

Talented and Gifted Education: Best Practices for Programs and Services

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Executive Summary

Talented and Gifted (TAG) education is the intentional practice of identifying and cultivating the exceptional strengths and advanced readiness found within our diverse student population. TAG education in the state of Oregon upholds a commitment to academic excellence and educational equity, ensuring that student's unique strengths are met with responsive, high-leverage instructional practices. While Oregon's administrative rules provide a clear, shared vision for identification and service, they also offer districts the flexibility to build tailored support systems for their unique student populations.

Oregon Administrative Rule [581-022-2500](#) requires districts to develop a district-level TAG plan and specifies that instruction provided by districts must be specifically designed to accommodate a TAG student's assessed level of learning (the depth, complexity, and grade-level of instructional materials) and accelerated rate of learning (pass at which they progress). The primary requirement for districts is to ensure that daily instruction for TAG-identified students (provided each day, throughout the day) is directly aligned with the learning evidence used to determine the student's unique learning needs. This approach moves beyond a "one-size-fits-all" model by requiring educators to tailor both the content and the pace of delivery to the individual. By bridging the gap between identification and classroom practice, the district ensures that every student receives a personalized educational experience that maximizes their opportunities to learn at their assessed rate and level and prevents learning stagnation.

This report outlines the high-leverage instructional practices that fulfill the state mandate to provide services to students identified as talented and gifted, followed by an analysis of the staffing and professional learning hurdles that limit their consistent implementation. It explores solutions focused on systemic and instructional alignment and proposes a number of implementation strategies, the essential mindsets and skills supporting teachers to provide the conditions students deserve and the opportunities for meaningful state-level support.

By implementing a suite of high-leverage instructional strategies and shifting the focus from a standardized delivery to a model that respects each student's actual rate of learning, educators can provide the specialized support required for advanced learners while simultaneously elevating the quality of instruction for all students. Research shows that the following practices are key to effectively support the diverse needs of TAG learners:

1. Curriculum Compacting
2. Tiered lessons
3. Differentiation/Depth/Complexity

4. Acceleration

The path to educational equity and excellence lies in creating a seamless connection between district-wide systems and the daily experiences of students in the classroom. By fostering systemic and instructional alignment, districts can transform mandates into everyday classroom practices that celebrate student readiness based on their assessed rate and level of learning. The following strategies are key to this approach:

1. High-leverage instructional practices, including formative assessment coupled with responsive teaching, eliminating redundancy of mastered content, promoting student agency;
2. Cultivating internal expertise by providing staff with specialization training, using a “train the trainer” model to provide multi-layered professional learning for all instructional staff to ensure every educator has access to training in social-emotional learning (SEL), differentiation & curriculum compacting, equitable TAG identification, and developing individual student plans; and
3. Providing more pathways to equitable identification.

That said, districts across Oregon currently face a number of impediments to providing equitable and effective TAG services to TAG-identified students as required by law. The primary barriers include:

- Inconsistent access to high leverage instructional practices designed to provide academic challenge in teacher preparation programs
- A shortage of gifted education practitioners with expertise in the specialized affective needs of gifted students
- Limited professional development opportunities offered by districts to grow these skills across staff.

In Oregon, school districts receive the majority of their operational funds through the State School Fund (SSF), which is distributed using a per-student weighting formula; this funding formula does not currently provide an automatic funding weight for TAG students. As such, districts must decide how much of their general budget to designate for TAG identification and services, with a resulting range in dedicated funds districts allocate for TAG education that varies widely from several hundred dollars to \$0 per TAG-identified student. The opportunity exists for districts to prioritize and leverage ESSA allowances under Title 1 and 2A funds, ensuring that every student’s learning needs are met with the same robust commitment as other student populations. As districts consider how to best allocate available state and federal

funds to address barriers and offer TAG services in a manner that promotes educational equity and excellence, the following areas offer strategic investment opportunities:

1. Professional Development Resource Allocation
2. Adopting High Quality Instructional Materials
3. Leveraging State-Level Partnership

To maximize impact, TAG programs must be treated as a systemic educational necessity rather than an optional and occasional enrichment opportunity. Achieving educational equity and excellence will necessitate addressing specialized staffing shortages by providing funding, either at the state or district-level, for teachers to obtain a certified TAG specialization. An investment in educators who provide rigorous academic content and necessary affective support pays dividends when they are positioned to provide professional learning and coaching to others. This approach must also be paired with equitable practices like universal screening and the use of multiple identification pathways to find talent in underrepresented populations and ensure a student's background does not limit access to advanced services. By adopting a robust, line-item budget for specialized training and then focusing professional learning on high-leverage practices such as curriculum compacting, districts can actively challenge students working above grade level. Ultimately, this systemic approach guarantees the primary equity metric for TAG programs: that every TAG student gains at least one full year of measurable academic and affective growth for every year spent in school.

Introduction

Talented and Gifted (TAG) education is the intentional practice of identifying and cultivating the exceptional strengths and advanced readiness found within our diverse student population. Every learner deserves a school experience that addresses and respects their pace of learning and provides academic challenges necessary to elevate their intellectual and social-emotional growth. TAG education in the state of Oregon upholds a commitment to academic excellence and educational equity, ensuring that student's unique strengths are met with responsive, high-leverage instructional practices.

To appreciate the current landscape of Talented and Gifted (TAG) education in Oregon, it is helpful to examine the collaborative relationship between state-level guidance and the localized leadership within individual districts. While Oregon's administrative rules provide a clear, shared vision for identification and service, they also offer districts the flexibility to build tailored support systems for their unique student populations.

This report outlines the high-leverage instructional practices that fulfill the state mandate to provide services to students identified as talented and gifted, followed by an analysis of the staffing and professional learning hurdles that limit their consistent implementation. It explores solutions focused on systemic and instructional alignment and proposes a number of implementation strategies, the essential mindsets and skills supporting teachers to provide the conditions students deserve and the opportunities for meaningful state-level support.

State-Level Support (ODE)

State-level leadership for TAG education is anchored in a dedicated TAG education specialist position, funded through a strategic carve-out from the State School Fund (SSF). This position serves as a resource for the entire state, providing essential technical assistance on equitable TAG identification, instructional services, and district-level training that are aligned with the requirements set out in the Standards for Oregon Public Elementary and Secondary Schools (Division 22). By delivering both virtual and in-person professional learning, including annual training for district coordinators and workshops on K–12 instructional practices, this position empowers licensed and support staff across Oregon. Through partnerships with ESDs and dedicated office hours, ODE fosters a culture of family advocacy and continuous improvement, ensuring that the [Division 22 Standards assurance process](#) remains a reliable benchmark for educational excellence in TAG.

District-Level Requirements

By law ([OAR 581-022-2500](#)), districts must develop a district-level TAG plan using the Oregon Department of Education's [TAG Template Instructions Companion Guide](#). The template provides a universal framework for school districts to develop, submit, and maintain their TAG Education Plans.

Mandatory TAG Education Plan Components

Every district TAG Education Plan is required to address:

- **School District Policy:** A detailed list of local board policies governing TAG education, including the district's mission and how it addresses students' intellectual and academic needs.
- **Identification of TAG-Eligible Students:** A description of the identification process, including the use of multiple data collection methods, culturally responsive practices, and universal screening tools. Districts must document practices used to minimize bias and equitably identify students from underrepresented populations, such as students experiencing disabilities and culturally, linguistically, and economically diverse students.
- **Instructional Services and Approaches:** A comprehensive list of services (e.g., cluster grouping, acceleration, differentiated instruction) provided at the elementary, middle, and high school levels.
- **Plan for Continuous Improvement:** Includes three SMART goals for program and service improvement including but not limited to: professional learning for educators, equitable identification practices, instructional services, family engagement, and an evaluation protocol to measure effectiveness of specific TAG practices.
- **Communication with Families:** Plans must detail how the district communicates with families, including notification of testing dates, program options, and the right to file a complaint.

Key Instructional Requirement

[OAR 581-022-2500\(3\)](#): specifies that instruction provided by districts must be specifically designed to accommodate a TAG student's assessed level of learning (the depth, complexity, and grade-level of instructional materials) and accelerated rate of learning (pace at which they progress). The primary requirement for districts is to ensure that daily instruction for TAG-identified students (provided each day, throughout the day) is directly aligned with the learning evidence used to determine the student's unique learning needs. This approach moves beyond a "one-size-fits-all" model by requiring educators to tailor both the content and the pace of delivery to the individual. By bridging the gap between identification and classroom practice,

the district ensures that every student receives a personalized educational experience that maximizes their opportunities to learn at their assessed rate and level and prevents learning stagnation.

Literature Review: Foundational Instructional Strategies

By implementing a suite of high-leverage instructional strategies, educators can provide the specialized support required for advanced learners while simultaneously elevating the quality of instruction for all students. These practices are not designed to be additional or supplemental tasks; rather, they are essential refinements to the pace, depth, and complexity of the core curriculum. By shifting the focus from a standardized delivery to a model that respects each student's actual rate of learning, districts can replace redundant assignments with meaningful, rigorous engagement that keeps every learner challenged and engaged.

Research shows that the following practices are key to effectively support the diverse needs of TAG learners:

1. Curriculum Compacting

This strategy involves streamlining the curriculum for students who have already mastered certain concepts, allowing them to move on to more rigorous activities and advance in grade-level standards ahead of the typical pacing of the regular classroom. Using this method, teachers eliminate [24%-70% of the curriculum](#) without negative effects on test scores. This practice is essential for reclaiming the “six months of wasted class time” identified by The National Teacher's Project (TNTP) in its landmark 2018 study, [The Opportunity Gap](#).

2. Tiered lessons

In a classroom setting, tiered instruction is a differentiation strategy where all students work toward the same essential learning goal, but the pathway to that goal is customized based on their current readiness, interests, or learning profiles. Rather than giving every student the same assignment, a teacher tiers the lessons and assignments into different levels of depth or complexity. This instructional strategy is one of many that ensures students are met with appropriate academic rigor even when they are receiving instruction in academically inclusive classrooms where there is typically a range of 5-7 grade levels of proficiency ([Rambo-Hernandez, Makel, & Peters](#)).

3. Differentiation/Depth/Complexity

Teachers use tools like [Depth and Complexity](#) focusing on patterns, ethics, or multiple perspectives to add rigor to existing lessons. [Webb's Depth of Knowledge framework enables](#)

teachers to evaluate and design activities that go beyond surface-level understanding and maximize the depth and complexity of learning experiences. Unlike Bloom's Taxonomy which focuses on levels of difficulty, or how hard a task is to complete, DOK focuses on cognitive complexity, or the mental processing required to explain a concept or solve a problem. By integrating these frameworks, educators can move beyond "more work" and instead offer "deeper work," allowing students to transfer their knowledge across different subjects and authentic scenarios.

4. Acceleration

This approach is the [most research-supported intervention](#) in gifted literature, providing cognitive, emotional, and social benefits by matching the pace of learning to the student's ability. [Dr. Matthew Makel's research](#) affirms that academic acceleration is not only educationally efficacious but also has no negative long-term impact on social-emotional well-being. Acceleration is the primary tool for combating the [opportunity gap](#) by providing students with the "four key resources:" grade-level (or above) content, strong instruction, deep engagement, and high expectations. Districts may offer single-subject acceleration (e.g., a 5th grader taking middle school math) or whole-grade acceleration (e.g. a 5th grader demonstrating proficiency of 6th grade standards and therefore advanced to 7th grade where new learning will occur).

Prevalent Challenges in TAG Education

Districts across Oregon currently face a number of impediments to providing equitable and effective TAG services to TAG-identified students as required by law. The primary barriers include: inconsistent access to high leverage instructional practices designed to provide academic challenge in teacher preparation programs, a shortage of gifted education practitioners with expertise in the specialized affective needs of gifted students and the limited professional development opportunities offered by districts to grow these skills across staff.

Teacher Preparedness Gap

Surveys of teachers indicate that [limited resources and inadequate training](#) are the most significant barriers to providing effective gifted education. Many teachers report feeling unprepared to meet the creative potential of exceptional students due to a lack of specialized modules in their pre-service programs. They enter the classroom with a "preparedness gap" because gifted education is a specialized field rarely covered in standard pre-service programs. While new teachers are trained to support struggling learners, they are often left without the tools to challenge students who have already mastered the grade-level curriculum.

Meeting Students' Specialized Affective Needs

The social-emotional needs specific to gifted students remain a significant hurdle, often complicated by the "Disharmony Hypothesis." This misconception inaccurately suggests an inherent link between [high cognitive ability and poor social-emotional skills](#). While the "gifted" label can add a [layer of social complexity](#), many challenges stem from a lack of environmental fit rather than internal deficit.

Educators commonly overlook asynchronous development—the phenomenon where a student's cognitive, emotional, and physical maturation move at different speeds. A student may possess the intellectual capacity to discuss global ethics while still needing the emotional support typical of their chronological age. Without targeted support, this gap can lead to heightened anxiety, perfectionism, or a profound sense of isolation.

Grouping strategies that do not consider cluster grouping creates learning environments that are academically and effectively limited for TAG-identified students.

Ultimately, schools must move toward evaluating the success of [affective development programs](#) that go beyond academics. Success in these programs is measured by a student's progress in self-awareness, their ability to navigate peer relationships, and the feeling of being seen and accepted by their instructors and peers. When educators prioritize these specialized affective needs, they move from simply managing a student's intensity to helping them harness it as a lifelong strength.

Limited Professional Development

Limited professional development provided by districts and education services districts (ESDs) and wide variability of local resource structures compound inequitable funding and resource allocation across the state. For example, larger metropolitan districts utilize localized resources such as voter-approved levies, bonds, and community partnerships to provide opportunities and support for TAG and advanced learners. In contrast, smaller and rural districts often do not have access to similar local resources and therefore rely heavily on the general State School Fund, where resources are spread across a wide range of essential services, including TAG education.

Shifting Practices: Systemic & Instructional Alignment

The path to educational equity and excellence lies in creating a seamless connection between district-wide systems and the daily experiences of students in the classroom. By fostering systemic and instructional alignment, districts can transform mandates into everyday classroom practices that celebrate student readiness based on their assessed rate and level of learning.

Systemic Protocols for Student Success

Districts who have strengthened outcomes and advanced equity for all students have implemented the following protocols along with district-level accountability:

- **Multiple On-Ramps:** Offer multiple entry points for TAG identification starting in kindergarten.
- **Data Disaggregation:** Analyze data by grade, program enrollment (e.g., special education, 504), and demographic groups.
- **Tiered Acceleration:** Implement curriculum-embedded, tiered instruction and acceleration.
- **Professional Learning:** Prioritize sustained professional development for both general education and TAG teachers.
- **Dedicated Budgeting:** Establish specific budget lines for TAG licensure, staffing, coordination, and services.
- **Monitoring and Engagement:** Use clear tools for progress monitoring and develop strategies for family engagement.
- **Policy Safeguards:** Adopt policies that ensure equitable access and provide for ongoing program evaluation. To fully realize the talent of every student, it is essential to identify the specific structural areas where targeted support can most effectively strengthen our educational ecosystem. By examining current hurdles through an asset-based lens, we can transition from a model of limited resources to one of shared expertise. This analysis allows districts to move beyond temporary quick fixes to building a durable infrastructure that empowers every educator to meet the unique needs of advanced learners.

High-Leverage Instructional Practices

Oregon's framework for TAG education serves as a powerful tool for ensuring that every student's unique strengths are met with an equally unique instructional response. At the heart of this approach is the transition from static planning to formative assessment and responsive teaching. In accordance with OAR 581-022-2500(3), instruction is designed to honor a student's assessed level and accelerated rate of learning.

This process begins with the practice of pre-assessment, which allows educators to clearly see the knowledge a student already brings to the classroom based on current grade-level standards. By acknowledging this existing proficiency, teachers can adjust instructional pathways to ensure that every student encounters fresh, challenging content every day. This responsive model ensures that school is always a place of new discovery, lending to the promise of a "one-for-one" year of growth.

To achieve the mandated instructional services to students identified as TAG, many educators employ the following practices in their classrooms:

1. Formative Assessment Coupled with Responsive Teaching.

Oregon's approach to TAG education emphasizes both legal compliance and responsiveness to individual student needs and strengths through differentiated instruction, acceleration options, and personalized planning. OAR 581-022-2500(3) states, "the instruction provided to identified students shall be designed to accommodate their assessed levels of learning and accelerated rates of learning." In order for classroom teachers to know where students are in the learning process, it's important to preassess using relevant assessments that align with current grade level state standards. Once a student has demonstrated the percentage of information already mastered, the idea is to meet the student where they are in the learning process. For example, if a student scores 25% on a pre-assessment, that should be interpreted as, "The student knows 25% of what I'm about to teach." The next step is to account for what has already been learned by adjusting any instructional opportunities and pathways so students encounter new learning each day they are in the classroom.

2. Eliminating Redundancy of Mastered Content

To ensure that TAG education is implemented with integrity, districts must move away from repetitive instruction that stalls student progress. Curriculum compacting is a strategic instructional technique where teachers assess a student's prior knowledge of a unit before it begins. If the student demonstrates mastery of the "basics," the teacher "compacts" the traditional curriculum, eliminating the time spent on redundant practice. This creates a dedicated "pathway" where the student can instead engage with advanced standards and

materials that are strictly aligned to their assessed rate and level of learning. By replacing mastered content with accelerated or enriched material, districts ensure that the classroom remains a place of active discovery rather than a cycle of waiting.

3. Promoting Student Agency

Teachers promote student agency by shifting from a stand and deliver approach, in which they are center stage in the classroom, to an approach that centers on sharing leadership and power (empowerment), and in which they adopt a facilitative role. At its core, student agency involves voice, choice, and ownership, allowing students to take an active role in defining their learning path. When students are agents in their learning, they develop a stronger sense of purpose and the learning becomes more relevant and meaningful. [Zaretta Hammond's](#) work on Culturally Responsive Teaching emphasizes that agency is a prerequisite for intellectual independence, "moving students from dependent learners to self-directed scholars."

4. Structural Solutions

Research suggests that intentionally [placing gifted students together](#) allows for more rapid and advanced instruction while fostering a vital sense of community. By engaging with intellectual peers who share similar interests and "intensities," students find a validating space where they feel understood and experience a sense of belonging. Implementing structural solutions like cluster grouping is a highly effective, research-based strategy for addressing the needs of TAG-identified learners within the general education setting. In this model, a small group of TAG students are intentionally placed in a classroom with a teacher who has received specialized training in differentiation. Unlike traditional tracking, which separates students into different classes, cluster grouping maintains a diverse classroom environment while ensuring that gifted students have a critical mass of intellectual peers to interact and engage with when needed.

This structure offers several key advantages:

- **Facilitates Targeted Instruction:** Rather than a teacher trying to differentiate for one or two isolated gifted students, a cluster allows for efficient small-group instruction. This makes it more manageable for the teacher to implement high-leverage practices like curriculum compacting or tiered assignments.
- **Addresses Assessed Rate and Level:** Students in a cluster can move through standard material at an accelerated rate, preventing the boredom and underachievement that often occur when gifted learners are asked to wait for the rest of the class to catch up.
- **Fosters a Sense of Belonging:** Gifted students often experience asynchronous development, where their intellectual needs outpace their social or emotional maturity. Being part of a cluster provides a validating and safe space where they can engage with

others who share their intense interests and complex thinking, reducing feelings of isolation.

- Upholds High Expectations and Outcomes for All: Research on the Total School Cluster Grouping Model suggests that when a school commits to this structure, it often raises expectations for all students. As teachers learn to differentiate for the cluster, they frequently apply those high-level strategies to other students in the room, narrowing the "belief gap" and promoting growth for every learner.

By formalizing these clusters, districts can move toward a systematic, equitable approach that ensures gifted students access to the specialized instruction they require daily.

Cultivating Internal Expertise

Currently, the expertise required to navigate the complexities of gifted education is concentrated in a few dedicated individuals. By investing in a broader network of certified specialists, districts can move toward a model where every school has access to the high-level coaching and advocacy necessary to sustain advanced instructional practices designed to provide academic challenge. This foundational element is required to translate identification data into meaningful, specialized instruction for students. Transforming this current scarcity into a robust community of practice ensures that specialized knowledge is a common resource available to all staff and students.

To overcome the specialist deficit, districts may allocate funds to invest in a number of educators to receive specialization training. Research shows that [training in gifted education](#) fosters more positive teacher attitudes and leads to better student learning outcomes. Specialized training provides teachers with tools and skill development to meet the needs of all students in their classrooms, including those identified as TAG. Providing opportunities for advanced specialization training—such as TSPC-approved TAG programs (e.g., [Pacific University's TSPC-approved program](#))—for a dedicated cohort of licensed educators and administrators could create a district-wide professional learning model in which TAG specialists employ a “train the trainer” model upon completion of their certified training.

The cascading approach of “train the trainer” is essential because it ensures that expert knowledge spreads throughout the entire district. It creates a sustainable system where teachers learn from one another, making high-quality instruction available to more students. By investing in a few leaders to mentor many, the district builds a lasting foundation of support that can thrive even as staffing needs change, thus creating a culture of continuous professional growth that benefits the entire student body.

Providing Professional Learning for all Instructional Staff

To move beyond basic compliance, districts must implement a multi-layered professional learning strategy. While not every teacher is a TAG specialist, every educator should have access to the following targeted training modules, facilitated by the district's certified TAG coaches or by means of the "train-the-trainer" model:

- Social-Emotional Learning (SEL): Specific training for classroom teachers and counselors to address various challenges that impact gifted learners including asynchronous development (where a student's intellectual ability far outpaces their emotional maturity), identifying and supporting "overexcitabilities," and providing healthy coping mechanisms for the intense perfectionism often found in advanced learners. Educators need training to recognize traits like [perfectionism, heightened sensitivity, and a strong sense of justice](#), which are common in gifted learners. When educators focus on academic efficacy through understanding mindsets (fixed or growth), they help students become less risk-averse and build an understanding of the concept that productive struggle and failure are an important part of the learning process rather than a threat to their identity.
- Differentiation & Curriculum Compacting: Practical "how-to" sessions on Curriculum Compacting, where teachers learn to assess what a student already knows and replace redundant work with enrichment or accelerated content. This ensures the "one-for-one" growth rule by preventing students from "waiting" for the rest of the class to catch up.
- Equitable TAG Identification: Professional development on using local norms and non-verbal assessments to identify giftedness in underrepresented populations. This training helps staff recognize "hidden" giftedness in students who may be English Language Learners or from diverse socioeconomic backgrounds.
- Teachers develop individual, personalized plans in collaboration with families to document specific instructional needs and goals for students. These Personalized Education Plans serve as a roadmap for differentiation, ensuring that a student's unique strengths are matched with appropriate pace and depth. In many Oregon districts, the PEP acts as a living document that outlines the specific high-leverage practices, such as curriculum compacting or tiered assignments, that will be offered in lieu of reviewing content already mastered. See Appendix A for an example PEP.

For a complete list of common instructional practices and services provided by districts in Oregon for all students through a lens of Talented and Gifted Education, please visit the glossary section of [Oregon's District TAG Plan template](#).

Providing More Pathways to Equitable Identification

An equitable TAG program is predicated on the idea that talent, brilliance, and giftedness exist in every population. One pathway districts utilize to identify students more equitably is implementing universal screening, where every student in a specific grade level is given a common experience (assessment, observation protocol, planned activities) designed to identify students as means to receive TAG services. The practice of universal screening removes the practice of relying solely on parent or teacher referrals which can be prone to bias.

Furthermore, by utilizing multiple identification pathways—such as research-based characteristic lists and scales, classroom performance on standards-based learning, using local norms and learning progressions, districts can begin to capture strengths and brilliance from students who may not be captured by traditional standardized testing. This inclusive approach unearths and nurtures the talent already present within the diverse student body.

Districts that engage in universal screening in conjunction with collecting both qualitative and quantitative data minimize the bias that often impacts [underrepresented populations](#), such as multilingual learners or students experiencing poverty.

Districts benefit from a clear understanding and articulation of the services that are provided to students once they are identified as TAG. This requires aligning identification to services and applying proven strategies like differentiation and acceleration, which [studies show](#) benefit the entire student population. To achieve true equity, [Peters and Makel](#) recommend identifying the top performers within each specific school. Using local norms, comparing their performance to peers within the same grade, school, or district, rather than against a broad state and national average, can [increase demographic representation by up to 300%](#).

Districts can evaluate identification systems based on The CASA Criteria: **Cost**, **Alignment**, **Sensitivity**, and **Access** ([Peters, Makel, et al., 2023](#)).

- **Cost:** Is the system affordable for the district and families?
- **Alignment:** Does the identification match the services provided?
- **Sensitivity:** Is the test sensitive enough to find the talent intended?
- **Access:** Does every student have an equal chance to be identified?

Districts can move away from expensive, one-off clinical assessments. Instead, they should budget for [universal screening that utilizes existing data](#) (e.g. standards-based basal assessment and MAP Growth data) and local norming strategies which are more cost-effective and equitable

Policy and Resource Alignment

In Oregon, school districts receive the majority of their operational funds through the State School Fund (SSF), which is distributed using a per-student weighting formula. While the state adds "weights" (extra funding) for some student populations including students experiencing disabilities, it does not currently provide an automatic funding weight for TAG students. As a result, districts decide how much of their general budget to designate for TAG identification and services. The range in dedicated funds districts allocate for TAG education varies widely from several hundred dollars to \$0 per TAG-identified student. The opportunity exists for districts to prioritize and leverage ESSA allowances under Title 1 and 2A funds, ensuring that every student's learning needs are met with the same robust commitment as other student populations.

Professional Development Resource Allocation

Examples of [allowable uses of ESSA funds](#) for TAG include:

1. Professional Learning for Identification and Instructional Strategies for Advanced Learners

To ensure the long-term success of the gifted program, the district must prioritize consistent support for the annual training of its TAG coordinators. As the primary architects of the district's TAG services, coordinators require ongoing access to the latest research, compliance updates, and pedagogical innovations to lead effectively. By investing in their continuous professional growth, the district ensures that its leadership remains equipped to oversee complex identification processes and maintain a high standard of specialized instruction across all school sites.

2. Attending Gifted Education Conferences

The district can dedicate resources to send instructional staff to state and national gifted education conferences to foster a culture of excellence and professional networking. These conferences serve as vital hubs for emerging best practices, allowing educators to engage with leading experts and bring specialized instructional strategies back to their local classrooms. Providing teachers with the opportunity to step outside the district and learn from a broader professional community not only boosts morale but also ensures that TAG programs remain at the forefront of modern educational standards.

3. Providing Ongoing Professional Learning on Inclusive Practices for K-12 Teachers, Administrators, and Instructional Assistants

As [Peters and Makei](#) emphasize, "There are kids in every school who could be learning more." To upend the [Opportunity Myth](#), districts must commit to finding talent where it lives—in every ZIP code—and providing the immediate instructional acceleration required by law.

Because gifted students spend the majority of their day in general education settings, districts can benefit from investing in comprehensive training on inclusive practices for the entire K-12 staff. This initiative ensures that every educator—regardless of their grade level or subject area—possesses the foundational skills to recognize high potential and implement differentiated strategies. By cultivating a universal understanding of how to support diverse learners, the district creates a more cohesive environment where TAG students are understood, challenged, and supported in every classroom they enter.

High Quality Instructional Materials

To effectively support learners identified as TAG, it is crucial to prioritize the acquisition of specialized resources and instructional materials that align with their accelerated rate of learning and level of need. Budgeting for these additional materials ensures that educators have access to high-quality instructional materials, complex informational texts, and inquiry-based tools that go beyond standard grade-level offerings. By investing in these targeted resources, districts can provide TAG students with the necessary challenge to prevent academic plateauing or regressing, fostering an environment where students are consistently engaging in productive struggle through rigorous and relevant content.

State-Level Partnership

ODE supports regional and district-level staff by providing a diverse range of resources that are designed to expand local capacity in TAG education. ODE hosts both virtual and in-person professional learning opportunities for staff so they can stay aligned with current equitable identification pathways and high leverage instructional best practices. District TAG leaders may book meetings with ODE's TAG Education Specialist or join scheduled office hours where dedicated technical assistance addresses specific implementation challenges with expert and peer guidance. This collaborative approach not only strengthens institutional capacity but also fosters a direct line of communication with state leadership, ensuring that local initiatives are both supported and sustainable

Evaluation and Impact Assessment

Evaluation is a powerful tool for affirming the effectiveness of instructional strategies and translating a commitment to equity results in tangible student success. By adopting a talent-scouting approach to data, districts can move beyond static scores and instead focus on the dynamic trajectory of each learner. This assessment phase serves as a feedback loop that honors the hard work of both students and educators, providing a clear map of how specialized

support translates into academic excellence. Measuring impact moves beyond simply checking for a deficit to documenting the flourishing growth across the entire student body.

Equity Metric: Measuring a Full Year of Growth

The primary indicator of success in an equitable system is the "one-for-one" growth metric: ensuring that every student achieves at least one full year of academic progress for every year spent in the classroom. This is particularly vital for students already performing at or above grade level, whose growth can sometimes be masked by high proficiency scores.

To achieve this, educators look through a lens of talent development, using [existing data](#), such as classroom assessments, interim assessments, and progress monitoring, to identify exactly where a student is and where they can go. This approach dismantles the false hierarchy that suggests the needs of different student populations are in competition. In a truly equitable classroom, the progress of one student does not come at the expense of another. Instead, we embrace the understanding that diverse needs are compatible and that our collective goal is to provide every learner with the specialized pathways necessary to reach their highest potential.

Program Fidelity: Assessing the Consistent Use of High-Leverage Instructional Practices

Districts can assess program integrity by:

- Tracking the consistent use of high-leverage instructional practices, such as the percentage of classrooms utilizing curriculum compacting or tiered assignments. Some districts in Oregon currently use a [classroom walkthrough tool](#) that is designed to observe rate and level instructional practices.
- Using [local norm data](#) to track if advanced achievement is becoming more proportional across racial and socioeconomic lines is an approach that addresses the Excellence Gap.
- Monitoring assignment rigor and conducting "assignment audits" based on [TNTP's methodology](#) to ensure TAG students are receiving work that matches their identified level (e.g., tracking the percentage of teachers utilizing [curriculum compacting](#)).

Capacity Building: Focus on Collaborative Growth

To measure the growth of internal expertise, ODE encourages districts to align their program evaluation framework (required by [OAR 581-022-2500](#) and included in their district-level TAG plan) to formally monitor the number of educators and administrators who complete the TAG Specialization Program each year. This metric serves as a key indicator of the district's "capacity

building"—our ability to expand the pool of qualified professionals who can lead advanced instruction and make informed placement decisions. By monitoring these completion rates, leadership can identify schools that are becoming centers of excellence and target additional recruitment or support to areas where specialized human capital remains thin.

Education Partner Feedback: Monitor Appeals and Complaints

Districts can maintain a transparent accountability loop by closely monitoring the volume and nature of appeals and complaints handled by the State TAG Education Specialist. This feedback serves as a critical "red flag" system, highlighting potential systemic gaps in how the district identifies students or provides mandated services. By analyzing this data, districts can proactively address recurring concerns from families and ensure that local policies remain in full alignment with state standards, ultimately improving trust and satisfaction among all stakeholders.

Conclusion

To maximize impact, TAG programs must be treated as a systemic educational necessity rather than an optional and occasional enrichment opportunity. Success requires universal screening and multiple identification pathways to eliminate barriers for underrepresented students, ensuring talent is recognized regardless of background. Utilizing [local norm data](#), districts can ensure that advanced achievement is equitable and proportional across all demographic lines. Achieving educational equity and excellence will necessitate intentionally realigning professional learning toward inclusive practices that do more than just support advanced learners; they must actively challenge students working above grade level within the general education environment. A key lever for districts to prioritize is funding licensed TAG specializations and "train-the-trainer" models to embed expertise across all classrooms. This ensures advanced learners achieve at least one year of academic and effective growth for every year spent in school.

To bridge the gap between identification and excellence, it is essential that Oregon's education system and funding model create conditions where districts and ESDs can consistently allocate a dedicated budget for specialized pedagogical training and high-quality instructional materials. This financial commitment is essential to sustain a high-performing system.

Achieving true systemic integrity and educational equity for TAG students requires a deliberate commitment to both specialized instruction and sustained resource investment. The core

solution involves addressing specialized staffing shortages by providing funding, either at the state or district-level, for teachers to obtain a certified TAG specialization. An investment in educators who provide rigorous academic content and necessary affective support pays dividends when they are positioned to provide professional learning and coaching to others. This approach must also be paired with equitable practices like universal screening and the use of multiple identification pathways to find talent in underrepresented populations and ensure a student's background does not limit access to advanced services. By adopting a robust, line-item budget for specialized training and then focusing professional learning on high-leverage practices such as curriculum compacting, districts can actively challenge students working above grade level. Ultimately, this systemic approach guarantees the primary equity metric for TAG programs: that every TAG student gains at least one full year of measurable academic and affective growth for every year spent in school.

References

Content from the “TAG QEC” Presentation (Source 1)

- Oregon Administrative Rule [581-022-2500](#)
- [Division 22 Standards assurance process](#)
- [TAG Template Instructions Companion Guide](#)
- [Curriculum compacting](#)
- [TNTP - The Opportunity Myth \(2018\)](#)
- [Rambo-Hernandez, Makel, & Peters](#)
- [Depth and Complexity](#)
- [Webb’s Depth of Knowledge framework](#)
- Acceleration [most research-supported intervention](#)
- Acceleration [Dr. Matthew Makel’s research](#)
- [opportunity gap](#)
- Teacher Preparedness Gap [limited resources and inadequate training](#)
- Meeting Students’ Specialized Affective Needs [high cognitive ability and poor social-emotional skills](#)
- Meeting Students’ Specialized Affective Needs [layer of social complexity](#)
- Meeting Students’ Specialized Affective Needs [affective development programs](#)
- [Zaretta Hammond’s](#) work on Culturally Responsive Teaching
- Structural Solutions [placing gifted students together](#)
- Cultivating Internal Expertise [training in gifted education](#)
- [Pacific University TAG Specialization Program](#)
- Providing Professional Learning for all Instructional Staff [perfectionism, heightened sensitivity, and a strong sense of justice](#)
- [Oregon’s District TAG Plan template](#)
- ODE TAG Data Brief [underrepresented populations](#)
- [National Association for Gifted Children \(NAGC\) - Strategies](#)
- [Peters & Makel - Gifted Education advances integration and equity \(Kappan Online\)](#)
- The way schools identify gifted students is inequitable, UW-Whitewater study finds [increase demographic representation by up to 300%](#)
- How Does Your Identification System Measure Up? A Guide to Applying the CASA Criteria to Gifted and Talented Identification Systems [Peters, Makel, et al., 2023](#)
- [Peters & Makel - Gifted Education advances integration and equity \(Kappan Online\)](#)
- ESSA funds [allowable uses of ESSA funds](#)
- [Peters & Makel - Gifted Education advances integration and equity \(Kappan Online\)](#)
- [Opportunity Myth](#)
- [classroom walkthrough tool](#)
- [local norm data](#) [Peters, S. J. \(2025\). Use local norms to find them. NWEA Blog.](#)
- [TNTP's methodology](#)
- [curriculum compacting](#); [Reis, S. M., et al. - Curriculum Compacting and Achievement Test Scores](#)

General Information/Research

- [Makel, M. C., et al. - Academic Acceleration and Psychological Well-Being](#)
- [Assouline, et al. \(2021/2023\). Accelerated Learning for Gifted Students: A Systematic Review.](#)
- [Wiley, K. R. \(2020\). The social and emotional world of gifted students. Psychology in the Schools.](#)
- [Oregon Department of Education \(ODE\). TAG Basics and Mandates.](#)
- [Makel, M. C., et al. \(2022\). Academic Acceleration in Gifted Youth and Fruitless Concerns Regarding Psychological Well-Being. PMC.](#)
- [Peters, S. J., & Brulles, D. \(2017\). Designing Gifted Education Programs and Services.](#)

Appendix: Example of a PEP from an Oregon district

Personalized Learning Plan for Talented and Gifted Students

The [] School District TAG Personalized Learning Plan (PLP) is a plan generated in partnership between the teacher and TAG student. It outlines modifications to core instruction based on individual level and rate of learning and includes goals to enhance and elevate student learning experiences. The completed TAG PLP should be shared with parents either in person at fall conferences or be sent home with the student.

TAG services are daily modifications to core curriculum and instruction that accommodate the student's assessed levels of learning and accelerated rates of learning in the area(s) in which the student is identified. TAG services also include social emotional supports. TAG services are provided by the classroom teacher(s) with resources and support from building TAG coordinators, district TAG TOSA, and additional staff as needed such as special education teachers, counselors, and administrators.

Click **HERE** for detailed instructions for completing, saving, and sharing this form. Please review these instructions prior to completing the PLP.

School and Student Information

School: Select school	Teacher:	Grade: Select grade	Date: Enter today's date
Student Name: Enter student's name		Student ID:	

TAG Identification, PLP Information, and Student Interests

Area of TAG Identification: ☐ Intellectually Gifted ☐ Academically Talented in Math ☐ Academically Talented in Reading			
☐ Initial PLP	☐ Updated or revised PLP	Date of initial PLP: Enter date	Grade level at time of initial PLP: Select grade
Areas of student interest: Click or tap here to enter text.			

To gain a better understanding and perspective of the student as a whole child, please indicate any services, supports, or interventions they currently receive.

☐ 1:1 Support	☐ 504	☐ Behavior support	☐ Counseling	☐ ELD	☐ IEP	☐ OT	☐ PT	☐ Social Worker	☐ Speech
☐ Request for consultation if further supports are needed (provide copy of TAG Personalized Learning Plan to appropriate staff member or administrator)									

Notes or comments: Click or tap here to enter text.

Please note social emotional learning supports here. See the new [Social and Emotional Learning Framework and Standards from ODE](#) for more information, suggestions, and resources.

Please mark the social emotional supports your gifted student needs.

- ☐ Take risks as a learner, engage in productive struggle, and work on activities that take student out of comfort zone.
- ☐ Persevere with challenges as they arise.
- ☐ Advocate when work is not the right fit (too easy or too hard) and a challenge, extension, or support is needed.
- ☐ Identify and reflect on how thoughts, emotions, and perspectives can influence behaviors.
- ☐ Apply social skills (i.e., empathy, compassion, etc.) to develop and maintain healthy relationships.
- ☐ Take other's perspectives during teamwork and collaborative problem solving.
- ☐ Learn executive function strategies to support organization and self-management.
- ☐ Spend time with like-minded peers allowing students to find others with similar interests and abilities, leading to friendships and opportunities for growth.

OPTIONAL: Type supports specific to your student here:

Click or tap here to enter text.

Please document current level and rate of learning that correlate to the student's area(s) of TAG identification and include curriculum and instructional modifications (click the hyperlinks for more information and resources). In addition, outline specific student learning goals and supports connected to the modifications that students will work toward during the school year (see PLP Modifications and Learning Goals for examples). Reflect on student progress toward the end of the year.

Content Area	Determine Level of Learning	Determine Rate of Learning	Curriculum and Instructional Modifications
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Math ☐ Student is identified TAG Math ☐ Student is identified Intellectually Gifted	☐ Above grade level ☐ At grade level ☐ Below grade level ☐ Consistently works at a higher level than peers in the class	☐ Finishes assignments quickly and correctly ☐ Learns with few repetitions ☐ Processes, problem solves, and responds quickly and accurately ☐ Consistently learns faster than peers in the class ☐ Does not demonstrate an advanced rate of learning	Click the links for more information on each modification. ☐ Choice assignments ☐ Curriculum compacting ☐ Differentiated instruction ☐ Extensions and enrichment ☐ Higher-order thinking and questioning strategies ☐ Independent study ☐ No modifications needed
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Select goals connected to modifications that will support academic progress in math. See iReady K-5 Math Suggestions for TAG Students for more suggestions. ☐ Develop accurate approaches and strategies for solving math problems that include explanation and justification. (higher-order thinking) ☐ When solving complex math problems, explain thinking processes to the teacher, a small group, or in writing. (higher-order thinking) ☐ Partner with like-minded peers and use high-level math discourse to explain thinking, deepen understanding, and make connections. (cluster grouping, flexible grouping, differentiation, higher-order thinking) ☐ Use various manipulatives or multiple methods to solve problems and demonstrate thinking. (higher-order thinking) ☐ Complete <i>fill in number</i> of iReady MyPath lessons each week. (differentiation, accelerated pace, individualized instruction) ☐ Work on <i>Differentiation Extend Challenge</i> options or <i>Enrichment</i> activities in iReady lessons that deepen understanding with higher-order thinking tasks. (differentiation, extensions, enrichment, higher-order thinking, cluster grouping) ☐ Complete iReady <i>Math in Action</i> extension activities. (cluster grouping, choice assignments, extensions, independent projects, individualized instruction) ☐ If assessments determine that student has mastered a standard, student may work on replacement activities such as iReady MyPath, Math in Action, independent projects, ALEKS online math program (contact TAG TOSA for more information on ALEKS), walk-to-math at the next grade level, etc. (compacting, choice assignments, independent projects, accelerated pace, individualized instruction) Type goals specific to your student here: Click or tap here to enter text.	Date for spring goal reflection: Click or tap here to enter text. Was the goal completed? Click or tap here to enter text.	Notes for next year's teacher(s): Click or tap here to enter text.
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Reading ☐ Student is identified TAG Reading ☐ Student is identified Intellectually Gifted	☐ Above grade level ☐ At grade level ☐ Below grade level ☐ Consistently works at a higher level than peers in the class	☐ Finishes assignments quickly and correctly ☐ Learns with few repetitions ☐ Processes and responds quickly and accurately ☐ Consistently learns faster than peers in the class ☐ Does not demonstrate an advanced rate of learning	Click the links for more information on each modification. ☐ Choice assignments ☐ Curriculum compacting ☐ Differentiated instruction ☐ Extensions and enrichment ☐ Higher-order thinking and questioning strategies ☐ Independent study ☐ No modifications needed
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Select goals connected to modifications that will support academic progress in reading. See HMH K-5 Reading Suggestions for TAG Students. ☐ Develop ability to decode new and unknown words using phonemes, affixes, root words, compounds, and syllables. (differentiation) ☐ Read books from various genres. (choice assignments) ☐ Participate in book studies and book groups using texts of appropriate complexity. (cluster grouping, flexible grouping, higher-order thinking) ☐ Complete Challenge assignments in HMH Supporting All Learners. (extensions, independent projects, individualized instructions) ☐ Work with like-minded peers receiving instruction using HMH Ready for More Tabletop Minilessons to apply comprehension skills to more complex texts. (differentiation, cluster grouping, flexible grouping) ☐ Student will complete the Inquiry and Research Project from Modules in HMH. Rubric may be adjusted depending on student's ability. (independent study, individualized instruction) ☐ If student completes weekly story and/or lessons ahead of the class, student may work on replacement activities such as HMH Inquiry and Research Projects, independent projects, or walk-to-reading at the next grade level. (compacting, extensions, enrichment, independent projects, accelerated pace, individualized instruction) ☐ Participate in Battle of the Books (OBOB). (enrichment, cluster grouping, flexible grouping) Type goals specific to your student here: Click or tap here to enter text.	Date for spring goal reflection: Click or tap here to enter text. Was the goal completed? Click or tap here to enter text.	Notes for next year's teacher(s): Click or tap here to enter text.
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If student requires modifications and learning goals in additional content areas (science, social studies, etc.) please record that information here.

Content area Enter other content area	☐ Above grade level ☐ At grade level ☐ Below grade level ☐ Consistently works at a higher level than peers in the class	☐ Finishes assignments quickly and correctly ☐ Learns with few repetitions ☐ Processes, problem solves, and responds quickly and accurately ☐ Consistently learns faster than peers in the class ☐ Does not demonstrate an advanced rate of learning	Click the links for more information on each modification. ☐ Choice assignments ☐ Curriculum compacting ☐ Differentiated instruction ☐ Extensions and enrichment ☐ Higher-order thinking and questioning strategies ☐ Independent study	
Goals connected to modifications that will support academic progress in the specified content area. Click or tap here to enter text.			Date for spring goal reflection: Click or tap here to enter text. Was the goal completed? Click or tap here to enter text.	Notes for next year's teacher(s): Click or tap here to enter text.

Additional notes or comments: Click or tap here to enter text.