). Also for Carlos there would be the additional importance of maintaining a good relationship with his teacher as an essential aspect of his school life, which manifests in the attention he directs toward her during class.

**Developing emerging themes.** Given the rigor of having memoed, formed an initial dialogue, then expanded that dialogue formally through multiple listening and readings of all collected data types (scale, interview and observation) and three levels of coding, a shift was made to identify themes. In keeping with IPA recommendations, I shifted away from the transcripts and focused on the memos and notes. At this juncture the data became more fragmented, as I began to separate out different thematic pieces of the data and interpret them. The ongoing dialogue with each participant, established early on in data collection, became far more abstract at this point as I began to inductively let abstractions and themes emerge from the analysis conducted. The conceptual notes were a focus during this stage of data analysis, and in keeping with Smith et al.'s (2009) recommendations for IPA analysis, I further analyzed the conceptual notes, condensing them into themes. I then typed all the emerging themes into lists and cut the list into thematic strips. With the arrangement of data into typed thematic strips, the abstraction was more pronounced, as it was now completely separated from the transcript data. As IPA guidelines for analysis suggest, this somewhat separated abstraction yielded the broader view necessary to establish connections among themes.

**Connecting emerging themes.** In keeping with IPA data analysis recommendations, I set all of the separate thematic strips in front of me and then began organizing them into appropriate groupings. I found that some themes had application in two separate groups, which meant the generation of additional strips. Once a group of themes was organized under a particular heading, I glued the thematic strips into place underneath the larger thematic heading. As a novice researcher, the cutting, moving, and pasting of thematic strips at this stage was of great benefit because of the kinesthetic and



somewhat visceral element it brought to a largely abstract undertaking. Following are the IPA recommended techniques that were used during the analysis and thematic grouping for each participant.

***Abstraction.*** Abstraction is the method of putting like themes together and clustering them around what Smith et al. (2009) refer to as a “super-ordinate” theme. Continuing a pattern from earlier data collection, the research questions served as the first four super-ordinate themes around which the data coalesced, serving to solidify the research questions as pillars of thematic construction. The further solidification of the research questions flowed inductively from participant responses; however, this method of thematic organization also had an unavoidable element of the expected and imposed, as participant responses came from queries stemming directly from the research questions. These initial pillars did not prevent the development of other super-ordinate themes, and as newer themes developed outside the research questions, new thematic pillars were added. Language emerged as a super-ordinate theme outside the research questions, as several participants began to express a greater familiarity with the nuances of English than those of Spanish, and to discuss their English and Spanish usage.

***Subsumption.*** Subsumption occurs in IPA analysis when an emerging theme seems to rise to a higher status, and other themes cluster around it (Smith et al., 2009). At different points during the data analysis a theme would emerge and draw other themes to it, based on the particular participant context. Within the data analysis process for Carlos, it was clear that aside from the research question oriented theme of ethnic identity, a separate theme of family also emerged. This theme of *family as the source of identity* and its primacy in his life ran so thoroughly through both sets of interviews that in many

instances, other themes such as his academic orientation or goals were subsumed under this larger theme.

**Contextualization.** Smith et al. (2009) portray contextualization in IPA data analysis as an attempt to discern “temporal” and “local understandings” (p. 98) of the data based within the narrative of the participants. Contextualization deals with the often significant moments in a participant’s life that may have an effect on current perceptions. For participants in this study, a change of schools was made from second to third grade from the regular elementary setting to the Morristown school district’s advanced academy, which houses grades three through five in an all-accelerated and gifted environment. Establishing this type of accelerated academic environment or *context*, where participants recalled that teachers interacted with them frequently and they were placed with other students of like abilities, may have affected the way participants perceived discrimination. As data collection and analysis proceeded, none of the gifted Hispanic male participants reported any personal experiences with discrimination in school. To the contrary, as the theme of *no personal experience with discrimination* emerged, there was almost no elaboration on this topic other than the word “no” and a description of school environments as places where “everyone is treated as an individual.”

**Function.** IPA data analysis suggests that certain participant phrases may have a functional meaning beyond what the participant intended; moreover, these phrases may function within the transcription as a cue to particular interpretations. Fredrico, who was struggling academically at the time of the study, would always speak of success in terms of “trying hard” but never as succeeding. His use of “trying hard” was an indicator that

he wanted to limit his view of success to what remained attainable for him, which was “trying hard.” Another participant, Guillermo, also used “trying hard” in his definition of success, then added a completion or achievement element to the definition. “Trying hard” became a functional cue within the transcripts to look for completion or achievement elements within definitions of success.

***Numeration.*** As themes repeat within data, IPA suggests that noting their frequency may indicate the degree to which the theme should be emphasized in the analysis. More of a search for possible patterns than a move toward the quantitative, with certain participants it proved useful in developing emerging themes. Jose was the most reticent of all participants, and outside of the interview setting he did not seem unduly shy or withdrawn. Upon further analysis of the interview, especially through listening, I noted that he asked for repetition and clarification of questions far more than any other participant. Furthermore, his pauses were also more frequent, longer and more pronounced than other participants. In analyzing the frequency of the aforementioned phenomena, I noted that the issue seemed to be a lack of verbal processing. When I spoke to his teachers, they said they had noticed similar behaviors in class. For Jose, the frequency of certain behaviors indicated an individualized theme, which then illuminated much about his academic orientation.

**Connecting across participants.** Once the individual analysis and thematic identification was completed, the data were analyzed for connections and intersections across thematic elements for all participants. As with previous data analysis, the analysis began with the research questions. The most obvious connections were made around the four research questions. Each question category was written down and participant names

written underneath, then previous themes were searched for places of connection. The focus group data proved especially beneficial in this search, as participants spoke one after the other on the same set of questions, so similarities and connections could be efficiently noted. Often connections were made in pairs or threes, such as Ricardo, Guillermo and Carlos noting the naturalness of their Colombian culture when they visited with family, and how they found it superior to their perceived notions of the more fabricated culture in the United States. Another connection was the language connection among Fredrico and Jose, who were both taking Spanish, in part, so they could communicate better with a parent at home.

Closer examination of the smaller connections helped build larger, more thematic ones that eventually resulted in construction of a thematic framework. The larger thematic connections were done primarily in the abstract, returning to the thematic strips and conducting a meta-analysis of themes among the themes. Causation came into play during this analysis as themes were analyzed in light of how they functioned in terms of effect on academic achievement and what each participant identified as sources of resilience. The influence of family proved significant as a primary theme affecting all others, and within the family it seemed important how intentional family members were in exploring ethnic identity.

### **Triangulation**

In establishing layers of trustworthiness in the data analysis process (Yardley, 2000), the qualitative method of triangulation was utilized. Interview, survey and focus group data are “vulnerable to “self-report bias” (Maxwell, 2005); therefore, it is important to further establish the trustworthiness of the interpretation by having at least

two other qualified individuals view and co-interpret the data, resulting in a triangulation of the interpretation. Yardley (2000) reports that a three-part confirmation of findings helps establish a more “rounded, multilayered understanding of the research topic” (p. 222).

Separate individuals with established familiarity and knowledge of Hispanic students were chosen to triangulate or co-interpret the collected data: Ms. Marguerite Petron and Ms. Cynthia Gabriel (pseudonyms). Ms. Petron is a first generation Latina with Cuban American parents. Ms. Petron is fluent in Spanish and taught Spanish for five years at the middle and high school levels. Currently she is a middle school language arts teacher and has extensive experience working with Latino students throughout her 11 years in the education profession.

Ms. Gabriel currently teaches English as a Second Language (ESL) and has taught ESL at the middle school level for the last eight years. Ms. Gabriel stated that the population of her classes has remained 75-90% Latino throughout her time as an ESL teacher, giving her extensive experience with this student population. Ms. Gabriel considers herself to be semi-fluent in Spanish and noted that she has traveled throughout Mexico.

Using these two outside individuals, the findings were triangulated through separate analyses of the data. Each individual analyzing the data was given unmarked, name-free, interview transcripts, and the overall purpose, and procedures of the study were discussed along with the research questions. I highlighted basic coding and note taking options and encouraged them to code for the themes they saw emerging from the data. Once they coded and discussed their transcripts independently of one another, I

developed an initial consensus. We then met together and they confirmed the initial consensus, which was an agreement on the themes I identified, along with some additional confirmation and insight.

Both of the outside readers took special notice of Jose, and the difference in his pattern of communication along with his overall reticence in comparison with other participants. His lack of verbal processing/listening comprehension was discussed and confirmed through triangulation. Ms. Petron and Ms. Gabriel also provided additional cultural insights that enhanced my interpretation of the data. Ms. Petron noted that labeling family members as “extended” might be effective for reader understanding but would probably not be the label participants would use. She indicated the lack of differentiation in Hispanic culture between immediate and extended family, with the prevailing view of all members as family, with no implications of distance imposed.

At the request of both outside parties, compensation for their assistance was made through two separate charitable donations to the Susan G. Komen breast cancer foundation.

### **Member Checks**

There were two points along the path of data collection and analysis where member checks were utilized with participants in order to increase the trustworthiness of the findings (Ary, Jacobs, Razavieh & Sorensen, 2006). The first member check point occurred after the first interview and two observations had been conducted, and prior to the second interview. At this juncture participants looked over previous transcripts and observation data to clarify accuracy, and emerging themes were discussed with participants clarifying themes and offering additional commentary. The second member

check came after the completion of data collection, where transcripts from the second interview and focus groups were read and emergent themes were discussed with participants. The participants affirmed the identified themes in the data and in some cases offered additional clarification. When discussing the emergent language theme with Carlos, he mentioned that in addition to continuing his study of French next year he would also like to pursue additional Spanish studies to improve his communication abilities in this area. Guillermo shared that indeed he was taking Spanish to help him communicate at home, and he also confirmed the value he places on his individualism.

### **Framework and Format**

Having completed data collection and analysis, I constructed a framework illustrating how the data fit together thematically. This framework developed following the guidelines of Interpretive Phenomenological Analysis (Smith et al., 2009) and is presented in Chapter Four.

### **Trustworthiness**

The idea of trustworthiness in qualitative research arose, in part, from epistemological arguments by researchers such as Lincoln and Guba (1985) and Kvale (1996) who argued that concepts such as the credibility, transferability and dependability of the research should be considered more than the absolute generalizability of the research. Kvale (1996) further distinguished trustworthiness from validity in qualitative research by emphasizing the importance of craftsmanship in the research design and execution. In essence a trustworthy qualitative design strives to create an object virtue in which the strength of the conclusions emanates from the architectural design alongside the precision inherent in the execution and analysis of the collected data.

## **Criteria for Trustworthiness**

To better establish trustworthiness I adhered to four broad principles Yardley (2000) recommended for establishing trustworthiness in a qualitative study: sensitivity to context, commitment and rigor, transparency and coherence, and impact and importance.

**Sensitivity to context.** According to Yardley (2000) sensitivity to context can be achieved in a multitude of ways, including sensitivity to the literature as well as to the participants. In this study sensitivity to context resulted from paying close attention to cultural sensitivity, interviewer empathy, and a close engagement with the personal and particular experiences of the participants. Seidman (1998) captured an important aspect of this principle in relation to interviews when he wrote “if the interview structure works to allow them [participants] to make sense to themselves as well as to the interviewer, then it has gone a long way toward validity” (p. 17). By creating a design with multiple interviews, observations and a focus group along with subsequent member checks, sensitivity to context was achieved through the multiple opportunities for expression and evaluations of expressions, allowing for a high level of engagement with the experiences of participants and multiple opportunities for them to make sense to themselves and the interviewer.

**Commitment and rigor.** Yardley’s (2000) second principle was evidenced in this study through the establishment of memos and initial categorizing of data, which progressed to a more formalized step by step data analysis in the latter stages. During formal data analysis, data were taken step by step through author recommended analysis procedures (Smith et al., 2009), including not only major coding stages but sub-stages such as abstraction, subsumption, numeration, contextualization and function. Attention to



data analysis procedures, which were preceded by in-depth data collection, established a clear pattern of commitment to rigorous data collection and analysis procedures.

**Transparency and coherence.** Transparency and coherence for Yardley (2000) occur primarily in the writing and reporting of data. In following IPA recommendations to increase transparency and coherence (Smith et al., 2009), I have carefully reported the processes of participant selection, interview schedule development and implementation, and the analytical processes involved during data collection and analysis. I anchored all questions from each interview in the research and later used Chapters Four and Five to appropriately bridge participant experience to existing theory and research.

**Impact and importance.** Yardley's (2000) final criterion for trustworthiness addressed the overall contribution of the study through its at-large impact and importance. For this study the impact and importance comes from the insight it provides into a group of learners seldom examined in the literature. This in-depth exploration of gifted Hispanic males' middle school experiences provides a great deal of insight into these learners as a whole and the nature of specific areas including ethnic identity, resilience, academic orientation, goals and language use. This research also provides insight into how the values of the school culture, especially the culture of gifted settings, can be more meaningfully aligned with the values of Hispanic culture in an effort to promote academic achievement (LaRoche & Shriberg, 2004).

### **Ethical Considerations**

The nature of this examination and the in-depth exploration of human experience required that ethical issues be given paramount consideration. To this end, all participants, school site names and individuals participating in the triangulation process

were substituted with pseudonyms to protect identities, and participants were informed of the use of pseudonyms prior to participation. Clear expectations and procedures were given to participants and parents prior to interview, observation, and focus group participation. All student interviews and focus group data were collected within school facility spaces designated by supervisory personnel on site. All interview and focus group transcripts were completed by a professional and reputable transcriber, under a signed confidentiality agreement. All interview data were kept in my possession in a locked cabinet or under a password protected file to which only I had access. Prior to outside party triangulation, all student identities were protected in transcripts.

Prior to data collection, I discussed with the school counselors at each respective site the nature of the research and interview process, and they were aware and ready for any necessary consultations after interviews and focus group sessions. The participants required no additional counseling during the course of the study.

Additionally, at each stage of data collection, short debriefings occurred where participants were thanked and encouraged for their participation and next steps and expectations were always communicated and outlined to participants in terms of the time and context of their next stage in the study and what my role would entail. At the focus group session, participants were informed of the official end of data collection and expectations of decreased interaction and possible follow-ups were communicated. For Jose, a sixth-grade participant, two particular issues with potential ethical effect arose during the research process. The first was the struggle with his verbal comprehension that emerged during data collection. Upon its emergence, I went to his teachers to discuss the nature of his processing struggles and possible interventions. Another issue that emerged

was Jose's lack of a male role model, which may have caused him to view me as a role-model, especially as I often encouraged him and discussed his progress throughout the data collection process and also when I encountered him informally in the course of the school activities at the sixth-grade site. As data collection came to its official end, I expressed to Jose that I would remain available to help him and continued to encourage him both informally in our day to day encounters, and more formally during the member checks.

As in all matters, I also prayed for guidance from the Holy Spirit during this research. To this end I conducted this research in the spirit of John 16:13, which states "But when He, the Spirit of truth, comes, He will guide you into all truth. He will not speak on his own; he will speak only what he hears and he will tell you what is yet to come" (NIV). In light of this Holy Spirit of truth I allowed the participants speak for themselves and to express the truth of their experiences to the best of their abilities. My role as a participant-observer created an environment where the participants felt safe enough to express their truths, knowing that their expressed level of honesty would be of great eventual assistance to other gifted Hispanic students. The data analysis and reporting for this study were conducted in light of the Spirit of Truth where honest reporting and analysis were completed in an effort to assist those who make decisions regarding these students in the future.

## **CHAPTER FOUR: FINDINGS**

Any notabilia within the results presented in Chapter Four comes from viewing them in light of reported evidence that Hispanics consistently underperform both in and out of gifted programming at a rate higher than other ethnic groups (Alfrano et al., 2006; Ford et al., 2008; Renzulli & Park, 2000). This documented underperformance has put a quietus to a great deal of Hispanic academic talent, underserving of such premature desinence. Of the six participants whose experience s are related in these pages, at least one, and possibly two of the six, were experiencing just such a desinence.

The use of Interpretive Phenomenological Analysis (IPA; Smith et al., 2009) explored the ethnic identity and academic orientation of these gifted Hispanic adolescent males at a depth capable of yielding insights beyond the cursory, in hopes of illuminating motivations for high or low achievement pointing to improved directions for higher Hispanic achievement. Given that issues of ethnic identity loom large in the research on Hispanics and academic achievement (Flores-Gonzalez, 2002; Ford et al., 2008; Herbert & Kelly, 2006; Huguet et al., 2009; Umaña-Taylor, et al., 2009), this use of IPA methodology explored answers to questions such as “Who am I?” alongside academic orientation questions such as “How do I approach my learning?” Informing these two foundational questions and other related questions, such as “What are my goals?” was resilience, a construct which has shown the potential to undergird and protect high achieving academic orientations (Bland & Sowa, 1994; Herbert, 1996; Kitano & Lewis, 2005).

## **Structuring the Results**

The main body of Chapter Four begins with analysis of the results of the Ethnic Identity Scale (Umana-Taylor, et al., 2004). Chronologically, the scale was the first piece of data collected, and though quantitative in nature, it provided significant insight into the ethnic identity orientations of participants. Following the discussion of EIS, each participant is individually profiled, with the four major thematic elements of academic orientation, ethnic identity, resilience and goal setting serving as the pillars around which participant portraits are conveyed. As all participants portrayed the value of resilience in light of the other themes, its interactions within the overall thematic framework are discussed in detail, as well other emergent themes resulting from data analysis outside of the four main pillars. The chapter concludes with a graphic representation of thematic interactions and a discussion of the results in light of the research questions.

When the results began to emerge from data analysis, clear lines of delineation developed among the major thematic elements. As participant experiences were expressed, they rendered distinctive qualities to each of the four major themes of academic orientation, ethnic identity, resilience and goals. Through the ongoing analysis of participant portrayals, other themes outside of the four major elements began to distinguish themselves as well. Simultaneously, there was significant interaction among the themes, the most prominent of which concerned the theme of resilience and its occurrence as a thread-like theme weaving its way through other major thematic elements, significantly increasing their sustainability. Other significant thematic interactions among the themes developed from analysis of participant portrayals, sometimes occurring within a major thematic element, like the effects of intentional

ethnic exploration on overall ethnic identity. Other times the thematic interaction occurred among separate themes as the positive relationship between a clear, long-term goal and a high level of expressed resilience.

The related themes that developed outside the four principle themes were in the three areas of (a) language, (b) participant portrayals of an ideal classroom, and (c) discrimination. Language developed significance as participants expressed a desire to increase their Spanish speaking abilities in an effort to communicate better at home. The ideal classroom theme was cultivated during the focus group discussion where participants applied several attributes of their individual learning styles and academic orientations to an ideal classroom, which then spawned a group depiction of tailored learning environment. The theme of discrimination emerged from what initially appeared as a sense of reticence on the part of participants during the interview process, which through further analysis and questioning became a link to previous research regarding discrimination experiences among gifted Hispanics.

Aside from these larger thematic elements, the individual participant results provided significant insight into the overall experience of being a gifted Hispanic male. Each participant portrayed a distinctive set of understandings during the interviews and observations that demonstrated a uniqueness of character in their respective academic lives. As data collection progressed into formal data analysis, and the processes of Interpretive Phenomenological Analysis (Smith et al., 2009) were applied, it became clear that a sufficient depth of data collection had been reached to facilitate more precise interpretations.

### **The Ethnic Identity Scale**

Given the qualitative nature of this study, employment of a numerical scale served two primary phenomenological ends. First was the establishment of an Ethnic Identity perception among participants and researcher on three primary ethnic identity elements: affirmation, exploration and resolution. Secondly, the scale promoted a higher consciousness of ethnic identity for the participants, which would serve as a gateway for freer expression during the interview process. With regard to these phenomenological ends, the scale served its purposes. With its small sample size ( $N = 6$ ) and lack of variation in the responses (see Table 2), the scale created a quantitative nocturne, which was later illuminated by the more purely qualitative and phenomenological data collected.

The Ethnic Identity Scale (EIS; Umana-Taylor et al., 2004), (see Appendices A and C) is a 17-item Likert scale measuring participant perceptions of where they see themselves in three separate areas of Ethnic Identity: affirmation, exploration and resolution. The scale was administered in two separate sessions; the first administration was with all of the sixth-grade site participants and the second with all of the seventh/eighth-grade participants. At both administrations, participants were offered the scale in English and Spanish, and all participants chose to take it in English. The results of the scale are displayed in Table 2.

Table 2

*Results of Ethnic Identity Scale by Participant*

Participant Name	Affirmation Score Highest poss. 24 Cut-off value: 19.5	Exploration Score Highest poss. 28 Cut-off value: 20.5	Resolution Score Highest Poss. 16 Cut-off value: 9.5
Roberto	24	23	16
Guillermo	24	20	14
Jose	24	16	12
Jaime	24	18	13
Fredrico	24	24	14
Carlos	24	23	16
<i>Mean</i>	24	20.66	14.16
<i>Standard Deviation</i>	0	3.20	1.60

**Interpreting scale results.** In developing the EIS, Umana-Taylor et al. (2004) established eight principle categories into which respondents could be placed based on their responses. The categories are as follows: diffuse negative, diffuse positive, foreclosed negative, foreclosed positive, moratorium negative, moratorium positive, achieved negative, and achieved positive. Categorizations of *achieved*, *diffused* and *moratorium* were based on scores in the Exploration and Resolution categories, while designations of *positive* or *negative* were reliant upon how high of a response was given in the Affirmation category. Receiving a designation in one of these eight categories was dependent upon numerical cut-off values the authors established for each category, meaning that a *high* value was given to scores above the cut-off value with a *low* value assigned to those beneath it. In Table 2 Roberto would be considered *achieved positive*



because his scores were above the cut-off values in all three categories, while Jose would be considered *diffused positive* because his Exploration score did not make the cut-off value, while his scores in Affirmation and Resolution did. According to scale scores, all participants in the study were either categorized *achieved positive* or *diffused positive*.

These cut-off values were established by the creators of the scale using a variation of the K-means cluster analysis to establish the best possible mathematical cut-offs and subsequent eight groupings for the data. The respective cut-off value is listed for each category in Table 2.

All six participants received a *positive* overall designation because of their scores on the Affirmation section of the scale; moreover, all participants scored the highest possible number of points in Affirmation, suggesting there was overall positive participant feeling regarding ethnicity. All six participants also scored *high* in the area of Resolution, with each respective score registering above the cut-off value of 9.5. Combining these *high* Resolution scores with the *high* Affirmation scores indicates participants had an overall positive view of their ethnicity, and these results suggest the participants were successfully relating and/or integrating their ethnic identity into their broader view of themselves.

The largest amount of variation in the EIS scores came in the area of Exploration. Roberto, Fredrico and Carlos all scored high in the Exploration category, as well as the other two categories, which designate these three participants as *achieved positive* because they scored above the cut-off in all three categories. That Roberto, Fredrico and Carlos all received an *achieved positive* is evidence of their perceived participation in all phases of the ethnic identity process (Phinney & Ong, 2007; Umana-Taylor et al., 2004,

2009). Furthermore, these scores suggest a more seamless integration and possible manifestation of their respective ethnicities in their day to day lives.

Guillermo, Jose, and Jaime, while scoring high in Affirmation and Resolution, did not have scores high enough in the Exploration category to make the established cut-off. The variance in these Exploration scores when considered with the high scores in the other two categories suggests that further exploration of their ethnicity may be ongoing considering their ages (11-12), or may be an aspect of their lives they are not intentional about exploring. During additional conversations Jaime revealed he was intentional about scoring his responses in Exploration as 3s, as opposed to 4s, in part because there was more left for him to explore, while follow up conversations with Jose suggested that further explorations of his ethnicity were not a priority for him now beyond what he had already experienced. Guillermo only missed scoring *high* by .5 of a point, and being the youngest participant in the study, he seemed poised to further his ethnic explorations, especially as it related to family and family history.

Taking the survey results to their phenomenological end, the initial corporate impression of the participants was that they were expressing an overall positivity with regard to their ethnicity. Moreover, the scale results indicated that no one seemed to be struggling with integrating their ethnicity into their overall identity. As data collection continued, and the interview process began, a clarification of these findings was sought alongside a focus on how this overall positivity and resolution in the participants was interacting (or not) with their academic performance.

## **Participant Portraits**

The following portraits emerged from data collection and focus on the individual qualities and portrayals of each participant. These portraits allow the unique voice of each participant to emerge while simultaneously placing and discussing that voice within the framework of both the major and emergent themes.

### **Roberto**

With Roberto, there was an immediately noticeable level of engagement. As he entered a classroom or conversation, it was as if he were searching to wring the essential elements from the given context. Once he discovered the essential elements, he focused on them intently, and with bulldog tenacity sought to capture their essence. Once he captured this essence, he disengaged and slowly returned to a normal level of interaction, with his mission accomplished.

Though technically not the oldest of the participants, Roberto was the most advanced in grade level (eighth) because of skipping kindergarten early in his school career. Because of his high level of engagement, the interviews with Roberto always brought with them an enjoyable intensity. His answers often felt more like he was pushing back into the question as opposed to just responding. And while responding, he often purposively experimented with unique ways to express himself.

**Academic orientation.** Roberto's high level of engagement was evident in his academic orientation as well. Evidenced in both the interviews and observations was a desire to be consistently involved in challenging work. When unchallenged, he grew restless or became disengaged. I saw this restlessness and disengagement in the observations and in the interview process as well. There was a persistent advocacy in his

personality to have his knowledge challenged and expanded, and frustration was the result whenever this advocacy was slowed.

Whenever like I'm in a classroom and there's this one person that's trying to waste time or doesn't really get it and we have to go over something that like I already got and we have to go over it several times and that just drives me crazy. . I mean, I know it's not their fault, but it's still just like "uhhh."

This frustration was evident during observations when Roberto would grow restless and begin coping with his frustrations through a series of different movements or off-task behaviors. In one class observation he spent several minutes doodling during a Power Point presentation by the teacher. When I asked him about this later, he responded with this statement: "A lot of the information, I would like, pick it up, I'd get the information and he'd keep going for people who wouldn't, so I'd have to wait and so I doodled. And I like doodling."

This governing aspect of needing consistent expansion seemed a major motivation for Roberto's academics and was a source of much enjoyment in his academic life. Science was his favorite school subject because of the undiscovered horizons it offered. Notice how it is the unknown that propels his expansion orientation in the following quotation about why science was his favorite subject.

I just really like it and it interests me a lot because there's just so much more that we don't know. Math is just math and that's done. Grammar, it changes a bit, but I mean, that's done. Social studies is what already happened, so that's not going to change anytime soon, so that's done. But science is still expanding.

He echoed this same sentiment later in the focus group, when speaking of the

differences between elementary and middle school. In the following quote, his depiction of knowledge as a “thin film” also shows his often experimental use of metaphor in his language, which emerged as a sub-theme during data analysis.

Yeah, like in elementary school, they just taught you everything, but it was like a thin film. And now in middle school they’re expanding on what you already knew before. They’re making it so that you have like a thicker knowledge instead of just a little sprinkling than you knew before.

Past his need for challenge and expansion and the associated frustrations he felt when they were lacking, Roberto expressed an additional need for purity and uniformity in his work. He mentioned being bothered by mispronunciation in language and misperceptions of information in him and others.

**Roberto:** I don’t know. I have some sort of minor, like OCD sometimes. I want everything to be like one way or another way, but not, you know, an amalgamation of different ways. I don’t know, sometimes that bothers me.

**Interviewer:** Okay. Do you like it to be perfect?

**Roberto:** I don’t know. No, not perfect, just the same.

There was an ideal that Roberto seemed to be questing for in his academic life that he had yet to discover. He portrayed this quest as an individual journey; he mentioned very little about any dependence on friends, other than as friendly competitors who helped spur him on to better grades. It was this want of expansion and the push toward the horizon of the ideal that seemed to inform his individualism. If he could make it to the place of perfect and expanding knowledge, he would have no trouble walking alone to get there.

**Ethnic identity.** According to the results of the Ethnic Identity Scale, Roberto was classified as *achieved positive*, meaning he scored high in all three areas of affirmation, exploration and resolution of his ethnic identity. He visited Colombia with his family and had come away from the trips with strong notions of cultural affirmation. When speaking of what he noticed in Colombia he said, “How culture is there. It’s different. How awesome it is.” Past his cultural appreciation, informed by his visit and his love of Colombian food, “It’s generally a lot better than American food,” Roberto found his ethnic identity to be more assumed than a conscious undertaking toward resolution and affirmation. As the quote that follows indicates, there is an apparent acceptance of his ethnicity to the point of logic, “...you just are,” which seems a positive indication of a lack of struggle or angst with regard to his ethnic identity.

We’ve gone on trips to Colombia, for example, like over summer. I mean, it’s not exactly something you think about, you just are. It’s like saying, ‘You’re white!’ How do you know? Because you are.

As with the other participants, Roberto indicated no personal experience with discrimination, though he did express disagreement with the classification of different Hispanics as “Mexican.” His remarks at the injustice of wrong classifications show how his previously expressed love of purity, which was so prominent in his academic orientation, transferred to a want of just classification in matters of ethnicity. Following is the exchange based on the question, “What do you like least about being Hispanic?”

**Roberto:** I don’t think there’s any part I really don’t like. I think it’s just great. But something else that bugs me is whenever people are like, ‘You’re Hispanic, oh, you’re Mexican.’ That bothers me.

**Interviewer:** How would you rather they be?

**Roberto:** Like, ‘Oh, you’re Hispanic? Oh, what country are you from?’ or like, ‘Are you X or are you X.’ Instead of just, ‘Oh, you’re Mexican.’ It’s like instant classification.

Intersecting in Roberto’s profile was the role of family as both a source of ethnic identity and resilience. Roberto, his brother Guillermo, and a third participant, Carlos (all of Colombian origin) expressed strong ties to grandparents and family in Colombia. These ties were always described as sources of strength and foundation in their lives. For Roberto, the grandfather was his role model and a source of inspiration. In statements later echoed in a similar fashion by Carlos, Roberto defines the success of his grandfather in the following exchange in terms of materialistic (owns a business), intellectual (very smart) and humanistic (a very good person).

**Interviewer:** Do you have anybody that... a friend, an adult, a family member, anybody... that you consider to be a role model and who would that be?

**Roberto:** My grandfather.

**Interviewer:** And why is that?

**Roberto:** Like, he has his own company and everything and he’s very smart and he’s a very good person. So, yeah.

**Interviewer:** And he lives...?

**Roberto:** He lives in Colombia still, but he and my grandmother, they’re going to come and they’re going to live with us soon, which is going to be awesome.

**Resilience.** Inherently, Roberto’s high academic achievement found its core in his family life and his resolved ethnic identity. The explorations he had taken to

Colombia, he had seemingly taken for granted or their significance was yet to be realized; nonetheless, he easily incorporated his sense of ethnicity into his sense of self and it was of no apparent distraction to his academic life.

Outside of his family life Roberto identified the primary source of his resilience as a self-described tenacity.

**Roberto:** Well, I guess I'm a very perseverant person. Like, if I want to do something I will get it done.

**Interviewer:** So you persevere?

**Roberto:** Yeah.

**Interviewer:** Do you know where that comes from at all?

**Roberto:** No. I just do.

Despite his admitted lack of awareness about its source, his tenacity about learning and meeting challenges was observable in almost any interaction with him. It often came across as a form of challenge or defiance, as he portrayed his intellect as one that viewed other intellects as a source of competition. When asked about how his friends supported him, he defined it as a passive support because of the competition friends provided.

Well, in terms of grades, it's not really support; it's more of a friendly competition, which does help because like... I'm, for example, very competitive; I'm a very competitive person. So... I mean, it's just sort of a passive thing; it's not really, like, they're supporting, per se. I guess in a way they are, but not directly.



Working in conjunction with his resolved sense of ethnicity and his perseverance was a healthy sense of experimentation that seemed to greatly inform his resilience.

Roberto clearly saw the benefits of exploring options as a way to find strengths.

Well, if you put yourself in lots of stuff and you do try, you're going... there's more likely that you're going to win something or succeed at something because if you stretch yourself out, you have to know... you have to find out what you're good at and that will help with that [succeeding in school].

Roberto defined his resilience in terms that did not include school success, as it did not seem a major struggle. The larger issue for Roberto was getting his need for challenge and expansion met while in school, and in this area he was still working out appropriate coping behaviors, while waiting on others to understand.

## **Goals**

As the thematic element of goals emerged from the analysis of all of the data on Roberto, he expressed a clarity and singularity of vision in his desire to earn a doctorate. As analysis progressed, I began to write this theme as *I have a clear vision of a distant future*. There are two excerpts that follow; the first is from Interview 1 and the second from Interview 2.

**From Interview 1.** Well, I like physics. I like the physics part and when I grow up I want to go to MIT and possibly maybe in the future be a professor there for some time and, I don't know. I don't know... physics makes like the most sense to me.

**From interview 2.**

**Interviewer:** Okay. Looking ahead, looking down the road for you, 10-15 years out, so, think you're in your 20s, where do you see yourself when you're in your 20s?

**Roberto:** Still in university. I'm going for a doctorate.

**Interviewer:** Okay. And what do you think you need to do to get to that place?

**Roberto:** Just keep working at it. Just don't give up. Just keep going.

Roberto's shorter term goals had defined endings, like project due dates and contest entries, though they seemed largely eclipsed by the larger goal of a doctorate. This lack of shorter term goals was not surprising given that Roberto's grades were consistent and that his struggles resulted from a lack of challenge rather than any immediate notions of academic shortfall.

When Roberto expressed the nature of his goals, he saw their function as a strategic measure against veering astray in the shorter term.

Having goals helps you to know where to go to get what you want and it helps you plan out your life better so that it's not just diving in guns blazing; it's more strategically far out. Like, how am I going to do this? Oh, I'm going to do it like this and I'm going to do that by doing this so that I can do this so that I can be this. It's not just, 'Oh, this looks cool. I'm going to do this.'

As with other participants, Roberto was homiletic about the role procrastination can play in sabotaging goals. In keeping with Roberto's emergent sub-theme of turning phrases uniquely, he made an attempt to give some advice with a twist stating, "You have to know how to procrastinate." Later he clarified and expanded this initial statement into more of a proper warning against the dangers of procrastination, and the cyclical

exhaustion it can cause when habitually needing to finish projects on the nights prior to due dates.

**Language.** With regard to the theme of language use as it emerged with Roberto, the view he took of it seemed to emanate from a long range perspective. Roberto was bilingual with Spanish being his first language and English taught to him by his parents starting at age four. The view he took of his bilingual abilities was as gateway for later opportunities.

Because of a lot of things, if you can speak more languages, you have like a greater probability of getting hired or maybe being paid more and like the best colleges; they want you to have languages for a set amount of years.

Language was of practical value to him, but even the practical contained elements of the postponed. Moreover, his view of language also was appurtenant with his views on the value of experimentation found in his commentary on resilience; having more languages simply gave him more options. To this end, Roberto was taking German classes at the time of the data collection.

A secondary view of language arose from a line of questioning about the underrepresentation of Hispanics in gifted programs. Roberto expressed a literature supported perspective (Brice et al., 2007b) that a lack of English knowledge can be a barrier, sometimes the sole barrier, for the proper placement of gifted Hispanics.

But sometimes there are barriers like language. Like I knew these kids, the Liones brothers, and they're in ninth grade now, but when they were younger and they moved to America, they didn't speak English. They're like really smart, but they

were held back because they didn't speak English. And now they speak English, but for some kids that might be like a barrier if they don't speak English that well. Roberto indicated that these brothers have now been identified as gifted.

**Deferential treatment.** Roberto was one of the only participants to offer any insight into being treated deferentially because of his giftedness. Though all participants noted little to no discriminatory behavior had been directed toward them due to ethnicity, Roberto acknowledged some preferential treatment because of his giftedness. He seemed to view this treatment as a logical response to his achievements.

**Roberto:** Well, people are going to try to be nicer to you if you're in like, a lot of activities or if you win a lot or you have a lot of awards and you're good at a lot of stuff, then people are going to treat you differently than if you're just an average Joe.

**Interviewer:** Why do you think that is?

**Roberto:** Because you've shown that you can do something well and you're likely to be able to do more stuff well and that's something good.

With a more dampened tone, Roberto also spoke of the effects of having skipped a grade (kindergarten), which resulted in him consistently being the youngest member of the class. I asked him to elaborate on two separate occasions, and he was reticent. However, his comments and tone indicated that the skipping of a grade had been more of an issue for him earlier in elementary and had now resolved itself to some degree. However, as he progressed through the following quote, there seemed to be an indication in his voice that not all of the effects of skipping a grade had completely dissipated.

Well, since I've been like this whole time younger, I think most kids have like acknowledged it and now they're just cool with it. But like at first they're like, 'Whoa, you're so much younger. Whoa, that's so weird.' I don't know... I don't know really what they thought, but it's not really been a problem; it's just sort of been an annoyance.

Though not without its share of difficulty, being the youngest in the class seemed to have positively influenced his ability to think and express himself independently of others, as well as his abilities to express his ideas in unique ways.

### **Guillermo**

"I dreamed I was a Lego and got eaten by a giant worm," Guillermo once said when recalling a dream. Guillermo loved Legos; they seemed a catalyst for his active and vibrant imagination. As Michelangelo saw his sculpture David in an unformed mass of rock, so Guillermo saw visions of death stars and X-wing fighters in unformed piles of Legos. He was a former member of the Lego Club, and in his opinion, they didn't take their designs far enough. During our interviews he told me of his earnest wish to work with the Lego Company in Europe when he was older.

Guillermo's enchantment with all things Lego was part of a larger creative artistry of which he was just becoming aware. Alongside his creativity, Guillermo expressed an enthusiastic yet tender nature, and an overall innocent eagerness. Having just turned 11, he was the youngest of all the study participants, and he processed the questions in a manner suggesting self-awareness was still somewhat new to him. From a developmental standpoint Guillermo's self-awareness seemed just at the point of dawning. His pauses and word choices during the interviews indicated he was establishing some new pathways

into his own consciousness and awareness that may have been previously unexplored. What this sense of newness brought to his interviews was an authentic sense of earnestness and honesty. While this quality was certainly present in other participants, Guillermo's tone of good natured innocence was somewhat unique to the transcripts and recordings.

Though he was just beginning to identify some discordant patterning in his academic orientation, Guillermo maintained an excellent academic record during the months of data collection. He even won the school spelling bee and went on to compete at the district level.

**Academic orientation.** Though he was inducted into gifted programming at third grade, Guillermo has been ahead in school since he effectively skipped a grade when moving to third. This was a very similar path as his brother Roberto, another study participant, who had skipped kindergarten. Giftedness was a part of the family culture, and Guillermo adhered to this culture of giftedness with a genuine enthusiasm. Skipping grades and reading far above grade level were simply normal phenomena within the family.

Coming from a home culture of giftedness, Guillermo expressed a kindred enjoyment of being in gifted classes with others of like ability. However, he was also becoming aware of his own restlessness in the classroom. As he moved into a sixth-grade environment with up to seven different room changes a day, he admitted to certain loss of focus at times. The observation data concurred with his conclusion and revealed behaviors where Guillermo would focus for periods of time, fall into an interlude of breathing or movement, such as tapping his pencil or going into his book bag, and then

return his focus to the work at hand. Because he sat in the front of the room during my observations of him, whenever he could not pull himself from the interlude, the teacher would often verbally cue him back into the present class activity.

The data collected during the two observations suggest a possible patterned flow of disengagement and engagement, including interludes of small breaths and movements alongside interspersions of occasional verbal teacher cues. All of these minor disengagements and engagements served as a navigational system to help Guillermo focus while in class. There were not enough data to suggest that this flow had become a set pattern, or that it was academically negative, only that it had the potential to establish itself as a pattern, if Guillermo did not progress past his own awareness of it.

Guillermo had also identified another, related pattern in his academic orientation. This one he characterized as falling behind and needing to catch back up.

**Guillermo:** I remember sometimes I was kind of starting to fall behind and I'd always come back up, but I think it was in third grade where I got like an F and then I got like three As and brought it back up. So... I'm doing that this year too.

**Interviewer:** Falling behind and then catching back up?

**Guillermo:** Yeah. But not like in all my subjects, just like in one and I brought it back up to a B.

Though Guillermo showed an awareness of both patterns, he had not yet identified potential changes he could make to prevent them from occurring.

Guillermo revealed much of his academic orientation when defining success. Guillermo used a shopping cart analogy that encompassed both an effort component "pushing the cart" and completion component "then you make it".

Like, say you're trying to push a shopping cart up a hill or something and if you can make it to the top with all your stuff, because like your car is parked at the top of the hill or something, then you made it up successfully.

The inclusion of the completion component within his success definition was significant in that he viewed success as both effort and positive outcome. Inclusion of a positive outcome indicated an achievement or results orientation, as opposed to an orientation reliant on effort alone.

With regard to the value Guillermo placed on the collective in his orientation, he seemed to value his independence and uniqueness. Though he mentioned the importance of friendship from a social standpoint, his view of his academic success was based on an individual effort. His view of friendship was as an escape from school; at school, friends were non-essential with regard to achievement.

**Ethnic identity.** Guillermo was identified as *diffused positive* on the Ethnic Identity Scale (Umana-Taylor et al., 2004) because of his high scores in the areas of ethnic identity *affirmation* and *resolution* and his score of 20 in the area of *exploration*, which though designated as *low*, only missed the cut-off score for *high* by .5. His relative youth in comparison to the other participants may have contributed to this score of 20, as his commentary indicated exploration of his ethnic identity was ongoing.

Guillermo also expressed that with regard to his ethnicity he carried it proudly but internally, preferring to be viewed as an individual first before being assigned to any group. He elaborated on this idea when he said, "It's not that I don't want them to know [I'm Hispanic], it's just that I don't need them to know. It's not that I don't like it; I like it, but when I don't need it, I'm not using it." He also expressed that he had experienced



no personal discrimination because of his ethnicity and that “most of the time it [being Hispanic] helps.”

For Guillermo, it seemed the Colombian origins of his family took greater precedence in his identity than did the distinction of being Hispanic. He had visited Colombia on a few different occasions to see his grandparents, and these visits helped impart to him the importance of his extended family and of his culture. At one point he expressed his greatest challenge as wanting to know more of his relatives in Colombia (both living and dead). His motivation for meeting them was simply because they were relatives. Family was so prominent in his consciousness that knowing everyone in the family was paramount. Additionally, the impending move of his grandparents from Colombia to his current residence was an event expressed in only the most positive language.

**Resilience.** Guillermo expressed his resilience in terms of four key components: individuality, hard work, confidence, and attentiveness. He expressed a competency with the first three components, with a growing awareness of what he lacked in the fourth (attentiveness). Individuality and hard work emerged when he was asked to advise other students like himself.

I know that it seems to be that a lot of people, they try to fit in and I would tell them, ‘be yourself and just work your way through school. It doesn’t matter if you’re different.’ I think that being different is a good thing because if everybody was the same, it would be boring all the time.

As to the third component of confidence, Guillermo had a great deal of expressed confidence in himself, at one point simply stating, “I am awesome,” with no sense or tone

of irony. As discussed previously in the academic orientation section, he seemed only now to be coming to terms with possible consequences and ways of addressing the fourth component of attentiveness through overcoming the inattentiveness he'd noticed in himself.

The bow on the package that all four components came in was Guillermo's creativity. He saw his artistry as a way around many of the challenges he faced; moreover, he seemed to enjoy creative endeavors such as Legos and projects as appropriate outlets for his creativity. The opportunity to create served as an inspirational component of his achievement.

Guillermo's resilience was firmly rooted in family and the encouragement he received there, especially from his mom. The expressiveness in his eyes and pride in his voice when he said, "My mom says I'm the best one of speaking Spanish in the whole family," evidenced the importance he placed on the maternal encouragement he received.

His resilience also seemed greatly informed by the culture of giftedness within the family. The exceptionality of intellectual giftedness seemed to be an implied expectation in the family, and after interviews with two of four siblings in the family, it seemed to be a familial norm. With giftedness in place since first grade for Guillermo and kindergarten for his brother Roberto, it seemed interwoven into their respective identities. Their giftedness had an element of the natural to it, as opposed to being an assigned label based on test results.

**Goals.** Guillermo did not have many life goals, but rather one focused life goal that at first listen seemed whimsical.

**Interviewer:** Okay. And when you talk about the Lego Company being in Europe, and you said a good job, would that be your good job?

**Guillermo:** Yeah.

**Interviewer:** What would you see yourself doing for Lego?

**Guillermo:** Maybe be one of the designers.

When I prompted Guillermo for his intended preparation for the Lego job, his response highlighted a practicality that belied the seeming whimsy of his initial answer.

Well, I need to get good grades in math and science. Well, good grades in all of them, but mainly math and science because it's sort of like being an architect and an engineer and maybe even a little bit of an artist when you're at Lego. Because it has to like not fall over when you build a model and has to be appealing to the eye and it has to be cool because it's a Lego; Legos are cool.

This answer highlighted Guillermo's knowledge of the eventual university trainings (architect, engineer, artist) necessary to accomplish his career goal and the connection that training has to his current performance (get good grades in math and science).

His two shorter term goals were equally specific, making all As and achieving 180 Accelerated Reader points in the school's computerized reading program. The specificity of these short-term goals alongside the longer term Lego goal indicated a high degree of focus and clarity within Guillermo's goal setting behaviors.

**Language.** The theme of language emerged for Guillermo in a similar manner to other participants. Guillermo had grown up learning English first, with Spanish being acquired in a simultaneous but more gradual manner, as his parents taught it to him. He expressed pride in how much his mom praised him as the best Spanish speaker in the

family. He also indicated how intentional his family had been in promoting his acquisition of Spanish. What he also revealed in the interview was his current enrollment in an advanced Spanish class in order to communicate better with family.

**Interviewer:** So you see there's an advantage to taking [Spanish]. You see it as an advantage then, would you say?

**Guillermo:** Yeah. And then I get to like talk with my grandparents and aunts and uncles 'cause since my mom and dad, they're from Colombia, so all my cousins and stuff are Spanish. So, it kind of helps.

**Interviewer:** Get along with the family.

**Guillermo:** Yeah.

Guillermo indicated the familial application of his school Spanish acquisition. School enhanced family life and family language use enhanced school academic life. Thus, the transmission of language between school and home had created a beneficial symbiosis, where Guillermo's language growth was continually encouraged.

Well, I'm taking the class, so I have to use it [Spanish] more. I have to use it to learn now. So, it's not just when the grandparents come, 'Oh yeah, how do you say that again?' I know how to say it because I was using it yesterday at school. ...school is teaching me to write and stuff and it's teaching me more [about Spanish]. So I can learn more at home and learn even more at school.

### **Carlos**

At 5'8" Carlos was an 11 year old gentle giant walking the hallways of Morristown Sixth Grade Academy. His jet black, curly hair was always coiffed to perfection by lots of gel, and his gray, zip-up hoodie and black skateboarder shoes were

mainstays in his wardrobe. He was soft-spoken and sensitive, aware not only of the physical aspects of his environment but many of the emotional ones as well. When Carlos sat in class his eyes followed his teacher closely, somewhat intensely, as he took his cues for smiling and laughing directly from her actions and commentary.

Some of the most telling commentary about Carlos came from his social studies teacher who said, “Carlos is just an old soul.” The truth of this comment manifested throughout the two interviews as an advanced emotional awareness, no doubt nurtured by the connectedness of his family. Of all the participants, Carlos openly articulated love, support and relationship with family and friends as the primary components in his life. This well-developed emotional awareness in Carlos permeated all of the other thematic frames and became an emergent theme of its own accord during the analysis of data.

Throughout the interviews, observations, and focus group, and even in brief hallway chats, Carlos was consistently genteel and friendly, always returning an inquiry about his day with an inquiry about my own. He possesses a nature that allowed him to be immediately relatable to adults, as well as to most other students.

**Academic orientation.** Carlos approached academics as an integrated whole. Proficiency in one subject was directly related to proficiency in another. He stated, “Well, I think I need to practice all my subjects because, as I said, they were all related to each other. If you didn’t know one, you would probably be less good at another one.” Carlos also saw a clear relationship between high academic performance across the board and long-term options. He made this connection with the statement, “Just because you might not think that you need a subject, you never know if your job will go wrong and then you can go to a different career path.”

Another facet of the interconnectedness of knowledge for Carlos was the year to year expansion he had just begun to experience and acknowledge during sixth grade. What his tone and words conveyed was not only an appreciation of scaffolding knowledge for academic growth, but also the practical value of being able to reuse previously acquired information.

I think now in middle school you use more the knowledge you already knew to increase it. In elementary, you just couldn't use what you used to know; so it would kind of like go away - what you knew – you would just forget it.

With regard to actual style of learning, Carlos expressed an affinity for hand creating and producing products in a classroom. He spoke of his like for elementary gifted settings where he made volcanoes and huts and more recent technological creations generated on the computer. He was quick to balance his love of the kinesthetic with the practical viewpoint that pencil and paper options should still be utilized, so that traditional classroom practice remained a working option, because for Carlos maintaining options was portrayed as essential.

I noted a relationship with his academic orientation from his commentary on ethnic identity. Relationships were clearly an important part of his school experience for both their practical and emotional value. He said, "Now you have to rely on your peers to help you. If you don't understand something, you would go to them because they're in the same class as you. They should know what to do." Later when asked about the best parts of middle school he said, "I think the change of schedule has been better. So I get to go around different classes to make more friends from different places." Just as his school subjects were interrelated, Carlos also saw the academic and relational aspects of

schooling to be interwoven and expansive aspects of a successful middle school experience. It seemed Carlos was building an expansive school family to mirror his expansive home family.

**Ethnic identity.** Carlos' scores on the Ethnic Identity Scale (Umana-Taylor, 2004) indicated that he was *achieved positive*, with high scores in all three areas of measure: affirmation, exploration and resolution. These scores are consistent with what was revealed about him through the interviews, observations, and focus groups. The roots of his ethnic and cultural identity were the emotional bonds he received from his own family. When speaking of what he liked best about his culture, he spoke of the ways Hispanic parents and children relate.

. They're like really communicative. So, I really like that. They also like, they're like very, they're more like together. 'Cause some other cultures, they wouldn't like really communicate with their children a lot, they would like respect them more as if they were another adult or something like that. I don't think it should be that way. I think they should really like love their children, people should love their children, and they're adult and treat them like, with love.

When I asked him to clarify the different treatment Hispanic children receive he said, "Cause they like really, they like being with their children. My mom would rather be with me than go somewhere out than like to have fun. So, I really think she... that's really nice."

By definition, family for Carlos included not only his immediate family but his extended family in Colombia. His mom video chatted or called his grandmother in Colombia every day, and Carlos spoke to her weekly, at the very least. Carlos also spoke

of the importance of family consciousness in his daily life with statements like, “We remember each other; we’re always thinking about each other.” He went on to portray the contact he had with family as almost a favorite hobby or pastime. Carlos found renewal in family relationships, and he often used the family renewal time as an incentive to finish his work.

So, I have to prepare myself better so that I can actually pass my gifted classes.

So, me being Hispanic, I usually get only like a few or a few hours at the end of the day or on Saturday or Sunday, almost all day Saturday and Sunday, to really like talk with all my other family.

For Carlos this weekend time with his family was precious. Carlos was genuine in his expressed desire to spend as much time as he could either in person or on the phone with his family. Having heard this sentiment expressed on three different occasions, it was evident how much he viewed his family as a place of refuge.

As part of his ethnic identity exploration, Carlos had made a few trips to Colombia, which had given him a deeper, emotional connection and appreciation of his ethnicity. Although, for Carlos, he expressed his ethnicity in terms that suggested a more transcendent integration of his identity had taken place. “Being Hispanic is like something you naturally are. Even though you might not know it, you don’t have to be a part of the culture that is actually being Hispanic. [It’s] in the way you live, what you do.”

Carlos indicated no separate compartment for his ethnicity, as it had been firmly integrated into the foundation of his identity. Because of its integration, his ethnic identity was the largest, most prevalent thematic frame for him. All the other frames of



Academic Orientation, Goals, and Resilience resided well within this primary, ethnic and familial frame.

**Resilience.** The core of Carlos' resilience came from his family. Mirroring the academic and relational components of his academic orientation and goals, Carlos spoke often of both the emotional and academic support he received from his family.

I think my parents are the ones that give me the motivation to actually finish school to have a lot better life. And they do whatever they can to help me. ... they try to get me to figure out the answer on my own. They help me and at the end if I don't figure it out, they'll help me at a more higher level.

This statement shows both the more intrinsic motivation Carlos had received from his parents as well as the capable intentionality they showed in providing direct and often "higher level" assistance with school work. Carlos perceived his parents as providing the kind of significant familial support Cabrera and Padillo (2004) noted could bring long-term success for Hispanic students all the way to college.

Another primary way his family supported Carlos was through the obvious intentional value the family placed on education.

My mother and father always say that school and education is the best thing you could have. They [my parents] really say that it's the only thing they can leave with you, your knowledge, so I think that's it because they say school is the most important thing.

The obvious value Carlos placed on education was underscored during the classroom observation process. He was pensive and earnest about his classwork and maintained a

level of engagement throughout both observations, which clearly supported his expressed views related to the value of education.

Aside from its familial foundations, Carlos defined his own resilience in terms of creativity and resourcefulness:

I think I'm creative and because if I don't remember exactly how to do something, I'll figure it out doing a different thing. Like, in mathematics, if I forget a certain way to do something, I could just do something else to answer a question.

The manner in which he defined his own resilience in this area correlates to the early noted inter-connectedness he portrayed in his academic orientation. A major portion of Carlos' resilience comes from his intentional preserving and sustaining of several options, not just on larger academic scales, like doing well in several classes, but also on smaller scales like the aforementioned working of an individual math problem. In both small and large areas his resilience resulted, in part, from maintaining a number of choices in regards to challenges.

**Goals.** The goals Carlos has set culminated in being able to provide for a family. Carlos presented two different, long-term visions during the course of the study. In our first interview he indicated a love of linguistics and a desire to one day become a world translator. In the second interview he expressed a vision of practicing as a professional chef during the day and taking technology classes at night. These differing visions highlight how formative Carlos' long range vision was and the need Carlos had for options, as he previously expressed in his academic orientation. For Carlos, the differing options allowed him to spread a wide foundation beneath him; moreover, he showed

enthusiasm to do the necessary work (chef by day/student by night) to keep his options open.

The shorter term goals were less articulated but clear. He expressed that the best path for him in the short-term was to make good grades in all of his classes, which is consistent with his vision of an inter-connected schooling process and the importance he placed on keeping his options open and multifarious. He was specific in speaking of grades he wished to improve in particular classes related to his short-term goals.

At their core, Carlos' academic goals existed within the emotional and familial framework. When asked to define success, his answer highlighted both his academic orientation and his strong familial connection:

To be successful for me is you actually having something like, a good job to do, you are completing all your studies because then you would be smarter. And also having like a family or having a good relationship with friends. I think that's being successful.

His advice to other Hispanic students was equally revealing in terms of relational value.

Well, exactly to keep on studying, doing everything you can to actually graduate from a college or university and be a nice person. If you're a really bad, stubborn person, I don't think you'll get a lot of friends or get a good career. So, to be a nice person and finish all your school.

Carlos always presented the academic and relational together, and these areas could be characterized as an in-progress integration for him. The successful integration of these two aspects seemed to be as much of an eventual target for Carlos as his stated goals of career and college.

Carlos articulated a key component of what researchers have termed *mastery goals* (Midgley et al., 2001; Witkow & Fuglini, 2007). Mastery goals are motivated by an internal desire to achieve rather than by external motives (Whitkow & Fuglini, 2007).

Carlos articulated his *mastery goal* orientation well with the following statement:

I would say to be successful you actually have to want to do the work so you can better yourself, not just so you can show other people that you're smart, but for yourself. So that you can actually get a better life.

Present within this statement is both his obvious internal motivation and the more implied but practical implication that achieving academic goals leads to better life, as opposed to achievement for more immediate benefits such as grades or avoiding the consequences of low grades.

### **Jaime**

Intelligence and confidence became immediately evident upon meeting Jaime. Big for age 12, with bright and alert eyes, Jaime was consistently assessing his environment. He tended to measure most settings for what would be required of him before he engaged fully into them. Once he did engage, either physically or intellectually, he did so with a self-assurance that seemed to evoke the trust of others around him. I noted during observations that other students would come to Jaime with work or sometimes with jokes or drawings and seek his approval. The actions of these other students were subtle, but evidenced the respect others had for Jamie's judgment.

Jaime also possessed a good-natured friendliness. In every large group setting Jaime showed his love of camaraderie. He seemed to relish the time with the other participants, quick to joke with them on a number of topics. His tone was never offensive

but tended to unite everyone through humor. Throughout the study, Jaime seemed to relish all social environments, even commenting that socialization time would play a key role in his ideal classroom.

Jaime carried an appreciation of the opportunities that being gifted provided him. He commented that given his ethnicity and his placements in both gifted and STEM environments, he was a rarity. His sense of appreciation for his giftedness seemed reinforced from home, and though there were admitted struggles, he expressed a developed awareness of his potential academic shortcomings. Moreover, he expressed an earnest desire to not stray too far from the middle of the academic path.

**Academic orientation.** Jaime expressed a thoughtful self-assessment of his academic strengths and weaknesses when asked about them during the interview process. He portrayed a love of math and science, which upon further analysis seemed to be a love of the problem solving processes.

**Interviewer:** When you go to say math or science and they're giving you problems, do you like working the problems out?

**Jaime:** Yeah. I am pretty much, almost always, the first to finish.

Jaime went on to express that he liked to work math problems out of the textbook, which he often did in class and for homework. According to Jaime, he would just work the problems out on his own, since they were fairly easy for him to understand and gave him the satisfaction of working out problems to their conclusions. Where he seemed to indicate struggle was in the areas of projects, where both time and answers were more nebulous, and there was not necessarily the satisfaction of a right answer waiting at the end. Jaime labeled project work as “restrictive” because of the time commitments they

required and because of the difference in work orientation from elementary school, where work for him was more about completing individual assignments. Jaime portrayed middle school as requiring more multi-aspect tasks, which brought with it responsibilities for managing workloads across several days. Stretching a problem solving process across an expanse of days was challenging Jaime's need to arrive at the right or correct answer quickly.

Jaime expressed his weakness in the area of geographic memorization, and he discussed the use of a problem solving process to place geographical places correctly on a map, stating, "Yeah, I find it a bit challenging at times, but I do the countries and the stuff I know first in the process of elimination, but I really have to study for a while on memorizing those."

Jaime related the application of his process orientation (process of elimination) and discipline (study for a while) to a self-identified weakness (memorization). This ability to apply the strengths of his academic orientation to his perceived weaknesses connected directly to the determination he later expressed at the core of his resilience orientation. This intersection of Jaime's academic and resilience orientations showed the dependency of academic success on the successful manifestation of resilience qualities.

Arriving at the right answer was a process Jaime also applied to his socialization. Jaime's responses showed a strong inclination toward using collective and social processes to work toward resolutions: " [At my ideal school]...Where we can ask a question and start socializing. Like if we ask a question and get into a discussion about it and at the end we find the answer."

**Ethnic identity.** The Ethnic Identity Scale scores indicated that Jaime was one of five participants whose score indicated *achieved positive*, meaning the areas of ethnic affirmation, exploration and resolution all had values above the established cut-off scores. His commentary about his ethnic identity was consistent with his indicated score of *achieved positive*, and within the interviews he expressed a great deal of pride in his ethnicity.

**Interviewer:** And thinking about being Hispanic, what do you like best about being Hispanic?

**Jaime:** Well, pretty much my heritage and culture. It's actually interesting that the Mayans... to learn about the Mayans, Aztecs and the Incas.

**Interviewer:** What kind of associations do you make with them?

**Jaime:** I've been told that they were some of the first civilizations...the Mayans, some Hispanics are descendants of Mayans, so that's kind of interesting.

As this exchange continued, Jaime went on to enthusiastically speak of Mexican history stating, "The history, oh, the battle of the Mexicans versus the French; they were outnumbered but they still won." All of Jaime's statements around his ethnicity indicated that previous ethnic explorations of significant depth had been conducted and were continuing. Analysis of his commentary also indicated that the outcome of these explorations had been the positive affirmation and to some degree resolution of his perceptions of being Hispanic. When asked during focus group to finish the statement "Being Hispanic means...", Jaime's response was "having a rich culture."

Jaime indicated that much of his cultural knowledge was attained through simply living in it. During the focus group as participants spoke of family activities promoting

ethnicity, Jaime simply stated, “Where I live we’re surrounded by all that.” He clarified this statement to mean that his family has no need to undertake intentionally Hispanic activities because they are already immersed in a Hispanic neighborhood culture that teaches him about its value.

As with the other participants, Jaime spoke of no personal experiences with being discriminated against on the basis of ethnicity; however, he did express that Hispanics are often wrongly classified as criminal by law enforcement. Though not directed at him, this was a phenomenon he had witnessed and with which he felt a connection.

**Jaime:** As, they view us as actually different. They kind of tend to think we’re all in the same, like that we’re all criminals and all that.

**Interviewer:** And when you say ‘they,’ who’s they, for you?

**Jaime:** For me, I’m pretty... I’ve seen a lot of this about cops and how they discriminate against Hispanics. They’ll arrest them for no reason.

When I questioned Jaime specifically about discrimination within the school environment, he was quick to answer that contrary to discrimination, he had experienced a valuing of his individualism. “Because really, at school, it doesn’t really matter what you are, [but] who you are.” The “what” of his statement referenced ethnic designation and the “who” referenced individual character and performance.

Jaime expressed an awareness of his perceived uniqueness as a gifted Hispanic male. This awareness was made apparent by the fact that he had counted, without prompting, the number of Hispanic students in the STEM program, “under 15, 13, under that number.” When I asked him how this number could be increased he offered, “It can be increased probably by offering a test to [Hispanic] kids who are interested when



they're young.” As with other ideas for program improvement he offered, he did not expound past this statement. He did express his own uniqueness as a gifted Hispanic male as something he prized and regarded as an opportunity. “I feel like I’m one of very few, but that just means I’m one of a couple who were actually able to make it and that makes me feel kind of special.” His genuine appreciation of himself seemed to serve as a vital aspect of both his confidence and resilience.

**Resilience.** When Jaime spoke of his resilience he expressed it in terms of determination. He defined his determination this way, “Sometimes I just want to finish something and I try to do my best at it, so I motivate myself, not to just sit around and I just pull it off the next day.” What I noticed in his definition was the phrase “not just to sit around and I just pull it off the next day.” In exploring this phrase further with him I found that Jaime had already self-identified some “feelings of procrastination” as an obstacle to his determination. I also coded the obstacle/theme as *feelings of procrastination* because Jaime admitted to struggling with procrastination but did not indicate a great deal of consequence for procrastination in his statements. During the second interview he even stated, “At time I feel like procrastinating, but no [I don’t].”

I noted leadership qualities in Jaime, and he explained that this feeling of being out in front of others has been a growing phenomenon since second grade where he first became aware of his giftedness. He also indicated that he saw himself as “more or less of a role-model.” Jaime stated, “The less is what I really don’t like about me is [that] I sometimes tend to want to procrastinate, but the more is that I can get past that.” In this self-aware expression of resilience, he was aware of using his determination to overcome the self-identified barrier of procrastination feelings. Elaborating further on how to avoid

procrastination through established priorities he advised, “I say do the work first and then add any visual effects you want to a project. Like coloring it. Save that to the end.”

As with other participants, family played an important role in Jaime’s resilience. Jaime expressed that his family valued and encouraged his giftedness and recognized it as a significant opportunity. When asked about differential treatment because of his giftedness he indicated that his parents were the only ones who treated him differently because of his giftedness.

**Jaime:** I am kind of treated differently, but that’s just by my parents. Not by anybody else since I don’t really go around telling people.

**Interviewer:** Okay. How do your parents treat you differently?

**Jamie:** They were pretty much telling me to keep it up once I was accepted into [the gifted program].

Jaime took no negative tone about this treatment from his parents; contrarily, he indicated that his parents’ treatment of him was positive, and he portrayed a strong sense of connectedness to his family as a support system. Moreover, Jaime seemed to have internalized the family’s view of his giftedness as a form of positive uniqueness, and it seemed to inform his confidence and his ability to form independent opinions that others sought for validation.

**Goals.** Jaime expressed a vision of a distant future as a graphic designer and what would be necessary to achieve this goal.

**Interviewer:** Okay. What do you think you need to do to get to that place, to be a graphic designer?

**Jaime:** To get really good grades in probably math and sciences, it's what it uses, and probably also take some art courses since that's probably a necessary thing. Jaime's vision was still formative and not as singular or assured as Roberto's impending professorship at MIT. However, Jaime's mention of the grades and areas of concentration needed for graphic design indicated a significant understanding of how his current academics connect to his future vision. He expanded this understanding to encompass how current grades relate to college entrance. "When you're entering into college, they check your grades. If they see that you have a D or an F that will make your chances of getting into that college a lot less likely." Jaime went on to articulate the ability of a long-term vision to help in the short-term.

It keeps you from being conceited and just think... this helps you set like a plan for you. So, yeah, as to what you're going to be, what you're going to grow up to be, what you're going to study. What grades you might want to make.

Jaime was consistent and self-assured about his visions throughout data collection, especially in terms of overall confidence for eventual success. As Jaime expressed pathways between his current contexts, such as classes and grades, to his future contexts, such as college or graphic design, he indicated his comprehension of the academic and cultural understandings, which are likely to result in achievement (Cabrera & Padillo, 2004).

**Language.** Though Jaime was bilingual and being raised in a home with Spanish as the primary language, his primary language was English. Since Jaime shared with me that he learned Spanish first, I asked him if he translated the Spanish that he heard into English. Jaime answered, "No, I don't translate it into Spanish; I just hear it as it is. If it

were in Spanish, I would probably translate it into English to get a better understanding.” As Jaime explained it, a preference for English was rooted in the logic that English usage would result in greater academic gains, gains that would be ultimately supported by his family, even at the cost of a less nuanced home communication.

At home Jaime indicated that his parents spoke no English, though his dad was taking English classes. He further articulated the difficulties of translating his school work into Spanish to ask for parental help, only to have his parents either not understand the question or the nature of the work.

**Jaime:** My parents don’t really help me out because they don’t really speak English that much and I sometimes have trouble trying to translate only for them to give me a wrong answer.

**Interviewer:** Okay. So you translate what you’re asking them into Spanish and then they tell you back an answer and sometimes you don’t understand their answer?

**Jaime:** Yeah.

In order to improve his communication abilities at home Jaime was currently taking Spanish. Gaining these communication skills took on particular significance for Jaime because of the value he placed on verbal communication, sociability, and camaraderie. I noted this need for sociability in commentary such as, “I really just don’t like to sit there and be quiet. I like to talk to the people around me,” and during his classroom observations, where socializing often seemed to be the reward for his completion of his work. I also noted how he would initiate friendly banter with everyone when all participants were gathered together. Given the importance he placed upon these

sociability needs at school, it seemed only probable that he would want them met at home, hence his efforts to increase the nuances of his Spanish abilities.

### **Jose**

Though not immediate when meeting him, one of Jose's salient qualities was his sense of mischief. Mischievousness hid just beneath the surface of Jose, as if he didn't quite want you to know how clever he actually was. Then a sly smile would work its way across his face, and he knew he'd gotten you. When asked what it meant to him to be gifted, Hispanic and male, he responded in his sixth- grade 11 year old way that it meant "having to hide from scientists who wish to study you." Then he scrunched himself up and laughed his mischievous laugh.

Jose's movements were restless and somewhat obscure in nature. Prior to our interviews he would pace around the room, in part from the fantod of being interviewed and in part out of curiosity about where he was. His pacing may have arisen from the admitted concreteness in his learning; he liked to feel and see what he was learning, and it was part and parcel of the often kinesthetic way he approached his environments. In order to understand my room; he wanted to walk its perimeters, so he could understand his environment. Then he would return and wind his height and lankiness down into the seat, and we would begin.

Much of what I discovered about Jose came from what he didn't say; our time was often punctuated with long pauses on his part. The prevalence of one word answers on his transcripts was high and under-elaboration was the norm. I first mistook his pauses for his reticence or my own novice in eliciting responses, but later analysis showed Jose to have a hesitancy and even slowness to his verbal processing and listening

comprehension abilities. Because of this lack of ability, it became as important to listen to the exchanges between us as it was to read the transcripts in order to discern what was he was and was not processing correctly.

**Academic orientation.** The interviews with Jose made clear his limited verbal processing/listening comprehension, though it took time and analysis to discern this significant feature of his academic orientation. Jose had tested into gifted programming by the third grade and indicated that he had to take the ITBS reading test twice in order to qualify. Going into the interviews there was an assumption on my part of verbal and listening comprehension skills, which were challenged by exchanges like the one below from the second interview.

**Interviewer:** Okay. Can you define what it means to you to be successful?

**Jose:** No.

**Interviewer:** You don't know what the word means?

**Jose:** I do, but I have trouble remembering what it is.

Below is a similar exchange where vocabulary becomes an obstacle.

**Interviewer:** How much support do you get from your friends regarding school and schoolwork and grades and that sort of thing?

**Jose:** What does regarding mean?

These types of exchanges during the interviews in conjunction with long pauses on Jose's part on somewhat routine questions for other participants began a trail of analysis that ended at his lack of verbal processing and listening comprehension. Because of the seriousness of its potential impact on his academics, I followed-up with his teachers and mom, who all verified this aspect of his academic orientation.

Jose also revealed during the interviews a preference for more visual and concrete activities. Despite the implementation of concrete/visually oriented intervention strategies to address these identified difficulties, Jose was placed on academic probation because of low grades during data collection. Shortly after its completion he was removed from the gifted tier of classes down to the advanced tier of classes, all within the school's STEM program. Of all the participants, Jose showed the most evidence of academic struggle.

Due in part to his struggles and expressed lack of ability in certain areas; Jose expressed a need for help from teachers to assist him. He stated, "There should be like after school and before school classes for anyone that needs help with their homework or class work or projects." Comments like this one characterized a sense of aloneness or isolation for Jose, which would pervade much of his commentary with regard to school. Moving from elementary to middle school, with the multiplication of teachers, classes and workloads had seemingly left him in a state of overwhelm. He also expressed that his aloneness was exacerbated by the attitude he received from his teachers, who, because of his listening difficulties, perceived him as inattentive. During the focus group he said, "[in an ideal school]... It would be like all quiet and you could get help from the teacher without being told you're not paying attention."

When prompted about what he felt was non-productive about school he commented on the unimportance of expository reading because, "all you do is like learn about things that the book's about, well, the non-fictional ones." As for writing he stated, "I don't really like to write. It makes my hand all tired." Implicit in these statements was a resistance or even a rejection of what could possibly increase his ability to process

verbally. Simultaneously, there was a leaning toward an intellectual lethargy, which was disinterested in expansion.

In part because of the sense of overwhelm he expressed, Jose's attitude toward collectivism was more of a need than a preference. Friends and classmates were a necessity for him, as they served as coping instruments. To illustrate this need Jose spoke of the role his friends took when helping him catch up with his work after a long absence. "Like this year, like I was absent a whole bunch of times and they [my friends] let me see all the work to see like all the things they did like when I wasn't there."

In this statement Jose expressed the helping role his friends played and the need he often had for them. Additionally, any sense of overwhelm his friends helped him overcome would have only been exacerbated by the multiple absences he mentioned. While Jose was struggling to overcome his own verbal/listening challenges, he seemed at key moments to have lapsed into costly self-defeating behaviors (absences, incomplete reading/writing assignments) that only lessened his academic achievement.

**Ethnic identity.** The results of the Ethnic Identity Survey (Umana-Taylor et al., 2004) for Jose showed the lowest scores of all participants in the areas of *exploration* and *resolution*, resulting in an overall designation as *diffused positive*. Further examination of these low scores in the interview process revealed Jose's understanding of Hispanic culture seemed relegated to more cursory cultural aspects such as the use of Spanish, clothing styles, and food. He seemed unable to express any deeper cultural understandings past these somewhat cursory aspects of his ethnicity. When asked to elaborate on these aspects, Jose could articulate little more than a repetition of them.



**Interviewer:** Let me ask you this: Being Hispanic, is that really mostly about knowing Spanish? Or is it about something else?

**Jose:** I'm not really sure.

There seemed to be little evidence of intentionality, either his own or his family's, with regard to ethnicity in Jose's identity building. Consequently, Jose's answers to questions about ethnic identity exploration or resolution were often one word answers (no/yes) or were about eating certain types of food. Whereas other participants would mention heritage, history, or even Hispanic pop-culture figures, Jose remained largely quiet on the issue of his ethnic identity. This lack of conversation may have also been informed or exacerbated by the difficulty of home communication, which emerged within the language theme.

**Resilience.** A major source of resilience for Jose was his mom, whom he saw as a role model. When I asked him why he felt she was a role model he responded, "She's always showing me how to do my work, like which ways of doing stuff is easiest." This statement indicates Jose's mom met his need for help and perhaps showed him ways around his lesser abilities. As I coded through Jose's comments on family there was mention of an older brother by five years and a younger sister, but no mention of a dad or any adult male role model. The theme ended up being characterized as "no male role model" in part because Jose's demonstrated lack of overall direction and resolve seemed to indicate that a male role model was an important, yet unfulfilled need for him.

Apart from his familial sources of resilience, Jose's self-identified source of resilience was his persistence, though he had difficulty elaborating on why.

**Interviewer:** What is it about you specifically or what strengths do you feel you possess that help you overcome challenges?

**Jose:** Not giving up so easily.

**Interviewer:** Why do you think that is for you?

**Jose:** I don't know.

What these resilience statements possessed was an appropriate understanding of the importance of effort; what they lacked was a completion element. Jose defined his resilience in terms of effort "I don't give up" but never made any mention of accomplishment (and I eventually succeed). To make mention of succeeding would potentially mean making changes in his behavior that he was not ready to make. Keeping success and resilience couched in terms like "not giving up" let him keep the image of his resilience intact.

**Goals.** Cabrera and Padillo (2004) conducted case studies of Hispanic college students and ascertained that one of the most important factors in attaining college admission was an understanding of the culture of college and what was required to attend. When I considered Jose's commentary about his goals in light of this research, I noted not only an overall lack of specificity in his long-term goals but by the lack of knowledge he possessed with regard to the culture of college in general.

**Interviewer:** Okay. When you look down the road, say 10-15 years when you're in your 20s, where do you want to be?

**Jose:** Out of school looking for a job or going to college. I'm not sure what year high school ends.

**Interviewer:** High school ends when you're 18. So, this would be past high school definitely.

**Jose:** Being in college.

Though working with only five other participants, by comparison all had some working notion of college, when it occurred, and even the rudimentary requirements for admission (languages, grades). Jose's uncertainty about the age of high school completion was also notable, given that Jose has a 16 year old brother in high school. Jose's lack of articulation with regard to long-term vision is not unexpected, given this same lack of articulation in other areas. The significance of this commentary emanated from the genuine naiveté he expressed around higher education, which was echoed in other statements as well. A correctly formed vision needs information, and Jose did not seem to have enough information about the future to form a vision. There was a sense of isolation, here isolation from information, which debilitated his goal setting abilities.

Aside from his longer term goal, which he did articulate as college, he made mention of the vague shorter term goal of "getting higher grades." When I followed up about a grade or goal for a specific class, he simply answered "no."

**Language.** Pervasive among all emerging themes for Jose was a sense of isolation. The world he portrayed seemed limited. Where the sense of isolation ran deepest was in his statements about family. He portrayed a sense of singularity that seemed to drift directly out of his withdrawal when relating to me and others, which I had noted in my observations. This sense of isolation seemed to emanate in part from language use issues, aggravated by his demonstrated lack of listening comprehension and

verbal processing skills. This theme of language use emerged when I asked him what he found most challenging as a gifted Hispanic student.

**Jose:** Like, trying to understand Spanish because I forgot all about it when I was in school.

**Interviewer:** Why is that? Because the school was so English-based?

**Jose:** Mm hmm.

**Interviewer:** You're saying you forgot how to use Spanish?

**Jose:** I forgot a lot of the Spanish words I used to use.

With additional questions Jose expressed that he was indeed bilingual but for more nuanced communication felt more comfortable with English because it had been a language he had used at school and with his brother. He was enrolled in Spanish to learn or re-learn a greater vocabulary in order to better communicate with his mom, which also partially explained the sense of isolation that kept coming through in his interviews. Jose was expressing that nuanced communication with his primary caregiver was a challenge, further isolating him from her and from a primary source of resilience.

**Interviewer:** Do you ever have trouble communicating with your mom?  
Language-wise?

**Jose:** Sometimes 'cause I don't really understand the words.

**Interviewer:** When she's speaking Spanish, you don't know all the words, is that what you're saying?

**Jose:** No, like when I'm speaking to her, I sometimes like say other things in Spanish than what I mean to say, like they don't come out right.

Having identified what I perceived to be a problem-solution scenario for Jose, I continued to probe the language theme for additional information. As questioning continued, Jose revealed that his true wish was not necessarily for an increase in his own Spanish speaking abilities, but an increase in his mom's English speaking abilities. This desired increase in his mom's English speaking abilities was not only for the sake of their mother-son communication but for her overall communication and well-being.

**Interviewer:** In other words, how would you like to see your communication with your mom improve as far as language is concerned?

**Jose:** I would like to see it improve by... by me learning more Spanish... no, wait, my mom learning more English so then she can communicate with others, not just me.

**Interviewer:** Do you think she would be able to do more things if she could speak more English?

**Jose:** Yes.

**Interviewer:** Is she learning anything? Is she doing anything about that?

**Jose:** No.

Jose expressed that the Spanish-English language barrier created isolation within the home among family members due to an inability to communicate in a nuanced way. Moreover, Jose portrayed an overall familial sense of isolation, as his motherfamilias would not increase her English abilities, which Jose hoped would provide her with expanded opportunities.

As data collection concluded I had occasion to meet Jose's mom and through a translator thanked her for allowing Jose's participation in the study. She was able to

Speak some limited English to me and others gathered at the meeting. I also checked with Jose's Spanish teacher toward the end of data collection and though he was struggling in several academic areas, his Spanish grade was an A.

### **Fredrico**

Fredrico wasn't always the first person you notice in any given setting, and he probably preferred it this way. His overall look indicated that he was trying to blend. His look usually consisted of a non-descript zipped-up grey hoodie, dark pants, black, and skateboarder shoes with dark, short socks. His hair was cut in a Caesar style and gelled lightly. He wore this look in all of our meetings and even through the observations. He is somewhat stocky and his countenance was watchful, but not necessarily open. Of all the candidates, his demeanor was the most reserved, although when he spoke he seemed to give much thought prior to speaking.

Fredrico struggled with his grades, and his teachers mentioned that this struggle had been ongoing since the outset of middle school. Toward the end of the study, Fredrico was removed from the middle school STEM (Science, Technology, Engineering and Mathematics) program for low academic performance, though he remained in gifted classes. With this removal occurring just prior to the focus group, it seemed to add a layer of regret to his already serious demeanor, and tinges of this regret about his past low academic performance were expressed.

His tone during the interviews and focus groups was a thoughtful, albeit soft-spoken one. He was earnest, yet remained uncomfortable about the lengthy self-expression that interviews require. In the first interview, it took five questions before his left leg, which was shaking unconsciously, came to a stop. He seemed far more

comfortable in blended situations with other students who served as a camarilla of sorts, which bolstered his sense of security. This bolstering was evident during the focus group, when there seemed to be a tone of playfulness setting in, and Fredrico took the microphone and gave such a serious, thoughtful response to a posed question that it turned the tide of the whole group in a more productive direction. It was a quiet, unexpectedly welcome show of leadership on his part, perhaps indicative of a newer, more ardent direction toward improvement.

**Academic orientation.** Much of what I learned about Fredrico's academic orientation I learned during the observations. As he progressed through the observation protocols in both gifted social studies and language arts settings, he drifted into a passivity from which he often struggled to recover. His engagement level increased when he was with friends or in groups, but individually he frequently drifted in his attention. I noted that as teachers began whole group instruction it often served as a cue for Fredrico to disengage. Though he would awake into slight periods of engagement from time to time, he usually non-verbally communicated with other students during whole group instruction until another style of work (group/partner) could begin.

Once in groups, Fredrico's demeanor changed, and he became more engaged. It seemed a relief for him to be in a group setting, possibly a relief from the overwhelm and isolation of working alone.

**Interviewer:** Did you ever wish in elementary school they would either slow down or speed up?

**Fredrico:** Slow down sometimes.

**Interviewer:** Do you ever still feel that way, like ‘I wish this would slow down a bit.’?

**Fredrico:** Yeah.

Fredrico seemed to draw a sense of strength and support from the group setting and from his friend Jaime (another study participant), as well. Fredrico, while in the STEM program, had several classes with Jamie and during my observations, they were often in the same small group. Fredrico seemed to draw strength from Jamie, and even during whole class presentations, Fredrico would subtly try to communicate non-verbally with Jamie, often successfully. For Fredrico group work was not just an academic preference; partnerships and grouping seemed a necessary support network. Task commitment was not an issue he wanted to face individually; he expressed doubt that he could. Groups relieved this sense of doubt and overwhelm in him to the extent that the relief on his face was noticeable upon moving to group settings.

Past his need for group work in academic settings, Fredrico indicated a passion for music and band, again showing a bent toward the collective. While many aspects of school were conceptually frustrating for Fredrico, band seemed to encompass concepts he understood inherently. He had pared down his list of favorite school subjects to exclude all but band and music. This academic focus on band later overlapped into his discussions of long-term goals, which were consistently expressed in terms of a career in music.

Not specific to any subject was Fredrico’s underlying assumption of his own eventual shortfalls, expressed in statements pertaining to his academic orientation. When asked to give advice to other students like him, Fredrico and I had the following exchange.



**Fredrico:** To always try hard and don't under-exceed yourself. Always over-exceed.

**Interviewer:** Can you explain a little bit more what you mean by "over-exceed"?

**Fredrico:** If you give 90%, you'll probably miss that 90% and you'll go to like 70% but if you aim for 100%, if you miss that, you'll get 90.

**Interviewer:** Okay. Do you have any other situations where getting work in on time, has that ever been something you've struggled with at all?

**Fredrico:** Sometimes.

**Interviewer:** How are you addressing that?

**Fredrico:** Well, when I do miss work, I do my best the second time he gives us work to see if I can make up for that work.

The underlying assumption in these statements is that the first time will be to some degree insufficient ("you will probably miss"/ "I do my best the second time"). Fredrico seemed to have removed the option of getting it right the first time from his equation for success. With an inevitable sense that the first time will "miss," it seems highly unlikely the initial efforts would be the best efforts, even with his admonition to "over-exceed." The notion of always needing a second chance seemed to have established itself as a mainstay in Fredrico's academic orientation.

By the time the focus group was conducted Fredrico had been removed from the STEM program as a consequence of his low grades. With this removal came an acknowledgement and awareness on his part of the dangers of relying on second chances.

**Fredrico:** Yeah, you shouldn't procrastinate. It's not a good idea.

**Interviewer:** Okay. You've learned this the hard way?

**Fredrico:** Yeah.

**Ethnic identity.** The results of the Ethnic Identity Scale (Umaña-Taylor, 2004) indicated an *achieved positive* distinction for Fredrico, as he scored above the cut-off values in all three areas of the scale: *affirmation*, *exploration* and *resolution*. Some of the anecdotal data collected, teamed with the poor academic performance evidenced during the study, seemed to conflict with this result. When I asked each participant in the focus group to discuss the intentional ways in which their family had helped them learn about their culture, Fredrico gave the following response: “My dad, I mean, we have like Mexican meals and stuff, but... you know... it doesn’t really matter for him.”

The one place Fredrico did connect culturally was through music. He mentioned the band Gypsy Kings, a group that sings in both English and Spanish, as a favorite of both his and his father. It was evident from his responses that any ethnic identity exploration placed his father as the arbiter, or at least the major influence in the process. Despite a shared love of the Gypsy Kings, the more prevailing attitude toward intentional ethnic identity seemed to be expressed in his previous response with, “it doesn’t really matter for him.” Most of his commentary regarding his ethnic identity portrayed only a cursory acquaintance with his own ethnicity, with only vague comments about food or music. When compared to several other participants who had journeyed to their family’s country of origin, or could express historical and cultural events of significance, the nature of Fredrico’s commentary seemed distinctly superficial.

As with other participants, Fredrico could cite no instances of personal discrimination because of his ethnicity during his school career. When I probed him

deeper on the subject, searching for elements of discrimination based on giftedness, he affirmed how much the school had valued him as an individual.

**Interviewer:** So you don't see any difference between the way you're treated and say, someone who is a lot like you but they're just not gifted, is treated?

**Fredrico:** No.

**Interviewer:** And why do you think this is?

**Fredrico:** Because I feel everybody looks at me for who I am.

These responses were more congruent with his scores on the EIS, and may highlight the significance of institutional affirmations in the construction of ethnic identity. The value that his schools had placed upon Fredrico's individual ethnicity may have significantly contributed to his high EIS scores despite the lack of intentional ethnic exploration at home. The worth he garnered from his school environments may have also made a significant contribution to his resilience.

**Resilience.** Closely related to the second chance mentality present in his academic orientation, Fredrico saw his resilience in terms of effort, but not achievement. A phrase he repeated often was, "I don't give up. I always try my best." Within this statement and others like it, there is an implied perseverance. Alongside the notion of perseverance ("I don't give up"), Fredrico placed a value on effort ("I always try my best"). For Fredrico the issue was not the importance he placed on effort, but the lack of any result or achievement component in his statements about resilience. As long as he could perceive himself as trying hard, he could deem himself successful, often despite the evidence of low grades.

**Interviewer:** Do you feel like you're on track to be successful?

**Fredrico:** Yes.

**Interviewer:** Why?

**Fredrico:** Because I feel that I have a lot of potential.

Fredrico's equating of success with potential highlighted his reluctance to assign any significance to the end results, but only to the means of potential. He portrayed this resilience strategy as insulation from any real acceptance of his documented underachievement. However, his removal from the STEM program seemed to penetrate this insulation to the point that it manifested during the focus group as an increased academic sobriety in his demeanor and commentary.

Fredrico identified his familial source of resilience as his father. He depicted his father as his role model and an important source of support for him.

**Interviewer:** And what was it that you think enabled you to do that math project, even though it was really hard?

**Fredrico:** The motivation from my dad.

**Interviewer:** Was there something he said to you?

**Fredrico:** I mean, it was just, he really wanted me to finish it and do it. So, I told him I would and I was able to.

He added later commentary about his father, assigning to his dad similar components of effort and potential, while leaving out the achievement component, just as he had done with himself. Fredrico stated, "He's [dad] very hard working and he always tries his best in doing work. Even if he doesn't understand, sometimes." In the preceding quote, Fredrico assigned a similar value to his dad's efforts as he did to his own ("always

tries his best”) with a similar, acknowledged lack of achievement (“Even if he doesn’t understand, sometimes”).

During the focus group discussion on familial support, which occurred just after his removal from the STEM program, Fredrico depicted a lack of help from home and indicated a need for additional support.

Well, my family doesn’t really help me out. My dad has... he’s a manager and he has these crazy hours, so he doesn’t really get home a lot and my brother is always out with his friends and everything. And when I ask him something about my homework, he gives me a complicated explanation that I don’t understand.

Fredrico’s depiction of the lack of support he feels from family teamed with the lack of achievement components in his statements on resilience suggests instability in the key components of his resilience, which could have contributed to his documented underachievement.

**Goals.** With regard to long range goals, Fredrico offered a clear vision of a career in music along with the necessary college training he would need to have this career.

**Interviewer:** What kind of job do you see yourself in?

**Fredrico:** I want a job in music.

**Interviewer:** Have you thought about what kind?

**Fredrico:** Like, now I’m learning the saxophone, so like in an orchestra or something like that.

Unwavering in his musically oriented goals over the course of two separate interviews, Fredrico expressed both an authentic desire to explore what he loved while

simultaneously avoiding more purely academic topics that seemed to periodically overwhelm him.

In regard to more immediate day to day goals, Fredrico quickly answered that he wanted to make As and Bs, but was vague in the establishment of any concrete pathway to achieve these scores. When I tried to explore the specifics of his short-term goal, Fredrico was reticent to elaborate about specific goal-achieving behaviors.

**Interviewer:** In order to get all As or all As and Bs, what do you feel like you need to do?

**Fredrico:** I need to try very hard and do my best to understand what the teachers give us to learn.

**Interviewer:** In... and do you have any picture of what that looks like on the day to day, for you? Like, when you go into a certain classroom and you say, 'I need to try my best,' or 'I need to understand what the teachers give me to learn.' Is there anything that you see yourself doing differently or doing better than you do now, like a specific thing in the classroom?

**Fredrico:** No.

As it was with his academic and resilience orientations, remaining non-committal with regard to specifics about achievement in his short-term goals allowed the effective preservation of a self-image of success ("I am trying hard") without the necessity of having to change any behaviors.

**Language.** The theme of language took on a similar significance and role for Fredrico, as it had for other participants. He portrayed a lack of the necessary Spanish speaking abilities to communicate effectively with his primary care giver, which for

Fredrico was his dad. Fredrico shared that Spanish use had been both a primary and secondary language, and then later revised these comments to indicate Spanish as the primary language in his home. What he did portray clearly was the lack of intentionality around language use within the family.

**Interviewer:** Now, when you say you're not fluent in it [Spanish], do you speak it at all?

**Fredrico:** Yeah, I speak it.

**Interviewer:** Okay. Do your parents speak it? Are they fluent in Spanish?

**Fredrico:** My dad speaks it a lot. Like he has friends and he talks to them in Spanish.

**Interviewer:** Did your parents say to you, 'Okay, we're going to... we want you to speak English.' Was it like a decision that got made or was it just something that kind of happened?

**Fredrico:** Kind of happened.

Fredrico indicated that his current Spanish course was helping to mitigate this language issue and increase his fluency. The other phrase that stood out within the exchange noted earlier was the phrase "Like he [my dad] has friends and he talks to them in Spanish," which Fredrico spoke with undertones of sadness in his voice. Fredrico seemed to perceive that Spanish was the language of closeness or friendship for his father, and Fredrico was still largely unacquainted with the nuances of a language his father used as a pathway to closeness. Because of the importance Fredrico placed on his relationship with his father, I asked Fredrico to express the role of this language as a child to parent communication issue.

**Interviewer:** Is Spanish the main language that's spoken in your home?

**Fredrico:** More or less.

**Interviewer:** More or less, so there's both Spanish and English? Who speaks more Spanish at home?

**Fredrico:** My dad.

**Interviewer:** Your dad. Does he communicate with you in Spanish, your dad?

**Fredrico:** Sometimes.

**Interviewer:** Sometimes. Do you ever feel like if you knew more Spanish, you'd be able to communicate better with him?

**Fredrico:** Yes.

I pursued the language issue further with Fredrico, probing for expressions of cultural or generational transitions regarding Spanish to English but was once again brought back to the how important Fredrico's father was to him.

**Interviewer:** Does it ever feel like because you're so good at English and you've been able to master this, does it ever feel like you might be leaving something behind, like your own like Spanish and that sort of thing? Do you ever feel like you want to go back and get that and make sure you learn that too?

**Fredrico:** No, but I like learning Spanish, so I would like to learn more about it and actually go to another country and speak Spanish someday.

**Interviewer:** Any particular country?

**Fredrico:** Well, my dad was taking me to Mexico this summer.

The motivation for language acquisition Fredrico expressed was the trip with his father and the potentially shared experiences of language and travel.



### **Data Analysis and the Research Questions**

Given their importance as both structural pillars around which the participant inquiries were initially organized and their later significance as categories for collected data; it is important to discuss the research questions in light of the outcomes of data analysis. Also of significance was that the research questions emerged from data analysis with their foundational role intact, as well as an integral *métier* as interpreters of identity.

In addition to the phenomenological analysis of the individual participant experiences, data were analyzed for consensus and interaction elements among participants. As data were analyzed it became increasingly clear that within the framework of the research, resilience would be of profound influence upon the other three. More difficult to measure empirically, resilience seemed best measured by how it was manifested in the related experiences of participants. This contextual approach to this more nebulous theme saw it emerge as both a thread running through the other participant themes but also as a theme with its own distinctive stand-alone qualities, with protectionism as its salient quality. Because of its interaction with the other elements, resilience is discussed first among the research questions, with discussion of the other three questions following.

#### **Research Question 3**

How do gifted Hispanic male middle school learners describe their academic resilience and how it relates to their achievement orientation?

The nature of resilience, as not only a buffer against difficulties but a determination to overcome them, means its effective measure is in the degree to which it

buffers against and surmounts difficulties. Additionally, research highlights the interactive nature of resilience and the abilities of the interactions to further define and evolve resilience mechanisms within the individual (Davydod et al., 2010; Herrman et al., 2011; Ungar et al., 2007). By contrast, academic achievement, while mutable, had a grade measure, ethnic identity had a scale measure, and goals have expressed components whose orientations can be characterized. Therefore resilience was examined in light of its interactions with the other thematic frames and how the context of these frames helped shape the formation of resilience mechanisms within the participants. Participants were all experiencing similar resilience-influencing contexts through attending the same schools, while simultaneously experiencing different home and family contexts that all combined to shape the resilience of each individual in a distinctive way. Within existing literature regarding resilience and Hispanics, resilience is viewed as a positive quality that buffers against dropping out of school and promotes a sense of individual accomplishment (Herbert, 1996; Lopez & Soto, 2009). Although resilience has been shown to have positive effects on academic achievement (Bland & Sowa, 1994; Kitano & Lewis, 2005), questions have remained about the manifested nuances of resilience in the gifted Hispanic male.

As participants portrayed it, resilience emerged as both systemic and functional. Systemically, resilience undergirded academic achievement and was interwoven with ethnic identity through familial frameworks passed down both consciously and unconsciously from parents and family to participants. On a more functional level, participants were in the process of defining the components of their own resilience, often through their goals and definitions of success utilizing terms such as perseverance,

resourcefulness and creativity. A significant functional component of resilience seemed to be the amount of emphasis a participant placed on success or completion. When a goal or success had an expressed result or completion component, academic achievement in the short-term was evident and the required long-term academic achievement was articulated with knowledge and clarity. However, when perseverance and resourcefulness were expressed as ends unto themselves, no consistent academic achievement seemed evident.

To best illustrate the contrast in definitions of success, Guillermo defined success in the following manner.

Like, say you're trying to push a shopping cart up a hill or something and if you can make it to the top with all your stuff, because like your car is parked at the top of the hill or something, then you made it up successfully.

Within this definition are found both an effort component ("pushing a shopping cart") and a completion component ("made it up successfully"). When participants with high academic achievement defined success, a completion component was evident. When participants with lower academic success defined success, the definition was confined to terminology involving only effort, such as Fredrico's definition of success as simply "trying hard," with no indication of completion as part of the definition.

The following sections discuss the expressed resilience of the participants within the context of the three other major themes from the research questions: academic orientation, ethnic identity and goals.

### **Research Question 1**

How do gifted Hispanic male middle school learners describe the collectivist aspects of Hispanic culture and the individualist aspects of academic achievement prevalent in gifted programming?

Research has documented the value Hispanic culture places on collectivism (Flores-Gonzalez, 2002; La Roche & Shriberg, 2004), especially as it relates to academic achievement. Hispanic students can have difficulty when individual, academic distinction means moving away from comfortable peer and familial structures and ideals about school. These difficulties are often tied to a strong sense of collectivism within Hispanic culture that can sometimes unwittingly deter individual accomplishment. As part of the interview process for this study, participants were asked to relate their academic preferences, in terms of a collective achievement versus an individual achievement orientation.

Cultural collectivism for the participants was portrayed as familial, as home life was described as central in each participant's life. However, for participants there was an additional school based element to the Hispanic collectivism emanating from family. Since each of them had been in an all accelerated/gifted scholastic environment since third grade, this placement seemed to elevate their giftedness to a primary level within their identity, while physically placing them in an environment where the Hispanic populations were often less than their previous first- and second-grade elementary schools. The prevailing culture of their schools since third grade, while culturally diverse, was an accelerated/gifted culture. Therefore collectivism, as portrayed by participants,

seemed to simultaneously coalesce around family membership and being gifted, especially when speaking of school. For participants, being a part of a gifted community was portrayed as a separate but prominent form of collectivism.

Portrayals of Hispanic collectivism were generally reserved for depictions of home and family. However, participants did not portray home and school dichotomously; the collectivism found in the family was portrayed as a support for achievement at school. Culture was not portrayed as diminished or even muted by school, but was portrayed as a quiet source of strength, because more strictly academic identifiers (e.g. accelerated placement) were moved into the forefront by the participants while they were at school. As Guillermo commented about being Hispanic at school, “It’s not that I don’t want them to know, it’s just that I don’t need them to know. It’s not that I don’t like it [my ethnicity]; I like it, but when I don’t need it, I’m not using it.”

As the six participants shared about their own academic achievement, they self-described a dichotomy of achievement within the group, with four participants describing high academic achievement, and two describing lower achievement. The role of collectivism seemed to differ according to the level of academic achievement. For the four participants performing well (Roberto, Jaime, Carlos, and Guillermo), cultural collectivism was characterized as a strong and wide foundation, which provided a sense of security for their academic ascension. As Guillermo portrayed it in his earlier quote, this sense of security was present but subdued at school.

Jaime expressed that group discussion and socialization greatly aided his expansion of knowledge and should be included as regular classroom practice. For Carlos, relationships were expressed as an essential aspect of schooling and life in

general but more to meet emotional rather than academic needs. Roberto and Guillermo seemed to take similar views of friendships as pursuits for outside of school; however, Roberto expressed that his classmates did help spur him to higher achievement via “friendly competition.”

For Jose and Fredrico, who expressed more academic struggles, collectivism was portrayed as a need. Jose and Fredrico expressed a need for a school-based cultural collectivism of friends and classmates to help them in class and with homework, in part because their familial foundation may have lacked the perceived strength and width required for their own academic ascensions. These two participants did not express either in interviews or observations the necessary level of security to undergo the separation from the mainstream that may occur when individual achievement is realized.

## **Research Question 2**

How do gifted Hispanic male middle school learners describe their ethnic identity especially as it relates to their academic orientation?

Ethnic identity research characterizes its development in three identified stages: affirmation, exploration, and resolution (Phinney, 1996; Umana-Taylor, 2004). Data analysis indicated that a salient area of variance within the results was the area of ethnic identity exploration. Analysis in the area of ethnic identity included survey data along with the more purely qualitative interview and observation data. Initially, the variance in the area of ethnic identity exploration emerged from the results of the Ethnic Identity Survey (Umana-Taylor et al., 2004), which indicated high scores in affirmation and resolution for all participants but low exploration scores for Jose and Jaime (see Table 2).

As participants expressed their ethnic identity experiences and perceptions through the interviews and focus groups, a more nuanced portrayal of ethnic identity emerged that both affirmed the survey results and revealed differences. All participants communicated high levels of ethnic identity affirmation and resolution both from home and at school, which aligned with survey results. When asked during the focus group what it meant to be Hispanic, Jose responded that it meant, “Being better than everybody else.” Jaime responded, “Being Hispanic means having a rich culture,” and Carlos responded, “Being Hispanic is something you naturally are.” These responses were indicative of the general participant attitude toward their ethnicity, which was often expressed in a natural, positive and self-affirming manner. Additionally, the lack of participant response to inquiries about negative ethnic experiences, like discrimination, revealed that most of the conscious and relatable experiences regarding their ethnicity were either positive, as their earlier statements indicate, or neutral, such as statements about certain foods they ate.

The differences in ethnic identity were concentrated in the area of ethnic identity exploration. Interestingly, the differences in ethnic identity exploration aligned with the differences in academic achievement. The same four participants who indicated high academic achievement (Roberto, Jaime, Carlos and Guillermo) were the same four participants who expressed high ethnic identity exploration. The two participants describing lower academic achievement (Jose and Fredrico) also had lower expressed levels of ethnic identity exploration. There was also a difference in results from the data sources for Fredrico and Jaime, as Jaime scored low in the area of exploration on the

survey but related much more significant levels of exploration in his interviews, while the reverse was true for Fredrico.

The differences also highlighted the role of intentionality within the family with regard to ethnic identity exploration. The four high achieving students all expressed significant and direct cultural connections and experiences. Roberto, Guillermo and Carlos had traveled to Colombia and spoke often of their connectedness to family and culture there. Jaime spoke of his own personal studies of Mexican history and culture and his self-described immersion in a Hispanic neighborhood where he was consistently learning about his beliefs. Each of these families had made conscious decisions to promote ethnic identity and cultural pride. In turn, their children seemed to have internalized this exploration to some degree, which was manifesting in a self-perception that contained an expressed sense of security and history, which then served as the warp and woof for their expanding identities.

Jose and Fredrico, who were performing at a lower level than other participants academically, expressed their ethnic identity exploration in more cursory terms, describing it in terms of food or clothing styles. These more ephemeral associations without any expressed underpinnings of more enduring cultural aspects, seemed to render them more susceptible to outside characterizations by friends, teachers, or their own academic performance. Additionally, both of these participants depicted their ethnicity positively, but seemed at a loss to explain the reasons for their ethnic affirmations.

#### **Research Question 4**

How do gifted Hispanic male middle school learners describe their mastery and performance goals and how those goals relate to their academic orientations?



Research on goal setting often divides goals by their orientation. A mastery orientation is an intrinsic goal orientation prone to challenging tasks and includes the notion of learning for the sake of learning; whereas, a performance goal orientation is an orientation undertaken to avoid failure (Elliot et al., 2001; Pijares, et al., 2000; Witkow & Fuligini, 2007). Mastery goals tend to be more long-term in nature and have the tendency, as noted in the resilience section discussed earlier, to act as buffers against short-term difficulties (Dweck, 1986; Elliot et al., 2001).

As participants articulated their goals, the key identifier for a mastery goal orientation was the way in which the participant portrayed expansion. When participants described their goals in ways that resisted closure and had a quality of the continuous, then mastery orientation became evident. Roberto expressed a desire to study science because “there’s just so much more that we don’t know.” Carlos indicated that he wanted to master a variety of world languages, and what Guillermo could create with Legos extended *in aeternum*. Jaime’s long-term goal was graphic design and he indicated a need to study art, math, and science, which undergirded his future career with elements of expansion and integration of differing subject matter. Implicit in these depictions of mastery goals was a need for expansion and the notion of learning for the sake of learning. Additionally, all of the participants who had strong expansion elements in their goals were also performing well academically.

All the participants indicated a vision of a distant future including college, and all but Jose also indicated a specific career choice past college and sometimes more than one. Each participant had some vision or notion of long-term goals and no participant related a goal to the avoidance of punishment; however, participants did mention the

longer-term consequence of no college admittance for poor academic performance in the lower grades. What was less clear was how precise these long-term goals were. This lack of clarity may have been a function of participant age, as the maximum age for the study was 12.

For the two participants who were performing lower academically, there was less articulation about goals in general and a tendency towards closure in the depiction. Jose articulated no other long-term goal other than going to college, and Fredrico expressed a desire to play an instrument in a band or orchestra. The way he depicted this goal was that it was an end in itself; the goal stopped or closed at the job. There was no mention of underlying expansion elements in his goal, such as learning to play many instruments, styles of music or composition.

As participants portrayed them, goals with imbedded expansion elements, which transcended a singular destination such as a degree or job, propelled participants toward a continually increasing knowledge base and seemed to promote higher academic achievement than goals without such expansion elements.

### **Emergent Themes**

The research questions provided a valuable initial framework for the organization and interpretation of participant data. As data analysis progressed, other themes emerged from the data, which were related to the research questions, but also seemed to warrant a category of their own. These emergent themes were in keeping with what Maxwell (2005) termed “an inherent openness and flexibility” of qualitative research design that allows for “new discoveries and relationships” (p. 22). Language use emerged early as a participant theme, initially from Jose’s first interview where he revealed that a lack of

Spanish was hindering his communication with his mom. When three other participants made similar statements, the theme became significant and deeper investigations ensued.

Similarly, the theme of discrimination, or the perceived lack of it, emerged early in data collection. The significance of discrimination emerged from the lack of emphasis expressed by participants compared to its emphasis in the research (Ford et al., 2008; McHatton et al., 2007b; Phinney et al., 1990; Umana-Taylor et al., 2008), which indicated a need for further exploration.

The ideal school theme emerged as a focus group phenomenon, and seemed to come as a culmination of past participant discussions regarding academics, as well as a rare opportunity to garner a group consensus, albeit small, of gifted Hispanic male thought on best classroom practices.

### **Language**

Previous research focused on gifted Hispanics and language use has noted that gifted Hispanics tended to regulate their use of Spanish to non-gifted contexts, and viewed their knowledge of Spanish as an eventual vocational and occupational advantage (McHatton et al., 2007b). Supporting McHatton et al.'s (2007b) view, participants in the current study portrayed Spanish as a familial language and English as school language, and the participants with the exception of Jose, also mentioned the advantage of knowing Spanish in some future context, with college or career most frequently cited. Related to these findings was the expressed aspiration of participants to learn additional Spanish in order to improve familial communication. Jose, Guillermo, Fredrico and Jaime, who were all taking Spanish courses at the time of data collection, commented how it aided them in the nuances of their Spanish language use with family. Carlos, who was taking French at

the time of data collection, mentioned that he would like to take Spanish next year to increase his communication abilities with family.

Each participant also expressed either a higher comfort level with English compared to Spanish or an equal comfort level with both languages. The lack of intimacy with Spanish that the participants expressed supported research by McHatton et al. (2007a) where gifted Hispanics “acknowledged feeling less facile or intimate with their mother tongue” (p. 14). Where there was intentional familial language support, participants indicated a preference for English because of the increased likelihood of academic success nuanced English could bring. Where there was not as much intentional language support at home, English still took precedence because of the need to utilize English at school, especially in gifted settings, which were exclusively English and among other school-aged siblings in the home, who were also English speakers. However, this pattern of language usage sometimes resulted in a loss of language nuance between participant and parents, who were often just learning English.

Motivating the move back toward Spanish for many participants may have been a developing need within participants for more nuanced communication in all contexts, especially family contexts, where this need for communication coincides with a need for approval (Harter, 1999). Participant responses indicated they could express themselves well in English, which would have aided them in relation to other students and teachers. However, the need for deeper understanding and approval among family was hampered by a lack of nuanced language ability, which was being mitigated by the study of Spanish at school. With Spanish as the language of family, and English the language of school, middle school Spanish class seemed to introduce the first notions of reunification for a

language separation that had been strictly adhered to by participants since early elementary school. For many participants, these Spanish classes also held the promise of an increased closeness within the family.

### **Discrimination**

Discrimination is defined as “referring to beliefs, attitudes, and practices that denigrate individuals or groups because of phenotypic characteristics or ethnic group affiliation” (U.S. Department of Health and Human Services, 2001, p. 38).

Discrimination arose as a theme from data analysis due to the consistency of participant responses on the topic. When asked pointedly and recursively about discrimination directed at them, especially at school, the response by all participants was always a direct “no” without elaboration. Two participants indicated feelings of indignation at ethnic mislabeling by others, such as when others equated the term Hispanic with Mexican. Even in these two commentaries, at no point did a participant relate an instance of being singled out by a teacher or someone at school. The elaboration the participants provided around this theme of discrimination related more to the affirmation of their individuality received in school settings than any denigration experiences.

All participants portrayed school as a place where equality was paramount in their experiences. In relation to this equality expressed by participants, Fredrico shared, “I feel everybody looks at me for who I am.” Guillermo portrayed his equal treatment at school as a daily, matter of fact occurrence:

Well, I’m the same as any other student, but I can think in a different way and I’m more advanced. And I don’t see why the teachers and stuff would treat me differently for that. I’m just another one of their students.

Guillermo's brother, Roberto, elaborating on the equal opportunities he perceived, pointed out that schools placed a high value on performance:

Because it's not really where you're from; it's about what you do. Like, you look at people, like Steve Jobs, and he, he was from a lower class family and he turned out rich. So, it's not really where you start; it's where you finish.

McHatton et al. (2007a) also reported that the focus of the gifted Hispanic identity in school seemed to be one based in their academics, especially their giftedness, while ethnicity was regulated to a more secondary role. They also questioned whether gifted Hispanics engaged in a conscious downplaying of ethnicity in favor of academic performance, or because of the affiliation with other gifted students. Guillermo spoke of the role of his ethnicity with classmates:

It's not that I don't want them to know [about my ethnicity], it's just that I don't need them to know. It's not that I don't like it; I like it, but when I don't need it, I'm not using it.

Guillermo expressed a consciousness about his ethnicity and its purposeful, background placement during school. This conscious, secondary placement of his ethnicity within his school identity supports the similar assertion by McHatton et al. (2007a) regarding the subordinate placement of ethnicity in the school identity of gifted Hispanics. Moreover, the role of giftedness in the identity of all participants may have been significantly influenced by enrollment in primarily gifted and advanced settings, in which all participants had been enrolled since third grade. This placement in setting where all of the students were gifted or advanced may even have encouraged the elevation of giftedness in participant identity.

## **The Ideal Classroom**

The exploration of participant work styles during the interviews and observations led to discussion of the ideal classroom during the focus group. Upon further analysis, the responses of the participants at this final stage of data collection led to the emergence of the ideal classroom as a theme and a source of potential best and worst practices from a gifted Hispanic male perspective.

In regard to what not to do, “busy work,” work that just “occupies us,” and “worksheets that are completely useless,” were all terminologies participants utilized to disparage this type of assignment. Given Roberto’s want of continuous expansion, he expressed, and others concurred, the frustrations at the loss of time these work-sheet types of assignments bring into the classroom, time that participants noted could be better used as time for intellectual growth or challenge.

Harmony and respect among teachers and students was another aspect of the ideal classroom expressed by participants. Participants portrayed ideal classrooms as places where students were “getting along” and teachers were direct and non-enigmatic in response to student questions, as reflected in Carlos’ statement: “I think if I’m asking a question it’s because I couldn’t get it on my own. I think they [teachers] should actually help you more.” The harmonious, respectful classroom would also be one where students could, according to Fredrico, “do their work and not interrupt the teacher.” Harmony was not only valued for its own merit but also for the resultant increase in efficiency for everyone. In both the want of challenge and want of harmony, increased efficiency was a significant outcome for participants. They even noted that efficiency in the classroom

meant less homework outside of it and depicted homework as the by-product of an inefficient classroom.

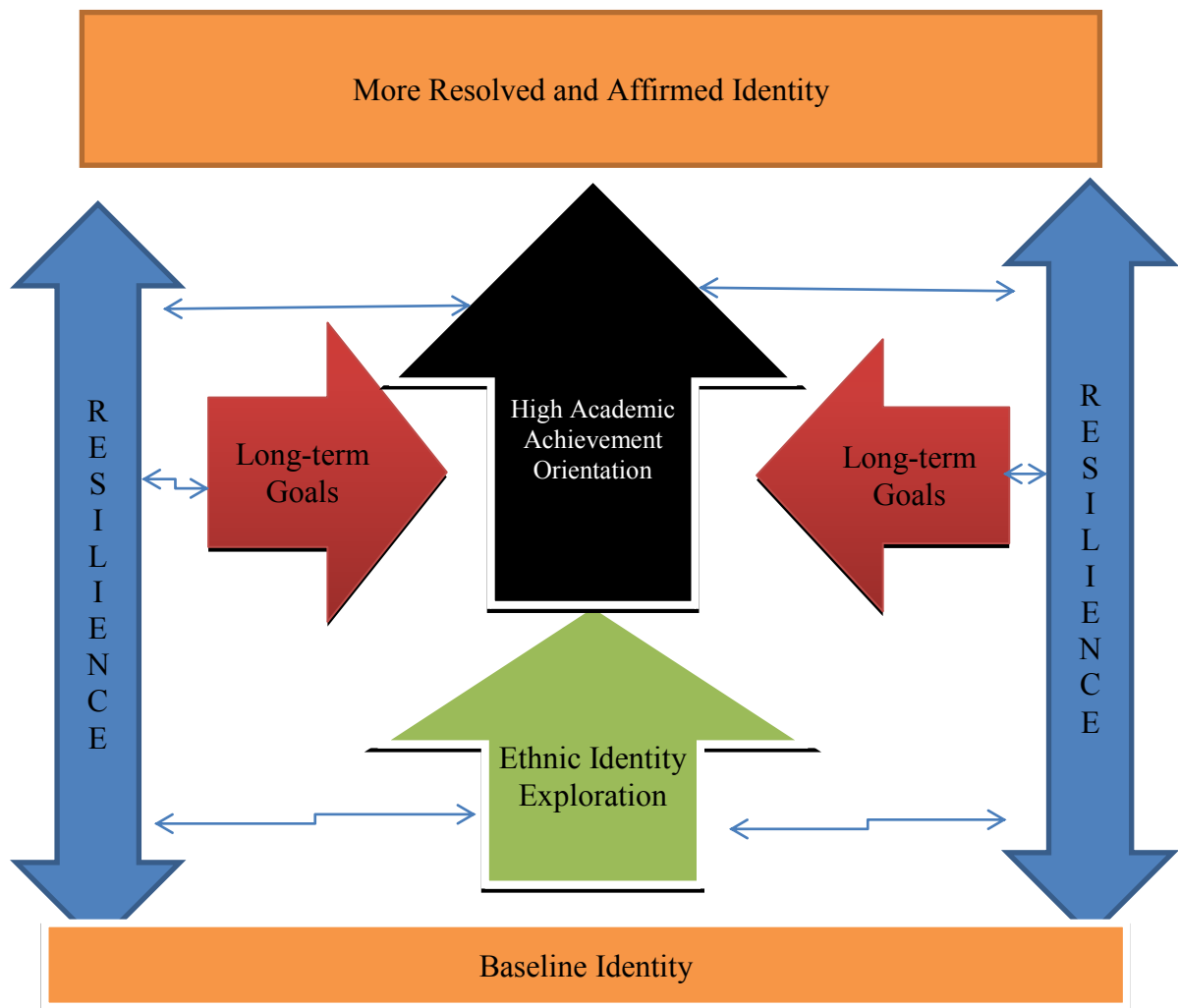
Another significant component of the participants' ideal classroom was meaningful discussion, which like the need for harmony, nodded toward the collective element in the participants' orientations. Working in cooperation with others through groups and discussions was viewed as preferable to working individually to solve problems. Discussion also incorporated the aforementioned need for challenge, as meaningful discussions were portrayed in problem solving terms. Jaime defined discussion by suggesting a question be posed to the class then, "get into a discussion about it and at the end we find the answer." His definition suggests both the importance of the challenge and the eventual return to harmony (the right answer) once the discussion concluded.

Though collective elements like harmony were of prominence in participant definitions of the ideal classroom, the role of the individual also found an emphasis. Participants portrayed this emphasis on the individual through the use of differentiated instruction, as the ideal classroom was portrayed as a place where individualized instruction was the norm. In advising the teachers of Hispanic students, Roberto admonished them to "worry more about the single student as opposed to [the group]." Carlos added, "Well, because everyone's different; different people learn at different paces." Jaime's suggestion was more systematic, suggesting math classes should add additional levels, which would result in more individual student needs being met. Jaime reasoned, "because people learn at different speeds and one [math] should be a slower class and [also have] the more advanced classes."



### Model of Thematic Interaction

This graphic model (see Figure 1) of the thematic interaction is presented as a progressive and interactive process of identity development moving up a center axis with the themes of ethnic identity and high academic achievement orientation leading to a more resolved identity. Informing the high academic achievement orientation are long-term goals, and informing and interacting with the entire identity formation process is resilience, which is depicted as pillar type structures along the sides, interacting with all thematic areas.



*Figure 1.* The major thematic elements of the study (academic orientation, ethnic identity development, goals, and resilience) are depicted progressively in the overall process of identity development.

### **Data Analysis Summary**

Adolescence has been characterized as a period where the interrelated processes of exploration and reconciliation begin to form the nexus of an identity (Erickson 1968; Marcia, 1994). What became increasingly clear throughout data collection and analysis was that each of the participants was engaged in ongoing exploration and reconciliation as they took established, collective foundations such as family life and elementary school experience into the newer setting of middle school. This ongoing identity formation provides a backdrop for the data collected and analyzed, as all of the participants were involved in this process of finding out how best to define themselves through the integration of information from different sources and environments.

Salient in the analysis were elements emerging from the research questions, with collectivism emerging as significant for all participants, but manifesting as either preference or need depending upon the level of academic performance. An emphasis on ethnic identity exploration also emerged as a potentially positive influence on academic achievement, and intellectual curiosity portrayed as expansion also figured prominently in participant portrayals of goals. Intersecting with these major themes was resilience, portrayed bidimensionally by participants as simple definitions including qualities such as perseverance and creativity, alongside success definitions of either one component (I try hard) or two (I try hard/And I succeed).

Two of the three emergent themes, language and discrimination, emerged from participant portrayals, and both themes seemed to rest under the larger umbrella of

acculturation. Placement in gifted settings seemed to have exerted some influence on participant perceptions of language use and discrimination in school context. The final emergent theme of the ideal classroom, reiterated the need for collective and individual balance in individually challenging work and meaningful group assignments. The ideal classroom theme revealed a slightly different set of insights from the individual interviews, as the collective environment promoted a clearer consensus of participant perceptions of best practices.

## CHAPTER FIVE: DISCUSSION

This Interpretive Phenomenological Analysis (Smith et al., 2009) explored the academic orientation, ethnic identity and goal setting behaviors of gifted Hispanic adolescent male students in the middle school setting. Through analyses retrieved from survey, interview, observation and focus group data, participant portrayals of their experiences were examined both as understandings unique to the individual and in light of their interconnectedness with extant research. These insights yielded practical implications that could improve the academic achievement of the gifted Hispanic male.

Like a comprador in a rarely visited island clutch, this research design facilitated a set of inland forays to participant identities. The findings make *précis* a problematic endeavor, given the unique shapes and turns found both within participant identities and at their contours. Even with this individuality, common elements did result from the research design and these elements pointed to the significant role resilience plays within the identity. The participants who fared the best academically seemed to have salient fortification mechanisms strengthening and protecting their identities. A great deal of this strength seemed derived from the degree to which participants had explored their ethnicity, from personal definitions of success and from the expansive nature of their long-term goals.

These findings become more significant in light of research indicating Hispanics underachieve in schools and in gifted programming at higher rates than other ethnic groups due in part to the strength within their academic motivations (Alfaro et al., 2006; Flores-Gonzalez, 2002; Ford et al., 2008; Umana-Taylor et al., 2009). The potential of the findings to not only attract but retain more Hispanic learners to gifted programming

may depend on the ability to make teachable the demonstrated inner strengths of participants.

It is important to view the findings of the study in light of the academic divergence that developed among participants during and just after data collection. Roberto, Guillermo, Carlos and Jaime continued to maintain credible academic records and placements, while Jose and Fredrico experienced negative academic consequences because of their scholastic performance. Jose, a sixth-grade participant, was removed from gifted programming due to poor academic reports but was allowed to remain in the STEM (Science, Technology, Engineering, and Mathematics) program. Fredrico, a seventh-grade participant, was removed from STEM programming but was allowed to remain in non-STEM gifted classes.

Retrospectively, this cantonization along academic lines into the four high performing and two lower performing participants was highlighted throughout the data collection process by their respective responses and observed behaviors, especially within the four major thematic areas of academic orientation, ethnic identity, resilience and goal-setting. However, there were also unified thematic trends across all participants, both within the four thematic areas and in some emergent themes as well.

What follows is a discussion of the study findings, beginning with the overall results presented in light of the four thematic areas addressed in the research questions: academic orientation, ethnic identity, resilience, and goals. Afterwards, the findings are discussed in light of the emergent themes of language, discrimination, and the ideal classroom developed during the course of data collection and analysis. At several points in the process, significant intersections were made with regard to extant research, and

these intersections are discussed thematically in light of the research questions and emergent motifs.

Using the findings and the interactions with research as a basis, several implications are discussed with regard to school policy and classroom practice. The discussion of the findings concludes with the limitations of the study and recommendations for further research.

### **Findings from the Research Questions**

The great facilitator among the four principle areas addressed in the research questions was resilience. Resilience served as both a stand-alone construct that participants were asked to define for themselves, but also interacted and influenced the other major thematic frames. As participants portrayed it, resilience seemed to strengthen and undergird high academic achievement orientation, and seemed significantly influenced and strengthened by a well-explored ethnic identity and a clear set of long-term goals.

Another salient factor in the findings, also closely related to resilience, was the amount of intellectual curiosity participants expressed. The more participants portrayed the development of their intellect as a major component of their goals, as opposed to just the achievement of an end, the more likely they were to be experiencing high academic achievement.

### **Academic Orientation**

The research design prompted participants to express how Hispanic collectivism manifested in their academic orientations. The participant responses and behaviors indicated that the high achieving participants viewed collectivism as a quiet source of

strength usually derived from familial relationships. The high achieving participants indicated no aversions to collectivist settings at school and sometimes indicated preferences for group work, such as discussions. The dividing issue among the high achieving and lower achieving participants was the motive for collectivist tendencies. The lower achieving participants expressed their notions of collectivism in terms of need, not preference. Fredrico and Jose expressed a reliance on the abilities of other students that seemed a necessary supplement to their own abilities. When working with others or seeking help from others, there was a freedom element missing in the choice for Jose and Fredrico, indicating a possible self-doubt about their abilities to complete the work on their own.

### **Ethnic Identity**

Ethnic identity results triangulated from survey, interview and observation data indicated the importance of ethnic identity exploration for participants. Researchers have divided ethnic identity into the component parts of affirmation, exploration, and resolution (Supple et al., 2006; Umana-Taylor et al., 2004). All the participants expressed high levels of resolution and affirmation across the different forms of data collection; however, the area of ethnic identity exploration showed significant differences among participants in survey and other data forms. The higher achieving group indicated significant explorations of cultural and historical aspects of their ethnicities, including travel to familial countries of origin for three of the four high achieving participants. The lower achieving group expressed only cursory understandings of culture and ethnicity, usually limiting depictions of culture to food and clothing with little elaboration.

Less clear in the results were the intentions of participants to continue the exploration process and the amount of expressed identity resolution and affirmation within the group. The high achieving group indicated that contact with family in other countries was ongoing and that travel to the countries would continue. Fredrico, in the lower achieving group indicated that he hoped to travel to Mexico in the near future with his father. These ongoing explorations could potentially have significant effects on the overall ethnic identity of the participants.

While all the participants received high scores on the survey for ethnic identity resolution, qualitative data collected indicated that participant identities were resolving at different rates, but little indication of a settlement was suggested by the data. Participant age ( $M = 11.5$ ) and grade levels ( $M = 6.6$ ), may have informed the amount of resolution expressed. For most participants it seemed as if their responses to the questions were their first opportunities to speak consciously and directly about their ethnicity outside of their family. As previous results indicate, many participants seemed to have explored their ethnicity before this study, but how conscious they were of the motives for that exploration is unclear. What was portrayed clearly was that the ethnic identity formation process was ongoing for participants.

Affirmation was also rated as high among all participants, meaning an ability to self-affirm their ethnicities, but the question remains as to what they were affirming. The amount of exploration undertaken by the four higher achieving participants meant they were affirming both current aspects of their ethnicity along with a cultural past that had endured into the present. The two lower achieving participants also expressed high levels of affirmation, but when considered in tandem with their cursory portrayals of ethnic



exploration, they seemed to only be self-affirming more superficial aspects of Hispanic culture, such as clothing and food. It would seem difficult for these participants to self-affirm deeper, cultural aspects of their ethnicity because they had no expressed knowledge of them. An important ethnic identity issue identified by the results was a lack of cultural knowledge as a hindrance to identity development, which may be important to distinguish from cultural deficiency.

### **Resilience**

The demonstration of resilience of participants came in two primary forms. The first was via direct definition by participants in relation to what made them resilient, and the second was through the interaction of resilience with the other primary thematic areas: academic orientation, ethnic identity and goals. When participants were asked to define their own resilience directly, perseverance, resourcefulness, and high levels of motivation were the most often identified attributes.

It was when participants portrayed resilience in its relationship with other thematic aspects of the study that it seemed to show a greater influence. As related to academic achievement, resilience seemed to have a positive or negative effect based upon the way participants defined success. The high achieving participants included two components in their definitions of success: a trying component (trying hard) and a completion component (finishing or succeeding). Lower achieving participants defined success in one dimension with only a trying component (I try my best) and no corresponding component of completion.

As discussed previously for ethnic identity, when intentional explorations of ethnicity had been undertaken by families, it seemed to help build a stronger expressed

resilience in participants, providing them with a security that came from connectedness to enduring cultural ideas and practices that went back generations and would continue well into the future. Their connectedness to the continuity of their culture seemed to promote a greater faith in their own ability to persevere.

The interaction between resilience and participant expressions of goals manifested in the participant's ability to articulate clear, long-term goals. The participants in the high performing group all expressed long-term goals and related that these goals were positively influencing current behavior. In effect, the goals served as forms of resilience in their provision of a long-term vision, which helped participants surmount short-term difficulties.

## **Goals**

Aside from the ability of long-term goals to serve as resilience mechanisms helping to surmount short-term difficulties, the key component to emerge from the examination of the participant goal expression was expansion. When participants in the higher achieving group spoke of future visions and endeavors, their portrayals contained elements of expansion. Expansion elements were words or phrases that resisted closure and inferred a level of intellectual curiosity that went beyond achieving a single end, such as a degree or job. Roberto's goal expressions contained specifics (doctorate from M.I.T.), but he also expressed his love of science because of the potential new discoveries within the field. Roberto and other high achieving participants' portrayals of goals included both specific ends, as well as desires to expand in the field beyond those ends. For the lower achieving participants goals were expressed more as an end with little in the way of expansion. Lower achieving participants tended to express goals in

straightforward, sum oriented language, such as “I want to go to college” or “I want to play in a band” with little elaboration beyond the statement of the goal.

Notably, participants whose goals contained expansion elements and were also performing well academically, expressed high levels of ethnic identity exploration along with high levels of expressed resilience.

### **Findings from the Emergent Themes**

During the course of data collection and analysis, emergent themes were illuminated, which while related in nature to the four principle areas identified in the research, showed enough variation in character to warrant their own category. These emergent themes were (a) language, (b) discrimination, and (c) the ideal classroom. The following sections discuss the participant findings and interpretive inferences in light of these emergent themes.

#### **Language**

Participants portrayed their language use dichotomously, with Spanish as the language of family and English as the language of school. Each participant also expressed either a higher comfort level with English compared to Spanish or an equal comfort level with both languages, and since data collection took place within school settings, every participant chose to use English over Spanish for the interviews and focus groups when given the choice between both. Additionally, Jose and Fredrico indicated much higher comfort levels with English than Spanish, while both expressed that they were taking Spanish classes to improve familial communication. With the exception of Roberto, each participant expressed this same sentiment of either currently taking Spanish or wanting to take Spanish to increase communication abilities at home.

With middle school being a time of increased reliance on verbal nuance within conversation (McHatton et al., 2007a), the participants' need for deeper understandings and approval among family (Harter, 1999) may have been hampered by a lack of nuanced language ability. This need for more nuanced family communication was being addressed by the study of Spanish at school. With Spanish as the language of family and English the language of school, middle school Spanish class seemed to be bridging a language dichotomy that had been in place since early elementary school. Moreover, the language dichotomy may have been exacerbated for these gifted Hispanic males by their placement into majority accelerated/gifted elementary environments where ethnicity, including language, may have been subjugated to family environments in favor of more purely academic attributes for school environments. In effect, middle school seemed to mark a change in the pedagogical purpose for school language instruction, as it took on the role of teaching more nuanced Spanish to Spanish speakers.

### **Discrimination**

As students were asked pointedly and repeatedly about discrimination at school their responses consistently indicated that they were not experiencing discrimination; moreover, almost every response was a direct "no" without elaboration. The only indignation expressed on the part of participants related to discrimination regarded the misinterpretation of "Hispanic" to simply mean "Mexican." However, even in these expressions, participants were expressing the indignation generally and not as personal experience.

Participants portrayed school as a place of quotidian ethnic equality with only higher expectations than other non-gifted students portrayed as a somewhat benign form

of discriminatory practice. This academically oriented discrimination was depicted as part and parcel of the gifted label. High demonstrated academic performance and high expectations were portrayed as going hand-in-hand for most participants.

Through their responses, or lack of response to inquiries about ethnic discrimination, participants seemed to suggest that at school, giftedness may have a more primary placement in their identity than ethnicity. This primary role of giftedness in their identities may have been significantly influenced by elementary placement in primarily gifted and advanced settings, given that the mean grade placement into gifted settings for the sample was 3.1 (see Table 3).

Table 3

*Participants by Age, Grade of Gifted Program Entrance, and Years as a Gifted Student*

Participant	Age	Grade of Entrance into Program	Years as a Gifted Student
<b>Carlos</b>	11	3 <sup>rd</sup>	3.5
<b>Jose</b>	11	4 <sup>th</sup>	3.5
<b>Guillermo</b>	11	4 <sup>th</sup>	3.5
<b>Jaime</b>	12	3 <sup>rd</sup>	4.5
<b>Fredrico</b>	12	3 <sup>rd</sup>	4.5
<b>Roberto</b>	12	3 <sup>rd</sup>	5.5
<i>Mean</i>	<i>11.5</i>	<i>3.5</i>	<i>4.1</i>

## **The Ideal Classroom**

The notion of the ideal classroom was initially a focus group phenomena resulting from a discussion of best and worst classroom practices among participants during the final stage of data collection. The rare research opportunity to have educational preference and practice discussed by a group made up of only gifted Hispanic middle school males produced a late breaking theme, further solidifying data collected in regard to academic orientation.

Clearly, work characterized as “work that just occupies us” and “busy work” was disparaged by the participants, even to the point of being termed “completely useless.” Returning the role of expansion within the goal-setting behaviors of many participants, there was an agreed upon preference for challenge and intellectual growth in the classroom activities.

Aside from the want of challenge, participants also expressed a want of harmony and respect among teachers and students, with special attention to the teacher’s role as instructional facilitator. The participants expressed frustration at enigmatic responses from teachers, when participants believed that approaching the teacher was often a last resort. They did not like receiving yet another inquiry in reply to their inquiry; they expressed a need for answers.

The participants also wanted efficiency. Efficiency for participants meant a focus on individualized instruction, so that everyone could work at their own level and no one was left waiting on others to catch up. Additionally, homework was portrayed as the by-product of an inefficient classroom. However, despite this seeming focus on the individual through differentiated instruction, the participants also noted the importance of

group discussion, especially discussions that promoted problem solving. With this dual focus on individualized instruction alongside a more collectivist-oriented activity like group discussion, participants seemed to portray their desire for a balanced approach in the classroom. The balance they sought valued both the individual and the group, while always keeping intellectual challenge at the forefront.

### **Intersections with Research and Theory**

An important theoretical lens for reviewing the ties between the study results and existing literature is the lens of identity development. As this study involved middle school students, fluctuation and change were common elements among participants. Though participants were clear and often definitive in their answers, it was also communicated that as middle school students, the question of “Who am I?” was still being answered.

As pioneering research in the area of identity development highlights, the desired outcome for an individual identity is an integration of family, cultural, spiritual, and academic components into an achieved identity (Erickson, 1968; Marcia, 1993). As this same research suggests, adolescence as a stage in identity development is rife with identity watersheds and even crisis. What the intersections of research and qualitative findings of this study suggest is that while each of these gifted Hispanic males were of similar demographic, they each cut a distinctive and individualized pathway through the somewhat imposed confines of existing research.

### **Research and Four Principle Themes**

The following section discusses the particular pathways of participants through the major thematic elements raised by the research questions: academic orientation,

ethnic identity, resilience and goals. Interspersed within the discussion are the places where those pathways intersect with current research.

**Academic orientation.** During data collection I asked participants to characterize their academic orientation in terms of collectivist and individually oriented elements. LaRoche and Shrieberg (2004) reported that the school emphasis on individual achievement often conflicted with the more cooperative and collaborative values found in the homes of Latino students. Similarly, earlier related research reported that Hispanic students often performed better academically in group or collectivist settings (Bos, 1996; Reyes, 1992). The findings of this study with regard to the academic orientation of the gifted Hispanic male participants indicated that the students who expressed an ability to cultivate an individualistic achievement orientation fared better academically than those with more expressed collectivist tendencies.

These results underscore the role of home to school consistency in the research findings of LaRoche and Shrieberg (2004), but not always in ways that reinforced collectivism. Roberto and Guillermo, the two siblings in the study, came from a home where there were four siblings, and all were gifted. A predominant cultural characteristic of the home was giftedness, so the gifted environs at school may not have presented significant inconsistencies with the home environment. In other words, there was potentially a great deal of consistency between the home and school environments for these two students, confirming the nature of LaRoche and Shrieberg's findings, that home to school consistency was important, without confirming the cultural particulars.

Carlos and Jaime, who also were performing well academically, expressed strong preferences for socialness (collectivism) in school but socialness was not necessarily



equated to collaboration in work. Jaime and Carlos' collectivist needs may have been met through friendships outside of purely working environments, examples being Jaime's penchant for talking and joking once his classwork was completed, and the variety of friendships Carlos seemed to cultivate in his various classes. These two students seemed to have crafted a system where their collectivist needs could be met, while maintaining primarily individualist tendencies within their academic work.

Fredrico and Jose expressed the highest need for collectivism with regard to collaboration on the work, supporting earlier research underscoring the potential importance of working in groups for Hispanic students, as group work often accurately reflects the Latino home environment (Bos, 1996; LaRoche & Shriberg, 2004; Reyes, 1992). However, there were no expressed indicators that these two students came from homes where collaboration was the emphasis. To the contrary, these two participants seemed to portray home situations that were overly independent, which may have influenced their expressed neediness for group work at school. Fredrico said, "My family doesn't really help me," and Jose portrayed a language barrier between his mom and him that hindered comprehensive communication. For these participants, school may have offered the only authentic collaboration opportunities currently available.

The larger concern for Jose and Fredrico is that their respective removals from gifted and STEM programming just after data collection concluded constitute what Zabloski (2010) termed a "middle-school event." Zabloski characterized a "middle – school event" as an event where a personal or in-school event during the middle school years later influenced a decision to drop out of gifted programming. Jose remains eligible for re-entry into gifted programming after a one-year period, and though Fredrico

underwent a change in schedule mid-year, he currently remains in gifted programming. Clearly, these two participants were showing signs of a potential “middle-school event” within their first year and a half of middle school, with no evident signs of reversal.

**Ethnic identity.** In a foundational study of gifted children, Terman (1925) longitudinally examined the intelligence, heredity, home life and academic tendencies of 1,500 participants and found them to be more emotionally stable than their non-gifted counterparts. Zou and Tao (2001) analyzed Terman’s (1925) interview data through the lens of Marcia’s (1993, 1994) stages of identity commitment and found that the more committed a child was to an identity, the more likely high achievement would result. Added to this resolution of identity, Umana-Taylor et al. (2004) added the component of identity affirmation, or being able to self-affirm aspects of ethnic identity. Given these longstanding links between identity and achievement, discerning participant placement along the ethnic identity continuum seemed a critical factor in their academic achievement.

Previous research relating ethnic identity to achievement orientation found high reported levels of ethnic affirmation to show a positive effect on school performance (Supple et al., 2006). The overall results of this study support this finding, as every participant reported a high level of ethnic affirmation, and four of the six were performing well in high level classes. It is also notable that every participant reported high levels of ethnic identity resolution on the survey, which research also highlighted as an indicator of high achievement (Herbert & Kelly, 2006; Zou & Tau, 2001). However, the indicators of high ethnic identity affirmation and resolution reported by all

participants did not account for the two participants (Jose and Fredrico), who were performing at lower levels academically.

For the differences between these two students and the other higher achieving participants, the remaining area of ethnic identity exploration was examined. In two separate studies, Umana-Taylor et al. (2008, 2009) found significant links between ethnic identity and self-esteem, with self-esteem viewed as a significant aid in overcoming a variety of difficulties, including those of an academic nature. What Umana-Taylor et al. (2009) found was that of all areas of ethnic identity, only a strong sense of ethnic identity exploration was predictive of a growth in self-esteem. In other words, ethnic exploration was a gateway in the identity development process with the ability to fortify an identity so that it could progress into a more resolved and self-affirmed state, which potentially holds the greatest benefits (Erickson, 1959, 1968; Hebert & Kelly, 2006; Marcia, 1993, 1994; Zou & Tau, 2001).

The results of the current study concur with the previous depiction of ethnic exploration as a propulsion element in the ethnic identity process. The four higher achieving students had all undertaken purposeful explorations of their identities, whether a trip to the familial country of origin or a study of cultural history. As these participants portrayed these activities, they seemed to lend a strong sense of the enduring to the participant's sense of selfhood, strengthening it for current and future endeavors. Ethnic identity exploration seemed to have a positive impact on their self-esteem, lending support to the work of Umana-Taylor et al. (2009).

For Jose and Fredrico, their expressed levels of ethnic exploration were more cursory, with mention of clothing styles or food prevailing. These two students, who were

faced with documented academic challenges during data collection, seemed to be looking for outside sources of help to meet the challenges, which may have been a sign of a lack of inwardly generated self-esteem. Moreover, the lack of exploration they portrayed may have left them in an unknowing state of diremption from the more enduring elements of their culture and history. Theoretically, such knowledge might have provided them the growing sense of self-esteem, which has been shown to aid in the surmounting of academic difficulties (Umana-Taylor, et al., 2008, 2009).

**Identity trajectories.** There is contradiction in the extant literature on the trajectory of ethnic identity. Pahl and Way (2006) contended that ethnic identity settles in late adolescence with fluctuations in identity exploration occurring during transition periods in schooling, such as moving from elementary to middle school. Azmita and Syed (2009) posited that ethnic identity continues to be explored into late adolescence and beyond, rendering it more of a life cycle trend than an adolescent phenomenon. Azmita and Syed found agreement with Pahl and Way, in that ethnic identity increases during transition periods in schooling.

Participant portrayals of ethnic identity exploration concur with the agreed upon fluctuation noted in the research for periods of transition (Azmita & Syed, 2009; Pahl & Way, 2006). Most participants portrayed their identity positively, but still developing, which may be significantly connected to the relative youth of the participants (mean age = 11.5). Those who had traveled wanted to travel more, and several participants expressed strong desires to meet and know more relatives, who were often in other countries. This desire seemed especially prevalent in the Colombian participants. Fredrico, who had expressed only cursory ethnic identity explorations, indicated his

excitement about an upcoming trip to Mexico with his dad. During the six months of data collection for these 11 and 12 year olds, there were no indications of slowing ethnic explorations.

With regard to identity trajectories, participant age and a six-month data collection window made long-term projections problematic. However, the resolution of ethnic identity seemed to be expressed as a function of intellectual curiosity, which was often portrayed through participant goals and future visions (Pijares et al., 2000; Witkow & Fuligini, 2007). For the participants who placed the element of expansion centrally in their future visions, ethnic identity seemed plotted for a lifetime trajectory. In essence, their continued attempts to satisfy their expansion needs, which include an expanding ethnicity, may eventually serve as not only identity expansions but as ways to continue to affirm their identities, and identity affirmation has been designated as the final stage of ethnic identity development (Umaña-Taylor, 2009). For participants with little to no expansion elements in their visions, ethnic identity may resolve more quickly due to a reallocation of intellectual abilities elsewhere, simple intellectual estivation regarding identity exploration, or other combinations of similar elements.

**Resilience.** Recent research has highlighted the ability of resilience to act as a buffer against difficulties in the present while simultaneously continuing its development influenced from a multitude of interactions in areas including genetics, life experience, social and cultural settings (Davydov et al., 2010; Herrman et al., 2011; Ungar et al., 2007). The results of this study support this interactive view of resilience, as its influence was expressed by participants throughout the identified thematic elements of the study.

Resilience bolstered high academic achievement, as students noted the processes involved in overcoming and continuing to overcome issues like procrastination and significant grade fluctuations due to late work. Students who had successfully found more effective strategies for these difficulties expressed a resilient orientation toward success that reflected an “even higher level of functioning with the acquisition of new skills, knowledge and confidence” (Herrman et al., 2011, p. 262), confirming how resilience is often built through its contextual interactions (Davydov et al., 2010; Ungar et al., 2007).

Resilience also interacted with the ethnic identity development of participants, as evidenced previously in the noted connections between highly expressed ethnic identity and high self-esteem (Umana-Taylor et al., 2008, 2009). High expressed levels of ethnic identity exploration, resolution and affirmation also seemed to serve as forms of resilience for participants, demonstrated by the strength participants assigned to their familial connections. This resilience from ethnic identity seemed especially strong for the Colombian participants who had all visited the country, and for Jaime, who seemed to draw much strength from residing in an all-Hispanic neighborhood. For these higher achieving students the combined ecologies of their ethnic backgrounds and gifted placements may have created unique resilience adaptations that allowed them to use their ethnicity as a quiet strength in an academically challenging environment (Ungar et al., 2007).

Research has also broken resilience down into components and mechanisms (Cabrera & Padillo, 2004; Kitano & Lewis, 2005; Lopez & Sotillo, 2009), and participants expressed specific behaviors that seemed to aid in building resilience. One

example was the way participants defined success. The participants who defined success with both an effort component (trying hard) and a completion component (succeeding/finishing), created a mechanism of resilience, which was transferable, as well as interactive across differing circumstances (Davydov et al., 2010; Kitano & Lewis, 2005; Lopez & Sotillo, 2009). Prominent in participant employment of this mechanism was its use in school projects, which were a challenging element for most participants across many subject areas. Participants seemed to portray evolving strategies for succeeding in this area, including intentional efforts at starting earlier and focusing on project content in advance of project appearance. In the characterizations of these evolving approaches, participants were demonstrating how their focus on the end result often drives them to find a better means of completion.

**Goals.** Research often ties resilience to the theme of goals, especially as the nature of a goal can intercalate it with resilient qualities. Findings from this study indicated a significant interaction among the resilience and goal-setting behaviors of participants. At a basic level, research portrays goals with two differing orientations. Mastery goals are formulated to attain success and often have qualities that indicate a want of learning for the sake of learning, whereas performance goals are generated to avoid failure (Elliot et al., 2001; Pijares et al., 2000; Witkow & Fuligini, 2007). Researchers note that those with mastery goals tend to choose more challenging work and show higher degrees of perseverance when faced with adversity (Dweck, 1986; Elliot et al., 2001). The mastery goals become resilience mechanisms or usable tools in overcoming adversity (Cabrera & Padillo, 2004; Kitano & Lewis, 2005; Lopez & Sotillo, 2009).

The participants who expressed mastery goals, or goals with the inherent quality of learning for the sake of learning, also tended to portray a stronger likelihood to overcome academic difficulties, supporting the connections between resilience and mastery goals (Dweck 1986; Elliot et al., 2001) and the utilization of specific resilience mechanisms in specific contextual and cultural settings (Kitano & Lewis, 2005; Ungar et al., 2007).

No participant expressed extensive performance goals other than mentions of upcoming assignments; however, there were notable discrepancies between the higher and lower achieving participants in the nature of the long-term goals. Long-term goals served a similar function in terms of their roles as resilience mechanisms, as participants with clearly articulated and somewhat specific goals demonstrated and expressed better academic direction in the present setting than did those with less articulated long-term goals, lending further support to the resilience building abilities of long-term goals, as well as to the positive relationship between mastery-type goals and self-regulation (Dweck, 1986; Elliot et al., 2001).

Another factor in the mastery goals articulated by the participants was the element of expansion. As middle school students, participants did not always directly state that within their goals that they were learning for the sake of learning; however, the way in which they expressed their motive for their eventual task, be it world languages or Legos, signaled the nature of the goal. Mastery goals were always portrayed with a motive for expanding present understanding, supporting previous research linking mastery goals to the improvement of self-efficacy (Pijares, et al., 2000; Whitkow & Fuligini, 2007),



whereas, participants without long-term mastery goals stated their goals with more definitive endings, such as “I want to go to college.”

### **Research and the Emergent Themes**

There were three major emergent themes resulting from data analysis and warranting their own categories: language use, dissemination, and the ideal classroom. While language use is often placed under the larger research umbrella of acculturation, the way participants portrayed discrimination seems to show links to acculturation as well. This section discusses the findings for language use and discrimination in light of acculturation, as well as more individualized, research-based results for each emergent theme. Lastly, the section briefly discusses the theme of the ideal classroom, a mostly focus group phenomenon, in light of research recommendations for diverse gifted classrooms.

**Acculturation and language use.** Acculturation has been defined as the adaptation, or lack of adaptation, that occurs when contact is made between individuals or groups of different cultural backgrounds (Berry, 2003). Language use or more specifically the immigrant shift in language use from their native language to the predominant language of their new culture, is often placed under the research umbrella of acculturation (Lopez, 2011; McHatton et al., 2007a; Ruiz, 2009; Xiaohui, et al, 2009). Within the U.S. Hispanic population, a generational shift toward a U.S. oriented acculturation including English language use over Spanish use has been identified (Hanson, 2006; Portes & Schauffer, 1996; Sole, 1982).

The results of this study support this identified shift toward English use, as four participants (Roberto, Jaime, Guillermo, Carlos) indicated an equal comfort level with

Spanish or English, and two participants (Jose and Fredrico) indicated a greater comfort with English. All of the participants, except Roberto, expressed a desire to learn more Spanish, and some were enrolled or planned to enroll in Spanish classes to improve their Spanish. These desires for further Spanish instruction support McHatton et al.'s (2007a) assertion that Hispanic students often feel less intimate with Spanish than they do with English. This lack of intimacy with Spanish was highlighted by the reasons participants gave for taking more Spanish, which was often to communicate better with family.

The reasons for the shift back toward additional Spanish instruction were clearly stated; however, the reasons for the more prominent use of English among participants were not as clear. Lopez (2011) found an emotional component to school language use, suggesting English use resulted in more positive school feelings. Though participants did not make direct associations between language use and feelings, it was clear that English was the language of school and rare was the admission of participant Spanish use at school, even with Spanish speaking friends. This finding lends tacit support to the research of Lopez, suggesting that participants did not seem to experiment with Spanish, even in more potentially emotional and intimate school settings, such as friendships.

What participants did not express was a forgetting or purposeful neglect of their Hispanic culture in favor of those traits of the dominant culture. If there was ongoing acculturation, it had a component of bi-dimensionality, supporting the view of Xiahui et al. (2009), who found that receiving newer cultural practices, such as language, was not done to the exclusion of Hispanic heritage practices. Given this bi-dimensionality, participants did often portray the retention of their Hispanic heritage as more of a private practice, while at school other practices were moved to the forefront. These shifts in

cultural prominence were not portrayed as dichotomous or even as polar in nature; they seemed to be carried out with a deft sense of quodlibet befitting the intellectual abilities of the participants.

**Acculturation and discrimination.** Throughout data collection participants expressed little in the way of firsthand experience or elaboration on the topic of discrimination, leading to its emergence as a theme from a non-characterization across all participants. Its non-characterization was noteworthy because previous research portrays discrimination as more commonplace than participants portrayed it (Ford et al., 2008; McHatton et al. 2007a;). However, though McHatton et al. (2007a) noted that all 16 of their bilingual Hispanic participants shared some form of discrimination during data collection, the gifted participants spoke of discrimination in terms not specific to personal experience. This non-specificity with regard to personal discriminatory experience was true of the six Hispanic participants in the current study as well.

What was also consistent with the depictions of discrimination in research was the development of discrimination perceptions within the ecology of participant experiences and environments. Hughes et al. (2006) noted that ethnic racial socialization began at home and then continued to be shaped by the experiences of school. With all participants portraying almost exclusively positive feelings about their own ethnicity and family, the emphasis Hughes et al. placed on the familial foundations of positive racial and ethnic socialization seemed supported.

As experiences are encountered at school, research highlights the importance of environmental interactions in the formation of discrimination understandings (Davidio et al., 2010; Hughes et al., 2006). School interactions and environments seemed to

significantly influence participant perceptions of discrimination, especially their early placement in all accelerated/gifted environments. Placement in these environments may have exposed participants to less discrimination and given them more affirmation than previous placements. As Carlos shared regarding his change in teachers when coming to the all accelerated environment, “I think, they were more involved with the students than our old school. Like, they talked to us more and were nicer. Cause at the other school they would talk to you, but not like as much.”

The perceived change in treatment Carlos related may not have been related to discrimination; however, these interactions seem to positively affirm his individuality, thereby lessening his perception of school as unfriendly and possibly discriminatory. The experiences of Carlos and other similar participant experiences further support the findings of McHatton et al. (2007a) who found the non-gifted Hispanic adolescents shared a greater volume of experiences related to specific teachers and reports of discrimination than their gifted counterparts.

As participants shared consistently about the amount of individual affirmation they received at school, it again raised the issue of acculturation in two significant ways. As previously discussed, ethnicity was portrayed as subdued in school environments and giftedness or academic abilities seemed to be moved to the forefront, which resulted in greater acculturation. Given the affirmations of individuality participants reported receiving in school settings (whether for their primary placement of giftedness in their school identity is unclear), participants portrayed positive connections and relationships with school, often complementing this positivity with high documented averages and observed levels of participation. As participants depicted this adaption to school culture,

or acculturation, they lent support to the positive connections between increased cultural adaptation and school success prevalent in recent research (Flores-Gonzalez, 2002; Lee et al., 2011; Lys, 2009; Ruiz, 2009).

**The ideal classroom.** The portrayal of an ideal classroom resulted from focus group discussions on best and worst classroom practices specific to these six gifted Hispanic male participants. The major consensus of participants was that teachers should strike an instructional balance between productive whole-group discussions and efficient, individualized instruction, including a cessation of worksheet use. On one side of this instructional balance is collectivism. As previously discussed, research has documented how important it can be for Hispanic students to solve problems collectively, as it often mirrors the way problems are solved within the family (Bos, 1996; LaRoche & Shrieberg, 2004; Reyes, 1992). What this side of the balance also highlights is the importance of establishing cultural relevancy, where classroom activities are designed with differing cultural needs in mind. Research has highlighted the importance of such culturally sensitive classrooms in building a healthy sense of self-esteem and identity (Ford et al., 2008; Ungar et al., 2007).

The other half of the balance depicted by participants suggests the importance of individualized instruction for gifted learners (Reis et al., 1992; Tomlinson, 1995). Research has highlighted the academic and emotional difficulties created for gifted learners when the pace of the classroom does not match the processing pace of the gifted learner (Reis & Renzulli, 2004). This mismatch of pace and ability was expressed and witnessed during the interviews and observations, as were more appropriate matches of

pace and ability, and the participant suggestions in this forum uniquely underscore their needs for appropriate challenge and pace in their classroom work.

### **Implications**

In keeping with the organizational scheme for the presentation of study results, the implications of the study are presented in this section by theme. Due to the similarities of their implications, the themes of academic orientation and the ideal classroom have been combined and discrimination implications are presented as a function of resilience.

#### **Academic Orientations and the Ideal Classroom**

There was a moment during the focus group of seemingly layered metacognition. It came as participants collectively discussed the roles of collectivism and individualism in an ideal classroom. Participants revealed their own need for educational balance between group approaches focused on problem solving and efficient individual approaches allowing them to learn at their own pace. At the heart of both approaches was the element of challenge; the academic orientations of these gifted Hispanic males required challenge, both collectively and individually. Their expressed desires to engage in group problem solving may be, as researchers suggest, firmly rooted in their collective cultural heritage (LaRoche & Shriberg, 2004). Or their collective cultural roots may have intellectually driven apical meristems, which require exposure to new ideas in more social environments to expand and thrive. The underlying requirement remains: the group work assigned requires a purposeful design promoting meaningful problem solving in a social environment.

On the other side of this balance within the academic orientation of participants was the need for efficiency. The participants wanted meaningful work to do at a pace that suited their intellect. Almost all forms of data collection, interview, observation, and focus group highlighted how mismatches of intellect and pace, often in the form of worksheets, led to some form of disengagement. Conversely, when the pace of learning was appropriate and well-suited to participant intellect, participants expressed an engagement and enjoyment of learning.

For classroom teachers with gifted Hispanic males to address this needed balance accordingly, collective discussions focused on problem solving or analysis should be regular classroom practice. Discussions could be done both as whole groups and small groups, with ample opportunities for student sharing, and with gifted Hispanic males given opportunities to play prominent roles within the discussions.

With regard to the other side of the instructional balance, classroom teachers may need to place more limits around whole group instruction time, using it more as an orientation prior to more individualized investigations of content. The individualized investigations should require appropriate depths of knowledge and be suitably paced to match the intellectual abilities of the learners. Moreover, teachers of gifted Hispanic males should avoid the use of worksheets as regular classroom practice.

Notably, the whorl of these collective and individual elements was revealed in individual participant interviews and observations, but the true nature of the required balance did not properly bloom until the focus group. In other words, the more authentic and applicable functions of the individual and collective within the academic orientations

of the participants were brought to fruition in a collective environment, underscoring its significance for participants.

### **Ethnic Identity**

With regard to ethnic identity, the most significant implication was how important the intentional exploration of ethnic identity can be for the overall growth of ethnic identity and potentially, self-esteem. Intentionally establishing links between participants and enduring aspects of their culture and heritage seemed to greatly strengthen their identities, as well as encourage further independent exploration of ethnic identity. Simply understanding where they came from seemed to give participants a better vision of where they were going. Moreover, high levels of academic achievement were associated with high levels of ethnic identity exploration. The majority of this identity exploration was done within families, and the results strongly encourage ethnic exploration by families.

Given the connections between family and classrooms, classroom teachers can promote ethnic exploration through lesson designs including individual exploratory activities and projects, such as comparative histories, civics, or family trees to promote intentional ethnic exploration. These activities may also help initiate deeper explorations within the home. Appropriate whole class forays into history, especially regarding Hispanic history, should be intentionally pursued as aids to ethnic identity exploration. Additionally, school promotion of ethnically based activities, such as Hispanic Heritage Month, should be designed as meaningful showcases for individual Hispanic accomplishments across several fields, alongside opportunities to further explore those accomplishments at greater depths.



## **Resilience**

The character of resilience, as revealed by participants, was interactive in nature. Because the nature of resilience was interactive and more internally built than externally derived, resilience may be best taught through the promotion of its mechanisms. For example, participants who defined success with both an effort and completion component were also doing well academically. Though successful completion cannot be taught directly, goal setting behaviors can be taught, especially as they relate to setting up smaller goals as part of project completion or taking major tests. Teaching completion as a series of events rather than a singular occurrence may help students more accurately define success.

Regarding long-term success, the higher achieving participants indicated several direct connections between current, middle school class choices and grades, and later college admittance. Being knowledgeable about specific college requirements seemed a clear advantage for the higher achieving participants. Given the advantages of this knowledge, middle schools would serve their Hispanic populations well by directly teaching them about college requirements as part of a meaningful curriculum or series of lessons. This knowledge seemed to serve as such a positive mediator of current behavior and grades that the potential to do the same in other students seems likely.

Given the nature of resilience as interactive, it also required a lush ecology in which to thrive. Within school, participants characterized resilience promoting environments as ones that placed an obvious value on the individual. In light of their giftedness, being valued often translated to well-designed curricula that cultivated intellectual curiosity through appropriate challenge. At the level of policy, resilience was

promoted through decision-making based on individual character and not across-the-board generalizations. High and low achieving participants cited the positive ways in which school had always treated them as an individual. Challenging curricula and a valuing of individuals often means reciprocal valuing on the part of students, as they take greater ownership of the school and its policies. In effect, curricula and policies valuing the individual help create more systemic and meaningful safeguards against discrimination through simultaneously affirming overall ethnicity and individual academic ability.

### **Goals**

Alongside their previously discussed ability to promote resilience, the key finding from the examination of participant goal-setting behavior was the emphasis placed on expansion or intellectual curiosity within their goals. Given this emphasis, it is important for educators to tie current lessons and material to the field at large and to other fields. Teaching a lesson in isolation from broader, connected fields of knowledge bred disinterest and restlessness in study participants, as it may well do for other gifted Hispanic males. The participants indicated a need for a vision of where current lessons place them along the larger continuum of knowledge. A lesson on the Great European Plain or the Pampas in South America could be interconnected among geography, farming techniques, land use by civilizations, and effects on the global economy. Showing connections between the daily activities and larger ideas may provide a sense of motivation and perspective, while encouraging cross-connections and independent ventures that span several content areas.

## **Language Use**

All of the participants, save Roberto, indicated a desire to learn more Spanish, though all had at least a working knowledge of the language. This finding indicates possible changes to the nature of Spanish instruction in middle schools for Hispanic students in similar language situations. While middle school serves as the introduction to foreign language instruction, findings suggest it may also become a place where existing or native language skills may be enhanced. In light of participant portrayals of language use, schools may want to offer Spanish instruction aimed at native Spanish speakers or those already versed in the language. Notably, the seventh/eighth grade middle school site participating in this study offers a Spanish class for native speakers for the express purpose of teaching more advanced Spanish to those with established familiarity.

## **Limitations**

The limitations of this study emanate from the small sample of learners and their concentration within one school district. The confines of sample size and location limit the ability to generalize the results of the study to other settings and students. Additionally, within the sample were two brothers, Roberto and Guillermo, which further limits the application of the results to other more heterogeneous participant groups. A component of the study, the Ethnic Identity Survey (Umana-Taylor et al., 2004), was a self-report survey, which has limited generalizability due to its subjectivity.

With regard to my own role in the study, it is important to note that I am not of Hispanic heritage nor is anyone in my immediate family, nor do I speak Spanish fluently. Though I have taught many Hispanic students, it is accurate to convey that what I brought

to this research was a level of cultural ignorance with regard to Hispanic learners. I addressed this limitation in my study through taking Spanish courses and offering participants the opportunity for a fluent Spanish speaker to be present at the interviews, which all declined. I also addressed this limitation in the selection of outside readers to triangulate the data. One of the outside parties triangulating the data was of Hispanic origin and fluent in Spanish and the other was semi-fluent in Spanish and had several years of direct experience with Hispanic students in ESL courses.

Over the course of data collection and subsequent analysis, an academic divide opened up between Fredrico and Jose and the other four participants. While the four major themes as well as the emerging themes were portrayed as significant factors in the divide, it is also important to note that these identified thematic elements may not have been the only influences on Jose and Fredrico's academics. The analysis of data suggests that other, possibly familial, elements beyond the scope of the identified themes may have also contributed to their lower documented achievement.

For Jose, interview responses indicated that his mom was his role model and often helped him with his homework. He also indicated that there were communication issues with his mom resulting from her lack of English and his lack of Spanish. Part of his enrollment in Spanish was to bridge this communication gap and improve this relationship; however, he also expressed that he wished his mom would be more intentional in learning English so that "she can communicate with others, not just me." Embedded within this statement seemed to be a sense of disappointment in his mom's lack of acculturation. Added to the sense of linguistic separation and even disappointment for his mom, was the seeming absence of a father for Jose. In several meetings with Jose

and even in a meeting with his mother, no mention was ever made of a father, which may have also been a contributing factor to Jose's academic underachievement.

For Fredrico, interview responses indicated that he saw his dad as a role model. He further qualified this role model categorization with "he [Dad] always tries his best in doing his work, even if he doesn't understand sometimes," a qualification echoing Fredrico's own view of success as "trying hard" without a corresponding component of completion. Consequently, for Fredrico to evolve and implement a success definition beyond the one-dimensional (I try hard) would have meant a seemingly extraordinary leap beyond his familial context and culture.

Further indications of potentially negative familial influence surfaced during focus group when Fredrico responded to a question about family helping with school by stating "My family doesn't really help me out. My dad has these crazy hours, so he doesn't get home a lot." The lack of support indicated in this statement from the final data collection stage indicates a potential lack of familial support not fully decocted by the thematic elements of the study. Additionally, throughout the data collection process, Fredrico made no mention of a mother, which may have also have contributed significantly to his academic underachievement.

### **Recommendations for Future Research**

As an approach to research, Interpretive Phenomenological Analysis (Smith et al., 2009) bears continued investigation, especially with other gifted Hispanic males who can add additional clarity to the findings. Being so rare a voice within the literature, the themes expressed by the participants would only benefit from the additional voices of other similar students. Replicating this study with other gifted Hispanic males of varying

ages and levels, other minorities, as well as participants in different regions would serve to broaden the findings. The voice of the gifted Hispanic female in conjunction with Hispanic males or in a similar isolation would also add further depth and dimension to the findings. The use of the Ethnic Identity Scale (Umana-Taylor et al., 2004) alongside qualitative methodology proved an insightful initiation to data collection, showing consistent alignment with other data for four participants, and inconsistencies with two others. Aside from insightful and applicable results, additional mixed method approaches may provide more reciprocal insight between quantitative and qualitative approaches.

Several questions of a subtle nature arose from the data analysis; significant among them were where ethnically diverse students place their giftedness and ethnicity within their identities, and how these placements manifest in home and school contexts. There seems benefit in examining the prioritizing of these identity aspects, and if these priorities change within different contexts over time. Within this same line of inquiry, the context of Spanish and English use by gifted Hispanics seems beneficial to explore, not only as its own issue, but in correlation to the placement of ethnicity within the identity of students both at home and at school.

The role of intellectual curiosity and giftedness in the trajectory of ethnic identity also seems to warrant further examination. Azmita and Syed (2009) suggested ethnic identity resolves as more of a life cycle event, and Pahl and Way (2006) suggested a late adolescent resolution to ethnic identity. The results of the current study suggest intellectual curiosity may expand the time frame of identity exploration and resolution, and its examination could potentially yield valuable insight into the possible effects of giftedness on ethnic identity trajectory.

## **Conclusions**

Recent research highlights that over the last four decades the Hispanic population has grown rapidly, while remaining the lowest achieving of all ethnic groups (Alfaro et al., 2006). Gifted programming has not been immune to this phenomenon of low achievement, emanating not only from a lack of performance but from a lack of persistence and even Hispanic participation in gifted programming (Ford et al., 2008; Renzulli & Park, 2000). Research indicates that a significant factor in Hispanic underachievement may be academic motivations or the academic identities of Hispanic learners (Alfaro et al., 2006; Flores-Gonzalez, 2002; Umana-Taylor et al., 2009). Further exploration of academic motivations and identities potentially holds promise to attract and retain more Hispanic learners to gifted programming.

Given the often unrealized potential of gifted Hispanic learners, this Interpretive Phenomenological Analysis (Smith et al., 2009) explored the academic orientation, ethnic identity and goal setting behaviors of gifted Hispanic adolescent male students in the middle school setting. This study examined how gifted Hispanic males are formulating answers to basic identity formation questions such as “Who am I?” alongside basic academic orientation questions such as “How do I approach my learning?” Informing these two foundational questions and other related questions were examinations of their goal setting behaviors alongside the interactions of resilience within their identity formations.

If it is true that identity formation is a process forged in crisis (Erickson, 1959, 1969; Marcia, 1994), then the key middle school crisis for gifted Hispanic males seems to be whether or not they will take up the mantle of continuing growth. To do so

would mean an embrace of continued ethnic and intellectual explorations and the establishment of a clear orientation toward expansion past current grades or even current definitions of self. To not take up this mantle seems to place an over-emphasis on present circumstances in self-definition, and promotes the establishment of an orientation destined for eventual closure, even commendable closures such as college degrees or careers. All of these gifted Hispanic participants wanted a college degree and a career, but the participants who saw those accomplishments as stepping stones within a larger frame of continuing development and expansion were the ones who seemed destined to overcome any obstacle they may face.

This study revealed many significant insights into the identity formation process of its gifted Hispanic male participants. These insights were allowed to surface due in large degree to the phenomenological design of the study and its emphasis on the portrayal of participant experiences both individually and as a group. Moreover, the findings of the study did not rely solely on participant portrayals but also examined corresponding behaviors in the classroom. The findings of the study highlight the importance of recursive depth in qualitative examinations of interplays between academic achievement and other potentially mitigating factors. Because of the depth in its design, the study contributes more nuanced understandings of a rarely examined group of learners, who were communicating those understandings through their own words and actions. Illuminating their experiences simultaneously illuminates more potential pathways to attract, retain, and better educate gifted Hispanics males in schools and within gifted programs.



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## **APPENDIX A: ETHNIC IDENTITY SCALE QUESTIONS**

(Umana- Taylor, Yazedifian, & Ba'maca-Gomez, 2004)

1. My feelings about my ethnicity are mostly negative (–A).
2. I have not participated in any activities that would teach me about my ethnicity (–E).
3. I am clear about what my ethnicity means to me (+R).
4. I have experienced things that reflect my ethnicity, such as eating food, listening to music, and watching movies (+E).
5. I have attended events that have helped me learn more about my ethnicity (+E).
6. I have read books/magazines/newspapers or other materials that have taught me about my ethnicity (+E).
7. I feel negatively about my ethnicity (–A).
8. I have participated in activities that have exposed me to my ethnicity (+E).
9. I wish I were of a different ethnicity (–A).
10. I am not happy with my ethnicity (–A).
11. I have learned about my ethnicity by doing things such as reading (books, magazines, newspapers), searching the internet, or keeping up with current events (+E).
12. I understand how I feel about my ethnicity (+R).
13. If I could choose, I would prefer to be of a different ethnicity (–A).
14. I know what my ethnicity means to me (+R).
15. I have participated in activities that have taught me about my ethnicity (+E).
16. I dislike my ethnicity (–A).
17. I have a clear sense of what my ethnicity means to me (+R).

*Note.* Response options are: Does not describe me at all (1), Describes me a little (2), Describes me well (3), and Describes me very well (4). The notation after each item

indicates the relevant subscale (i.e., A= affirmation, E = exploration, and= resolution); + indicates a positively worded item; – indicates a negatively worded item. Negatively worded items should be reverse scored so that higher scores indicate higher levels of affirmation, exploration, and resolution.

## APPENDIX B: PERMISSION FOR USE OF EIS SCALE

Thanks for your message, Matt. I am attaching a Word document that contains in the items, in case that is helpful for you. The scale is free and you have my permission to use it in your research. Best of luck with your research,  
Adriana

Adriana J. Umaña-Taylor, Ph.D.  
School of Social and Family Dynamics  
Program in Family and Human Development  
Arizona State University  
PO Box 873701  
Tempe, AZ 85287-3701  
480-727-8670 (voice)  
480-965-6779 (fax)  
<http://ssfd.asu.edu/umanataylor>

**From:** Forrester, Matt [mailto:mmforrester@liberty.edu]  
**Sent:** Wednesday, December 22, 2010 9:38 AM  
**To:** Adriana Umana-Taylor  
**Subject:** The ethnic identity scale

Dr. Umana-Taylor,

My name is Matthew Forrester, and I am currently a doctoral candidate at Liberty University. I will soon conduct a phenomenological study for my dissertation on gifted Latino adolescents and would like to use the ethnic identity scale you and your colleagues developed and discussed in the article entitled *Developing the Ethnic Identity Scale Using Ericksonian and Social Identity Perspectives*. At your convenience, could you please inform me of the steps I need to take to obtain permission to use the scale and where I might obtain or purchase copies for use in my study? I will need approximately 6-10 scales.

Thank-you so much for your time, and for your research; I have gained a great deal from reading your work.

Sincerely,

Matt Forester

Gifted Instruction

Morristown Sixth Grade Academy

Doctoral Candidate

Liberty University

[mmforrester@liberty.edu](mailto:mmforrester@liberty.edu)

## **APPENDIX C: ETHNIC IDENTITY SCALE ENGLISH/SPANISH STUDENT VERSIONS**

Below are 17 statements about you, followed by a range of numbers 1 through 4. Please use the below statements to guide you as you circle the numbers.

**1 = Does not describe me**

**2= Describes me a little**

**3= Describes me well**

**4 = Describes me very well**

Please circle only one number for each statement.

1. My feelings about my ethnicity are mostly negative.

1    2    3    4

2. I have not participated in any activities that would teach me about my ethnicity.

1    2    3    4

3. I am clear about what my ethnicity means to me.

1    2    3    4

4. I have experienced things that reflect my ethnicity, such as eating food, listening to music, and watching movies.

1    2    3    4

5. I have attended events that have helped me learn more about my ethnicity.

1    2    3    4

6. I have read books/magazines/newspapers or other materials that have taught me about my ethnicity.

1    2    3    4

7. I feel negatively about my ethnicity.



1    2    3    4

8. I have participated in activities that have exposed me to my ethnicity.

1    2    3    4

9. I wish I were of a different ethnicity.

1    2    3    4

10. I am not happy with my ethnicity.

1    2    3    4

11. I have learned about my ethnicity by doing things such as reading (books, magazines, newspapers), searching the internet, or keeping up with current events.

1    2    3    4

12. I understand how I feel about my ethnicity.

1    2    3    4

13. If I could choose, I would prefer to be of a different ethnicity.

1    2    3    4

14. I know what my ethnicity means to me.

1    2    3    4

15. I have participated in activities that have taught me about my ethnicity.

1    2    3    4

16. I dislike my ethnicity.

1    2    3    4

17. I have a clear sense of what my ethnicity means to me.

1    2    3    4

**Ethnic Identity Scale: Spanish Version**

A continuación se presentan 17 afirmaciones acerca de usted, seguido por una serie de números del 1 al 4. Por favor, utilice el siguiente declaraciones de guía para el circular de los números.

1 = No me describe

2 = me describe un poco

3 = me describe bien

4 = me describe muy bien

Por favor, marque sólo un número para cada declaración.

1. Mis sentimientos acerca de mi origen étnico son en su mayoría negativos.

1   2   3   4

2. No he participado en ninguna actividad que pudiera enseñarme acerca de mi origen étnico.

1   2   3   4

3. Tengo claro lo que mi etnia significa para mí.

1   2   3   4

4. He tenido experiencias que reflejan mi origen étnico, tales como comer comida, escuchar música y ver películas.

1   2   3   4

5. He asistido a los eventos que me han ayudado a aprender más acerca de mi origen étnico.

1   2   3   4

6. He leído libros / revistas / periódicos u otros materiales que me han enseñado acerca de mi origen étnico.

1 2 3 4

7. Me siento mal de mi origen étnico.

1 2 3 4

8. Yo he participado en actividades que me han expuesto a mi origen étnico.

1 2 3 4

9. Me gustaría ser de una etnia diferente.

1 2 3 4

10. No estoy contento con mi origen étnico.

1 2 3 4

11. He aprendido acerca de mi origen étnico haciendo las cosas como la lectura (libros, revistas, periódicos), buscando en el Internet, o manteniendome al día con los acontecimientos actuales.

1 2 3 4

12. Yo entiendo como me siento por mi origen étnico.

1 2 3 4

13. Si pudiera elegir, preferiría ser de una etnia diferente.

1 2 3 4

14. Sé que significami origen para mi.

1 2 3 4

15. Yo he participado en actividades que me han enseñado acerca de mi origen étnico.

1 2 3 4

16. No me gusta mi origen étnico.

1 2 3 4

17. Tengo una idea clara de lo que mi etnia significa para mí.

1    2   3   4

## APPENDIX D : SEMI-STRUCTURED INTERVIEW 1 QUESTIONS

This semi-structured interview is designed to follow IPA guidelines that allow for narration, description, analysis and evaluation, while also building in a progression toward abstraction during the course of the interview (Smith et al., 2009). Each question below is followed by an IPA categorization (narration, description, analysis or evaluation) and by a research citation(s) indicating the basis for the question.

*Summary of semi-structured interview questions and their IPA categorization and research basis*

Question(s)	IPA categorization and research basis
1 and 2. When did you realize that you were gifted or when were you first identified as gifted? What's it like to be identified as gifted?	Narration; Plucker & Stocking, 2001; Zou & Tau, 200
3. What was the gifted program like in elementary school?	Description/Analysis; Ford, Grantham & Whiting 2008; Herbert, 1996
4. What kinds of activities or subjects in school do you feel are your best and why? Which activities do you feel are unproductive or even a waste of your time?	Description/Analysis; Ford, Grantham & Whiting 2008; Herbert, 1996
5. What is like knowing how to speak Spanish?	Analysis/Evaluation; McHatton et al., 2007a,b; NCES, 2003; Ford et al., 2008, Huget et al., 2004
6. How do you feel this helps you at school?	Analysis/Evaluation; McHatton et al., 2007a,b; NCES, 2003; Ford et al., 2008, Huget et al., 2004
7. Can you describe for me a time or times	Narration/Description; Herbert, 1996;

when knowing how to speak Spanish or even being Latino has not helped or even hurt you at school?

McHatton et al., 2007b, b; Phinney & Ong, 2007; Umana-Taylor et al. 2008, 2009

8. What is it you like best about being Latino? And what is it you like least?

Analysis/Evaluation;; Herbert, 1996; McHatton et al., 2007a, b; Phinney & Ong, 2007; Umana-Taylor et al. 2008, 2009

9.. Why do you think there are not more Latinos in gifted classes? And what has been hard or challenging for you as a gifted Latino and how have you overcome it?

Evaluation; French et al., 2006; Pahl & Way, 2006; Umana-Taylor et al., 2009

## **APPENDIX E: OBSERVATION PROTOCOL**

Date: \_\_\_\_\_

Start Time: \_\_\_\_\_ End Time: \_\_\_\_\_

Study Participant(s) involved: \_\_\_\_\_

Curriculum Area: Math Science Social Studies Language Arts

Number of interaction(s) with teacher: \_\_\_\_\_

Number of interaction(s) with classmates: \_\_\_\_\_

1. Describe the appearance of the participant. Note any expression of culture in appearance (dress, hair, etc.)?
  
  
  
  
  
  
  
  
  
  
2. Describe the participants' positioning in relation to the rest of the class (include any movement the student is involved in.)
  
  
  
  
  
  
  
  
  
  
3. Describe the participant's desk or immediate physical surrounding and arrangement of work/class materials.

4. Describe the amount and types of verbal expression within the class (include verbalizations in whole class, individual, with teacher and small group). How and when does the participant employ the use of Spanish, if at all? Try to capture verbatim snippets where possible and impressions of their meaning.
5. Describe the level of engagement in the classroom activities (include frequency of answering questions and non-verbal communications).
6. What seems to be the response of others in the class toward the participant?
7. Describe the response/attitude of the teacher toward the participant?
8. General memos/reflective thoughts about the overall observation:



## APPENDIX F: SEMI-STRUCTURED INTERVIEW 2 QUESTIONS

*Summary of semi-structured interview questions and their IPA categorization and research basis*

<b>Questions</b>	<b>IPA Categorization and Research Basis</b>
1. Can you define what it means to you to be successful?	Description: Wigfield, A., & Eccles, J., 1991; Valentine, J., DuBois, D., & Cooper, H., 2004
2. In thinking about this year, what have been or what are your goals for the remainder of this school year? What do you feel you need to do to achieve these goals?	Analysis/Evaluation: Elliot, A.J., Chirkov, V.I., Kim, Y., & Sheldon, K.M., 2001; Midgley, C., Kaplan, A., & Middleton, M., 2001; Pajares, F., Britner, S. & Valiante, G., 2000; Witkow, M., & Fuligni, A., 2007
3. Where do you want to be in 10-15 years when you are in your 20s? What do you need to do to get to this place you describe?	Description/Analysis/Evaluation: Elliot, A.J., Chirkov, V.I., Kim, Y., & Sheldon, K.M., 2001; Midgley, C., Kaplan, A., & Middleton, M., 2001; Pajares, F., Britner, S. & Valiante, G., 2000; Witkow, M., & Fuligni, A., 2007
4. In our last interview you mentioned that there has not been a time when you felt being Hispanic or Latino was a disadvantage to you at school. Why do you think this has not been a problem? In comparison to your friends or even what you see outside of school, do you feel you are treated any differently by teachers, principals or authority figures	Description/Evaluation: Herbert, T., 1996; Kitano, M. & Lewis, R., 2005

because of your giftedness or participation in advanced programs like the Magnet school? Why do you think this is?

5. You are sure to face challenges as you go through school, both academic and otherwise. What is it about you specifically, or what strengths do you feel you possess, that you believe will help you overcome these challenges?

Analysis/Evaluation:  
Herbert, T., 1996; Kitano,  
M. & Lewis, R., 2005

6. If you could advise another student like yourself, gifted, Latino and male about what they could do to succeed, what would you tell them?

Evaluation:  
Bland, L. & Sowa, C., 1994;  
McHatton, et al., 2007(b)  
Cabrera, N. & Padillo, A.,  
2004; Flores-Gonzalez, E.,  
2002

7. How much support do you get from your friends regarding school and school work, grades, etc.? Can you describe a friend or time(s) when a friend was unsupportive of your efforts to do well in school? Do you have someone (friend, adult, family member) that you consider to be a role model to you?

Description/Evaluation:  
Flores-Gonzalez, E., 2002;  
Herbert, T.;1996; Huguet, P.,  
Dumas, F., Marsh, H.,  
Régner, I., Seaton, J. &  
Wheeler, L., 2009; LaRoach  
J. & Shriberg, M., 2004;

8. Participant specific question:  
Recently, you've mentioned that your grades have dropped lower than you, your mom/dad and your teachers would like them to be. How are you addressing these grades/ concerns of your mom and your teachers?

Description/Evaluation:  
Ford D.Grantham, T. &  
Whiting, G., 2008; Kitano,  
M. & Lewis, R., 2005

9. Participant specific question:

Analysis:

You've mentioned the importance of your family before in our conversations. In what ways do you feel your family influences your school performance?

Cabrera, N. & Padillo, A. 2004; La Roche, J., & Shriberg, M., 2004

10. Participant specific question:  
During my classroom observation of you, you seem to be really engaged in your learning, always talking, trying to answer the teacher, etc. Why do you think you are so involved in your own learning? What is it about you or the class, the teacher, the environment that makes you want to answer and participate in class so much?

Analysis/Evaluation:  
Herbert, T., 1996; La Roche, J., & Shriberg, M., 2004; López, V., & Sotillo, M., 2009; Zou, L., & Tao, L., 2001

11. Participant specific question: I noticed in the first classroom observation of you that the teacher had pulled you aside and was talking to you about some missing work. Can you tell me a little more about this conversation and what it was about?

Narration/Evaluation:  
McHatton, et al. 2007b, Renzulli, J.S. & Park, S., 2000; Supple, A. Ghazarian, S., Frabutt, J., Plunkett, S., & Sands, T., 2006; Van-Tassel Baska J., Chandler K., Feng A., Quek C. & Swanson J., 2009

12. Participant specific question:  
You mentioned in our previous interview that learning Spanish has been something you want to pursue because you feel you don't know it as well as you would like. Can you describe for me what it's like for you or what happens because of your not

Description:  
McHatton et al., 2007(b); Ford D., Grantham, T. & Whiting, G. 2008; Herbert, T., 1996; López, V., & Sotillo, M., 2009; Phinney, J.S., Lochner, B.T. & Murphy, R., 1990

knowing Spanish as well as you would like? Follow-ups: What about language issues at school with your friends? ...or at home with family? Are there any places or environments where you feel a lack of acceptance for any reason, language use or other(s)?

## APPENDIX G: FOCUS GROUP DISCUSSION QUESTIONS

Each question below is designed to be discussed collectively by all participants in a focus group environment. Each question is accompanied by an IPA categorization (narration, description, analysis or evaluation) and by a research citation(s) indicating the basis for the question.

*Summary of focus group questions and their IPA categorization and research basis*

Question(s)	IPA categorization and research basis
1. What's the best thing about middle school so far? What are the parts of middle school that you like the best? What are the parts you like the least?	Description/Analysis; Ford et al., 2008; Huguet et al., 2009; LaRoche & Shriberg, 2004 ; McHatton et al., 2007b
2. Can you describe what it was like to move from the elementary gifted experience to the middle school gifted experience? Describe for us how your experience as a gifted student has changed since elementary school? What are some differences you have noticed between the elementary and gifted middle school classes?	Description/Analysis; Ford, Grantham & Whiting 2008; Herbert, 1996
3. If you needed help in school or with your school work where or who would you go [to] for help?	Description/Analysis; Conoley & Meimei, 2007; Ruiz, 2009; Supple et al., 2006; Zabloski, 2010

4. Describe your ideal classroom environment. What kind of classroom structures seem to work best for you? What types of activities do you prefer to work on in groups? And what type of activities do you prefer to work on individually? Why?  
Analysis/Evaluation;; Ford et al., 2008; Lys, 2009; McHatton et al., 2007b ; Ruiz, 2009
5. Given your experience in middle school so far, what are the ways that you would like to see it improve?  
Evaluation; McHatton et al., 2007(b); Ruiz, 2009; Supple et al., 2006
6. What are the ways middle school could be improved particularly or specifically for Hispanic students?  
Analysis/Evaluation; Conoley & Memei, 2006; Ford et al., 2008; LaRoche & Shriberg, 2004; Renzulli & Park, 2000; Zabloski, 2010
7. In thinking about your gifted and advanced classes what should schools do to get more gifted Hispanics students into their gifted and advanced classes? Hispanics students sometimes drop out of gifted classes later in their school life. What do you think schools should do to hold onto the gifted Latino/Hispanic students that they already have in gifted classes?  
Analysis/Evaluation; Flores-Gonzalez, 2002; Herbert, 1996; Kitano & Lewis, 2005; McHatton et al., 2007b; Renzulli & Park, 2000; Zabloski, 2010
8. What does it take to be successful in gifted classes? What keeps people from being successful in gifted classes?  
Description/Analysis; Flores-Gonzalez, 2002; Kitano & Lewis, 2005; Lopez & Sotillo, 2009; Plucker & Stocking, 2001; Ruiz, 2009

- |   |  |
|---|--|
| <p>9. You've each talked in our individual interviews about the importance of family in your lives. Can you speak specifically about how your family helps you with school?</p>   | <p>Analysais/Description : Flores-Gonzalez, 2002; Herbert, 1996; Kitano &amp; Lewis, 2005; Renzulli &amp; Park, 2000; Zabloski, 2010</p>                                       |
| <p>10. Discuss with the group some specific things your family does that teach you or have taught you about what it means to be Hispanic?</p>   | <p>Description; Cabrera &amp; Padillo, 2004; French et al., 2006; Herbert, 1996; LaRoche &amp; Shriberg, 2004; Pahl &amp; Way, 2006; Ruiz, 2009; Umana-Taylor et al., 2009</p> |
| <p>11. Please finish these sentences: Being a male means...Being Hispanic means.....Being Gifted means....Being Gifted and Hispanic and a male means....</p>  | <p>Description/Analysis; Brice et al., 2007(b); French et al., 2006; Herbert, 1996; McHatton et al., 2007b Pahl &amp; Way, 2006; Umana-Taylor et al., 2008, 2009</p>           |
| <p>12. You've each expressed to me a goal that you have for yourself regarding your future. All of you have said that you wanted to go to college and have a career afterwards. Why is it important for you to have goals? What does having goals do for you?</p> | <p>Analysis/Evaluation; Elliot et al., 2001; Midgley et al., 2001 Pijares et al., 2000; Witkow &amp; Fuligni, 2007</p>   |

## **APPENDIX H: PARENTAL CONSENT FORMS (ENGLISH AND SPANISH)**

### **CONSENT FORM**

Building Resilience: The Gifted Latino Male and Academic Achievement Orientation  
Mr. Matthew Forrester  
Morristown School District  
Gifted Education  
Liberty University  
Department of Education

Your child is in a prestigious and important category of student; they are gifted.

Because of your child's giftedness and potential to help many other students, they have been selected to participate in a study for only gifted Latino males. This voluntary study is designed to help your child succeed at even higher levels, while also providing a forum to allow the Latino voice to be heard, which may bring even more success to gifted Latinos everywhere. The information and insights your child provides could help many other Latinos and many other gifted children succeed in significant ways. Please take a moment to read and sign this form and please feel free to ask any questions you may have before agreeing to be in the study.

This study is being conducted by: Matthew Forrester, who is a 20 year veteran of this school system and is also a doctoral candidate at Liberty University.

#### **Background Information**

The purpose of this study is to help Latinos succeed more in gifted programming by examining their attitudes and points of view regarding school and their own giftedness.

#### **Procedures:**

With your permission, we will ask your child to do the following things within the course of the study:

- 1- Fill out a survey
- 2- Participate in two brief, recorded interviews.
- 3- Be observed twice in their gifted classroom.
- 4- Discuss their academic achievement and school experiences in a group with other gifted Latino males.

#### **Benefits and Risks of being in the Study**

The benefits to participation are that your child will have a chance to analyze and improve upon their own successes and to dialogue with other gifted Latino males to exchange ideas and experiences. Their insights and experiences will be recorded and shared anonymously with others in order to help other gifted Latino students succeed.



There are no physical risks to study participant and while it is possible that their identity could be revealed, several steps are being taken to insure their name stays protected (Please see next section).

**Confidentiality:**

The records of this study will be kept protected. In any sort of report that might be published, I will not include any information that will make it possible to identify any student.. Research records will be stored securely and only the researcher and his dissertation committee will have access to the records.

Throughout the research, participants will be assigned pseudonyms (or false names) to protect their identity when reporting the data. While identity cannot be fully protected within the focus group because the participants will all be together, the importance of protecting it will be stressed to all involved.

**Compensation:**

You will receive payment of a \$25 gift card from Target, Best Buy, or another appropriate store.

**Voluntary Nature of the Study:**

Participation in this study is voluntary. Your decision whether or not to participate will not affect your current or future relations with the Morristown City School System or Liberty University or any teacher or faculty member. If you decide to participate, you are free to not answer any question or withdraw at any time without consequence.

**Contacts and Questions:**

The researcher conducting this study is Mr. Matthew Forrester. You may ask any questions you have now. If you have questions later, **you are encouraged** to contact him at Morristown a Sixth Grade Academy, 404-933-1445, [mmforrester@liberty.edu](mailto:mmforrester@liberty.edu).

You may also contact Dr. Lucinda Spaulding at Liberty University 434-592-4307 or [lsspaulding@liberty.edu](mailto:lsspaulding@liberty.edu).

If you have any questions or concerns regarding this study and would like to talk to someone other than the researcher(s), **you are encouraged** to contact the Institutional Review Board, Dr. Fernando Garzon, Chair, 1971 University Blvd, Suite 1582, Lynchburg, VA 24502 or email at [fgarzon@liberty.edu](mailto:fgarzon@liberty.edu).

***You will be given a copy of this information to keep for your records.***

**Statement of Consent:**

I have read and understood the above information. I have asked questions and have received answers. I consent to have my child participate in the study.

Signature of parent or guardian: \_\_\_\_\_ Date: \_\_\_\_\_  
(If minors are involved)

### **Parental Consent: Spanish**

Su hijo pertenece a una categoría de estudiantes muy prestigiosa e importante, el es talentoso o superdotado.

Debido al talento de su hijo y su potencial para ayudar a muchos otros estudiantes, ha sido seleccionado para participar en un estudio de jóvenes latinos intelectualmente talentosos. Este estudio voluntario está diseñado para ayudar a su hijo a triunfar en niveles aún más altos, mientras que también forma parte de un foro para que la voz latina sea oída, trayendo así aún más éxito a los latinos talentosos en todas partes. La información y los conocimientos que proporcione su hijo podrían ayudar a muchos otros latinos, y muchos otros niños superdotados a encontrar éxito de manera significativa. Por favor tome un momento para leer y firmar este formulario y por favor no dude en hacer cualquier pregunta que tenga antes de aceptar participar en el estudio.

Este estudio está siendo realizado por: Matthew Forrester, un veterano de 20 años en este sistema escolar y también un candidato doctoral en la Universidad Liberty.

#### **Antecedentes:**

El propósito de este estudio es ayudar a los latinos a tener más éxito en los programas diseñados para los niños talentos, examinando sus actitudes y puntos de vista con respecto a la escuela y a sus dones propios.

#### **Procedimientos:**

Con su permiso, vamos a pedirle a su hijo que haga las siguientes cosas como parte del estudio:

- 1 - Llenar una encuesta
- 2 - Participar en dos breves entrevistas, grabadas.
- 3 - Ser observado dos veces en una de sus clases para niños talentosos.
- 4 - Hablar de sus logros académicos y experiencias en la escuela, en un grupo con otros jóvenes latinos talentosos.

#### **Beneficios y riesgos de participar en el estudio:**

Los beneficios de participar son, que su hijo tendrá la oportunidad de analizar y mejorar sus propios logros y de dialogar con otros jóvenes latinos talentosos con el fin de

intercambiar ideas y experiencias. Sus conocimientos y experiencias serán registrados y compartidos de forma anónima con otros, con el fin de ayudar a otros estudiantes latinos talentosos a lograr el éxito.

No hay ningún riesgo físico para los participantes en el estudio de y aunque su identidad podría ser revelada, se tomarán varias medidas para asegurar que su nombre quede protegido (Vea la sección siguiente).

### **Confidencialidad:**

Los registros de este estudio se mantendrán protegidos. En cualquier tipo de informe que puede ser publicado, no se incluirá ninguna información que permita identificar a los estudiantes. Los registros de la investigación se almacenarán de forma segura y sólo el investigador y su comité de tesis tendrán acceso a los registros.

A lo largo de la investigación, a los participantes se le serán asignados seudónimos (o nombres falsos) para proteger su identidad al comunicar los datos. Mientras que la identidad no puede estar totalmente protegida dentro del grupo de estudio, porque los participantes estarán todos juntos, se les hará énfasis sobre la importancia de proteger la identidad de los miembros.

### **Compensación:**

Usted recibirá el pago de una tarjeta de regalo de \$ 25 de Target, Best Buy, u otro almacén adecuado.

### **La naturaleza voluntaria del estudio:**

La participación en este estudio es voluntaria. La decisión si desea o no participar, no afectará sus relaciones presentes o futuras con el Sistema de Escuelas de la Ciudad de Morristown o la Universidad Liberty o de cualquier profesor o miembro de la facultad. Si usted decide participar, usted es libre de no contestar cualquier pregunta o retirarse en cualquier momento sin sufrir ninguna consecuencia.

### **Contactos y preguntas:**

El investigador a cargo este estudio es el Sr. Matthew Forrester. Usted puede hacer cualquier pregunta que tenga ahora. Si usted tiene preguntas más adelante, puede contactarlo en la Academia de Sexto Grado de Morristown, en el 404-933-1445, o en las direcciones de correo electrónico [mmforrester@liberty.edu](mailto:mmforrester@liberty.edu).

Usted también puede contactar a la Dra. Lucinda Spaulding en la Universidad Liberty al 434-592-4307 o [lsspaulding@liberty.edu](mailto:lsspaulding@liberty.edu).

Si usted tiene alguna pregunta o duda sobre este estudio y le gustaría hablar con alguien que no sea el investigador (s), se recomienda que se ponga en contacto con la Junta de Revisión Institucional, Dr. Fernando Garzón, presidente, 1971 University Blvd., Suite

1582, Lynchburg , VA 24502 o al correo electrónico fgarzon@liberty.edu.

Se le entregará una copia de esta información para mantener en sus archivos.

**Declaración de Consentimiento:**

He leído y comprendido la información anterior. Yo he hecho preguntas y he recibido respuestas. Doy mi consentimiento para participar en el estudio.

Firma del padre o tutor Fecha : \_\_\_\_\_ : \_\_\_\_\_  
(Si hay menores involucrados)

## APPENDIX I: STUDENT ASSENT FORMS ENGLISH AND SPANISH

Dear Student,

Because you are gifted and Latino, you have been chosen to participate in an important study that can help many people. The purpose of the research is to allow the voices of students just like you to be heard in many more places. You will be asked many questions about your experiences as a gifted Latino student and your experiences in school.

The details of what you will be asked to do are simple: 1) fill out a short survey; 2) participate in 2 interviews, 3) be observed in your classroom a couple of times and 4) meet together with me and some other students in the study for a group discussion. You may need to come in to school early or stay late a few times; however, if you choose to volunteer you will receive a \$25 gift card.

Your names will not be used in the reporting of the research because that protects you, and everything you say will be kept secure. Participation in this research is strictly voluntary and if you refuse to volunteer or withdraw from the research there will be no penalty of any kind for you. If you wish to participate please sign below. Also please feel free to contact me using the information below if you have further questions.

Sincerely,

Mr. Forrester  
mmforrester@liberty.edu  
779-555-1221 ext. 1111

I \_\_\_\_\_ agree to participate in this study.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Estimado estudiante,**

**Debido a que eres talentoso y latino, has sido elegido para participar en un estudio importante que puede ayudar a muchas personas. El propósito de la investigación es permitir que las voces de los estudiantes como tú sean escuchadas en muchos lugares más. Se te harán preguntas acerca de tus experiencias como estudiante latino talentoso y tus experiencias en la escuela.**

**Los detalles de lo que se te pedirá que hagas son simples: 1) completar una breve encuesta, 2) participar en dos entrevistas, 3) te observaremos en el salón de clases un par de veces y 4) te reunirás conmigo y con otros estudiantes del estudio para un grupo de discusión. Puede que tengas que venir a la escuela temprano o**

**quedarte un rato en la tarde un par de veces, sin embargo, si decides ser voluntario recibirás una tarjeta de regalo de \$ 25.**

**Tu nombre no serán utilizados para el reporte de la investigación, ya que estará protegido, y todo lo que diga se mantendrá a salvo. La participación en esta investigación es estrictamente voluntaria y si no quieres ser voluntario o decides retirarte de la investigación no habrá sanción de ningún tipo para ti. Si deseas participar por favor firma abajo. Además, por favor no dudes en contactarme, a la información de abajo, si tienes preguntas.**

**Atentamente,**

**Sr. Forrester  
mmforrester@liberty.edu  
779-555-1212 ext. 5141**

**Yo \_\_\_\_\_ estoy de acuerdo en participar en este estudio.**

**Firma: \_\_\_\_\_**

**Fecha: \_\_\_\_\_**

## **APPENDIX J: MEMO EXCERPT FOR CARLOS FOLLOWING ETHNIC IDENTITY SURVEY SESSION**

### **Carlos**

Initial Memo following up on Ethnic Identity Survey September 20, 2011

Big, open, personable, relates well to adults, extremely competent (seemingly). Good sense of self and humor.

Slicks back his hair with a lot gel, very personable, relates very well to adults. Very open in the interview, gave more information and pertinent information whenever asked. Dad is from Colombia. He actually lived in Colombia for a year with his mom and brother, probably @6 or 7 yrs of age. He liked it b/c he got to spend time with his brother and see his family, many of whom live in Colombia. While there he studied English and said he knew more than the English teacher. "She couldn't say the word 'glue'." He keeps in touch with his Colombian family through Facebook. He has even video chatted with his Grandmother.

While here he has attended re-unions with family and goes with his father to a Hispanic church. He also stated that his mom cooks a lot of Hispanic foods. He also has actually sought out and read books about Colombia and Venezuela. He is currently reading the Harry Potter series in Spanish, and he states that he can easily switch off in his language use depending upon the situation.

His next stated goal is to learn French, which he is doing now. And his eventual goal is to be world translator.

I felt a little more confident this time, and was able to tie-in my conversation or base my conversation on the survey and just have him extrapolate about it, which is a good next step. He seemed open and responsive to everything I had to do/say. And I made sure to build him up and tell him what a good job he had done, as this seemed to help the process.

## APPENDIX K: IRB APPROVAL

IRB Approval 1141.081611: Resilience Building: The Effects of Ethnic Identity Formation on Gifted Latino Academic Orientation

Good Morning Matthew,

We are pleased to inform you that your above study has been approved by the Liberty IRB. This approval is extended to you for one year. If data collection proceeds past one year, or if you make changes in the methodology as it pertains to human subjects, you must submit an appropriate update form to the IRB. Attached you'll find the forms for those cases.

Thank you for your cooperation with the IRB and we wish you well with your research project.

We will be glad to send you a written memo from the Liberty IRB, as needed, upon request.

Sincerely,

**Fernando Garzon, Psy.D.**

*IRB Chair, Associate Professor*

**Center for Counseling & Family Studies**

**(434) 592-5054**

Sent Tuesday August 16, 2011 via e-mail