

**VALIDATING A REALIST GROUNDED THEORY: USING AN EXAMPLE OF THE
DOUBLE-LABELING PHENOMENON IN SPECIAL EDUCATION**

by

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Abstract

The aim of this dissertation study was two-fold. On one hand, it set out to investigate the newly emerged double-labeling phenomenon shared by twice-exceptional students in order to parcel out factors that affect the labeling process and to understand how these students perceive and cope with educational labels. On the other hand, this study sought to provide better understanding and tangibility of a realist grounded theory (RGT) approach, especially with respect to a validation model that could be used to guide RGT research practices.

In the first stage, three major grounded theory approaches were compared based on different ontological stances and an RGT validation model with a set of strategies was proposed. The validation model suggests that the degree of validity of RGT is contingent on the closeness between a theoretical account and social reality, which is rudimentarily suggested by the “groundedness” of a study (concurrent procedural validity) and subsequently reinforced by external testing studies and/or practices (incremental procedural validity).

In the second stage, the RGT validation model was adopted to study the interactive and dynamic process of double-labeling, which resulted in a theoretical model that is fortified with four theoretical propositions. This theoretical model highlights the interplay of individual agency, contextual factors, and developmental considerations and theorizes the pedagogical perspectives of educational labeling. Labeling practice is situated in and endorsed by a social context that carries explicit theory about, and educational policies regarding, labels. Taking a developmental perspective, labeling practice often results in some short-lived emotional responses and triggers a meaning-generating process that results in gradually formatted self-

knowledge. Positive academic and social adjustment behaviors are contingent on this self-knowledge. In this regard, labeling practice reconciles a constructed reality (consensual field knowledge) and a lived reality (self-knowledge).

Through implementing the RGT validation model in an empirical study and testing out the suggested strategies, the validation model was found to provide not only tangible operational terms that guided the research process but also a rendition of validation evidence that suggested the original GT canons—fit, work, and relevance.

Preface

This research was approved by UBC's Behavioural Research Ethics Board on July 13, 2011, as per certificate H11-00653. The research was designed and executed by Chih-shen Lo. The written document was produced by Mr. Lo, with input from his supervisory committee. Chapter Two, Groundedness in Realist Grounded Theory Research (Lo, 2012a), and Chapter Three, Labeling and Knowing—A Reconciliation between Field Knowledge and Self-Knowledge among Students with Exceptionalities (Lo, 2012b), of this thesis have been submitted to research journals and are currently under review. Both manuscripts are sole-authored.

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Dedication

To my parents, for the selfless love and supports they have generously given me, and in loving memory of my grandparents.

謹致

我的父親母親

及我敬愛的爺爺奶奶

謝謝您們無私的愛與關懷

Chapter 1: Introduction

Overview of the Study

Witnessing an emerging phenomenon—dual-exceptionality¹, in the field of special education, this researcher was interested in discovering how being aware of carrying divergent educational labels could affect students in regard to their academic performance and social-emotional well-being. The grounded theory method (GTM) came to the researcher's mind for its reputation for generating mid-range theories that are relevant to real-life issues and lend themselves to immediate applications. However, this method also often puzzles novice researchers with multiple versions and has been criticized for research validity issues. In order to achieve greater significance to the field of education, this study focused on improving the usability of GTM by constructing a validation model with tangible research strategies. It was hoped that this validation model could not only be used for theorizing the dynamic double-labeling process, but also would encourage educational researchers to generate theories that are pedagogically relevant.

Social Theory and Education

In Dimitriadis and Kamberelis' *Theory for Education* (2006), social theories are defined as “abstract sets of assumptions and assertions used to interpret and sometimes to explain psychological, social, cultural, and historical process” (p. vii). In actuality, social theories do more than satisfy human curiosity by providing an explanation or interpretation of social phenomena; they have further merit in their provision of inspiration and/or guidance for social practices. In the field of education, social theories stand prominent since, on one hand, we need

¹ The coexistence of giftedness and disabilities.

up-to-date social theories that unveil hidden mechanisms and explain emerging phenomena in educational settings while, on the other hand, we search for social theories that can render solutions for ameliorating educational circumstances and/or lead to better educational practices. While both making/discovering social theories and applying social theories are important, the applied nature of the field of education, however, has made it fall short of endeavors on the making/discovering of social theories since the field as a whole has lopsidedly emphasized applying theories to teaching and learning (Dimitriadis & Kamberelis, 2006).

Historically speaking, the applied nature of education as an academic discipline is a result of education being a derivative of other academic disciplines in the social sciences and humanities, such as philosophy, sociology, and psychology (Thomas, 2007). The fact that theorists mentioned in education can by and large be associated with the aforementioned disciplines provides simple evidence of the derivative nature of education. For example, John Dewey, whose developments on pragmatic epistemology and instrumentalism have had a longstanding influence in education, did his graduate studies in philosophy and also made a major contribution in sociology (see Archambault, 1964; Glassman, 2001; Mooney, 2002); Lev Semenovich Vygotsky, whose theory on the zone of proximal development has helped to shape constructivist practice in education, was a social psychologist (see Davydov & Kerr, 1995; Glassman, 2001; Mooney, 2002).

While good social theories lend us glasses to examine the social world reflectively and/or critically, an overly strong focus on application in a discipline can nonetheless generate some problems. For example, Glaser and Strauss (1967) pinpointed some possible problems derived from applying theories to research uncritically and proposed generating theories that are based on empirical data and have higher relevance to existent social situations. Moreover, one can also

imagine that a strong collective desire for applying grand social theories in the educational field could hinder potential educational theorists' desire and capacity to generate new and insightful educational theories rooted in educational settings (Dimitriadis & Kamberelis, 2006; Thomas, 2007).

Relevance of the Grounded Theory Method in Education

Similar to Dimitriadis and Kamberelis (2006), Gary Thomas (2007) recognized the *sine qua non* status of theories in the field of education for their function in directing and informing educational practices. Compared to Dimitriadis and Kamberelis (2006), Thomas viewed social theories in a more complicated framework based on the level of abstractness and their usage in education: (1) theory as the obverse of practice, such as a teacher's structural reflection derived from an action research study, (2) theory as generalizing/explanatory model, such as a grounded theory that intends to explain the underlying mechanism of a social process by incorporating empirical data, (3) theory as developing bodies of explanation in particular fields, such as the constellation of intelligence theories and (4) scientific theory that exists in the form of ideas and is expressed in formal statements, such as Albert Bandura's (1977) social learning theory or George Kelly's (1955) personal construct theory. While an educational theory can certainly be embodied by a higher level of abstractness, this study solely focuses on the application of grounded theory method since theories that result from the method are often linked tightly to emerging educational issues and lead to direct solutions for those issues.

Defined by Thomas (2007) as a less abstract theoretical explanatory model, a grounded theory (henceforth GT) is a mid-range theoretical account that is more responsive to present social issues, more relevant to the participants studied, and more sensitive to context as it involves a considerable amount of field work. Developed by sociologists Barney Glaser and

Anselm Strauss, the popularity of the grounded theory method has extended from sociology to other areas of social sciences (such as education, psychology, nursing, and management) and beyond since its inception in 1967 (Bryan & Charmaz, 2007). As its name suggests, the desired end product of a GT study is usually a theoretical formulation or an integrated set of hypotheses that can be achieved through either constructing a theory anew or formulating and clarifying an existing theory (Hutchinson, 1998). The word “grounded” also suggests that the constructed theory is generated with empirical data and situated in the complexities of participants’ lived experiences (Fassinger, 2005). The methodology was originally generated, at least partially, to serve as an antidote to the then hegemonic deductive way of theorizing in which empirical data were often forced to fit theories (Rennie, Phillips, & Quartaro, 1988). Therefore, Glaser and Strauss (1967) suggested researchers construct contextualized mid-range theories that reflect real issues by collecting empirical data and synthesizing these data with existing theories (rather than theory leading data collection).

After the 1980s, the GTM started to gain popularity and has been used by various disciplines including education (Bryant & Charmaz, 2007). The suitability of GTM for education was obvious for a number of reasons. First, the fact that a grounded theory is constructed with empirical data and reflects the lived experience of the participants gives it high relevance to real-life situations and narrows the gap between theories and practice. Second, the focus on generating readily applicable mid-range theories and the adaptability to small sample sizes fit the complex and diversified populations in education settings (such as students with special needs). Third, the method reminds researchers to examine existing theories, especially the ones borrowed from other disciplines, critically. (An example can be seen in Chapter Three where gifted education researchers let labeling theories derived from sociology with a strong focus on

deviancy lead their research, resulting in studies of low relevance with inconsistent results.) Moreover, the focus on reflecting contextual factors corresponds well to the recent “post” currents, such as postmodernism, poststructuralism, and postcolonialism, in educational studies (Dimitriadis & Kamberelis, 2006) that address the complexities of socially constructed worlds (Gergen, 2001).

Strengths and Problems in the Use of Grounded Theory Method

According to Morse (2001), a well constructed grounded theory has the following merits. First, it is elegant in its parsimonious theoretical presentation of a social process and contributes to our understandings of social problems. Second, while abstract, a grounded theory links directly to data and thus is embedded in the context, and reflects the lives, of the studied. Third, it has a high degree of relevance since grounded theorists focus on answering the concerns and questions that are important to a discipline. Due to these merits as well as the systematic analytical scheme it endorses, GTM is the most widely used qualitative research method with regard to its applicability to a wide range of disciplines and subject areas (Bryant & Charmaz, 2007).

In spite of its popularity, GTM is also ironically considered as esoteric for many social researchers, possibly because there are confusingly abundant versions of grounded theory models and the phrase “grounded theory” has been adopted to reflect a wide methodological spectrum (i.e., some see it as a methodological perspective while some use it as a method with concrete action steps and others use it as a methodology that encompasses a philosophy that guides actions). In the original text (i.e., *The Discovery of Grounded Theory*), the vagueness in its philosophical foundation has invited GTM proponents to further develop GTM into a family of methods by remodeling GTM based on their philosophical worldviews (Bryant & Charmaz,

2007; Dey, 1999). A schism even exists between the founders (stemming from the difference between their original research backgrounds). After four decades of evolution, three grounded theory methods, among other strands (e.g., Clark's situational analysis [2003] and Bower and Schatzman's dimensional analysis [2009]), have each gained a school of followers: classic grounded theory (sometimes called Glaserian or realist grounded theory; see Annells, 1996, Glaser, 1978, 1992; Lomborg & Kirkvold, 2003, Yeung, 1997), constructivist grounded theory (see Bryant, 2002; Charmaz, 2006), and pragmatist² grounded theory (see Corbin & Strauss, 2008). Each of these GT methods corresponds to a different world view and philosophical foundation and therefore owns a definition of theory divergent from the other. Some of the grounded theorists hold a more adamant position and attempt to claim the orthodoxy of the GT method of choice (e.g., Glaser, 1992; Milliken & Schreiber, 2001) while others hold a more liberal position towards their own approaches and embrace the idea that the contested nature of GTM development is beneficial because it shines light on some central practical and philosophical methodological issues (Bryant & Charmaz, 2007; MacDonald & Schreiber, 2001).

Believing that social theories can be pluralistically reflected in accordance with various ontological nature and world views, GTM in this study is generally regarded as a specific theorizing endeavor that focuses on the generation of an abstract theoretical explanation of a social process or phenomenon through both empirically grounded data as well as a theorist's theoretical sensitivity. While holding a premise of ontological pluralism (see Dierkes, 2010; Turner, 2011) in the social sciences, this study nevertheless addresses an imperative of having a clear philosophical foundation as the point of departure for the generation of a grounded theory. It is argued here that only in so doing can methodological integrity be ensured which, in turn,

² With a strong focus on symbolic interactionism.

entails quality and validity through the grounded theorizing process. Correspondingly, this researcher solely takes a critical realist stance and aims to develop a validation model for a realist grounded theory method (RGT) in tandem with a set of suggestive strategies that can assist grounded theorists in ensuring an adequate level of validity by demonstrating methodological integrity.

Structure of the Dissertation

The overarching goal of this research was to render better usability of GTM for educational research by conducting a two-stage study. In the first stage, the usability of the grounded theory method was fortified by supplementing GTM with a validation model that is rooted in a coherent philosophical foundation and providing clear guidance in praxis. In order to construct the validation model, the researcher engaged in a theoretical discourse focused on the ontological nature of various strands of social theories and further examined the issues of validity from a critical realist point of view.

In the second stage, the researcher employed the RGT validation model discussed previously to conduct an empirical study that aimed to render a theoretical explanatory account for the double-labeling process shared by students who have educational needs that reflect dual-exceptionality. It was expected that through successfully rendering a realist grounded theory, the usability and validity of the RGT validation model could be verified.

Via this study, it is hoped that (1) a well reasoned and structured RGT validation model will gain relevance in the theorizing enterprise in education, and (2) a comprehensive theoretical model on the double-labeling process will further the understanding of and hone practices for dual-exceptional students in the field of special education. While both the validation model and

the theoretical model have value in their own rights, the significance of the study is further highlighted by the correspondence between and integration of the two models.

Theorizing the Double-Labeling Process

For a society to achieve social mobility and social equality, celebrating individual differences by recognizing and cultivating them is one of the most efficacious strategies (Harris & Enfield, 2003; Levin, 2008). For each individual's zone of proximal development (ZPD; Vygotsky, 1978) to be supported and maximized, it is crucial that educational personnel are able to identify the gifts in each child and scaffold the growth of his/her potential by providing suitable programs (Aljughaiman, 2010). Therefore, one of the foci of this study was to understand the potential of, and highlight the educational rights for, disadvantaged gifted students.

One of the major trends in 21st century gifted education is to serve a more diversified population (Aljughaiman, 2010; Little, 2001) which can be achieved by broadening the concept of giftedness, (such as multiple intelligence theory [Gardner, 1983]) and recognizing giftedness among the disadvantaged (such as people who are disabled and socio-economically underprivileged). With respect to serving a more diversified gifted population, in the past two decades growing attention has been paid to children who are dual-exceptional (Reis & McCoach, 2002; Seeley, 2004). Yet, even with the growing attention in the field, multiple hurdles still thwart proper identification and fair educational services for students with dual-exceptionalities. Due to the masking effect³ (King, 2005; Nicpon, Allmon, Sieck, & Stinson, 2012) resulting from conflicting traits in an individual, many of these gifted students are forced to compromise their

³ The compensation that occurs between two conflicting traits which results in exceptional children appearing to be of average ability.

potential and surrender their gifts to mediocrity. Take a student who is gifted and has attention deficit and hyperactivity disorder (ADHD) for example. The common behavioral traits that exist between giftedness and ADHD (e.g., poor attention, overexcitabilities⁴, high activity level, defiance, excessive talking; see Willard-Holt, 1999) might confuse a teacher's judgment of this student's dual-exceptionality and result in an incomplete referral that only places attention on one of the exceptionalities. On the other hand, this student's exceptional cognitive skills may help him to develop some strategies to compensate for his ADHD-related learning problems and result in average academic performance that camouflages both learning problems and giftedness. Another possibility is that this student's ADHD-related behaviors are so blatant that teachers notice no other exceptionality but ADHD. Even if one luckily passes this multi-level identification hurdle, the lack of knowledge regarding serving these pupils' pedagogical and social-emotional needs still threatens their hidden potential (Lovecky, 2004).

While the awareness of dual-exceptionality has increased in the past twenty years, equal enthusiasm has not been reflected in conducting related studies (Nicpon, Allmon, Sieck, & Stinson, 2012). This might be due to the difficulties in obtaining research participants due to the unclear definitions of dual-exceptionality and/or the small population it constitutes. Yet, given the many difficulties in serving students with dual-exceptionality, it is important to have more empirical investigations on this vulnerable population in order for parents, educators, and policy-makers to respond properly to their potential and needs (Nicpon, Allmon, Sieck, & Stinson, 2012). In the following section, a synopsis of the nature and the common traits of dual-exceptionality will be provided to inform a general perspective of the population.

⁴ According to Dabrowski (1964), overexcitabilities are manifested in the following categories: intellectual (e.g., fast in capturing concepts), emotional (e.g., temperamental, prone to anxiety and depression), sensual (e.g., over-reacting to physical discomforts), psychomotor (e.g., hyperactive, restless), and imagination (e.g., day-dreaming).

Emerging Status and Current Knowledge of Dual-Exceptionality

As the field of gifted education matures, it has become broader in its goal and mission; one of its extended visions is the recent attention to the dual-exceptional population (Delisle, 1992; Whitmore, 1981). As early as 1923, Hollingworth discussed disabled gifted individuals in her book, *Special Talents and Defects*, but it was not until the 1970s that students who are gifted and handicapped started receiving substantial attention in professional literature (Delisle, 1992; Johnsen & Corn, 1989). Maker (1977) called this movement “post-Terman⁵” since it was the time when scholars and practitioners started to see gifted individuals beyond their IQ (Delisle, 1992). In the past four decades, the focus of dual-exceptional studies has expanded from gifted students with visible handicapping conditions such as visual and auditory impairments (e.g., Karnes, 1979; Maker, 1977) to more invisible handicapping conditions such as learning disabilities and attention deficits (e.g., Barton & Starnes, 1989; Fox, Brody, & Tobin, 1983; Nielsen & Mortorff-Albert, 1989). In 1989, the entire September issue of *Roeper Review*, a journal in gifted education, was dedicated to this latter diverse sub-group.

To use Baum, Rizza and Renzulli’s (2006) words, dual-exceptional students “demonstrate gifted behaviors or traits at certain times, under certain circumstances, in certain areas, but simultaneously experience problematic weakness in other areas” (p. 139). Conceivably, they are in need of unique educational considerations: academically, socially and emotionally (Baum, Cooper, & Neu, 2001; Baum et al., 2006). The term dual-exceptional is synonymous to twice-exceptional in North America and both are often abridged to “2E” by practitioners (Callard-Szulgit, 2008; Montgomery, 2009). There was a time that many practitioners had difficulty believing that deficits could co-exist with giftedness; currently some

⁵ Terman (1877-1956) was an educational psychologist in the early 20th century. He was known for developing the Stanford-Binet IQ test and longitudinal work on highly intelligent students.

even stay aligned with the same thoughts (Baum et al., 2006). Regardless of doubting minds, these students do exist and we all have seen some conspicuous examples in our daily life, such as Nelson Rockefeller who demonstrated outstanding leadership yet had dyslexia, and David Neeleman who has ADHD yet successfully founded Jet Blue airways (Baum et al., 2006). According to Montgomery (2009), dual-exceptional students appear to present deficits in the following areas: (1) general or global learning difficulties, (2) specific learning difficulties, (3) physical, sensory, and medical difficulties, (4) social, emotional, and behavioral difficulties, and (5) learning disorders (autistic spectrum disorder; central communicative disorders, or specific language disorders). Among these deficits, three combinations of dual-exceptionalities have been studied more frequently (Rakow, 2005): gifted students with general learning disabilities, gifted students with ADHD or Attention-Deficit Disorder (ADD), and gifted students with Asperger's syndrome or Pervasive Developmental Disorder (PDD). Regarding the prevalence of dual-exceptionalities, Yewchuk and Lupart (2002) reviewed literature and reported a range of prevalence from 2 to 9.2 percent; however, a formal large-scale incidence survey is still absent in the literature (Nicpon, Allmon, Sieck, & Stinson, 2012; Nielsen, 2002).

Based on field studies, four common traits are found among students with dual-exceptionalities. First, they all preserve a high level of persistence as well as strong motivation to succeed (Reis, Neu, & McGuire, 1995). As Baum and Owen (1988) noted, this high motivation usually becomes the signature of this student body when compared with learning-disabled students not identified as gifted. Second, dual-exceptional learners develop coping strategies that compensate for, sometimes even overcome, their learning problems. Reis et al. (1995) studied dual-exceptional students who achieved and found a variety of coping strategies that were adopted or developed by these special learners, such as technology aids (e.g., computer, audio

books), learning strategies (e.g., note taking, mnemonics), and time management. Ironically, these coping strategies, whether acquired naturally or not, may result in a masking effect or delayed identification of unusual abilities or disabilities (Robinson, Shore, & Enersen, 2007). Regarding this masking problem, McCoach, Kehle, Bray and Siegle (2001) suggested a 3- to 5-year longitudinal monitoring in early schooling in order to identify specific learning disabilities that may co-exist with giftedness. Third, these students often encounter peer, social, and adjustment problems which result in a sense of isolation. These problems are frequently attributed by these students to the disability (Moon, Zentall, Grskovic, Hall, & Stormont, 2001; Reis et al., 1995; Zentall, Moon, Hall, & Grskovic, 2001). Last, while it may sound counter-intuitive to some, these dual-exceptional learners are characterized by their reading ability just like their non-disabled gifted peers (Moon & Dillon, 1995; Whitmore & Maker, 1985; Willard-Holt, 1999). Except for some with certain learning disabilities, they are by and large reportedly fluent in reading (Robinson, Shore, & Enersen, 2007).

Goals and Objectives

As twice-exceptionality has emerged as a new topic in the field of gifted education, most studies on the topic, to date, have focused on identification and program development. Very few studies provide knowledge that informs twice-exceptional students' social-emotional needs (see Nicpon, Rickels, Assouline, & Richards, 2012). This study was intended to increase knowledge of the social-emotional dimension by constructing a theory on the double-labeling process among students who are gifted as well as have ADHD using a realist grounded theory method. The grounded theory method was chosen for this study for the following reasons: 1) there is no preconceived theory on this topic to date; 2) the phenomenon of dual-exceptionality and the process of double-labeling is hard to capture statistically since it is a dynamic process and

involves many contextual factors; and 3) the researcher was interested in investigating the underlying social and behavioral mechanisms of the double-labeling process.

This empirical grounded theory study aimed to generate a conceptual theory that renders an insightful picture of how the double-labeling practice, contextual factors, and time interact with each other and affect the lives of middle school students who are gifted and have ADHD. Middle school students were chosen as the main research participants since the identification of dual-exceptionality often takes a long time and this age group usually faces more developmental challenges (Delisle, 1992). ADHD was chosen as the parallel trait to giftedness for the following reasons. First, ADHD is one of the most commonly diagnosed behavioral disorders among school-aged students (Barkley, 1998). Second, the combination of giftedness and ADHD is a well-bounded topic for a substantive theory since the behavioral and learning traits and educational needs of this group of twice-exceptional students differ from other types of twice-exceptionality (Lovecky, 2004).

In the second stage of this study, the researcher searched for answers to the following research questions:

1. What does double-labeling mean to middle school students who are gifted and have ADHD?
2. What are the contextual factors that affect these students' perceptions of and reactions to double-labeling?
3. What are the developmental accounts (including key events) of middle school students who are gifted and have ADHD regarding double-labeling?

Significance of the Study

The aims of this study are considered significant to the field for the following reasons. First, through proposing a validation model for a realist grounded theory method, this study will (1) assist novice grounded theorists to conduct and evaluate a grounded theory study through its praxiological guidance, (2) encourage educational researchers to generate mid-range theories that are rooted in educational settings and readily applicable to practice, and (3) ignite further philosophical and validation dialogues regarding the realist grounded theory method specifically and the grounded theory method generally. These dialogues could also contribute to clarifying the validity issues faced by qualitative studies in general.

Second, the empirical grounded theory study on double-labeling is considered groundbreaking since there is no theory on this topic; it will also shed light on the practice of identification and strategies that meet these student's social-emotional and pedagogical needs. As mentioned earlier, the extended goal of this study was to advocate for the acknowledgement of educational rights for students with dual-exceptionality. Moreover, the inclusion of both theoretical discourse and empirical application of a validation model in this dissertation is expected not only to render instant feedback to the proposed model but also, in turn, to promise a higher degree of usability in practice.

Chapter 2: Groundedness in Realist Grounded Theory Research

From its inception in the 1960s in sociology, grounded theory method (GTM) grew in popularity and extended to various other disciplines in the 1980s (Bryant & Charmaz, 2007). It has become the most widely used qualitative research method (Bryant & Charmaz, 2007; Morse, 2009). The accrued popularity could be read as a result of the collective awareness among social researchers of the gap between theories and empirical research (Babchuk, 2009; Joas & Knöbl, 2009), the lack of endeavors towards theorizing and discovery in the social science research community (Bakan, 1967; Rennie, Phillips, & Quartaro, 1988), and the reflexive reaction towards the psychometric hypothetical-deductive research paradigm (Battersby, 1981; Hutchinson, 1988). Despite its popularity, novice grounded theorists often found themselves lost in a wide array of GTM models before and/or during a GTM study (Bryant, 2002).

Witnessing the struggles in GTM studies, the aim of this chapter is two-fold. First, in order to assist novice grounded theorists in choosing a GTM model to follow, this chapter provides a conceptual framework that presents possible meanings of social theory and corresponding GTM approaches. Second, to render better understanding and use of a realist grounded theory approach⁶, this chapter examines Glaser's validation canons and offers a validation model that can be used to guide GTM research practices.

Grounded Theory and Education

Interpreted from its origins (Glaser, 1978, 1992; Glaser & Strauss, 1967), GTM is a general inductive method that looks for an explanatory account of the underlying pattern of behavior or a social process. A grounded theory product (GT) is by and large presented as a theoretical

⁶ A realist GT approach aims to construct knowledge/theory that maximizes the correspondence to the external social reality (also refer to later sections in this chapter).

formulation or an integrated set of hypotheses (Glaser & Strauss, 1967). The word “grounded” implies a dual focus in which the theory is methodologically grounded in data from the field and the study question is practically grounded in what is considered relevant and problematic to the people studied (Glaser, 2005, 2009).

In relation to education, GTM is especially suitable because it reduces the gap between theory and empirical data by generating grassroots and effective conceptual frameworks that can further guide and focus educational studies (Hutchinson, 1988; Peine, 2003). The focus on generating readily applicable mid-range theories also can encourage and enhance administrative, curricular, and programmatic changes in education (Hutchinson, 1988; Richer, 1975). Additionally, the adaptability to smaller populations (such as students with special needs; e.g., Barnett, 2012; Peine, 2003) and the fact that a grounded theory is constructed with empirical data and situated in the complexities of participants’ lived experiences (Fassinger, 2005) give it high relevance to real-life situations and the complexity of educational settings.

Situating a Realist Grounded Theory Method in the Postmodern Era

GT methods originated with two sociologists, Barney Glaser and Anselm Strauss, while they studied the awareness of dying in hospitals (Glaser & Strauss, 1965, 1967). With an attempt to let dominant quantitative researchers of the time understand that a rigorous study can be done with qualitative data, Glaser and Strauss employed quantitative language (e.g., variables, mechanisms, subjects) and an implied realist orientation (i.e., GT is discovery-oriented) as the overarching analytical guideline and wove in naturalistic inquiry as one of the means to acquire grounded data. Yet, the merger of the two ontological and epistemological traditions⁷ and the

⁷ Glaser brought the analytical structure and the rigor derived from the quantitative survey methods developed at Columbia University, whereas Strauss brought a qualitative research tradition from the University of Chicago that addressed symbolic interactionism that accentuates data obtained from naturalistic settings.

fact that Glaser and Strauss kept rather ambiguous attitudes and engaged in little conversation on clarification of GT's philosophical foundation created gray areas and ample opportunities for reinterpretations of the method (see Dey, 1999).

The lack of philosophical foundation, especially the ontological discourse on social theory (which would inevitably lead to the discussion of social reality), nevertheless, is not really the skeleton in the closet for scholars who study the original GT text (i.e., *The Discovery of Grounded Theory*, Glaser & Strauss, 1967). With a closer look, the provenance of GTM challenged the then hegemonic way of theory generation and the connections between theory and empirical data; the stance it took towards the nature of, and the possible variability in, social theories, however, was still more synchronous with how social theories were generally perceived at that time. Therefore, it is not surprising that the original GT text has been philologically labeled as post-positivist (e.g., Annells, 1996; Bryant, 2002; Creswell, 2007; Osborne, 1994) for its embedded objectivist and realist rhetoric. While some scholars regard the original GTM as an anti-fundamental research movement (Battersby, 1981; Bryant, 2002; Thomas & James, 2006), this anti-fundamental position was only taken methodologically; in other words, it challenged the making, but not the meaning(s), of a social theory.

Given the absence of ontological discussions in the original GTM, the evolution of GTM shall neither be deemed as a surprising movement nor an unwelcome dimension—for a method that concerns the generation of social theories, it is imperative for it to be attuned to how a social theory is perceived within the research community. “Grounded theory ideas and practices must retain an openness to current thinking so that they retain their relevance within changing climates and conditions” (Henwood & Pidgeon, 2003, p. 152).

Indeed, in a postmodern era that encompasses and encourages different perspectives and voices (Caplan, 2011; Dierkes, 2010; Turner, 2010), it is important for social researchers to be aware of how different points of view and ways of procuring knowledge could possibly supplement each other and render a more comprehensive understanding of social events. Based on what is defined as truth and is recognized as knowledge, the meaning of a theory may be pluralistically reflected (such as analytical knowledge, persuasive perspective, orienting principles) by researchers who hold different worldviews (see Thomas & James, 2006). In light of this pluralism, the vague philosophical stance in the original GTM has somehow unintentionally encouraged researchers with different worldviews to adopt and further develop this original methodological perspective into a family of methods (Babchuk, 2009; Bryant & Charmaz, 2007; Urquhart, Lehmann, & Myers, 2010). Examples of the nature of theories and corresponding GTM, speaking only very generally, can be illustrated in the following way (also refer to Table 1).

The realist⁸ ontology assumes a social reality independent of our descriptions, knowledge, and beliefs about it (Miller, 2010). To build a theory, therefore, is an endeavour to maximize the **correspondence** to facts in the external social reality (Guba & Lincoln, 1994; Hussey, 2000; Lomborg & Kirkevold, 2003; Miller, 2010; Mills, Bonner, & Francis, 2006). The focal point of a realist study is social mechanisms; research participants are implicitly regarded as research subjects that carry information reflecting social mechanisms. Although Glaser has insisted on taking a “paradigmatically neutral” (Urquhart, Lehmann, & Myers, 2010) stance and stays unyieldingly close to the original GTM, scholars often categorize classic grounded theory (CGT;

⁸ These ontological strands are mentioned in a broad generic sense. Various clans have been developed within each strand and it is beyond the scope of this chapter to discuss these subtleties.

also called Glaserian GT) as a realist approach based on its implicit discourse on realism (Annells, 1997; Lomborg & Kirkevold, 2003; Simmons, 2010).

The relativist³ ontology embraces the idea of multi-realities constructed by emic (local) and idiographic understandings of the social world (Denzin & Lincoln, 1994; Kneller, 1964; Swoyer, 2010). A theory is therefore a matter of **coherence** and **consensus** that reflects a perceived reality (Lomborg & Kirkevold, 2003; Mills, Bonner, & Francis, 2006) by a group of culturally and historically bounded people and reconciles a researcher's cognizance of the observed event (Hamilton, 1994). The value/voice of a research participant is emphasized in this inter- and intra-personal tradition. Building on social constructionism (see Burr, 2003), Charmaz (2006, 2008, 2011) developed a well-perceived constructivist GTM that views knowledge in a fluid and changing fashion and takes into account "the researcher's construction of emergent concepts" (Charmaz, 2011, p. 365). Other scholars have taken more critical sociological stances, and use them as either perspectives to adopt a current GTM (e.g., MacDonald's critical theory, 2001; Wuest & Merritt-Gray's feminism, 2001) or a methodological framework to develop a new GTM (e.g., Bowers & Schatzman's dimensional analysis, 2009; Clarke's situational analysis, 2005), in order to respond to a more reflectively and diversely perceived postmodern society.

From a pragmatist point of view, ontology is relegated to a secondary issue when it comes to building a theory (Cherryholmes, 1992). Instead of being reference-oriented (e.g., realism), pragmatism is a use-oriented (Delanty & Strydom, 2003; Kneller, 1964) scientific endeavor that emphasizes the conjunctive value of theory and practice (Dewey, 1938). A theory therefore is a matter of **solution** for an existing social problem (Hookway, 2010; Lomborg & Kirkevold, 2003). Strauss (in cooperation with Corbin) traced back to the pragmatist philosophy of

knowledge⁹ proposed by Dewey, Mead, and James et al. (see Bryant, 2002; Corbin & Strauss, 2008; Pursley-Crotteau, Bunting, & Draucker, 2001; Strauss & Corbin, 1990) and more specifically focused on symbolic interactionism developed by Herbert Blumer (1969). Scholars who adopt a symbolic interactionist GT by and large look into relationships (as mediated by symbolic communication, therefore a strong focus on interviews) between individuals and society (Milliken & Schreiber, 2001).

Table 1.

A Conceptual Framework of Some Possible Meanings of Theory in GTM

	Realist GT	Relativist GT	Pragmatist ^a GT
Nature of social reality and focal points of scientific pursuits	An external social reality that consists of observable social objects and mechanisms	Multi-realities that reflect local and idiographic understanding of the world	Social reality is changing in its essence and bounded within human experiences
Aim of knowledge/theory generation	Maximizing the correspondence to the reality	Finding the coherence to others' ideas	Capturing transaction between an individual and a reality
Primary value ^b of knowledge construction	Generalization, Prediction	Understanding, Explanation	Action, Usefulness
Proponents ^c	Annells (1997); Glaser ^d (1978); Simmons (2010); Stern (2009)	Bowers & Schatzman, (2009); Charmaz (2006); Clark (2005); Gibson (2007); MacDonald (2001); Madill, Jordan, & Shirley (2000); Olesen (2007); Wuest & Merritt-Gray (2001)	Corbin & Strauss (2008); Crooks (2001); Milliken & Schreiber (2001)

^aWith a focus on symbolic interactionist research approach. ^bNot mutually exclusive. ^cThe lists are only exemplary, not exhaustive. ^dGlaser's implicit realistic roots was only suggested from his writing.

⁹ Pragmatism is generally perceived as consisting of two different schools: one is an implicitly realist position held by Charles Peirce and his proponents and the other is an implicitly relativist position advocated by William James, John Dewey, and Richard Rorty (see Mounce, 1996; 2000).

In sum, no matter whether a theory is about finding correspondence, coherence/consensus, or solution, these end products all contribute collectively to our knowledge of understanding of the social world. What should be evaluated in the theory-building enterprise are the philosophical clarity and methodological integrity of a research scheme; that is, when doing grounded theory research, a researcher should start with a question which has clear philosophical underpinnings in tandem with well-thought out and correspondent sampling (and how the participants are regarded), data mining, data analysis, and evaluative criteria. Take generation of theory regarding the phenomenon of assigning two special educational labels to students for example. A realist might ask questions related to and build a theory towards a generalizable mechanism of how labeling affects twice exceptional¹⁰ students' academic adjustment; a relativist might ask questions related to and build a theory towards how twice exceptional students perceive their self-identity regarding carrying two labels; a pragmatist is likely looking for a theory that aims to help twice exceptional students to cope with social-emotional maladjustment.

Among the three major strands of GTM, classic grounded theory (CGT; also called Glaserian GT) is perhaps the one that has received most criticism and is thus dissipating in popularity, possibly because of the vague praxiology of the method. Many researchers become lost in their attempts to do a CGT study (Stübing, 2007) and in its vague evaluative criteria (Gasson, 2004). While constructivist grounded theorists and pragmatist grounded theorists have more or less modified the original GT evaluative canons (i.e., fit, work, relevance, and modifiability) proposed by Glaser and Strauss (1967) in order to correspond better to their philosophical worldviews, classic grounded theorists are somewhat more insistent on the original canons (e.g., Giske & Artinian, 2007; Lomborg & Kirkevold, 2003). To address the struggles in

¹⁰ The co-existence of giftedness and a disability

using a realist GTM approach, this study's objective was to re-evaluate the original four evaluative criteria (Glaser, 1978) and propose a validation model for a realist grounded theory method. Despite the fact that CGT has been suggested as an implicit discourse on realism (Annells, 1997; Lomborg & Kirkevold, 2003; Simmons, 2010), this chapter does not intend to lay out a realist building block for CGT. Rather, it uses a realist framework to re-interpret CGT in order to provide a discussion of the philosophical etiology and a validation model that could supplement the usability of a realist¹¹ account of grounded theory method (RGT).

General GT Process and a Revisit of Glaser's Evaluative Criteria

The operational nature of grounded theory is analytically systematic and procedurally flexible. Its scientific rigors dwell in the logic of knowledge generation and the systematic structure that follows; its flexibility resides in its simultaneous and iterative attributes in comparison to verification studies that are more linear and bounded. To generate a grounded theory, a researcher has to immerse him/herself in the following activities: theoretical sampling and data collection, theoretical coding, theoretical memos, theoretical sorting, and theoretical writing (Glaser, 1978). The word "theoretical" can be better understood as "conceptual" in the sense that all these activities are guided by the goal of generating a theory that is fundamentally led by finding the conceptual grain in the data. The aforementioned activities are sequenced in a spiral shape with a researcher's attempts to achieve theoretical saturation zigzagging between data and theoretical codes. Readers interested in a more detailed GTM operational account can refer to Dey (1999) and Henwood and Pidgeon (2003). After a grounded theorist generates a theoretical account, Glaser (1978, 1992, 2002, 2008) suggested a set of criteria to judge the quality of the product: fit, workability, relevance, and modifiability.

¹¹ Of note, the realist notions in this chapter are largely influenced by the school of critical realism (see later section of this chapter).

Fit refers to the extent to which a theoretical account represents the empirical data from which it is derived. The categories of a theoretical account should honestly reflect the evidence gathered and ring true to the participants. A researcher should not force or select any category into a theory by adopting any pre-conceived concepts. This is not to say one should exclude pre-existing categories from theory development to attain theoretical refreshment. On the contrary, if an extant category is relevant, it will emerge during data analysis and earn its way into the grounded theory.

Workability means that the theoretical account should be able to explain what happens in an area of substantive inquiry. Workability is synonymous with applicability; it should hold power for predicting what will happen and rendering practical implications (such as policy making, changing practice). This criterion resonates with pragmatists' thinking; the "proof is in the pudding" so to speak.

Relevance denotes the importance of a study topic to the participants and the magnitude with which a theoretical account resembles their day-to-day life. The studied question gains its significance by emerging from the research process. It usually represents major concerns of people in a substantive area. A theoretical account also achieves its relevance by including and explaining more real life variation.

Modifiability speaks to the nature of a grounded theory. As Glaser (2008) stated, a theoretical account generated by GT is just an abstract of the unit, time, place and people or a pause in the ever-developing social process. Therefore it is never a perfected product. Corresponding to its embedded philosophy that social reality is never a fixed entity, a theoretical account is readily modifiable and always evolves with new data. As opposed to being regarded

as one of the criteria for judging GT, modifiability works better as an underlying assumption that delineates the nature of grounded theory and social reality.

Before viewing these criteria critically, certain merits should be addressed. First, these standards do not appear to be trivial and local. The parsimony of a theoretical account gives it power to be employed in a wider range of situations. For example, these criteria correspond almost perfectly to the progressive matrix of test validity proposed by Messick (1989, 1995, 2000) in which he unraveled the intricacy of interpretability, relevance, utility and social consequences of test scores. Second, these criteria render conceptual importance that further informs other qualitative evaluative procedures and criteria; they directly inspired later qualitative researchers (e.g., Guba & Lincoln, 1981; Morse, Barrett, Mayan, Olson, & Spiers, 2002) and served as a stepping stone for GT disciples (e.g., Charmaz, 2006; Corbin & Strauss, 2008) to develop their own evaluative canons that suit their worldviews and methodological awareness.

That said, the criteria Glaser (1978) proposed certainly do not fall short of questions. First, “fit”, “workability”, and “relevance” clearly stand better as criteria to which a theoretical account ultimately attempts to reach whilst “modifiability” works better as an underlying assumption that delineates the nature of a realist grounded theory. Moreover, these criteria apply to the end-of-inquiry product only; that is, none of them suggests the evaluation of the theory-making process. Aligning with this argument, Glaser’s canons appear praxiologically vacant with an absence of technological terms for operational guidance. A novice grounded theorist often finds him/herself lost in the search for practical evaluative techniques that supplement Glaser’s suggestions (Wilson & Hutchinson, 1996). Besides the lack of praxiological clarity in its criteria, CGT is subject to criticism for the scanty discussion of its philosophical foundation. This is perhaps a

more serious problem. Due to the impact of the original pragmatist philosophy that underpinned it, grounded theory has been unsurprisingly vague in discussing its ontology (Lomborg & Kirkevold, 2003), which poses a serious threat for setting proper evaluative criteria. A theoretical account is considered valid if “it presents accurately those features of the phenomenon that it is intended to describe, explain, or theorize” (Hammersley, 1992, p. 69), yet the features to be captured depend entirely on a researcher’s worldview. The objective against which a theoretical account is validated can be construed as objective reality, the constructions of agent actors, or other possible interpretations (Maxwell, 2002). What is also hinted here is that validity of a theoretical account is contingent on the philosophical parameters it sets for itself and which community it tries to persuade. Therefore, the dismissal of ontological and epistemological conversations about the acquisition of theory undoubtedly undermines the methodological soundness of GT (Bryant, 2002; Charmaz, 2006, 2011).

By offering a set of sequenced validation stages and tangible operational terms, it is hoped that the validation model¹² presented here will serve novice grounded theorists as both a conceptual guide and a guide to action. However, it is important to mention here that this chapter does not intend to promote the validation model in an arbitrary fashion (see Chamberlain’s notion on ‘methodolatry’, 2000); rather, it is hoped that the presence of this model will stimulate more ontological, epistemological and methodological discussions in regard to the meanings and the generation of social theories among grounded theorists (and perhaps qualitative researchers at large).

¹² The validation model proposed in Chapter Two is a final version which has undergone a few revisions that address both the author’s reflection on its practicality though testifying the model in an empirical study and comments received from journal reviewers.

An RGT Validation Model

“Validity is in its making.”

– Koro-Ljungberg (2008, p. 988)

Despite the difference in philosophical perspectives, a point of contact among various strands of social studies is their foci on inference making (Cronbach, 1982). From here, a definition of research validity can be correspondingly adduced from Lund’s (2005) words: “Validity refers to the approximate certainty of the truth of an inference or knowledge claim, where inference is taken in a broad sense so as to encompass interpretations and generalisations” (p. 121). This definition further implies that: (1) method, data or empirical results alone cannot be taken as a sufficient source for judging the validity of an inference claim and (2) validity should be concluded from a validation process as it never is a fixture attached to a methodology or a statistical technique (Lund, 2005). For readers to judge the extent to which a GT product is valid, an evaluative account that provides, at least, **transparency** between evidence and the abstract concepts and **auditability** of the methodological choices was suggested by Avis (1995). The requirement for transparency and auditability will be best prepared if a grounded theorist takes strategic action to ensure a grounded theory’s credibility¹³ is actively attained through the theory-making process, rather than passively re-interpreted by external readers (Corbin & Strauss, 2008; Morse et al., 2002).

Prior to the presentation of an RGT validation model, a brief account of critical realism (henceforth CR) will be provided in order to help readers reason the possible meanings of validity from a CR point of view. Trying to reconcile the prevalent dualisms (e.g., positivism vs.

¹³ Credibility in this chapter refers to a necessary, but not sufficient, quality for research validity. The meaning of validity in this chapter refers to the extent to which an inference or knowledge claim is well-grounded empirically and philosophically.

hermeneutics; structure vs. agency; reason vs. cause, see Shipway, 2011) in the enterprise of science, Bhaskar (1975, 1978, 1986, 1998) proposed two distinct dimensions of sciences and a stratified reality. CR assumes that social objects (such as social structures and mechanisms) of scientific knowledge are real, exist independently of human minds, and are more intransitive (i.e., enduring) whereas the generation of knowledge (such as theories) about these social objects is transitive, subject to modification, and contains historical and cultural explanations (see Scott, 2010; Shipway, 2011). To make a realist science possible, social reality is stratified into domains of the real (contains structures, mechanisms, and relations), the actual (events caused by those structures, mechanisms, and relations), and the empirical (a social individual's experience of events and behavior). The gaps in the stratified reality insinuate the fallibility of knowledge since the generated knowledge does not equate to the existence of a social study object; furthermore, these gaps further suggest an epistemological relativism that allows the reality to be captured in a more comprehensive way (Danermark, Ekstrom, Jakobsen, & Karlsson, 2002; Hacking, 1982). Another very important epistemological aspect of CR is the distinction between open and closed systems. While the generation of knowledge in natural sciences is possible in a closed system such as a laboratory, it is not deemed the same for social sciences since "the causes of social phenomena are manifested only in 'open systems'" (Shipway, 2011, p. 59). The differentiation between open and closed systems leads to the opposition to positivistic closed-system experiments in social sciences. Moreover, CR also tries to reconcile scientific facts and social values by implying social knowledge of generative mechanisms to social practices and emancipation (Danermark et al., 1997; Sayer, 1992; Shipway, 2011). To summarize briefly, CR is critical toward naïve realism and a strong opponent of empirical positivism. It suggests a preference for generalizable knowledge and recognizes the fallible nature of mind

constructions.¹⁴ In the following section, an RGT validation model is proposed with notions of these core CR tenets; a set of strategic action is also suggested to enhance better usability of the model.

Of note, the motivation for designing this validation model derived from the dissatisfaction with extant GT literature (which abounds with confusing internal GTM debates) and the reflection on the lack of a tangible validation account when the author planned to conduct a GT study on the double-labeling process among secondary students who are gifted and have attention deficit and hyperactivity disorder (ADHD). This validation model was later applied in a study focusing on investigating the double-labeling process (Lo, 2012b), resulting in the delineation of a reconciliation process between knowing labels and knowing oneself that captured and theorized the pedagogical perspectives of educational labeling.

The nature of validation in RGT research can be demonstrated in a simple fashion as a recursive loop (see Figure 1) between a theory and the external social reality. While an RGT account is informed by, and constructed with, data a researcher empirically collects, the validity of such an account is contingent on the closeness it represents to an social mechanism/event a researcher attempts to capture (therefore a recursive line back to the external social reality).

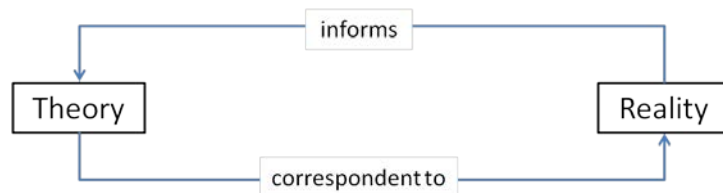


Figure 1. The recursive nature of validating an RGT account

¹⁴ Readers who are interested in gaining deeper understanding of critical realism are encouraged to refer to the earlier texts written by Roy Bhaskar (1975, 1978, 1986, 1998), Andrew Collier (1994), and Andrew Sayer (1992).

To further unpack the simplified expression in Figure 1, a more detailed RGT validation model is presented in Figure 2, wherein the proposed validation stages and strategies purport to assist in evaluating the closeness between a theoretical account and what is really going on out there.

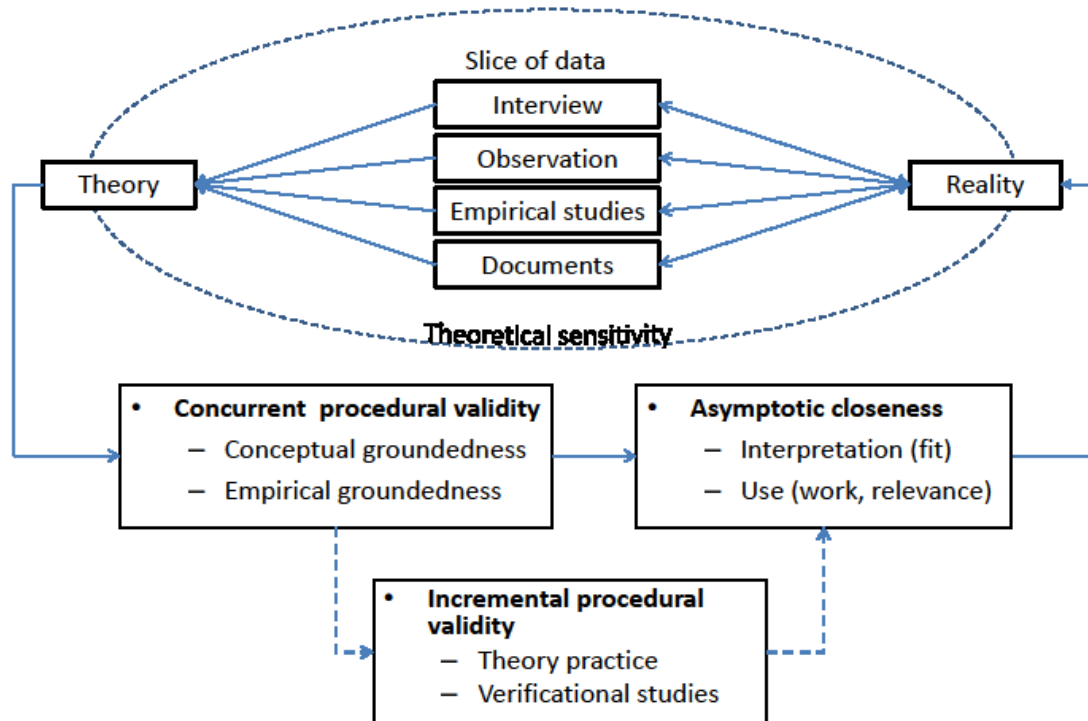


Figure 2. RGT validation model

To be more specific, the upper part of the model is a simplified silhouette of the RGT research process in which a researcher simultaneously collects and analyzes data from real life to form a theoretical account whilst the entire process is mediated by the researcher's theoretical sensitivity. The double-headed arrows between slices of data and reality denote the zigzagging nature of data collection and data analysis. The lower part of the model entails a two-tiered validation process for examining the closeness of a theoretical account and the external social reality. Since an external social reality will never be readily presented for validation, validity in

RGT is held as **asymptotic closeness** accrued through a rigorous and conscious validation process and Glaser's (1978) criteria (fit, workability and relevance) are re-considered to be employed as **referential standards** for judging closeness. That is to say, if a theoretical account fits and is relevant and workable, it can be assumed that the essence of a behavior or social/psychological process is captured by the researcher. Although it seems reasonable to claim that a theoretical account generated by real-life data has a higher degree of fit, relevance, and workability, the attainment of these three standards by no means should be assumed automatically just because a grounded theory approach is adopted since method alone cannot serve as a single source for claiming truth, goodness, or persuasiveness of any research (Henwood & Pidgeon, 1994).

The attainment of the aforementioned referential standards is an ongoing process in which a researcher collects **validation evidence** concurrent with and subsequent to a research project. The validation evidence collected concurrently with a research project speaks to the degree to which a theoretical account is dependable and credible to the audience; it is attained by examining how an RGT study is well-grounded, conceptualized, and justifiable. The validation evidence that comes subsequently (i.e., after the theoretical account is formulated) usually speaks to the degree to which the theoretical account has efficacy and force in real life; it is attained by adopting verification strategies such as verification studies (e.g., conducting survey research using a questionnaire based on the theory), theory practices (e.g., adopting a teaching theory and practicing it in a classroom), and a review of the end-of-inquiry theory by a group of field experts (e.g., defending the plausibility of a grounded theory in front of an examining panel). Correspondingly, two types of validity that contribute to the product proof are **concurrent procedural validity** and **incremental procedural validity** in this model. Considering the goal

of grounded theory methods (i.e., to generate a theoretical account or a set of hypotheses), incremental procedural validity is not essential to claiming the local justification of a grounded theory (therefore the use of a dotted line for incremental procedural validity in the model). Nevertheless, a satisfactory account of concurrent procedural validity serves as the necessary precondition for researchers to undertake any verification strategies.

In short, RGT validation is proposed as an ongoing process in which asymptotic closeness of the external social reality is rudimentarily suggested by concurrent procedural validity and subsequently reinforced by incremental procedural validity. Since protocols for implementing verification strategies have been consensually established among various academic disciplines, this chapter aims to provide possible means and thoughts to attain concurrent procedural validity.

Concurrent Procedural Validity

Concurrent procedural validity is the assorted wisdom that is structurally inspired by Dey (1999) and conceptually inspired by Dey (1999), Glaser and Strauss (1967), Lincoln and Guba (1985), Strauss and Corbin (2008), Maxwell (2002), Morse et al. (2002), and philosophies of critical realism (e.g., Bhaskar, 1978; Danermark et al., 1997) and pragmatism (e.g., Cherryholmes, 1992; Murphy, 1990). To use Dey's words (1999), concurrent procedural validity of a grounded theoretical account should be examined "conceptually" as well as "empirically."¹⁵ In the proposed validation model, the search for evidence of concurrent procedural validity goes beyond and above empirical elements (such as sampling, data analysis) of a research project and is guided by meta-theoretical considerations.

¹⁵ This empirical and conceptual groundedness structure is borrowed rhetorically from Dey's (1999) chapter that discusses GT validity issues. However the contents of the structures do not resemble each other.

This idea is akin to Morse and her colleagues' (2002) concept of "self-correction mechanism" (p. 14) by which a researcher employs well thought out verification strategies to ensure that threats of validity are detected before they subvert the analysis. In other words, the art of yielding evidence for concurrent procedural validity goes beyond passively pulling evidential threads interwoven in the research process in a post hoc manner; instead, it should be sought and collected intentionally during the research process and embodied in an evidential account of "conceptual groundedness" and "empirical groundedness."

Acquiring conceptual groundedness. In terms of conceptual groundedness, some suggestions are provided that can be implemented and synchronized into a conceptual blueprint that bolsters the philosophical clarity of an RGT study. Of note, the criteria listed below serve better as meta-cognitive reminders that guide an RGT study in various stages and should manifest via the more concrete strategies suggested later for empirical groundedness .

1. ***Meta-theoretical investigation and research purpose.*** In order to construct a tangible GT account, a GT theorist should, first and foremost, invest time in acquiring knowledge for meta-theories¹⁶ since knowledge (or, more specifically, social theories) is basically social products generated under these philosophical presuppositions (Altheide & Johnson, 1994). Danermark et al. (2002) argued that meta-theories permeate every stage of research and should be regarded as the central feature in planning scientific studies. Second, it is also recommended that a GT theorist be philosophically discerning about research purpose and render a reflective account that explains the mode of truth (e.g., correspondence to external reality, congruence of a perceived reality) he/she pursues (Cho & Trent, 2006; Moilanen,

¹⁶ Meta-theories consist of foundational assumptions and preconditions of science that correspond to different ontologies and epistemologies [e.g., critical realism, constructivism, and hermeneutics (Marrow & Brown, 1994)].

2001; Pawson et al., as cited in Porter, 2007). This interconnection among the question to be answered in a study, the fundamental purpose of doing a study, and the criteria employed to judge the legitimacy of knowledge claims generated from the study is the key to research integrity. Together, the meta-theoretical conversation and a reflection on research purpose render a blueprint for and serve as the bedrock of the previously mentioned philosophical clarity for constructing a GT account.

2. ***Normative-theoretical awareness and research propriety.*** Critical realists hold a value-aware stance towards research (Healy & Perry, 2000; Madill, Jordan & Shirley, 2000) in which researchers recognize the fact that we are all social beings and our acts are always vested with some social values and/or interests. These social values/interests could manifest in various dimensions (such as morality, politics, and cultural ideology) and often are the hidden force pushing the emergence of a grounded theory. A researcher's normative-theoretical considerations can be expressed as concerns about research consequences, such as the societal implications of a constructed theory, raised by some contemporary validity theorists (e.g., Dellinger & Leech, 2007; Hubley & Zumbo, 1996; Maxwell, 2002; Messick, 1985, 1995, 2000) and sometimes further translated into social standards he/she wants to set up or challenge (Morrow & Brown, 1994). An additional concern related to a normative-theoretical agenda is research propriety (Pawson et al., as cited in Porter, 2007) by which researchers examine the ethical and legal aspects of research a priori. Most contemporary research institutes have a mechanism (e.g., institutional research board) that ensures ethical and moral research conduct.
3. ***Logical-inferential accordance.*** Since social reality does not speak for itself, its revelation is inevitably tempered by human cognitive activities such as reasoning, imagination, intuition,

and so on. Therefore, Danermark et al. (2002) argued that the ability to perform rigorous reasoning¹⁷ should be deemed as a primary quality in a theorist and evaluative criteria for a theoretical account should be chosen to correspond to the reasoning style adopted. In the case of grounded theory, although it was suggested as an inductive methodology in its early development, later GTM proponents criticized this naiveté and realised that the generation of grounded theory begins with an inductive logic and is advanced with abductive reasoning¹⁸ (see Charmaz, 2011; Dey, 1999; Peirce, 1955; Reichertz, 2007; Richardson & Kramer, 2006).

Acquiring conceptual groundedness is essential, especially for beginning qualitative researchers since the adaptation of a new research paradigm often requires a major “mental relocation/dislocation” (Chamberlain, 2000, p. 293) from previous research paradigms (e.g., positivism). Although the validation model is proposed as a realist one, keen readers may have noticed that the strategies listed above for examining conceptual groundedness are rather generic and applicable to other genres of qualitative studies.

Acquiring empirical groundedness. In terms of “empirical groundedness,” an RGT theorist is advised to provide evidence regarding the variation of data and the process that bridges data into a theoretical account. In comparison to conceptual groundedness, criteria for judging empirical groundedness are more directly related to, hence confined within, a current research project. Some strategies for procuring empirical groundedness are suggested below.

1. ***Accuracy of data and conceptual incidents.*** In comparison to verification or descriptive studies, GT methods focus more on conceptual accuracy than descriptive accuracy (Glaser &

¹⁷ They listed deduction, induction, abduction, and retroduction as the four major logic reasoning styles.

¹⁸ Focusing on finding explanations for observed fact (i.e., associating data with ideas).

Strauss, 1967). The GT dictum “all is data” holds true if the conceptual value in a given slice of data is exploited and further compared with that in other slices of data. To achieve a greater extent of conceptual accuracy, a grounded theorist should be aware of sources, strengths, and limitations of both first-hand and second-hand data and versed at collecting, evaluating and analyzing these data (Stewart & Kamins, 1993). This conceptual accuracy is akin to “interpretive validity” in Maxwell’s (2002, p. 48) qualitative research validity typology. Maxwell recommended that conceptual incidents be checked with conscious as well as unconscious intentions, beliefs, concepts and values in the material.

Although placing more focus on conceptual accuracy seems a justifiable act in GT, it is still unwise to veto the importance of descriptive accuracy (or what Maxwell [2002] called “descriptive validity” [p. 45]). To some extent, conceptual accuracy has to be established on the basis of descriptive accuracy. It is especially evident in the fact that grounded theorists by and large use first-hand data (such as interviews and observations) in which the plausibility of any further interpretations is contingent on the quality of the original data. If the researcher is collecting qualitative data, *member checks* (Lincoln & Guba, 1985) ensure that descriptive validity is not eroded by mis-hearing or mis-remembering during the interview or observation. On the other hand, if the researcher is collecting quantitative data, she/he should pay attention to data importation, detecting outliers, types of scaling issues and so on in order to render a stratified account of data accuracy.

2. ***Disciplined imagination and documentation.*** To many social scientists, grounded theory method appears an attractive option because it allows researchers to wield power of imagination and creativity in rigorous scientific research pursuits (Charmaz, 2006, 2011; Corbin & Strauss, 2008; Glaser & Strauss, 1967). This is especially true while a grounded

theorist abductively stitches the conceptual codes/themes into a coherent theoretical framework. However, overuse or misuse of this imaginative power could result in a theory that is far from grounded. In order to keep the imagination “disciplined,” Dey (1999) suggested that a theorist record how the connections between concepts and the grounds for inference are made and offer reasons for why an explanatory account was chosen from among the alternatives. Such an account, in combination with reflexive memos (such as memoing the awareness of implications of decisions while attending to methodological problems), can help readers to evaluate the dependability of the research process (Shenton, 2004) and follow the bridging process between evidence and abstract concepts (Avis, 1995).

3. ***An overview of process and variation.*** One of the strongest factors that lends credibility to GTM is its prolonged and stringent research process (Guba & Lincoln, 1981). Corbin and Strauss (2008) suggested that researchers provide an overview of the research procedure (such as sampling, data collection and analysis) to make rigor explicit, thus assisting readers in judging overall research adequacy. Regarding variation in a set of data, it is perhaps the most salient piece of evidence to distinguish the realist orientation in a GT since it demonstrates the underpinning philosophical threats. Besides research procedures, several other components should also be considered. For example, evidence of variation (i.e., slices of data) is important for a realist theoretical account because it demonstrates how various social strata and observational dimensions are cross-validated and in turn synchronized into transcendental theoretical statements. A sufficient description of the research site is another important aspect because of the referential power it holds for generalization (Corbin & Strauss, 2008; Shenton, 2004). Moreover, a grounded theorist should also demonstrate some evidence of “methodological awareness” (Seale, as cited in Corbin & Strauss, 2008, p. 304)

since, amid a dynamic research process like GT, grounded theorists inevitably encounter moments when they have to make decisions. Taking the double-labeling phenomenon for example, a theorist with a realist goal might want to gather slices of data that would eventually converge on relations between the labeling and students' academic adjustment. Therefore, the questions to be asked and the participants to be interviewed after an initial set of interviewees will differ from those of a theorist with a constructive goal who intends to give a fuller picture of a comprehended reality of a group of people. To be concrete, a school principal might be interviewed by a realist theorist with a question regarding what resources are available to the students given the labels whereas the principal might not be considered as an important informant to a constructive theorist as he/she does not have direct observations of these students (a constructionist might predominately focus on interviewing the students and their teachers and parents/guardians). These moments call for a researcher's solid grasp of the methodology and clarity of purpose in relation to the modes of knowledge and truth.

4. ***Theoretical triangulation.*** In Glaser and Strauss' book (1967), grounded theorists are asked to bracket themselves from the extant field theories and literature in order to avoid fitting data into a preconceived theoretical framework. While this bracketing makes sense for constructing a theory anew with fresh perspectives, it is not to ask researchers to belittle or dismiss the importance of extant field theories and literature. Conceivably, a theory does not come from a vacuum. A new theory, at the very least, is informed and inspired by existing theories, thoughts, and ideas. The construction of a meaningful grounded theory is largely contingent on a researcher's theoretical sensitivity and the ability to reason abductively, which is facilitated by a researcher's theoretical foundation and the abilities to use the knowledge critically and synthetically. The notion of 'discovery' (Glaser & Strauss, 1967) in

the generation of a GT only pertains to the limited part of inductive observation at an earlier stage of a grounded theorizing process. In light of this adoption of both inductive and abductive reasoning, it is proposed that pertinent theories and literature should be used as both data for theory generation and reference for triangulating the validity of the grounded theory. That is, to generate a meaningful grounded theory, a researcher should have the flexibility to see extant theories/literature afresh, to examine them critically, and even to use them creatively. Such a triangulation strategy amplifies the theoretical value and soundness of an RGT account since the level of objectivity is manifested by the convergence, or the lack thereof, of a current theoretical account and extant theories/ thoughts/ideas (Madill, Jordan, & Shirley, 2000). By critically examining meaningful connections (e.g., consistency, continuity, inconsistency, contradiction [Dey, 1999; Mathison, 1988]) between extant theories and the newly grounded theory can constrain a theorist's personal bias.

5. ***Communicative validity.*** Last but not least important, an RGT account should be communicated in a style and language that reflects realist underpinnings. Above and beyond semantics, the correspondent style and language enable a higher level of interaction between the writing and the readers and raise the possibility of receiving more germane reviews from a targeted audience (Blumer, 1969). Watson and Girard (2004) argue that communicative validity should be regarded as one of the crucial components that comprise research integrity and wholeness as it informs the linkages between a researcher's philosophical clarity and the chosen approach as well as reinforcing the scientific adequacy of the study. In doing so, it also invites a higher level of communal validity¹⁹ (from the process of soliciting opinions and scrutiny) that endorses trustworthiness of a study (Moilanen, 2001).

¹⁹ Legitimization of knowledge requires a judgment of a community of the consumers of the research (Moilanen, 2001, p. 384).

Although conceptual groundedness and empirical groundedness are categorically separated above, these two kinds of groundedness should not be deemed as discrete criteria since they are used in an interwoven way (as the former informs the latter while the latter manifests concrete evidence of the former). In sum, through implementing the validation model in a realist grounded theory study, the model was found valuable in that it provided not only tangible terms that guided the research process but also a rendition of validation evidence that suggested the original GT canons—fit, work, and relevance.

Concluding Thoughts

“The time has come to revisit the nature of theory in grounded theory” (MacDonald & Schreiber, 2001, p. 49). Corresponding to Macdonald and Schreiber’s urge, this chapter provides a conceptual framework of some ontology of a grounded theory and encourages novice grounded theorists to procure philosophical understanding of a social theory before choosing a GTM. As Packard and Polifroni (1992) stated, “Every theory is based upon an idea of what truth might be and where it might be found” (p. 162); ontological and epistemological clarification is imperative in a GT study for the reason that it could serve as both an action guide (Whittemore, Chase, & Mandle, 2001) and a reference point for evaluation (Holt & Clarke, 2000). Therefore, philosophical discourses in GTM are never the “lofty talk” criticized by Glaser (2009, 2011).

Moreover, this chapter offers a realist interpretation of the original GTM and a validation model in order to facilitate “groundedness” in RGT studies. While GT studies are still plagued with validation issues (Annells, 1997; Chiovitti & Piran, 2003) and criticized for philosophical naiveté and methodological indefensibility (Bryant, 2002), it is hoped that the proposed RGT validation model with a few empirical examples will advance the usability of this approach. However, it is important to note here that this validation model is by no means promoted as “the”

way to do an RGT study. Rather, the author hopes the presence of a validation model will stimulate dialogue in formulating standards of rigor and enriching the concept of research integrity. Being well aware of the caution about “qualitative positivism” (Kvale, as cited in Cheek, 2008, p.205), this author will further offer some notions to assist readers to maintain a critical view on using the RGT validation model and the validation criteria. First, whilst some of criteria listed above are realist-specific, some are more generic and can be employed by other strands of GT approaches (or general qualitative studies). Second, some of the criteria have considerable rhetorical resemblance to other qualitative validity/credibility terminologies; these criteria should not be used merely for their semantic meaning but, rather, should be used with true understanding of the connection between a criterion and the ontological and epistemological aims of a study. Last and perhaps more importantly, these criteria are neither exhaustive nor rigid; they are listed to assist an integrative research process, not to control or cut short the possibilities of theory making. In other words, these suggested criteria are directional rather than prescriptive. Fellow grounded theorists are encouraged to integrate and/or modify the model and the set of criteria with their own validation constructs.

At this juncture, readers might still have the urge to ask: “So, what is social theory in the sense that it is realist and grounded?” Adduced from earlier discussions in this chapter, a realist grounded theory should at least have the following features. First, it should present a degree of correspondence to the social mechanism/event a researcher aims to unpack; this correspondence is contingent on its convincibility to the research community who will judge it. Second, its scope of generalizability should be reflected in its immediate usability since it is inspired by what is currently going on in the field. Third, it should achieve a balance between scientific rigor and

imagination, like every great invention. Fourth, it should possess face validity, such as using a form generally accepted as a theory (e.g., propositions), for the sake of communication.

While Corbin and Strauss (2008) suggested that grounded theorists follow one grounded theory approach in order to retain methodological consistency, this chapter urges a grounded theorist go beyond simply retaining methodological consistency and investigate the philosophical foundations of various inquiring modes of truth further in order to claim methodological justification and retain methodological integrity. It is argued here that an excellent grounded theory requires a researcher to take further steps to ensure that the study is guided by philosophical clarity. All the elements can therefore be interwoven into an integrated piece.

Chapter 3: Labeling and Knowing—A Reconciliation between Field Knowledge and Self-Knowledge Theory among Students with Exceptionalities

Introduction

Using symbols to name and label one's surroundings is a universal human intellectual tendency (Asher, 2001). In educational settings, labeling refers to categorizing children on the basis of their exceptionality for educational purposes (Henley, Ramsey, & Algozzine, 2008; Winzer, 2008); thus, labeling constitutes the foundation of special education. The enterprise of special education started in the 18th century with a charitable underpinning (Camara, 2011; Winzer, 1993). While some scholars keep a skeptical eye on the labeling practice from a sociological point of view (see Gates, 2011), Winzer (2008) argued that labeling is the result of social evolution that reflects the needs of societies rather than affirming or negating any individual for social control purposes. However, as benign and humanitarian as the origin of educational labeling may sound, it does not serve merely what the purposes of educational labeling suggest.

When they interact with social values, educational labels either can be perceived as benevolent/desirable (such as gifted) or toxic/undesirable (such as learning disabilities); even among the toxic labels, some encompass a higher level of intrusiveness and introduce a more painful and discrediting aftermath (such as mental retardation) while others are more benign and can even be joked about in a non-pejorative manner (such as ADHD, Camara, 2011; Edgerton, 1993; Goffman, 1963). Due to this complexity, the labeling practice has not been immune from public distrust and protest. Nonetheless, the practice of educational labeling has proved indispensable in some ways. At the very least, it provides a pathway for exceptional children to acquire services and resources that would otherwise not be available for them (Damico &

Augustine, 1995; Heward, 2005; MacMillan & Meyers, 1979; Winzer, 2008). Moreover, it helps to yield coherent understanding and promote effective communication and common language among related agencies that in turn encourage public policy making and research (Henley, Ramsey, & Algozzine, 2008; Winzer, 2008). In addition, labels sometimes have an ameliorative function, in the sense that they increase the visibility of students with special needs and result in better public understanding in regard to the students' nature and needs (Henley, Ramsey, & Algozzine, 2008; Winzer, 2008).

In short, the effect of labeling is multi-level. As Hudak (2001) says, a label issued for educational purposes brings simultaneous and multidimensional experiences for an individual—institutional, psychological, social, and spiritual—and it has “staying power” that affects the life of an individual beyond and after school years. Labeling is a complex issue that involves developmental, psychological, and sociological factors yet it has long been understudied, especially in the gifted education sector (Gates, 2011; Hoge & Renzulli, 1993; Robinson, 1986; Zimmerman, 1985).

Labeling in Gifted Education

In North America, modern gifted education was pioneered in the early 20th century by scholars such as Lewis Terman (1926) and Leta Stetter Hollingworth (1926) whereas systematic and publicly-funded gifted education began in the 1970s (Colangelo & Davis, 2003). The Marland Report (Marland, 1972) is commonly recognized as the historical landmark that announced a new era in gifted education as it issued a formal definition of giftedness. Meanwhile, studies on gifted labeling started to boom after the 1960s (e.g., Ford, 1978; Reschly & Lamprecht, 1979; Rubovits & Maehr, 1973; Tannenbaum, 1962; Wiener, 1968; Wiener & O'Shea, 1963).

Within the extant empirical literature, a considerable portion was influenced by labeling theories derived from sociological traditions, such as Becker's (1966) social deviance labeling theory, Hirschi's (1969) social control theory, and Goffman's (1963) theory on stigma and identity management. For example, Coleman (1985) developed a "Stigma of Giftedness Paradigm" that focused on negative social aspects of gifted labeling and has served as a theoretical framework for a few empirical labeling studies (e.g., Coleman & Cross, 1988; Cross, Coleman, & Steward, 1993; Cross, Coleman, & Terharr-Yonkers, 1991; Manor-Bullock, Look, & Dixon, 1995). Following a similar line of research, others focused on negative social reactions towards gifted labels and academic high performers, such as collective anti-intellectualism (e.g., Colangelo, 2002; Howley, Howley, & Pendarvis; 1995), social ostracism (e.g., Tannenbaum, 1962, 1983), and hostility derived from status and achievement comparison (e.g., Exline & Lobel, 1999; Massé & Gagné, 2002).

Another major trend in gifted labeling studies is the expectancy bias paradigm influenced by social psychological theories such as the Pygmalion effect (Rosenthal & Jacobson, 1968) and the Halo effect (Thorndike, 1920). A school of scholars (e.g., Allday, Duhon, Blackburn-Ellis, & Van Dycke, 2011; Babad, 1980; Fernald, Williams, & Droescher, 1985; Halpern & Luria, 1989; Moulton, Moulton, Housewright, & Bailey, 1998; Solano, 1987) followed this research paradigm and strived to discover how gifted labels might socially inherit stereotypes and generate expectancy biases that could have an impact on gifted students' peers, teachers, and parents and in turn affect gifted pupils' social-emotional adjustment. For example, in Moulton et al.'s (1998) study, pressure and expectations from parents were ranked as the most negative aspect of being gifted by a cohort of adolescent gifted females.

Yet another route has been pioneered in labeling studies, namely self-psychology (e.g., Baumeister, 1999). Scholars in this tradition have focused on how carrying a label affects gifted students' internal psychological properties, such as self-concept, self-knowledge, self-acceptance, self-appraisal, psychological well-being, and self-perception and attitude towards the labels (e.g., Cornell, 1989; Dole, 2001; Feldhusen & Dai, 1997; Freeman, 2006; Guskin, Okalo, Zimmerman, & Peng, 1986; Hershey & Oliver, 1988; Hoge & Renzulli, 1993; Holahan & Holahan, 1999; Jenkins-Friedman & Murphy, 1988; Kerr, Colangelo, & Gaeth, 1988; Manaster, Chan, Watt, & Wiehe, 1994; Rinn, Reynolds, McQueen, 2011; Robinson, 1990). Among these studies, some (e.g., Dole, 2001) tapped the importance of agency and stressed that causal effects of labeling were contingent on the presence of an individual's awareness towards and self-knowledge of the label(s).

Despite the presence of incongruent findings (Hoge & Renzulli, 1993; Neihart, 1999; Robinson, 1986), previous labeling studies on those identified as gifted nonetheless have helped us gain deeper understanding of their social-emotional profile and suggested valuable advice to educators (Gates, 2010; Henley, Ramsey, & Algozzine, 2008). Having said that, labeling studies on gifted individuals have also been criticized for the following two reasons.

First, some empirical studies fell short of developing tangible links between labeling and its effects (Neihart, 1999). The complexity of the labeling process in which moderating contextual factors and mediating personal factors reside was ignored and an over-simplified generalization was rendered as a result (Robinson, 1986; Roeper, 1996). One may argue that labeling in these studies was viewed from the behaviorist perspective, akin to the bell in Pavlov's (1927) conditioning experiment, where the view of individuals as active agents was largely dismissed.

Second, the importance of a developmental account frequently has been under weighed, perhaps due to the difficulty of including a wider age range of participants or finding participants for a follow-up or longitudinal study. This becomes a crucial problem when researchers are looking into the effects of labeling on self-psychology (Hoge & Renzulli, 1993). As Neihart (1999) said, “The development of self-concept is a cognitive task, changing as an individual’s cognitive capacities change over time” (p. 11). Besides cognitive maturity, developmental tasks that individuals deal with at different stages throughout the life span can also play an interactive role in labeling (see Holahan & Sears, 1995; Ryff, 1991; Sears, 1977). While very few papers have focused on this perspective, Freeman (2006) and Holahan and Holahan (1999) both tracked the longitudinal effects of labeling on gifted individuals, providing readers a comparative account of how shifts in life focus before and after adulthood could interact with labeling and affect one’s self-appraisal and psychological well-being. These studies are important to the field as they remind researchers that labeling is a life-long process and its examination should include developmental considerations.

Yet another problem is perhaps more foundational. Zimmerman (1985) criticized the suitability of borrowing labeling theories derived from social deviancy (e.g., Becker’s [1966] theory) to explain a gifted labeling phenomenon. Although she borrowed another sociologist’s labeling theory (i.e., Schur’s [1971] theory of labeling deviant behaviour) to rationalize the labeling of artistic giftedness in her paper, the point she raised regarding finding theoretical frameworks that are more suitable for gifted individuals and have greater relevance to educational psychology is still valid today. In regard to gifted students who have an additional special educational label, that is, twice-exceptional students, the need for a theoretical framework

that is more educationally correspondent is timely and compelling given the contradictory nature of the labels carried by this newly recognized gifted subgroup.

An Empirical RGT Study of the Double-Labeling Process

In the past few years, twice-exceptionality has emerged as a new topic in labeling studies (although these studies are still scarce to date). Within the extant empirical literature, some scholars have focused on the administrative and legislative impacts of carrying seemingly contradictory labels. For example, Bianco (2005; Bianco & Leech, 2010) and Elhoweris (2008) investigated the effect of disability labels on schoolteachers' willingness to refer twice-exceptional students to gifted programs in the U.S. and the United Arab Emirates. Their findings indicated that teachers are less willing to refer students with disability labels to gifted programs. Meanwhile, others have focused on the effects of labeling on students' psychological properties. For example, Dole (2001) did a narrative study to capture the dynamic identity formation process in four college students who were gifted with learning disabilities (GLD). The study revealed that a solid support system and engagement in goal-inspiring extracurricular activities were two key factors.

Following the emerging research trend on twice-exceptionality and taking into account that labeling is a complex process that constitutes multiple levels of factors, this study aimed to (1) generate a conceptual theory that accounts for how double-labeling affects the lives of students with both giftedness and Attention Deficit Hyperactivity Disorder (ADHD) in terms of their psychological development, social-emotional growth, and academic performance, and (2) discover successful coping strategies used by these students and resources they have been able to access for support. Since the concept of giftedness is socially constructed, it is also crucial that a

labeling study is synchronous with the current social milieu (Cross, 2005; Penn & Zlaesne, 2009).

The combination of giftedness and ADHD was chosen for the following reasons. First, ADHD is one of the most commonly diagnosed behavioral disorders among school-aged students (Barkley, 1998). Second, the combination of giftedness and ADHD is a well-bounded topic for a substantive theory since the behavioral and learning traits and educational needs of this group of twice-exceptional students differ from other types of twice-exceptionality (Lovecky, 2004). However, subsequently these findings can be integrated with other related substantive areas (such as giftedness/learning disabilities, giftedness/autism) to form a more formal theory (i.e., mid-range theory) of double-labeling.

A grounded theory method (GT; Glaser, 1978, 1992; Glaser & Strauss, 1967) is appropriate to address the research objectives for the following reasons: (1) there is no preconceived theory on this topic to date; (2) the double-labeling process is hard to capture statistically since is dynamic and involves contextual factors; and (3) there is an interest in discovering social and behavioral mechanisms underlying the double-labeling process. It is also hoped that, through the use of a grounded theory methodology and the adoption of a more naturalistic approach which accounts for contextual and developmental factors, a core category relevant to twice-exceptional students' social and academic adjustment will be identified, a category that also will have implications for educators and researchers.

Definition of Terms

Twice-exceptionality. Twice exceptional refers to the combination of high intellectual potential and school and/or learning related problems (Beckley, 1998). The term twice-

exceptional is used interchangeably with dual-exceptional and both are often abridged to “2E” by practitioners (Callard-Szulgit, 2008; Montgomery, 2009). According to Montgomery (2009), twice-exceptional students appear to present deficits in one or more of the following areas: (1) general or global learning difficulties, (2) specific learning difficulties, (3) physical, sensory, and medical difficulties, (4) social, emotional, and behavioral difficulties, and (5) learning disorders (autistic spectrum disorder; central communicative disorders, or specific language disorders). Among these deficits, three combinations of dual exceptionalities have been studied most frequently (Rakow, 2005): gifted students with specific learning disabilities, gifted students with ADHD or Attention-Deficit Disorder (ADD), and gifted students with Asperger’s Syndrome or Autism. Regarding the prevalence of dual-exceptionalities, Yewchuk and Lupart (2002) reviewed literature and reported a range of prevalence from 2 to 9.2 percent; however, a formal large-scale incidence survey is still absent in the literature (Nielsen, 2002).

Field knowledge vs. self-knowledge. In a 1981 paper, Sternberg, Conway, Ketron, and Bernstein made a distinction between field knowledge and self-knowledge of social constructs (e.g., creativity, intelligence). In their definition, field knowledge of a social construct is held by experts (psychologists, social scientists, etc.) and usually generated by hypothesis testing with empirical data. Self-knowledge on the other hand is “lay conceptions” (Higgins, 1996; Sternberg, Grigorenko, & Kidd, 2005) or common senses of a social construct held by individuals in a society. In this labeling study, field knowledge refers to the knowledge regarding educational labels generated and structured by experts, such as categories and nature of giftedness, whereas self-knowledge refers to the knowledge in regard to the educational label(s) held individually by twice-exceptional students.

Of note, while twice-exceptionality was a pre-determined research topic before the study proceeded, both field knowledge and self-knowledge emerged during the data analysis and are listed in the introductory section only to assist in better understanding in later parts of the chapter. The results of this grounded theory suggested that a positive behavioral and learning account is contingent on the reconciliation between implicit theory and explicit theory.

Method

To retain the integrity and clarity of a grounded theory (GT) study, this author (2012) suggested that researchers clarify the nature of the theory under pursuit since it serves as not only the guide for data collection and data analysis but also a reference point for readers to judge the quality of a GT study. In the present study, a realist grounded theory method (henceforth RGT, see Annells, 1996; Author, 2012; Yeung, 1997) was employed. Different from a pragmatist GT that focuses on finding a solution for an issue and a relativist GT that focuses on constructing a reflection of a perceived reality, a realist theory focuses on capturing facts and mechanisms in the external social reality and striving to achieve a higher level of generalizability (Guba & Lincoln, 1994; Author, 2012; Lomborg & Kirkevold, 2003; Miller, 2010; Mills, Bonner, & Francis, 2006).

Research Participants and Interview Procedure

Glaser and Strauss (1967) proposed theoretical sampling, a flexible process in which sampling co-occurs with data-analysis in order to explicate the emerging theory. However, this flexible process has been challenged by the regulations set by institutional review boards in research universities for the lack of clear recruiting criteria (Glaser, 1998). To overcome this challenge, this study used criterion-based/maximum variation sampling proposed by Fassinger (2005), a more realistic method that collects the widest range of experience possible with

auditable sampling criteria. The interview process of this study started with interviewing a number of G/ADHD students from a local school district and spiralled up to a sum of twenty-four participants that consisted of twelve twice-exceptional individuals, six parents, five school teachers in the gifted/special education sector, and one school board gifted education consultant. All of the participants lived in two large urban school districts in a Western province of Canada. Prior to the sampling, a few conversations with three teachers familiar with the local gifted education system were scheduled. These conversations only served an informative purpose; that is, they helped the researcher to gain a general sense of the local gifted education system and to identify sources for recruiting potential research participants.

Among the twelve twice-exceptional individuals (see table 1), ten were grade 7 to 12 students enrolled in two local school districts and two were adults. Only two of the twice-exceptional individuals were female. The ten twice-exceptional students were registered in various programs, including a self-contained accelerated science program (1), a self-contained gifted art program (1) and three twice-exceptional resource programs (8). The two twice-exceptional adults were over 28 years old; one was formerly enrolled in a secondary twice-exceptional resource program while the other realized his G/ADHD traits later in adulthood. The participating teachers came from one gifted resource center, two part-time twice-exceptional programs, and two full-time gifted programs. All of the participating parents had post-secondary degrees (some finished graduate school). One mother was an immigrant from Mexico; the rest were Caucasian.

Table 2

Twice-Exceptional Participants.

	Gender	Grade	School District	Special program	Additional label
Alina	F	7	A	Gifted art	Learning disability
Heather*	F	8	B	Honors program	Written output
Emily	F	9	A	Resource	Written output
Merton	M	8	A	Accelerated	Written output
Billy	M	8	B	Resource	Written output
Edwin	M	9	A	Resource	Written output
Isaac	M	9	A	Resource	Written output
Roland	M	9	A	Resource	Written output
Bruce	M	9	A	Resource	Written output
Rene	M	11	A	Resource	Written output
Dylan	M	12	A	Resource	Learning disability
Galvin	M	P.S.	NA	NA	Learning disability
Howard	M	P.S.	NA	NA	NA

Note. All the names listed are pseudonyms. P.S.= post-secondary.

*Heather did not assent to participate in the interviews; only her parent was interviewed.

At the inception of the interview process, the researcher designed three semi-structured questionnaires in order to help twice-exceptional students, parents, and educators reflect on their understanding, thoughts, and feelings towards labels and practices. In the questionnaire for students (see appendix D), three things were emphasized: (1) clarifying a student’s labeling history, (2) investigating how the labeling practice had affected them psychologically, socially, and academically, and (3) soliciting a student’s coping strategies with respect to the labeling practice. General inquiry (such as school life and general interests and hobbies) was also included, for two reasons: (1) to serve as an ice-breaker since it usually takes more time to build rapport with and gain trust from adolescent participants, and (2) to help the researcher to gain an understanding of a student’s background and gifted inclination(s). In the questionnaire for parents (see appendix E), the researcher focused on (1) triangulating the information provided by a student, (2) investigating how the labeling practice had changed their parenting style, and (3)

soliciting useful parenting strategies and resources. In the questionnaire for educators (see appendix F), the researcher emphasized (1) the identification, referral, and enrolment process for twice-exceptional students, (2) their observations and opinions on labeling practice and how that had influenced labeled students, and (3) challenges in teaching and providing services to twice-exceptional students.

The content of the questionnaires evolved with the emergence of the core category; some of the twice-exceptional individuals, including six students and one adult, were interviewed twice due to the shifts of focus in the questionnaire. In the follow-up interview questionnaire (see appendix G and appendix H), the questions were designed to collect data that reflected the emerging core category, such as, “Can you tell me your understanding of giftedness, how do you feel about yourself being identified as gifted, and who/what has helped you the most in terms of coming to these understandings” and “what are the strategies that you have adopted or developed to help yourself learn better at school and at home?” Based on the initial interview, the researcher also asked individualized probing questions. Examples of these probing questions were: “You told me that you dislike schools in general. What makes schools dislikable [sic] to you?” and “How did the experience of transferring from X school to Y school change the way you perceived your giftedness?” The initial interviews generally took 45 to 60 minutes, with a few taking up to 90-100 minutes whereas the follow-up interviews took no longer than half an hour. All of the interviews were tape-recorded and transcribed verbatim.

Data Sources

To accomplish a social theory that embodies realist underpinnings, research data should not be confined to interviews or any other specific type (Author, 2012), an argument that well

corresponds to Glaser's (1998) dictum "all is data." In this study, the collected data can be categorized into the following types.

In-depth case-based textual data. This set of data included 30 verbatim transcriptions from the interviews, a published autobiography written by a high school student²⁰ that highlighted a number of significant ADHD episodes in his life, and the stories from two twice-exceptional (pre-)college adults (pseudo-named Brian and Marie) in Sharon Dole's (2001) narrative study.

Field literature. A theory does not come out of a vacuum. It, at the very least, is informed and inspired by existing theories, thoughts, and ideas. The construction of a meaningful grounded theory is contingent on a researcher's theoretical sensitivity (Glaser, 1978; Glaser & Strauss, 1967) that is demonstrated by a researcher's theoretical foundation and the abilities to use the knowledge critically and synthetically. Field literature used for theory construction in this study included empirical labeling studies and theoretical articles on gifted and special education, adolescent developmental psychology, and self-psychology (such as self-concept).

Documents. This set of data included news clips from newspapers and newsletters, school and program handbooks, school board policies and brochures, and web pages of related information. These documents contained valuable contextual information.

Other supporting material. Other supporting materials in this study included anecdotal information regarding some twice-exceptional individuals (e.g., Richard Branson's and Jim Carrey's autobiographies), formative comments and feedback from peers and colleagues, and

²⁰ Blake Taylor started writing the now published autobiography when he was 16 and studying in an international baccalaureate program; currently he is a college student at the University of California, Berkeley.

memos written down during the fieldwork and data analysis (such as reflections on cultural differences).

Data Analysis and Theory Formulation

Inductive and abductive reasoning. Glaser's (1978, 1992, 1998) insistence on GT being an inductive approach has been criticized as naïve (Kelle, 1995). More GT researchers have found connections with abductive reasoning introduced by Charles S. Peirce in 1935 (Kelle, 1995; Reichertz, 2007; Richardson & Kramer, 2006). Both forms of reasoning were relevant to this study. The study started with inductive reasoning when the researcher tried to stay open-minded in order for a core category to emerge. Once this emergence happened, abductive reasoning, in which a theorist's theoretical knowledge and preconceptions "serve as heuristic tools for the construction of concepts which are elaborated and modified on the basis of empirical data" (Kelle, 1995, p. 34) and formulate relational routes among categories, took over.

Computer assisted analysis. In order to manage the amount of textual data, ATLAS.ti 6.2 was used for organizing and indexing data. The software was also found to be a helpful tool for recording memos and comments. Mindjet Mindmanager 9.0, mind-mapping software, was used to assist the visualization of the theoretical framework.

Coding paradigm. The study followed Glaser's (1992, 1998) coding paradigm that entails two coding stages: open coding and selective coding. During the open coding stage, the researcher stays open-minded and generates as many codes as the data suggest; once the researcher determines a core category, the study shifts into the selective coding stage in which the coding activities evolve around the core category (e.g., determine the relationships between the core category and other categories; determine the properties and nature of categories, etc.).

The objective for Glaser's (1992, 1998) coding paradigm is the incidents dormant in the data; codes that describe the nature of an incident are called substantive codes whereas codes that denote the relationships between incidents are called theoretical codes.

Results

A core category, namely an account of self-knowledge of one's own label(s), emerged during the data analysis. The process in which this core category is involved is presented in the LINK²¹ Model (see Figure 3). As displayed, the labeling practice is situated in and endorsed by a social context that carries an account of field knowledge of, and educational policies related to, the labels. Taking a developmental perspective, the labeling practice often results in some short-lived emotional responses and triggers a meaning-generating process that results in gradual self-knowledge upon which positive academic adjustment and social behaviors are contingent. The dimensions and depth of one's self-knowledge are mediated by personal factors and moderated by contextual factors. In this regard, the labeling practice serves as a reconciling factor between a constructed reality (consensual field knowledge) and a lived reality (self-knowledge). It is imperative to mention here that this self-knowledge is an ever-changing entity and its development is recursive. In addition, positive development of the self-knowledge may create a feedback loop (see the dotted lines in Figure 1) that further reinforces the support system (for others) and/or contributes to aggregate field knowledge. Four theoretical propositions are outlined below with further explanation to advance readers' understanding of the model.

²¹ The acronym is meant to depict (l)abel (in)duced (k)nowledge as well as imply the desired linkage between labeling and knowing for the labeled.

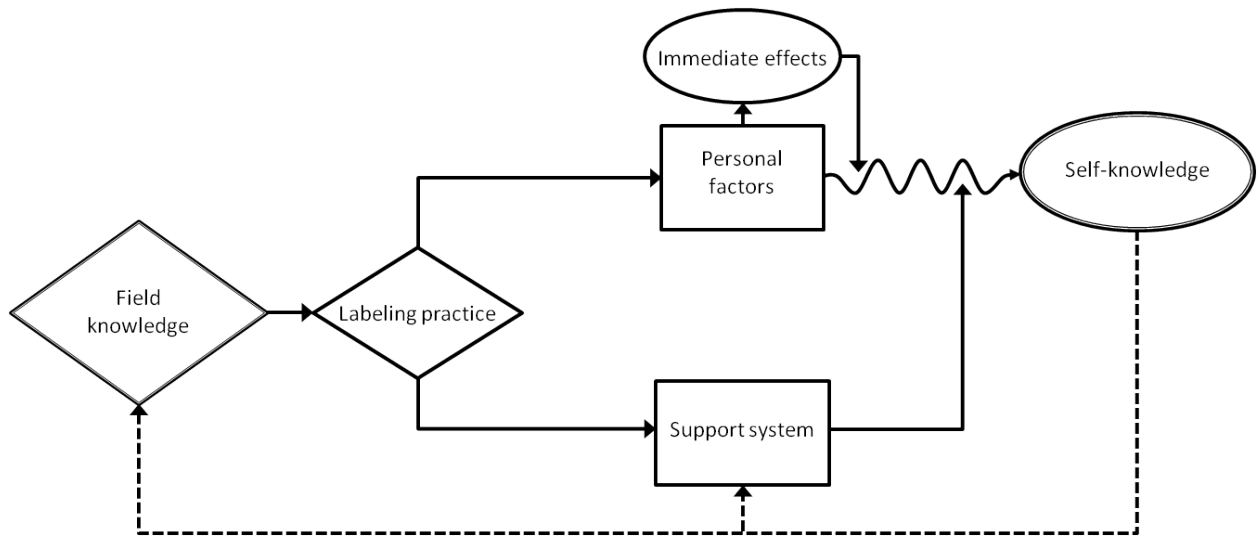


Figure 3. The LINK model of educational labeling

Proposition One: The Practice of Educational Labeling Is Embedded in a Historical and Cultural Context and Is Shaped by and Has Evolved with the Field’s Knowledge.

The practice of educational labeling does not exist in a vacuum; it is situated in historical and cultural contexts. Educational labeling practice is the instant reflection of what are considered exceptional learning and behavioral conditions that result in misfits between students with special needs and the mainstream education system. Being a socially constructed concept, the meaning of giftedness is reflected in who are identified and served in the gifted education sector (Freeman, 2006). The contemporary practice of gifted education in North America has undergone several major paradigm shifts, described below, and students who are identified and served for this sector have changed correspondingly. Twice-exceptional labeling can be regarded as part of the reflection of a current trend.

The modern onset of gifted education. Giftedness is not a novel contemporary concept yet the concept of giftedness changes over time and place and is never universally defined. In North America, modern gifted education was pioneered by Lewis Terman (1877-1956) who was

known for a series of longitudinal studies on highly intelligent students (viz., IQ equal to or greater than 140) conducted since the 1920s. Although his longitudinal studies have been criticized as elitist and reflective of eugenics, his interest in highly able students nonetheless set the ground for modern gifted education and provoked debates and conversations that have helped the field to grow (Feldman, 1979; Vialle, 1994).

Shifts in gifted education. The first paradigm shift derived from the dissatisfaction with Terman's limited vision of intelligence (Khatena, 1982; McClellan, 1985). For example, as early as 1926, Hollingworth (as cited in Pritchard, 1951) mentioned gifts demonstrated outside the realm of general intelligence, such as mechanical aptitude or artistic ability. Corresponding to Hollingworth's point of view, Feldman (1979) argued that gifted education should aim to "promote excellence in as many forms as possible" (p. 663). This school of thought hit its climax when Gardner (1993) proposed a theory of multiple intelligences (MI), which has had profound influence on the practice of gifted education.

The second post-Terman paradigm shift was the change from the focus of being gifted to the focus of becoming (actualizing) gifted (Arieti, 1976; Ford & Harmon, 2001; Khatena, 1982). An important concept, the zone of proximal development (ZPD), was proposed by a social constructivist—Lev Vygotsky (1978). In his view, giftedness and intelligence are not readily observable since they are subject to change; educators should adopt more dynamic approaches to investigate the potential that a student possesses. Current practices of identifying gifted individuals by adopting dynamic assessment is largely influenced by the concept of ZPD (Ford & Harmon, 2001; Lidz & Elliot, 2006).

The most recent paradigm shift is somewhat aligned to critical theory perspectives (Peca, 2000) in the social sciences. It is demonstrated by the fact that the field has started to gain the awareness that the concept of giftedness should transcend the constraints placed by our society such as gender, culture, ethnicity, poverty, geography, sexual orientation, or disabilities (Castellano, 2003). This new paradigm employs a critical view towards society and envisions new possibilities by empowering human beings who hold relatively disadvantaged positions (Fay, 1987; Siegel, 2001). Amid the wave of this paradigm shift, twice-exceptionality is not only recognized but is also becoming a major topic in the field (Assouline & Whiteman, 2011).

In the province where this study was conducted, the very first program that identifies and offers services for twice-exceptional students started in 1989 when a special education department head in a public secondary school noticed the needs of these students and proposed a pilot project for gifted and learning disabled (GLD) students (Bees, 1998). Over the years, the practice has spilled over to nearby school boards. For example, an adjacent school board started a secondary GLD pilot program in September 2011 that is currently serving eight students.

Proposition Two: A Positive Outlook on Labeling Practice Is Contingent on a Student's Self-Knowledge of His/Her Educational Label(s); a Successful Reconciliation Between Field Knowledge and Self-Knowledge can Trigger Positive Behavioral Changes.

It is clear that the practice of educational labeling does affect a student's behavioral profile. Yet despite what many labeling studies have assumed, the effects of labeling on students' behavioral changes are not homogeneous. The link between labeling and behavioral changes is not a simple linear causal relation in which students are deemed as passive receivers of the stimuli and a generalization can be made; instead, students are active agents that formulate the possible effects that labeling can have on them. This autonomous agency therefore generates

variation in behavioral effects among students. A positive account of self-knowledge reflects the depth with which one knows about him/herself and initiates behavioral changes for self-improvement. That is, the more one knows about him/herself, the more likely positive adjustments in behavior will occur. Positive behavioral changes observed in this study include goal setting, development of coping strategies, and self-advocacy.

Goal setting. It is common for twice-exceptional students to feel empowered after they realize that their academic struggles are not related to a lack of intelligence (Dole, 2001; Pliner, 1999). This sort of empowerment was universally observed among the twice-exceptional students interviewed in this study and many of them could further translate this empowerment into goal-setting behaviors. As Dylan nicely put it, this empowerment allows them to “shoot for the moon.” Compared to the all-encompassing attitude of incapability they held before, many participants expressed that they now would like to get As on their report cards, at least for the academic subjects they thought they were good at. For example, Isaac’s mother mentioned that he surprised her by bringing “quite a few As home on his grade 7 report card” and she attributed that to the goal he set at the time—to have high marks in order to be admitted to a twice-exceptional program he desired to attend. Goal setting was also embodied in their long-term aspirations. Knowing their potential, the twice-exceptional individuals expressed the following as their desired future occupations: architect, archeologist, visual and/or audio art engineer, animator, lawyer, veterinarian, and various scientists.

Coping strategy development. One of the key factors to a satisfying life is self-regulation (Carver & Scheier, 1981, 1998). Unfortunately, self-regulative functioning also happens to be one of the weakest characteristics among people who have ADHD (Barkley, 1997, 1998). Therefore, it is important for G/ADHD students to know who they are in depth in order

for them to develop coping strategies to make better adaptations in learning and social settings. In Blake's autobiography he mentioned, "I realized that a lot of my problems with making friends came from people reacting to my ADHD symptoms, which have an impact on basic social skills. Once I realized that, I began to do something about it, using some of the techniques" (p. 102). While Blake offered a good example of the development of social strategies, Merton provided some excellent self-developed learning strategies. To help himself overcome his inattentiveness in class, he mentioned that he would arrive in the classroom early in order to pick a nice chair which would ease his fidgeting and that he purposefully chose to sit between two hardworking classmates because "if everyone's pretty focused then I find it easier for me to do the same.... I also sit next to certain people that I know will help me focus...I sat beside Adam and Tim because they're both really intelligent, fun, and they focus!"

Advocacy. In the form of self-advocacy, what happened among twice-exceptional students was that they stood up for their educational rights after they realized that they did have potential and their potential had not been met under current educational services; some good examples can be found in Dole's (2001) case study as well as Blake's autobiography. Furthermore, a well-developed account of self-knowledge can also be translated into public advocacy that is usually backed up by thorough understanding of and empathy for people who share the same conditions. Blake's autobiography and the public speeches that followed its publication in helping people cope with ADHD is a case in point for public advocacy. Howard, who recently was granted a doctorate in educational psychology, had been invited to give speeches to and encourage students in alternative programs in which he participated during his high school years. Other examples are abundant. To name just a few: Thom Hartmann, a radio host, entrepreneur, and Ph.D. in homeopathic medicine, has served as a strong public voice in

revamping the public image of ADHD and advising the public to see ADHD as constellation of gifts rather than constraints (Hartmann, 1995, 1996, 2002, 2003, 2007). Peter Wright, a lawyer who internalized his personal experience with ADHD and LD and “immediately became involved in special education litigation after passing the Bar” (Wright, 1993, para. 18), has been a strong legal rights advocate for children with special needs for whom he has established websites and published books (Wright & Wright, 2002, 2007; Wright, Wright, & O’Conner, 2010).

It is important to note here that not every interviewed student demonstrated a positive behavioral profile. One of the key factors that catalyze a student’s self-knowledge into positive adjustment and learning behaviors is motivation. Merton’s strong motivation was supported by his mother’s words: “[Merton] really really wants to go to college and have a good life” and “it really bothers him when people blame their differences (like they don’t take responsibility for their behavior).” On the contrary, some participants mentioned that they enjoy being recognized as a GLD student because the LD part had allowed them to “cut some slack” at school.

Proposition Three: The Reconciliation of Field Knowledge and Self-Knowledge Is Mediated by Personal Factors and Moderated by a System in and by which a Labeled Individual can Access Emotional, Informational, and Institutional Support.

How one understands his/her educational label(s) does not always match what has been described in knowledge in the field. While it has been acknowledged that self-knowledge affects one’s emotional self and leads to self-determinative actions (Jopling, 2000; Wehmeyer, Argan, & Hughes, 1998; Wicklund & Eckert, 1992), it is equally important to recognize that the development of self-knowledge in relation to educational label(s) is contingent on many factors. In the present study, the factors that facilitate reconciliation between field knowledge and self-

knowledge in a twice-exceptional individual can be coarsely categorized into personal factors and supportive contextual factors.

Personal factors. The collected data suggest that intrapersonal intelligence, abstract thinking ability, sensitivity to social norms, and prior knowledge are important reconciling factors in relation to an individual's labels and his/her self-knowledge.

Intrapersonal intelligence. Intrapersonal intelligence “involves the capacity to understand oneself, to have an effective working model of oneself, and to use such information effectively in regulating one's own life” (Gardner, 1999, p. 43); moreover, it helps us to symbolize complex feelings (Gardner, 1993). When Merton was in grade 6, he came to his mom one day after reading a book and said, “I'm like that! I have ADHD. The way my brain works is ADHD. Do you think I have ADHD?” While most of the participants were told about their educational labels, Merton's capability to catch the information and reflect on it inwardly at a young age speaks to a specific intellectual ability. While Dylan stated that having self-dialogs was never an easy task for him, he nonetheless recognized that it had served as an important means for him to understand what his labels had meant to him and that he hoped to grow into a more self-reflective person. Emily reported that the way she came to understand her labels was a self-ruminating process that involved lots of reading and constant comparison between herself and others.

Abstract thinking ability. Educational labels are in and of themselves abstract concepts. Moreover, the interviewed twice-exceptional participants were predominantly adolescents in whom the growth of abstract thinking constitutes a defining developmental feature (Coleman & Hendry, 1999; Elkind, 1966; Inhelder & Piaget, 1958; Ross, 1973). This factor emerged while

the researcher compared the understanding of labels among the labeled participants at different development stages. Alina, being the youngest participant in the study, was not able to articulate the meaning of her educational labels, nor could she articulate what they meant to her. Similarly, Isaac could only link labeling practice to concrete effects, such as getting help for school. On the other hand, several participants in higher grades were able to provide their insights on labeling and expressed that they enjoyed theorizing about social events. Depth of understanding of one's educational labels may be dependent on one's ability to think abstractly. Rene, when asked if he would like to change anything if he were given a chance, demonstrated his ability to think critically by stating:

I would make no changes... What makes me today is the fact that I can't change. It makes me realize I have what I have and making me appreciate it. If I could change it I would be completely different then what I am now, which means I wouldn't have the same realizations. I mean for instance if someone was scarred for life and gained empathy for that scarring, they may wish that they didn't get scarred for life; however without that scarring for life they wouldn't get that empathy.

Sensitivity to social norms. As much as educational labels reflect benign and pragmatic educational purposes, they nonetheless hint at a certain degree of deviance from normality (Coleman & Cross, 1988). Therefore, an individual's sensitivity towards social norms inevitably affects how he/she responds to and takes on the given labels. For example, Heather, described by her mother as a shy, sensitive, and tentative girl, strongly disfavored being viewed as "different" and being in need of extra help in learning. Her mother stated:

She does not want an IEP. We're going through this right now actually because we just got this done. They're writing up an IEP at her high school. We showed it to her so she could make any changes she wanted and she just crossed it all out. She does not want any help with any of it even if it's just checking, a teacher checking her planner to make sure she's written everything down..... She doesn't even want help with that because other kids might see her in that light.

Although Heather was diagnosed as having ADD 3 years ago and had complied with taking medication to improve school performance, she had never let any of her classmates or friends know of her ADD. Similarly, suggestions of this sensitivity were found during Emily's interviews. As much as she appreciated being twice-exceptional (and felt unique about that), her statements such as, "I don't really like using my computer in class because it draws attention to me" when she was asked about the educational accommodation she received and "I don't like to tell people about it [giftedness] because then it makes me feel like I'm bragging or something" when she expressed her feelings of being labeled as gifted denoted that she had concerns about being anomalous.

Furthermore, this sensitivity was also detected in a more subtle form, namely information control. As various studies (e.g., Clair, Betty, & Maclean, 2005; Cross, Coleman, & Steward, 1993; Nochi, 1998; Schneider & Conrad, 1980) have suggested, people who bear undesirable social label(s) use information control as a pre-emptive strategy to cut losses in potential stigma. Some students chose to conceal the fact that they had disability/disorder label(s) from others while others chose to tell others they are gifted before they disclosed the fact that they also had ADHD and/or LD label(s). For example, Edwin, rather than saying he attended a program for

GLD students, would say that he was in the mini school (i.e., accelerated program) affiliated with the same school so that people “got the idea of I’m smart and stuff.” While Edwin preferred partial disclosure, Bruce expressed a hierarchical disclosure style. He stated that if he had to disclose his learning traits, he would say he is gifted but also has ADHD and LD.

Prior knowledge. The prior knowledge of the label a person holds before he/she received the educational designation plays a crucial role in self-acceptance. Kauder (2009) mentioned, “Twice-exceptional individuals may witness other persons with disabilities being treated negatively, which could adversely impact how they think about themselves and others with disabilities” (p. 51). In Heather’s case, the effect of prior knowledge was salient as she had not wanted to accept the gifted designation because she had strongly associated giftedness with being odd and quirky based on her past encounters. One of the negative encounters described by her mother was:

We told her about it [a teenager philosophy seminar] and it sounded interesting to her and so she went and she came back and she didn’t say anything to me about it for a few days. But then she said that was for gifted and everybody there was kind of weird and they were fighting amongst each other and they were arguing and nobody was getting along and that’s what gifted is.

On the contrary, Edwin had no objections to taking both labels since he had learned about twice-exceptionality from his core family members and thought that was pretty cool. Merton also had been acquainted with the ADHD behavioral traits from observing his classmates in a private school for gifted and twice-exceptional students that had helped him to give an expedient self-diagnosis of ADHD based on a book he read.

Supportive contextual factors. To assist better understanding of a large number of contextual factors suggested by the data, a dynamic person-environment (PE) system originally proposed by Lewin (1935) and later elaborated into a holistic-interactionistic framework by Magnusson and Stattin (2006) is used. Three environmental positions in relation to an individual are employed to structure the supportive contextual factors: (1) the immediate situation, (2) the proximal environment, and (3) the distal environment.

Immediate situational factors. In this study, immediate situational factors refer to direct and interactive forces that channel field knowledge to an individual and facilitate the development of his/her self-knowledge. In relation to developing self-knowledge, immediate situations not only present information to an individual passively but also provide feedback interactively (Magnusson & Stattin, 2006). Hartmann (2007) argued, “Often the single most significant variable in a child’s life that will determine his or her success was the presence of an adult who believed in and supported the child” (para. 25). Hartmann’s point was well supported by the grounded data. Significant others that helped students develop their self-knowledge were family members, psychological professionals, teachers, and mentors and tutors.

Family members. When the participants were asked who helped them the most in regard to understanding the meaning of the label(s), the majority answered that their mothers were the major source of knowledge. For example, Blake’s mother used Ferrari vehicles as a metaphor to make him understand how he was different from others while he was in grade 3 (as a sensitive high performing car that needs more fine-tuning). This metaphor apparently influenced him to such a great degree that he devoted a full chapter to the experience, *Being Gifted: The Ferrari, 3rd Grade*, in his autobiography. Although the participants predominantly mentioned mothers, the researcher nonetheless observed high paternal involvement in a local twice-exceptional

parental advocacy group. Occasionally, other family members were mentioned, for example, Merton's aunt who worked in the school system and had experience with gifted students was reported as an important resource for his understanding of the labels.

Teachers. Teachers with special education background are, and should be, a helpful resource for these students to gain knowledge about their special needs. In this study, students frequently mentioned teachers in charge of the two twice-exceptional resource programs. Yet the participants referred to very few teachers in the general education sector as a helpful resource. Only one elementary counselor was mentioned by parents as being helpful in aiding understanding of their children's traits and offering guidance regarding application to appropriate high school programs.

Psychological professionals. This may not be a surprising finding to readers since psychologists, psychiatrists, and pediatricians deal with ADHD diagnoses and prognoses. Merton's mother, a psychological professional herself, expressed how much she appreciated the thorough consultation she received from a psychiatrist before the ADHD diagnosis was given. Galvin mentioned that a conversation he had with a therapist while he was at college had changed the way he viewed both giftedness and learning disabilities. He said, "The expression [I got from the therapist] 'differently-abled'[sic] is something I've held onto. I think it's a great descriptor. Something a therapist said to me, 'You're not learning disabled, you're differently-abled.'"

Mentors and tutors. Mentors and tutors were noted occasionally in the interviews. They played a significant role in helping these twice-exceptional students understand their unique potential and boost their confidence. Merton had a family friend who would discuss complex

social issues with him, a process in which he gained insights on his cognitive strengths. Brian and Dylan both had tutors that understood their potential and encouraged them to push their limits. When Dylan was enrolled in a private school for students with learning disabilities, his school tutor turned his remedial sessions into potential developing ones soon after she realized his linguistic propensity. Dylan's mother stated:

He [Dylan] was a fantastic speller so they [tutor and teachers] pushed him way up into Latin and Greek and reading literature and all kinds of stuff that was well above grade level so it was almost like he had a little gifted class everyday through them.

Proximal environmental factors. Magnusson and Stattin (2006) defined proximal environment as social settings in which a person can be in direct contact with others, such as home, schools, and community centers. Different from immediate situations, environmental factors provide tacit and non-interactive types of learning opportunities for an individual. As Neisser (1997) stated, part of self-knowledge is gained through looking outward to “see the self as embedded in its environment, ecologically and socially situated in relation to other objects and persons” (p. 19); environmental cues provide information that reflects who we are. Observed social settings that provided information for the participants to gain insights on their educational labels included:

Family composition and background. Giftedness and ADHD often run in a family (Elia, Ambrosini, & Rapoport, 1999; Storfer, 1990) and this hereditary factor can turn a household into a library where twice-exceptional individuals index their cognitive and behavioral traits. For example, having three gifted/ADHD individuals in his household, Edwin stated that he learned

about the concept of twice-exceptionality at a young age. On the contrary, Galvin had had a hard time to truly believe that he was gifted because he was surrounded by high-achieving siblings and parents. The prevalence of giftedness among siblings in a family also could affect the ways parents discussed giftedness with their children. Some parents mentioned that they were being extra careful in using the word gifted, or even tried not to bring up the word, in order to protect the feelings of a child who demonstrated less evidence of giftedness. Moreover, a family's cultural background could hint at the meaning of giftedness. A mother who came from a Mexican-Spanish background expressed very different perceptions and expectations regarding giftedness compared to Caucasian Canadian parents. She was very insistent on her children finishing at least college education and expressed her expectations of giftedness to her children through a famous movie (Spider Man, 2002) quote, "With great power comes great responsibility."

Curriculum and programs. The majority of twice-exceptional students in this study voluntarily applied to the programs in which they were enrolled. While such voluntary choices could reflect how an individual identifies him/herself, the program in which a student is enrolled could also further shape how an individual perceives him/herself in relation to the educational label(s) they carry. For instance, Emily, who was enrolled in a twice-exceptional resource program and had enjoyed hanging out with her twice-exceptional peers during the two curriculum blocks and daily lunch hours, claimed that her self-knowledge came not only from introspection but also comparisons between herself and program peers. Brian noted that his understanding of himself as being gifted emerged when he was enrolled in an advanced placement (AP) history class.

I realized how wonderful it was that I'd been in this class; how lucky I was to have been with Mrs. [name of teacher], too. How lucky I'd been to have known that particular group of students, to have been in this particular class. I mean, we were such geeks.

Similar notions occurred repetitively among the participants.

School atmosphere and policies. How a school is structured and operated also influences a person's internalizing process about labeling. School safety policies matter. For example, Dylan mentioned that the high school where he was enrolled had set clear anti-bullying policies and his peers would not pick on him just because he carried an ADHD label. With the help of the researcher's cross-cultural experience, it became clear that how a class is assembled also exerts subtle influences. In a Taiwanese context (where this researcher originally came from), high school students are organized into classroom cohorts. Students in a classroom cohort take most of their classes together and bond strongly to each other. It is therefore difficult for a student to conceal his/her educational label(s). On the other hand, high school students in this Canadian province are treated as a year cohort and students go to classes that consist of different classmates. A loose assembly like this does not endorse strong ties among students and gives leeway for a labeled student to conduct information control. A few twice-exceptional students in this study expressed that their classmates were not cognizant of their exceptionalities.

Distal environmental factors. These factors could be referred to as general socio-cultural characteristics (such as individualism and collectivism) and physical features (such as ocean and mountain) of an environment (Magnusson & Stattin, 2006). Although distal environmental influences are remote and often not known to an individual, they nonetheless shape part of who a person is. Distal environmental factors illustrated by this study include the following.

Public acceptance. Entering the 21st century, twice-exceptionality has gained some momentum in both academia and the public in North America. Using “twice-exceptional” as a keyword, the number of resulting articles in the EBSCO academic search engine demonstrates a surging interest in the past decade²². Similarly, the term twice-exceptionality came into use in Canadian newspapers,²³ speaking to a public interest in the topic. To some degree, this social trend has reflected the accumulating public acceptance of twice-exceptional individuals. Howard, who attended high school in the early 1980s, offered a counter-example. Recently having received his doctoral degree, he expressed some regrets for having to take a much longer route to achieve this since he did not get a chance to know his own learning and behavioral traits during his school years. He stated, “It wasn’t till I was an adult that I really had the self-confidence and efficacy that I was okay.”

Aggregate cultural disposition. Cultures partially contribute to the construal of self in their members (Markus & Kitayama, 1991). As Gardner (1993) nicely put it, “Glorification of the self is a cultural option, one that has been taken up in contemporary Western circles” (p. 275). Canada, being a country that embraces an individualistic culture (Hofstede, 2001), has provided an environment that encourages twice-exceptional students to develop more self-knowledge (Devos & Babaji, 2003; Hetts, Sakuma, & Pelham, 1999; Higgins, 1996; Triandis, 1989). The participants generally expressed that they appreciated being unique and different from other students and they did not care much about what other people thought of their labels. Rene’s statement corresponded resoundingly to this cultural disposition:

²² 24 articles were published during the 1990s and the number surged to 177 in the past 12 years

²³ Using ProQuest Canadian Newsstand Complete Database

I understand the reason why people would feel pressure with labels. I understand why they would do things however I've never felt. However, I don't really care much about what other people think because what I think is much more important than what they think, for the most part, in retrospect, when it comes to labels.

Mass Media. The multitude of, and easy access to, contemporary mass media, provides a salient source for self-knowledge formation. Offering easy access to knowledge, the Internet has become a major learning tool in modern education (Buckingham, 2008; Lenhart, Simon, & Graziano, 2001). Several participants mentioned that they tried to learn more about twice-exceptionality and their learning traits through searching information online. A few participants also mentioned the content of some broadcast media. For example, Edwin and Roland both expressed their fondness for a North American TV series, *The Big Bang Theory*, and strongly associated themselves with one of the gifted characters. Others pointed out that they had learned about themselves through accessing print media. Dylan was reading an autobiography, *Surely You're Joking Mr. Feynman*, written by a physicist who had many characteristics Dylan could relate to his twice-exceptionality; likewise, Merton learned about giftedness and how it could interact with other factors (such as serendipity) before it makes a contribution to future success through reading the book, *Outliers*. The participants also mentioned several other public twice-exceptional figures during the interviews, such as Albert Einstein, Bill Gates, Leonardo da Vinci, and Stephen Hawking.

Proposition Four: A Student's Self-Knowledge Regarding His or Her Educational Label(s) Is an Ever-Developing Entity in which New Experience Is Internalized and Integrated. Moreover, an Individual's Maturity Level as well as the Developmental Tasks He or She

Encounters at Different Stages Should Also Be Taken into Consideration for the Reconciliation between Field Knowledge and Self-Knowledge.

“I would say this, of all kids too, that their understanding of their own labeling changes over time and sometimes the label even changes over time itself,” said Dylan’s mother.

Being in the field of educational psychology, Dylan’s mother definitely had an acute observation on educational labeling. The effects of labeling on an individual are fluid and the onset of labeling often introduces short-term emotional events. Some observed emotional events are described below.

Sense of closure. Fernald and Gettys (1980) argued that the practice of educational labeling provides a sense of closure—the comforting feeling of understanding the causes of a problem that was previously puzzling to an individual. This study found that the sense of closure was more apparent if a student was diagnosed at an older age since they had then developed more acute awareness of their differences to others. Some of the twice-exceptional participants were given diagnoses at younger ages (such as grade 1 or 2), the stage at which they generally were not very sensitive about their learning and behavioral anomalies.

Identity redemption. Many of the twice-exceptional participants expressed that they were labeled as lazy and/or stupid by their teachers before their unique learning and behavioral profile was discovered. A few participants expressed that realizing they actually possessed high intellectual capacity gave them power to redeem their besieged self-esteem.

Denial. Occasionally, a label would generate an aversive reaction in a student that could result in denial of the label. Take Heather for example. Her sensitivity and negative prior knowledge of giftedness led to a resistance towards the gifted label.

The emotional events described above are usually short-lived as later on they are integrated into an individual's self-knowledge. In response to the contradictory nature of twice-exceptionality, several students stated that they had experienced some confusion. For example, although Dylan once felt great about having a gifted label, he now felt more confused about his giftedness and the notion that he did not know "how he was smart" occurred in both of his interviews.

Other than developmental factors (e.g., mental maturity, abstract thinking ability), developmental tasks at different life stages also change a person's perceptions regarding his/her labels. While some of the labels (such as LD) are more confined to school environments, some persist longer and carry their effects into adulthood. Howard mentioned that knowing himself as a gifted person in adulthood did not help him much whereas knowing he had ADHD helped him hugely as he had been able to develop coping strategies to overcome some ADHD traits that could undermine his career development. Galvin, currently in his late twenties, provided a valuable account of how the meaning of giftedness had shifted at different life stages. Despite being accepted to a twice-exceptional program during high school, he did not believe himself to be a gifted student because he could not handle academic tasks very well. His self-doubt about giftedness was overturned when he recognized how he could skip steps to accomplish a writing assignment when his classmates had to do it step by step. Now an adult, Galvin stated that he no longer felt that giftedness and LD have a strong relevance to his current life yet still lingered on ADHD since it applied to situations outside of a learning environment and had a persistent effect

in other aspects of life. Of note, the construction of self-knowledge is akin to a grounded theory research process where a person constantly compares new incidents to previous experiences. However, the development of internalizing experiences into positive self-knowledge is not always calm and smooth. Several parents mentioned that they would not mind seeing their children “crash and burn” sometimes in order for their children to gain more accurate self-appraisals through the experience.

Discussion

The Emergence of a Core Category

One of the defining moments in a grounded theory study is the emergence of a core category—a variable that has relevance to the participants and has the capacity of stitching other variables together into a coherent theoretical framework. During the inceptive stage of data collection and analysis, the predominately appreciative and positive voices of both twice-exceptional students and parents regarding the double-labeling practice (e.g., allowing them to receive services) led the researcher to reflect on a possible direction of constructing a theory corresponding to positive psychology (see Seligman & Csikszentmihalyi, 2000).

The core category, reconciliation between field knowledge and self-knowledge of one’s label(s), emerged later when the researcher compared and rationalized the differences among participants’ social-emotional and academic adjustments in relation to labeling practice. The relevance of the core category became exponentially salient when the inclusion of adult cases further demonstrated how time, an individual’s agency, and accrued contextual effects interacted with and mediated/moderated the reconciliation process and resulted in highly diverse behavioral profiles. Through observing incidences with a wide developmental range, it was clear that

labeling should be regarded as a complicated and interactive process in which a more stabilized account of self-understanding could be crystallized with time and, in turn, trigger adjusting emotions and behaviors. As Higgins (1996) stated, self-knowledge “concerns the only object in the world that the person must continually regulate in order to survive” (p. 1062), a person cannot set proper goals for adapting to an environment without knowing his or her own capabilities, strengths, and weaknesses.

Triangulation with Extant Theories/Literature

At the onset of a grounded theory study, researchers are asked to bracket themselves from the extant field theories and literature in order to avoid fitting data into a preconceived theoretical framework and to construct a theory anew with fresh perspectives (Glaser & Strauss, 1967). However this is not to ask researchers to belittle or dismiss the importance of extant field theories and literature. In a grounded theory, extant field theories and literature should be used as both data for theory generation as well references for triangulating the validity of the grounded theory. That is, to generate a meaningful grounded theory, a researcher not only has to be able to collect empirical data, but also have the flexibility to see extant theories/literature afresh, to examine them critically, and even to use them creatively. This author (2012a) suggested GT researchers conduct theoretical triangulation (or what Dey [1999] called “grounding theory conceptually” [p. 242]), that is, to look critically for (in)consistencies, contradictions, and connections between the grounded theoretical account and extant theories and literature in order to enhance the validity of a theoretical account. Moreover, this triangulation could serve to honor the field researchers/theorists for pioneering a path that leads to a current study.

To conduct theoretical triangulation, the findings of this study were first contrasted to previous gifted labeling studies. While stark inconsistency is present between the core categories

(or core dependent variables) of this study and previous studies, it is contemplated that this inconsistency is due to the following possible explanations. First, in the current study, labeling was observed and examined in educational settings and situated in the history of special education. The core category therefore reflects the functional purpose of education. Second, labeling in this study was examined as a process (with participants from a wide age range) whereas a large number of labeling studies (e.g., Feldhusen & Dai, 1997; Ford, 1978; Guskin, Okalo, Zimmerman, & Peng, 1986; Hershey & Oliver, 1988; Kauder, 2009; Manaster, Chan, Watt, Wiehe, 1994) took a behaviorist framework in which labeling was conceived as an instant stimulus that would cause certain linear reactions.

In making connections to the extant theories/literature, several theories/research paradigms call for attention. First, functional psychology is found to have strong relevance to the LINK model for its strong accentuation of agency. Pioneered by William James, John Dewey, and George Herbert Mead, functional psychology holds the belief that human behaviors are mediated by the active agent that resides within an individual. Therefore, social researchers should not undervalue the importance of individual variations and personal experiences. The notion of agency and personal experience can also be further connected to symbolic interactionism (see Blumer, 1969), a theoretical perspective that focuses on how people acquire meanings of symbols through their interactions with others in an environment. It was observed that a labeled student constructed an account of self-knowledge (or what Gopnik and Wellman [1994] called “theory theory”) of his/her label(s) through collecting information from the surrounding environment and constantly comparing it to previous information. These meaning acquisition processes are highly individualized yet commonly reflect a larger social and cultural structure. Second, threads of social constructivism are also easily spotted in the LINK model. For example,

the moderating role a support system plays in constructing a student's self-knowledge relates to Vygotsky's (1980) zone of proximal development. Moreover, how students vicariously learn about their educational labels from others (such as twice-exceptional role models)' experiences is similar to Bandura's (1977) social learning theory. In all, the findings of this study suggest that the development of self-knowledge of label(s) is a highly flexible and context-sensitive process; this process calls for an interpretive framework that provides a holistic perspective that includes interplay between the individual, the collective, and the environment (e.g., Devos & Banaji, 2003, Lewin, 1935; Magnusson & Stattin, 2006).

Gender as a Possible Factor

During the data analysis, gender was speculated to be a personal factor due to the differences in response between male and female twice-exceptional participants when they talked about how labeling might affect their social lives. It was observed that these female twice-exceptional students were concerned more about their social life in relation to their labels (e.g., fitting into the group and making friends). Alina mentioned that one of her main concerns in applying to a mini school for her high school education was the tight nature of the social interaction there. Heather, as mentioned previously, was very sensitive to labels and just wanted to be seen as normal by her peers. Emily, though she presented an independent and tough outlook, mentioned that she had to try really hard to suppress her ADHD traits in the classes in order to fit in and make friends. Male twice-exceptional participants, on the other hand, very often expressed that they did not care about what others were thinking. Although strong gender differences were present, gender was not listed in the LINK model due to the limited sample size of female participants. Further studies to uncover possible gender effects are encouraged.

Implications for Education

Since labeling practice constitutes the foundation of special education, numerous studies have been dedicated to the topic. However, many of these studies were guided by deviancy theories derived from sociology. A lack of a guiding educational paradigm makes it difficult to derive educational implications from these studies. Grounded in educational settings and embedded with educational purposes, the LINK model provides a positive outlook to the labeling practice in which several important educational implications can be suggested.

First, the emphasis on agency in the LINK model should remind parents and educators to be fully aware of the power of a student's self-knowledge in mediating his/her behaviors. Tate and Copas (2003) pointed out that adultism has become a problem in our school system in that students are fundamentally regarded as inferior to adults and in need of adults' intervention or rescue. Their intelligences and potentials are often overlooked, if not dismissed. The adultism phenomenon may be even more prevalent in special education settings where students are considered as vulnerable and in need of rescue or realignment. However, the lack of respect for a student's agency could result in conflicts and distrust between children and adults. A smoother process could take place if adults assist students in developing deeper self-understanding of their own strengths and weaknesses (e.g., by cultivating their intra-personal intelligence) before they give advice. An easy step to start this process in special education could be inviting students to attend their own individualized educational plan (IEP) meetings. As a regional twice-exceptional consultant interviewed in this study wisely put it, "When kids are at IEP meetings, you can't just spend the whole time saying all the bad things the kid can't do. You have to be positive and you have to talk about the things that the kid can do because they are right there....I think it makes

you work to the strengths more.” Students also have a fair chance to gain a fuller picture of their learning profile.

Second, educational personnel should take a more active and constructive role in facilitating the reconciliation between field knowledge and self-knowledge of label(s). To do so, teachers should be prepared with an adequate level of knowledge of educational labels so that they can construct meaningful learning experiences for labeled students. It surprised the researcher that very few general classroom teachers were mentioned as helpful when the twice-exceptional participants were asked who had helped them understand their label(s). Ironically, several general classroom teachers were mentioned by both students and parents as a counter force to boosting these students’ self-confidence and self-knowledge. While inclusive education has become the commonly accepted approach of educating students with special needs in Canada (Timmons, 2007), it seems there is still room for improvement of general classroom teachers’ preparedness. Similarly, rather than focusing on establishing exclusive gifted programs, school administrators and policy makers could focus on creating a smart learning environment geared with means (e.g., flexible curriculum, multiple intelligence activities) to accommodate and facilitate different types of potentials (see Barab & Plucker, 2002).

Limitations and Future Directions

This study extends labeling studies by providing a holistic overview of the labeling process and a critical examination of past labeling research paradigms. Although the rendered propositions are supported by grounded data, this study should still be deemed as exploratory rather than confirmatory due to the inductive nature of grounded theory approaches. The number of participants was constrained by time, research resources, and the size of the geographical area covered. Moreover, the narrative abilities of young adolescents also limited the depth of the self-

report data due to the limitation of their developmental stage. In general, it requires more time to build a trusting relationship with this age group in order for them to feel comfortable to express their thoughts and feelings.

Given the modifiable nature of inductive studies (Glaser, 1978; Glaser & Strauss, 1967), suggestions for future research that intend to follow up on the LINK model follow. First, given the fact that labeling is very personal experience, it would be meaningful to conduct a symbolic interactionist study focusing on how students with label(s) internalize the meaning of the label(s). Second, it would be interesting to investigate how much knowledge of educational labels teachers have since they could (and should) be the facilitators for students to know themselves better. Third, considering that developmental stages and tasks may influence the labeling process, a longitudinal study that tracks the change and growth in a cohort of participants could also render insightful information for the field.

Concluding Remarks

Perhaps it is best to conclude this chapter with Richard M. Lerner's (2006) words:

By understanding and celebrating the strengths of all individuals, and the assets that exist in their families, communities, and cultures to promote these strengths, we can have a developmental science that may, in these challenging times, help us, as a scientific body and as citizens of democratic nations, to finally ensure that there is truly liberty and justice for all. (p. 14)

All in all, the proposed labeling model calls for attention to an interactive paradigm for labeling studies, no matter whether the focus is on the innate symbolic interactive process or the

holistic nature-and-nurture interaction, and a pedagogy that promotes students' individual agency and self-knowledge.

Chapter 4: Conclusion

A Review of the Study

The long journey of this dissertation study started with an attempt to use a realist grounded theory method (GTM) to investigate the social and behavioral mechanisms that underlie the double-labeling process in special education. Feeling dejected by futile efforts to find a convincing realist grounded theory (RGT) model that was clear in operational terms, the researcher delved into the grounded theory (GT) literature, especially validity discussions, in order to re-ground a realist grounded theory method that could not only be used for the empirical double-labeling study in this dissertation but also advance the understanding of GTM in general and the usability of RGT specifically.

The aim of this dissertation study was two-fold. On one hand, it set out to investigate the newly emerged double-labeling phenomenon shared by twice-exceptional students in order to parcel out factors that affect the labeling process and to understand how these students perceive and cope with educational labels. The researcher intended to construct a theoretical framework of the labeling process inclusive of contextual and developmental factors that would have greater relevance to educational practices. The general theoretical literature on this subject was scanty and inconclusive due to its current emergent status and the complexity involved in the phenomenon. On the other hand, this study sought to provide better understanding and tangibility of an RGT approach, especially with respect to a validation model that could be used to guide RGT research practices given the dissatisfaction with extant GT literature and the lack of a tangible validation account. An in-depth discourse on such a validation model was deemed necessary because RGT had been criticized for its lack of clarity in its philosophical foundation and its vague praxiology and evaluative criteria. Prior to constructing the validation model, the

researcher rendered a conceptual framework that captured the development of GTM and the situatedness of RGT vis-à-vis other GT models. To be more specific, this situatedness was reasoned by (1) discussing the etiology of the remodeling movement in GTM (i.e., the absence of ontological discussions in the original GTM text that has resulted in problems with justifiability and ample opportunities for reinterpretations), (2) chronicling the development of GTM and drawing connections between RGT and other strands of GTM, (3) adopting a postmodern pluralistic point of view regarding the meaning(s) of social theory and comparing the major philosophical schools and their influences in the GTM development in juxtaposition, and (4) explaining how a realist GT approach is less developed compared to other strands of GT and needs further clarification in both its philosophical foundation and evaluative criteria. Of note, the ontological underpinnings of this study are specifically in line with critical realism that accentuates generative mechanisms in the social world and addresses the fallibility of knowledge construction.

This study sought to answer these main questions:

1. What is a more tangible and reliable way of using a realist grounded theory method? And how should an RGT study demonstrate its validity?
2. What does double-labeling mean to middle school students who are gifted and have ADHD?
3. What are the contextual and developmental factors that affect these students' perceptions of and reactions to double-labeling?

General Findings, Significance, and Novel Contributions of the Study

This study resulted in two informative theoretical models. First, an RGT validation model (see Figure 1) was designed to assist researchers in conducting realist GT studies. This validation model depicts a validation procedure that consists of two validation stages, namely concurrent procedural validity and incremental procedural validity, and suggests a set of strategies that could help researchers to procure a higher level of groundedness of knowledge claims that result from a realist GT study. The ultimate goal of doing a realist GT study is to create a theoretical account (e.g., a set of hypotheses) that amplifies its closeness to an external social reality. This groundedness furthermore demonstrates that the criteria suggested by Glaser (1978)—fit, workability, and relevance—can be met evidentially. The RGT validation model suggests that the degree of validity of an RGT account is contingent on the asymptotic closeness between a theoretical account and social reality, which is rudimentarily suggested by the “groundedness” of a study (concurrent procedural validity) and subsequently reinforced by external testing studies and/or practices (incremental procedural validity). Since strategies for procuring incremental procedural validities, such as theory practices and expert panel discussions, have been established among various disciplines, validation strategies in this study focused on concurrent procedural validity and were categorized under the titles of conceptual groundedness and empirical groundedness. Although the model was designed to assist a realist GTM, many of the strategies are embedded with relevance that underpins general GT studies and qualitative research at large.

The RGT validation model was then adopted to study the double-labeling process, which resulted in a second theoretical model, named LINK²⁴, that is fortified with four theoretical propositions. The LINK model highlights the interplay of individual agency, contextual factors, and developmental considerations and theorizes the pedagogical perspectives of educational labeling. Labeling practice is situated in and endorsed by a social context that carries field knowledge of, and educational policies regarding, labels. Taking a developmental perspective, labeling practice often results in some short-lived emotional responses and triggers a meaning-generating process that results in gradually formatted self-knowledge. Positive academic and social adjustment behaviors are contingent on this self-knowledge. In this regard, labeling practice reconciles a constructed reality and a lived reality. It is important to note that a student's self-knowledge is an ever changing entity. In addition, positive development of self-knowledge may create a feedback loop that further reinforces the support system and/or contributes to aggregate field knowledge. More than following the strategies suggested by the RGT validation model and rendering an auditable account of conceptual and empirical groundedness, the GT labeling study also spoke to critical realism in that (1) it located ontological foci on social and behavioral mechanisms that underlie the double-labeling process, (2) it adopted a naturalistic epistemology for social studies and examined the process in an open system, and (3) it aimed to generate an educational theory that has social (pedagogical) relevance.

The significance of this dissertation study is multi-fold. First, through implementing the RGT validation model in an empirical study and testing out the suggested strategies, the validation model was found to provide not only tangible operational terms that guided the research process but also a rendition of validation evidence that suggested the original GT

²⁴ An acronym of (l)abel (in)duced (k)nowledge, also denotes the relational link between educational labels and self-knowledge.

canons—fit, work, and relevance. Moreover, the suggested strategies did not merely function in a mechanical and operational way. The philosophical exercise of engaging in meta-theoretical discourses suggested in conceptual groundedness was found to be helpful in guiding and re-orienting the later empirical double-labeling study throughout different research stages and ensuring the study resulted in a theoretical account that reflected methodological integrity.

Second, more than providing a validation model that guides RGT studies, the study also came with a conceptual framework that compares GT approaches that reflect various ontological underpinnings as well as provides the rationale for the situatedness of an RGT approach in the GT family. This conceptual framework is crucially important for novice grounded theorists since they often find themselves lost amid a wide selection of GTM models and the internal debates among grounded theory methodologists. This conceptual framework may serve to guide a novice grounded theorist to find a suitable point of departure that fits his/her philosophical worldview for a GT study and also help to keep the researcher on the right track during the pursuit of knowledge.

Third, grounded in educational settings and based on empirical data that included contextual and developmental factors, the LINK model not only informs a new research paradigm in which the complexity of educational labeling can be comprehensively examined but also reminds educators of an important pedagogical aspect of educational labeling—label(s) as an avenue for looking into and knowing oneself.

Fourth, theoretical sensitivity was illustrated by inductive and abductive reasoning about extant literature. The extant literature was used first as data for theory generation through critical and analytical examination. After an initial framework of grounded theory was formulated, the

extant literature was once again triangulated with the LINK model for contradiction, contrast, continuity, connections, and (in)consistency. Since the creation of a social theory does not come from a vacuum, this process was important as it acknowledged what informed and established the foundation for the current theory. Moreover, the process foregrounded one of the core values of GTM—the anti-fundamental stance²⁵ it takes on the use of field literature.

Last, the overall structure of the study is innovative as it accentuates vertical integration between a methodological model and a corresponding empirical study that testifies to its practicality. While the methodological model contributed to guiding the empirical GT study and the attainment of a higher level of validity in the study, the empirical study reciprocally provided feedback for validating and modifying the methodological model.

In all, this dissertation study makes a novel contribution to the field of education. First, the RGT validation model advances both clarity and usability of GTM, which will in turn encourage research endeavors in generating pedagogically relevant theories that also further understanding of educational phenomena and processes. Second, the resulting grounded theoretical propositions that highlight social and behavioral mechanisms underlying the double-labeling process should encourage the adoption of critical realism in grounded theory studies. Moreover, the contribution also lies in the new research paradigm the LINK model has set for future educational labeling studies. The new paradigm suggests comprehensive examinations of the interactive and developmental nature of the labeling process. One could expect studies following this new research paradigm to further collective understanding on the complexity of educational labeling.

²⁵ The original GT text challenged the then predominant hypothetical-deductive way of doing research. Glaser and Strauss (1967) urged grounded theorists to bracket themselves from extant theories in order to gain fresh perspectives from empirical data. Field literature is suggested to be used as data for theory generation.

Limitation of and Caveats on Implementing the Results

Although the RGT validation model suggests a set of criteria to assist in attaining a higher level of methodological integrity and research validity, it is important to note that this validation model should not be treated as a rigid closed system. In other words, the validation model is not promoted to be “the” way to do an RGT study. Being well aware of the caution about “qualitative positivism” (Kvale, as cited in Cheek, 2008, p. 205), it is hoped that the contribution of a validation model will stimulate dialogues in formulating standards of rigor and enriching the concepts of methodological integrity and the validity of theoretical studies. Relatedly, it is also hoped that with tangible operational terms, the presence of this validation model can encourage more educational researchers to conduct RGT studies and render more evidence as to the usability of the model.

In regard to the LINK model, since it is the first known theoretical framework that accounts for the double-labeling process and its possible effects upon twice-exceptional students, some limitations co-occur with this initiative attempt. That is, although the results were rendered by a thorough examination of the process and supported by both theoretical and empirical data, they are best regarded as exploratory due to the small sample size and the rather broad scope of the study as well as the lack of closely related literature on the topic. Subsequently, caution about transferability is suggested since the study is contextually confined to the studied geographic area and the local culture. Also, since a large set of factors embodies the LINK model, it is best for readers to attain a general understanding of the double-labeling process by grasping the major concepts in the LINK diagram and the theoretical propositions before going into the detailed results and examples. Moreover, the study is not an exhaustive presentation of the double-

labeling process. Further research is needed into depicting a detailed theoretical account that renders more comprehensive understanding of the pedagogical labeling mechanism.

Implications of the Study and Further Research

This study put equal weight on constructing methodological knowledge and knowledge in a substantive field (i.e., gifted education). The two parts were vertically integrated as the methodological model guided the generation of the substantive theoretical model. This vertical structure resulted in models that have high relevance to educators and researchers.

First, the successful vertical integration of the study suggests possible avenues for researchers in special education. Given the nature of the student body with exceptionalities (such as smaller populations, some with limited abilities to provide detailed data), researchers in special education are encouraged to take a more active role in investigating and developing methods/methodologies suitable for studying phenomena shared by students with exceptionalities. By doing so, the field of special education not only benefits from having methods/methodologies germane to its settings and the unique needs of its students, but also benefits from high quality empirical studies guided by philosophical clarity and embodied methodological integrity.

Second, the dense and immediate pedagogical relevance of the LINK model suggests the suitability of using RGT in the field of special education for its capability to generate theories that fit pedagogical orientations in educational studies. Another strong application of a realist approach to the field of education is that its studies are often focused on finding social and behavioral mechanisms that explain behaviors. While an explanatory account stands as scientifically valuable in its own right, understanding of these mechanisms constitutes the

foundation for workable solutions to learning and behavioral problems. Furthermore, the positive feedback and comments on the practice of double-labeling from the research participants also shed light on policy making in promoting more sensitive identification and offering suitable programs for these twice-exceptional students.

Given the fact that both the RGT validation model and the LINK model are newly constructed, further developments for strengthening their validity and honing their subtlety are crucial. A few suggestions follow.

In regard to the RGT validation model, although its usability was demonstrated in the labeling study, it is still crucial to collect more evidence and render possible modifications of the model in order to further its validity. For the field of education, it is hoped that by offering a well-reasoned validation model and a set of tangible strategies, educational researchers will be encouraged to partake in constructing theories that are grounded in, and therefore have a higher level of applicability to, educational settings. Moreover, evaluation of the validation model could lead to further elaboration. For example, a detailed account of the use of theoretical triangulation through an empirical GT study could further clarify the role field literature plays in the generation of a grounded theory. Likewise, researchers could also focus on other disaggregated criteria in the model, such as rendering a detailed account of the logical-inferential reasoning process in relation to the generation of a grounded theory. These evaluative efforts on advancing the validation model not only will contribute to its validity but also help GTM to expel its reputation on being somewhat esoteric. In addition, it is hoped that by reconciling GTM with contemporary research issues and contexts via (re)situating GTM meta-theoretically and historically and applying the methodology in current educational settings, this study will encourage more conversations and communication among grounded theorists from different

philosophical schools that further the development of GTM on which complexities of knowing/theorizing in the current post-modern zeitgeist are reflected.

In regard to labeling studies, the LINK model gives an in-depth and comprehensive examination of social and behavioral mechanisms of labeling. On one hand, the interaction captured speaks to the importance of both individual agency and environment when the pedagogical purposes of labeling are concerned. To apply this pedagogically, educators not only are enlisted as part of the immediate environmental factors that contribute to a student's self-knowledge regarding their educational label(s), they can furthermore play an important catalyzing role that mediates the interaction between a student's agency and other environmental factors. For example, school principals can promote a safe school environment in which students who carry educational labels can feel respected; teachers who have students labeled with special educational needs in the class could select multi-media materials (such as introducing related autobiographies or movies) to let students understand their potential. On the other hand, the holistic nature of the LINK model suggests multiple directions for further research development. For example, on a more macro level, a researcher could conduct a thorough examination of the socio-structural dimension of an educational labeling development (such as analyzing the discourse in mass media relevant to how public understanding/acceptability in regard to certain educational labels has changed historically or conducting cross-cultural studies comparing how various cultures affect individuals' internalization of the meaning of an educational label); on a micro level, a researcher could focus on how personal factors such as gender, sensitivity, and ability to engage in internal dialogue mediate the formation of an individual's self-knowledge.

Final Remarks

This study offers a realist interpretation of the original GTM and provides a validation model in order to facilitate the “groundedness” in RGT studies. Through successfully rendering a meaningful grounded theory of an educational labeling process by adopting the RGT validation model, this validation model was found to be operationally tangible. In so doing, RGT speaks to its usability in the field of education for its capability to produce a theoretical account that fits the collected empirical data and is workable and relevant to the participants. Nevertheless, it is hoped that this study not only promotes RGT with mechanical and technical advances but also encourages GT researchers at large to pursue methodological integrity via the correspondence between a thorough understanding of social theories under pursuit and a GTM approach.

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Appendices

Appendix A: Assent Form & Recruitment Letter (Student Participant)

THE UNIVERSITY OF BRITISH COLUMBIA



Department of Educational and Counselling
Psychology, and Special Education

2125 Main Mall

Vancouver, B. C. Canada V6T 1Z4

Title of Study: Validating a classic grounded theory using an example of the double-labelling phenomenon in special education

Principal Investigator: Marion Porath, Ph.D., University of British Columbia, Department of Educational and Counselling Psychology, and Special Education

Co-Investigator: Chih-shen Owen Lo, Ph.D. candidate, University of British Columbia, Department of Educational and Counselling Psychology, and Special Education

Student Assent Form

Dear [insert student name]

We are writing to invite you to participate in a research project which will be conducted by Chih-shen Owen Lo as part of the requirements for his doctoral degree. This project aims to understand how students who are considered both gifted and have Attention Deficit Hyperactivity Disorder (ADHD) (often called double-labelling) feel about these labels and the effect the labels may have had on them. Therefore we would like to ask you to talk about your experiences with these labels. We would also like to talk to your parents and school teachers about their ideas of and observations on this topic. This study will give you a great chance to express yourself and your educational needs.

In order to learn the most from you, we will ask you to have an interview session with Chih-shen Owen Lo. The interview will take about 40-60 minutes. In some cases, a short second interview may be requested to follow up on information from the first interview.

All the information we collect will be kept strictly confidential. We will only use your personal information if we need to schedule a second interview with you. Interviews will be audio-taped and transcribed for analysis. We will not use your real name in the transcripts and the reports. Instead, we would like to ask you to provide us a made-up name that you would like us to use in the report. If you do not have any preferred made-up name, we will then assign you a number code and use the number code for data analysis and the report. Only me and Dr. Porath will be able to read what you said in the interview. All the electronic research files will be stored in a password protected computer that only the researchers can access. In this computer file, only code numbers or made-up names will be used (not real names). All paper copies of interview transcriptions will be kept in a locked filing cabinet. You will not be identified by name in any reports of the completed study

Your participation in this study is entirely voluntary. If you do choose to participate, you can stop your participation at any time you want. You may also choose not to answer any question(s) in the interview. You may refuse to participate or stop participating in the project without any impact on your schoolwork and grades.

We would be grateful if you take part in this research. If you have any questions about the project, please contact Chih-shen Owen Lo by phone at (xxx)-xxx-xxxx or email at xxx@gmail.com and/or Dr. Marion Porath by phone at (xxx)-xxx-xxxx or email at marion.porath@ubc.ca. If you have any concerns about your treatment or rights as a research participant, please contact the Research Subject Information Line in the UBC Office of Research Services at 604-822-8598 or if long distance e-mail to RSIL@ors.ubc.ca or toll free 1-877-822-8598. Thank you very much for your time and consideration of this request.

If your parent(s)/guardian(s) have given permission to your participation and you are willing to participate, please sign the form on the next page. Please kindly let us know even if you do not want to participate so that we know you received our request. We also encourage you to keep a copy of this letter and the assent form for your records.

Thank you very much for considering to participate in this study.

Sincerely,

Chih-shen Owen Lo, UBC Ph.D. candidate

Marion Porath, UBC professor

***** PLEASE KEEP THIS COPY OF THE ASSENT FORM FOR YOUR RECORDS *****

STUDENT ASSENT FORM

Project Title: Validating a classic grounded theory using an example of the double-labelling phenomenon in special education

Principal Investigator: Marion Porath, Professor, University of British Columbia

Co-Investigator: Chih-shen Owen Lo, Ph. D. candidate, University of British Columbia

Assent: I have read and understood the information about the research study called “Validating a classic grounded theory using an example of the double-labelling phenomenon in special education”. I understand that my participation in the project is voluntary and I may stop at any time without any impact on my schoolwork and grades.

Please check one from each section:

-
- YES, I would like to participate in this study.
 No, I would not like to participate in this study.
-

Please indicate if you would like us to have a report on the general results of the study

- YES, I would like to request a report on the general results of the study sent to me via email.

My email address is: _____

- No, I do not need a report on the general results on the study.
-

Signature : _____

Date: _____

***** PLEASE RETURN THIS ASSENT FORM TO THE CO-INVESTIGATOR *****

STUDENT ASSENT FORM

Project Title: Validating a classic grounded theory using an example of the double-labelling phenomenon in special education

Principal Investigator: Marion Porath, Professor, University of British Columbia

Co-Investigator: Chih-shen Owen Lo, Ph. D. candidate, University of British Columbia

Assent: I have read and understood the information about the research study called “Validating a classic grounded theory using an example of the double-labelling phenomenon in special education”. I understand that my participation in the project is voluntary and I may stop at any time without any impact on my schoolwork and grades.

Please check one from each section:

-
- YES, I would like to participate in this study.
 - No, I would not like to participate in this study.
-

Please indicate if you would like to have a report on the general results of the study

- YES, I would like to request a report on the general results of the study sent to me via email.
My email address is: _____

- No, I do not need a report on the general results on the study.
-

Signature : _____

Date: _____

Appendix B: Informed Consent Form & Recruitment Letter (Parent)

THE UNIVERSITY OF BRITISH COLUMBIA



Department of Educational and Counselling
Psychology, and Special Education
2125 Main Mall
Vancouver, B. C. Canada V6T 1Z4
Tel: 604-822-6022
Fax: 604-822-3302

Consent Letter)

- Chin-Shen Owen Lo xxx-xxx-xxxx email: xxx@gmail.com

如果您需要中文版本的家長同意書，請和本研究的協同研究者羅志森聯絡。

如果您需要中文版本的家长同意书，请和本研究的协同研究者罗志森联络。

Title of Study:	Validating a classic grounded theory using an example of the double-labelling phenomenon in special education
Principal Investigator:	Marion Porath, Ph.D., University of British Columbia, Department of Educational and Counselling Psychology, and Special Education
Co-Investigator:	Chih-shen Owen Lo, Ph.D. candidate, University of British Columbia, Department of Educational and Counselling Psychology, and Special Education

Parent(s)/Guardian(s) Consent form

Dear Parent(s)/Guardian(s),

We are writing to ask you to participate in a dissertation research project which aims to understand how students who are considered both gifted and have Attention Deficit Hyperactivity Disorder (ADHD) (often called double-labelling) feel about these labels and the effects these labels may have had on them. This research project will be conducted by Chih-shen Owen Lo as part of the requirements for his doctoral degree. It involves asking you and your child to talk about your experiences with special educational labels. The project will contribute to supporting students who have special educational needs and to informing schools of their needs.

Participants: Secondary school students (Grade 8 to Grade 12) who are considered gifted and ADHD are invited to take part in this project. Parents and school teachers who have close experience with the double-labelling phenomenon are also invited to participate and share insights with us. Only students who receive parent/guardian permission and who themselves assent to participate can take part in the project. To help you decide whether you and/or your child wish to participate, we provide a short description of the project below.

Project Description: For this project, all participants will be asked to have an interview with the co-investigator.

Your child's participation in this study involves:

- an interview of approximately 40 to 60 minutes to take place in his/her school at a time convenient to your child and the school.

Your experiences and insights are also important in understanding double-labelling. We would like to invite you to take part in the project. Your participation involves:

- an interview of approximately 40 to 60 minutes. Interviews will be scheduled at a mutually convenient time and place.

In some cases, a short second interview may be requested to follow up on information from the first interview.

Note: Your child may withdraw at any time during the study without any impact on his/her schoolwork. Any responses collected from students who withdraw from the study will be shredded and discarded. **You may also withdraw from the study at any time without any consequence. In this case, any responses collected from you would also be shredded.**

Data collecting and reporting: Interviews will be audio-taped and transcribed for analysis.

Confidentiality and anonymity: All answers provided by participants to the interview questions will be kept strictly confidential. Study results will be entered into a password protected computer that only the researchers can access. In this computer file, only code numbers or pseudonyms will be used (not real names). All paper copies of interview transcriptions will be kept in a locked filing cabinet. Participants will not be identified by name in any reports of the completed study. We will only use your personal information if we need to schedule a second interview with you. This project is the basis of the Co-Investigator's dissertation. The results also will be presented at a conference and published in an academic journal. A written report of the general results of the study will also be provided for interested parents/guardian(s).

Potential risks: There are no known risks to participating in this study. However, the process of talking about double-labelling might be upsetting for a child. A list of professional counsellors and educational psychologists will be provided in case support is needed.

Benefits: This study gives students and parents a voice in helping schools and faculties of education to understand the social-emotional and academic needs associated with double-labelling.

Consent: Please complete the consent form on the next page indicating whether or not you consent to participate in this study and whether or not you give permission for your child to participate. Please kindly let us know even if you do not want your child to participate so that we know you received our request. Please keep a copy of the letter and the consent form for your records.

Contact: We would be grateful if you and/or your child take part in this research project and hope that you will give permission to do so. If you have any questions about the project, please contact Chih-shen Owen Lo by phone at (xxx)-xxx-xxxx or email at xxx@gmail.com and/or Dr. Marion Porath by phone at (xxx)-xxx-xxxx or email at xxx@ubc.ca. If you have any concerns about your and/or your child's treatment or rights as a research participant, please contact the Research Subject Information Line in the UBC Office of Research Services at 604-822-8598 or if long distance e-mail to RSIL@ors.ubc.ca or toll free 1-877-822-8598. Thank you very much for your time and consideration of this request.

Sincerely,

Chih-shen Owen Lo, UBC Ph.D. candidate

Marion Porath, UBC professor

***** PLEASE KEEP THIS COPY OF THE CONSENT FORM FOR YOUR RECORDS *****

PARENT/GUARDIAN CONSENT FORM

Project Title: Validating a classical grounded theory using an example of the double-labelling phenomenon in special education

Principal Investigator: Marion Porath, Professor, University of British Columbia

Co-Investigator: Chih-shen Owen Lo, Ph. D. candidate, University of British Columbia

Consent: I have read and understood the information about the research study called “Validating a classic grounded theory using an example of the double-labelling phenomenon in special education”. I understand that my participation in the project is voluntary and I may stop at any time without any negative impact. I also understand that my child’s participation in the project is voluntary and he/she may stop at any time without any impact on his/her schoolwork and grades. I have a copy of this form for my records.

Please check one from each section:

For yourself:

- YES, I would like to participate in this study.
 No, I would not like to participate in this study.
-

For your child:

- YES, I consent to my son/daughter’s participation in this study.
 NO, I do not consent to my son/daughter’s participation in this study.
-

Please indicate if you would like to have a report on the general results of the study

- YES, I would like to request a report on the general results of the study sent to me via email.

My email address is: _____

- No, I do not need a report on the general results on the study.
-

Signature : _____ Date: _____

***** PLEASE RETURN THIS CONSENT FORM TO THE CO-INVESTIGATOR*****

PARENT/GUARDIAN CONSENT FORM

Project Title: Validating a classical grounded theory using an example of the double-labelling phenomenon in special education

Principal Investigator: Marion Porath, Professor, University of British Columbia

Co-Investigator: Chih-shen Owen Lo, Ph. D. candidate, University of British Columbia

Consent: I have read and understood the information about the research study called “Validating a classic grounded theory using an example of the double-labelling phenomenon in special education”. I understand that my participation in the project is voluntary and I may stop at any time without any negative impact. I also understand that my child’s participation in the project is voluntary and he/she may stop at any time without any impact on his/her schoolwork and grades. I have a copy of this form for my records.

Please check one from each section:

For yourself:

- YES, I would like to participate in this study.
 No, I would not like to participate in this study.
-

For your child:

- YES, I consent to my son/daughter’s participation in this study.
 NO, I do not consent to my son/daughter’s participation in this study.
-

Please indicate if you would like to have a report on the general results of the study

- YES, I would like to request a report on the general results of the study sent to me via email.

My email address is: _____

- No, I do not need a report on the general results on the study.
-

Signature : _____ Date: _____

Appendix C: Recruitment Letter (Adult Participant)

THE UNIVERSITY OF BRITISH COLUMBIA



Department of Educational and Counselling
Psychology, and Special Education
2125 Main Mall
Vancouver, B. C. Canada V6T 1Z4
Tel: 604-822-6022
Fax: 604-822-3302

Title of Study:	Validating a classic grounded theory using an example of the double-labelling phenomenon in special education
Principal Investigator:	Marion Porath, Ph.D., University of British Columbia, Department of Educational and Counselling Psychology, and Special Education
Co-Investigator:	Chih-shen Owen Lo, Ph.D. candidate, University of British Columbia, Department of Educational and Counselling Psychology, and Special Education

Teacher/School district informant consent form

Dear Sir/Madam,

We are writing to ask you to participate in a dissertation research project which aims to understand how students who are considered both gifted and have Attention Deficit Hyperactivity Disorder (ADHD) (often called double-labelling) feel about these labels and the effect the labels may have had on them. This research project will be conducted by Chih-shen Owen Lo as part of the requirements for his doctoral degree. It involves asking you to talk about your experiences with these students and their special educational labels. The project will contribute to supporting students who have special educational needs and to informing schools of their needs.

Participants: Secondary school students (Grade 7 to Grade 12) who are considered gifted and ADHD are invited to take part in this project. Parents and school teachers who have close experience with the double-labelling phenomenon are also invited to participate and share insights with us. To help you decide whether you wish to participate, we provide a short description below.

Description: Your experiences and insights are also important in understanding the double-labelling phenomenon. We would like to invite you to take part in the project. Your participation involves:

- an interview which takes approximately 40 to 60 minutes. Interviews will be scheduled at a mutually convenient time and place.

In some cases, a short second interview may be requested to follow up on information from the first interview.

Data collecting and reporting: Interviews will be audio-taped and transcribed for analysis.

Confidentiality and anonymity: All answers provided by participants to the interview questions will be kept strictly confidential. Study results will be entered into a password protected computer that only the researchers can access. In this computer file, only code numbers or pseudonyms will be used (not real names). All paper copies of interview transcriptions will be kept in a locked filing cabinet. Participants will not be identified by name in any reports of the completed study. We will only use your personal information if we need to schedule a second interview with you. This project is the basis of the Co-Investigator's dissertation. The results also will be presented at a conference and published in an academic journal. A written report of the general results of the study will also be provided to interested teachers.

Potential risks: There are no known risks to you in this study.

Benefits: This study gives students and parents a voice in helping schools and faculties of education to understand their social-emotional and academic needs.

Consent: Please complete the consent form on the next page indicating whether or not you consent to participate in this study. Please keep a copy of the letter and the consent form for your records.

Contact: We would be grateful if you take part in this research. If you have any questions about the project, please contact Chih-shen Owen Lo by phone at (xxx)-xxx-xxxx or email at xxx@gmail.com and/or Dr. Marion Porath by phone at (xxx)-xxx-xxxx or email at xxx@ubc.ca. If you have any concerns about your treatment or rights as a research participant, please contact the Research Subject Information Line in the UBC Office of Research Services at 604-822-8598 or if long distance e-mail to RSIL@ors.ubc.ca or toll free 1-877-822-8598. Thank you very much for your time and consideration of this request.

Sincerely,

Chih-shen Owen Lo, UBC Ph.D. candidate

Marion Porath, UBC professor

***** PLEASE KEEP THIS COPY OF THE CONSENT FORM FOR YOUR RECORDS *****

TEACHER AND SCHOOL DISTRICT INFORMANT CONSENT FORM

Project Title: Validating a classic grounded theory using an example of the double-labelling phenomenon in special education

Principal Investigator: Marion Porath, Professor, University of British Columbia

Co-Investigator: Chih-shen Owen Lo, Ph. D. candidate, University of British Columbia

Consent: I have read and understood the information about the research study called “Validating a classic grounded theory using an example of the double-labelling phenomenon in special education”. I understand that my participation in the project is voluntary and I may stop at any time without any negative impact.

Please check one from each section:

-
- YES, I would like to participate in this study.
 No, I would not like to participate in this study.
-

Please indicate if you would like to have a report on the general results of the study

- YES, I would like to request a report on the general results of the study sent to me via email.
My email address is: _____

- No, I do not need a report on the general results on the study.
-

Signature : _____ Date: _____

***** PLEASE RETURN THIS CONSENT FORM TO THE CO-INVESTIGATOR *****

TEACHER AND SCHOOL DISTRICT INFORMANT CONSENT FORM

Project Title: Validating a classic grounded theory using an example of the double-labelling phenomenon in special education

Principal Investigator: Marion Porath, Professor, University of British Columbia

Co-Investigator: Chih-shen Owen Lo, Ph. D. candidate, University of British Columbia

Consent: I have read and understood the information about the research study called “Validating a classic grounded theory using an example of the double-labelling phenomenon in special education”. I understand that my participation in the project is voluntary and I may stop at any time without any negative impact.

Please check one from each section:

-
- YES, I would like to participate in this study.
 No, I would not like to participate in this study.
-

Please indicate if you would like to have a report on the general results of the study

- YES, I would like to request a report on the general results of the study sent to me via email.
My email address is: _____

- No, I do not need a report on the general results on the study.
-

Signature : _____ Date: _____

Appendix D: Interview Protocol (2E Student, 1st Round)

Estimated Time: 40-60 minutes

Section	questions
Ice-breaking	Greetings & introductions
	Briefly review the purpose of the study
	Assure confidentiality and voluntary participation
	Solicit participants' questions and/or considerations
	What club(s)/association(s) do you belong to at school? and out of school?
	What are the things you like to do when you have free time?
Main questions	When were you first considered as a gifted student? How did you feel when you received the label? What does it mean to you now?
	When were you first considered as having ADHD? How did you feel when you received the label? What does it mean to you now?
	Do the labels affect the way you see yourself? If yes, how?
	Do you think the labels affect the ways others see you? If so, how?
	Does having the labels make your life easier in any way? If yes, in what ways?
	Does having the labels make your life hard in any way? If yes, in what ways?
	Do you feel that anything has been taken away from you since you received the labels? If yes, what has been taking away?
	Do you feel that anything has been added to you since you received the labels? If yes, what has been added?
	Is there a difference in how the labels affect you in secondary school as compared to elementary school?
	Who do you talk to when you want to share your feelings and emotions?
	What are the things you do when you are feeling upset?
	Who and what have been great resources in helping you cope with the labels (emotionally, academically, and socially)?
	Are there times when you try not to let people know about your labels?
	Would you prefer to have no labels at all or just one? Which one? Why?
	Do you ever try to hide your labels from other people? If so, when and why?

Ending section	Overall, what do you appreciate about having the labels? And to whom and what would you express your appreciation regarding dealing with your dual labels?
	Are there any suggestions you would like to make to your school and/or the school board?

Appendix E: Interview Protocol (Parent)

Estimated Time: 40-60 minutes

Section	List of Questions
Ice-breaking	Greetings & introductions
	Briefly review the purpose of the study
	Assure confidentiality and voluntary participation
	Solicit participants' questions and/or considerations
Main questions	When did you start to notice your child's exceptionalities?
	What were the circumstances when his/her giftedness was suspected?
	What were the circumstances when his/her ADHD was suspected?
	Did your parenting style and expectations for your child change after the designations? If so, what has changed?
	Did your child change after receiving the designations? If so, in what ways?
	How has this labeling process made your child's and your life different in addition to the above mentioned?
	How have you helped your child to cope with his/her exceptionalities?
	What resources have you found useful?
Ending section	Overall, to whom and what would you express your appreciation regarding dealing with your child's dual labels?
	Do you have suggestions for the school and/or education system regarding support for your child?

Appendix F: Interview Protocol (Teacher)

Estimated Time: 40-60 minutes

Section	List of Questions
Ice-breaking	Greetings & introductions
	Briefly review the purpose of the study
	Assure confidentiality and voluntary participation
	Solicit participants' questions and/or considerations
Main questions	When did you become a teacher? What is your training in education?
	When did you decide to become a teacher in G/T education? What made you decide to pursue a career in this field?
	How does gifted education work in your school district?
	What students are served by gifted education in your school district?
	When did the school district decide to implement services for 2E students? What were the reasons?
	What is the identification and placement procedure for 2E students?
	In your experience, when do they usually get referred? What are the reasons for referral?
	What are the challenges regarding teaching and/or providing services to students who are gifted and have ADHD?
	What are the commonalities and differences of this group of students, compared to their gifted peers?
Ending section	From your perspective, what supports do these students have in dealing with their dual-exceptionality?
	Are there any suggestions you would like to make regarding serving these 2E students to the school board and/or BC Ministry of Education?

Appendix G: Interview Protocol (2E Student, 2st Round)

Estimated Time: 20-40 minutes

Main questions

1. Can you tell me your understanding of giftedness and how do you feel about yourself being identified as gifted?
2. Can you tell me your understanding of ADHD and how do you feel about yourself being identified as gifted?
3. Can you tell me your understanding of LD and how do you feel about yourself being identified as gifted?
4. Do you think you stand out as a gifted individual?
5. Who/what have helped you the most in terms of coming to these understanding?
6. What are the strategies that you've adopted to help yourself learn better at school and at home?
7. How do you feel about the co-existence of these different ability traits? And how you think that would your life and your self-actualization?
8. Please name as many twice-exceptional people as you know.
9. Are you satisfied with the educational services you receive? Do you know the content of your IEP well? Have people communicated that with you well? Do you attend your IEP meetings?
10. Are there any disadvantages of having these labels?
11. According to what you can recall, what have changed in school? In your family? after you got the labels?
12. Decision making: how do labels facilitate/help the process?
13. Self-appraisal: on a scale of one to ten, and considering the fact that you are both ADHD and gifted, what score will you give yourself and why?

Probing questions (example)

1. Confusion about the contradicting traits:
 - Who do you talk to when you felt that way?
 - Does this sort of confusion still occur?

2. Procrastination

- Have you tried to tackle with this problem? If so, how?

3. Self-identify (among ADHD/GT/LD)

- How do you acknowledge yourself? Does it change the way you choose your friends and the school you go?

Appendix H: Interview Protocol (Adult 2E Participant)

Estimated Time: 60-90 minutes

Part A: Self-identity

1. Tell me your definition/understanding of giftedness
2. Tell me your definition/understanding of LD
3. Tell me your definition/understanding of ADHD
4. How do you come to these understanding (in regard to the labels)? Who and what have helped?
5. Among the three, how do you see yourself nowadays? Which one, if any, is your primary identification
6. How your self-identity has changed over time (elementary, secondary, college, adulthood)? And how various developmental tasks affect how you see and perceive the labels?
7. Any narrative (self-conversation and conversation with others) instances that include labels post-secondary stage of lie? In college? In adulthood?
8. Do you think that knowing yourself as being a twice-exceptional person affects your how you make important decisions in your life (such as choosing a program, a university/college, finding a partner, etc.)?
9. You mentioned before that GLD isn't necessary the best description for this group of students. Why is that? And what will be a better describer?
10. You are one of the main leaders in pushing the development of GLD programs in VSB. Tell me what makes you decide to being the GLD advocate?

Part B: Social changes in perceiving twice-exceptionality

1. Which year did you join the GLD program?
2. What have changed in the GLOD program (including services and selecting criteria)?
3. How the school environment and social milieu have changed in regard to twice-exceptional students since then?

Part C: Self-appraisal

1. On a scale of one to ten, how would you rate your school life? 1. Secondary; 2. College
2. On a scale of one to ten, how would you rate your self-actualization as far as your career goes.
3. On a scale of one to ten, how would you rate your happiness?