



THE O FACTOR

A White Paper on Leadership Ability as a Gift in 2- to 22-Year-Olds

ABSTRACT

In spite of the US Department of Education Marland Report's (1972) inclusion of leadership ability as a gifted and talented (GT) domain, little has emerged to synchronize this into the mainstream GT community, let alone education systems and society at large. Unlike other articles written by education experts on leadership among students, this white paper is from a leadership specialist perspective, focusing on young leaders (ages 2-22, with an emphasis on years 10-18). It recommends a new construct of student leadership ability by offering: suggestions of why it was originally and continues to be included on lists of giftedness domains, a functional definition for establishing metrics, a means of assessing leadership talent by focusing on essential characteristics typically overlooked in GT instruments, and ideas for making this a viable part of the educational arena. This white paper offers an executive summary of a book by the author with the same title. (Author bio at end)

Alan E. Nelson, EdD

A Weed in the GT Garden?

I grew up on a farm in southwest Iowa. We raised hogs and cattle, and grew alfalfa and corn. I learned at a young age what it takes to cultivate row crop; prep the soil, select and plant the seed, water, fertilize, and harvest. One day, around age 10, my dad and I stood in a neighbor's soybean field, admiring it. My dad pointed to a lone stalk of corn rising 3-4 feet above the surrounding plants. He asked, "Do you know what that is?" I looked at the stalk of corn and then back at him. What a stupid question, I thought. "It's corn," I answered. "No, it's a weed," Dad said. A weed? No way. I knew the difference between a weed and corn. Sensing my perplexed stare, my dad explained, "A weed is whatever you're not trying to grow."

Standing in the gifted and talented field, I see a plant that looks different from the rest. Is it a weed or just a different kind of crop? The plant is leadership ability.

"Gifted and talented children are those identified by professionally qualified persons who by virtue of outstanding abilities are capable of high performance. Children capable of high performance include those with demonstrated achievement and/or potential ability in... leadership."¹ Those words are from The Marland Report (1972), a familiar document to nearly all in the gifted and talented (GT) movement, the US government's recognition that students with exceptional aptitudes should be offered specialized resources for their development.



Yet only a handful of articles exist on the topic. Interest in this domain listed in that US Department of Education doc seems significantly behind the other five. For example, during the 2015 National Association of Gifted Children convention, touting over 400 workshop offerings, only 3 used leadership in their title and only 1, a single poster, reflected an impetus on the gift.² Leadership ability appears to be the proverbial red-headed stepchild of the GT family.

Don't Confuse a Lack of Acceptance with Insignificance

As a professor who teaches organizational behavior, it is relatively easy to identify plausible reasons for the lackluster support leadership ability has received in schools, since its inclusion on Marland's list.

First, teaching leadership has not historically been a part of the educational culture. Org cultures change slowly, and rarely without significant pain. Intellectual endeavors occupy most class times. In a knowledge-driven world, how can anyone push back on the need for more and better academics? Yet, there appears to be a growing gap between what employers seek after school and what is actually taught in schools (i.e. 21st century skills). Change is difficult and requires strong leadership, so if educational leaders don't champion an urgent focus on leadership ability, it will never become a part of the educational culture.

Second, Pavlov and B. F. Skinner taught us you shouldn't hope for A while rewarding B.³ Don't expect what you don't inspect. Schools' focus on generalized test scores and an ever-changing list of top-down requirements leave little to no bandwidth for the work of leadership identification and development. While

each interest fights for its own turf, such as STEM enthusiasts wanting space from the liberal artists, neither is apt to make room for outsiders.

Third, educators specialize in pedagogy, not leadership. Few have degrees in organizational leadership (vice administration), and usually only principals and superintendents have experienced some type of formal executive training. When you have a persistent ringing in your ears, you don't make an appointment with a podiatrist. When you review the literature, nearly all who write about leadership ability in education and the GT community are from the field of education, not leadership. In the schools and associations supporting student leadership I've observed, I see good things, but little that reflects grounded organizational leadership content. Although being around students who are leading can teach us a lot, developing adequate schemata to think more deeply in it is at the foundation of what we believe about education.

Fourth, and related to the third, the leadership community has all but snubbed a focus on young leaders. Before writing *LeadYoung*, I could not find a single book on organizational leadership from an executive skills perspective that was specifically published for teens. People with doctorates in the field typically become professors and/or work with middle- to C-level executives, employed by corporations and large organizations. The latter fund the research that gets professors published, a requirement of higher ed institutions. Thus the leadership community creates its own system of reinforcement that excludes the young and very young.

What's in Your Blind Spot?

I did not seriously consider young leaders until a midlife transition prompted me to rethink my views on leadership development. Although this has been my primary focus the last decade, I only discovered leadership ability's inclusion in the Marland Report and potential home within the GT neighborhood in the last couple of years.

Our work globally suggests to us that most cultures consider leading an adult behavior, telling students, "Someday, you're going to be a leader." Our farsightedness overlooks the need to identify and develop leaders now, for both today and tomorrow. We need to train students gifted in leadership how to lead, not just recruit talking head politicians or business celebrities to drop by class for a chat.

The Marland Report warns about the potential damage done to gifted students who are all but ignored in schools, including them in the category of special needs.⁴ Although many have read this in the context of intellectual gifts, the words of caution were intended for all the domains listed. Most schools are by nature leader-averse, demanding compliant students and punishing those who are not. When you stub your toe on a carpet nail, chances are you'll get a hammer and pound it down. Students gifted in leadership ability often stick out in compliant cultures. We should not force our most talented leaders to wait 20 years to use their gifts, or until after they've been formally educated. We should figure out how to do both at the same time. Make the systems comply to our students, not the other way around. Students gifted in leadership fall through the culture gap lying between specialists in education who work with youth and specialists in leadership who work with adults.

Just as the GT community is becoming more aware of its need to reach under-represented populations, the leadership arena should expand beyond the adult world to identify and develop students gifted in leadership ability. The field of leadership studies, around 75 years old, has abdicated its responsibility to include the young, catering to the traditions that be if not pandering to the sources of fortune and fame.



Defining Leadership

Before diving further into a discussion on the gift of leadership ability, let's develop a working definition. Based on a review of the 700 leadership books in my library, less than 5% define the term, as if assuming we all know and/or agree on a single explanation of the concept. Buyer beware, because leadership has become a very popular adjective for selling books, seminars, degrees, and other products. Any linguist will tell you that semantics are important and complex. For example, I can say I love my wife, pizza, God, tennis, my dog, and my sons, but in each context, *love* means something different. Likewise, the term *leadership* spans many shades.

When you explore the world of leadership for the young (ages 10-18), you notice a lack of depth and consistency. For the most part, leadership is defined as any number of things quite different from how adults convey the concept, focusing rather on citizenship, responsibility, self-esteem, character, and service. Granted, these are wonderful qualities, but they don't distinguish what leaders do in comparison to non-leaders. They are characteristics we hope for in all people, regardless of whether they are leading or not. The cultural popularity of being called a leader and a lack of specialization in the area of young leadership have resulted in a concept reflecting self-actualization and appropriate social behavior, not executive organizational skills.

A more effective strategy is to define leadership specifically in terms of what leaders do and how they behave uniquely to others, regardless of age. We define leadership as *the process of helping people accomplish together what they would not or could not as individuals. Leaders are the individuals who catalyze this social process. Leading is how they do it.* This definition provides a stake in the ground to benchmark behaviors, attitudes, and processes that focus on the unique and distinctive qualities of leading, as opposed to something everyone does or can be. It also reflects more of an executive role, used by those who study organizational behavior. We refer to this ability as the O Factor, because it reflects the ability to organize people to achieve a common goal. I also prefer the term because the word *leadership* carries significant cultural baggage. We are so concerned about our children being or not being leaders that we are unwilling to recognize that some might be more highly gifted in this area, as is often the case in other talent domains, given our country's philosophy of egalitarianism, also noted in the Marland Report (1972).

How Leadership Ability Got Into the Marland Report

Why would the U.S. School Chief identify gifts outside of a traditional focus on intellectual development? Sidney P. Marland, Jr., after whom the report is named, was respected by insiders, but he also recognized the need for educational reform. For example, Marland emphasized states requiring their public schools to comply with the Civil Rights Acts or else lose federal funding. He also advocated that students gain field experience in various occupations. Marland saw the educational system beyond academics, as a means to shape both students and society. His experience as a high school English teacher and school superintendent, combined with his role as an Army officer during WWII, offer him unique perspectives on those gifted in leading.



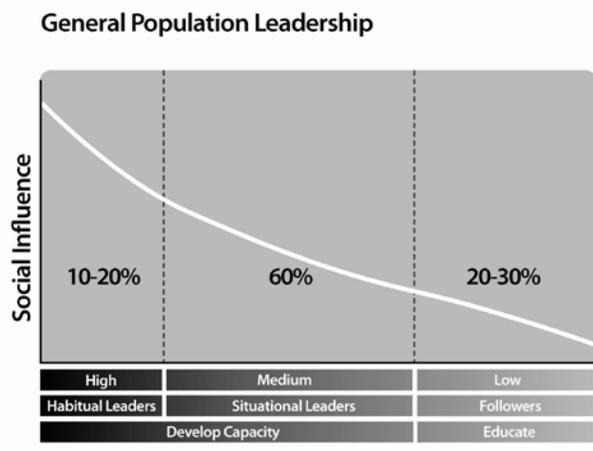
During conversations with Marland's son, Sid Marland III, and a granddaughter (Kami), I heard numerous stories and anecdotes of his style as a leader and a penchant for challenging status quo.⁵ His son remembered coming home one time, seeing his house surrounded by picketers due to a decision his father made as the Pittsburgh USD Superintendent. He remembered religious and community leaders coming over to their

house, along with their father being active in Rotary and other fraternal organizations. They concur that the variety and number of his life experiences offered him an array of seeing effective leaders, raising both his appreciation of and value for developing this gift in students.

Marland and educational leaders at the time were also likely influenced by other discoveries in the field. J. P. Guilford's research expanded the concept of intelligence and noted the limitations of IQ assessments. Guilford developed a list of 150 skills, ways by which individuals process information and exhibit various types of intellect, including a few focusing on behavior. He became a strong advocate of studying creativity separately from intellect.⁹ Subsequent thinkers furthered this idea, as seen in Howard Gardner's multiple intelligences (1983, 1988) and Daniel Goleman's social intelligence (1995).^{6,7} Gardner mentioned leadership as a domain within interpersonal intelligence. When I asked him if he'd done any research in that area, he said he had not, but based it on his observations.⁸

Gardner's comment is true for most of us. In spite of the importance of research and critical thinking, one need not be a rocket scientist or Harvard education professor to understand how leadership ability could make it into a landmark DOE document. Walk onto any school playground or observe the social behaviors in the hallways, cafeterias, and athletic areas, and you'll see leadership happening organically. Veteran classroom teachers realize that a few students possess unique abilities to influence their peers, for good and bad. Principals host frequent office meetings with future CEOs and entrepreneurs, irritating as they may seem at the moment. Educational systems are the primary social structures for children and adolescents. Because leadership is a social art, it makes sense that those who work in these environments observe the natural results of this, even if it is not within their teaching objectives.

If you graph leadership ability, you find similar distributions to the other domains, with a small percentage exhibiting a strong likelihood of giftedness (see Illus. 1.0). The left category is high leadership, indicating students who habitually try to lead, whether or not they're invited to. The large mid-section represents those who may learn to lead situationally, but later, after educational and life experiences. The right side reflects those with no desire and little capacity to lead organizationally. They may be very intelligent and gifted in other domains, but leading isn't one of them. By identifying and developing organizational prodigies, we can teach them with specifically designed training methods that focus on executive skills.



Illus. 1.0 Social Influence Spectrum

Short Term Benefits

So why should local school educators recognize and consider leadership ability, as opposed to seeing it as a nominal tipping of the cap by high-up idealists? Of the six domains identified in the Marland Report, leadership ability is strategically qualified to benefit its host. Positive behavior research demonstrates the correlation between social climate and academic achievement.⁹ States such as California now require climate improvement plans as part of their local school funding. Yet a gaping hole in PBIS research is noting how certain students exude significantly more influence than others. They did not study what most of us know by experience—that certain students wield more influence than the rest. These are often the ones gifted in leadership. By identifying and developing these catalysts, schools can directly benefit from tapping their social influence. A peer strategy for positive behavior could extend the reach of staff with minimal budget impact. Reducing bullying and classroom disruptions and elevating student engagement can be accomplished by leveraging the natural socializing qualities of student leaders. A thermometer tells the temperature, whereas a thermostat sets it. By identifying and developing student thermostats, schools can improve the social climate of these influencers.



Long Term Benefits

The bumper sticker, “If you can read this, thank a teacher,” illustrates a long term benefit of schools. Most teachers would admit that the reason they are willing to be overworked and underpaid is for the sake of the students and society. This same rationale can be associated with leadership talent. Society is not just improved by educated

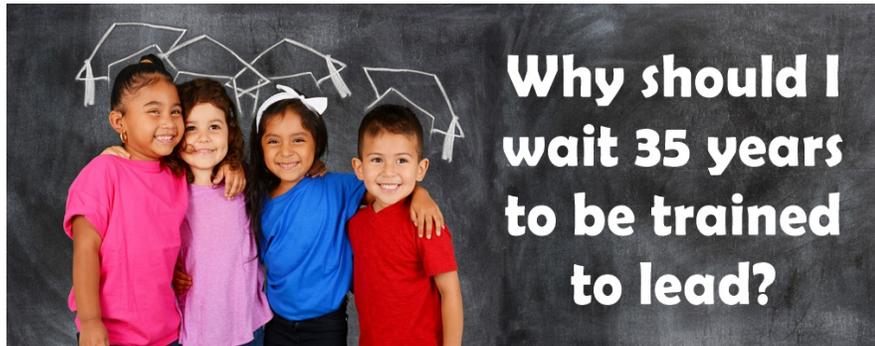
people. It’s keenly shaped by leaders, whether corporate, governmental, or in the social sector. You see it within the DC Beltway as well as inner city gangs. Society seeks individuals possessing the O Factor, the ability to organize people to accomplish together what they would not or could not alone. Imagine if we began teaching people how to read at age 42. What kind of society would we have? A Harvard publication based on surveys of 17,000 managers over several years, noted 42 as the average age of first formal leadership training.¹⁰ The long term benefits of developing leaders while they’re moldable, not moldy, are significant.

One reason is getting to leaders while their character is pliable. Teaching ethics to MBA students is akin to closing the barn door after the horse has escaped. Moral development begins very young, so if we want ethical leaders, we should start early to hone their character in the context of leading, as opposed to hoping the adult leaders we follow had a good upbringing. Weekly news stories on leaders bankrupting their companies, communities, and countries prove the current system is broken. My work with the Naval Postgraduate School convinces me that the primary reason the US invests 25% of its national budget on the military is the existence of unethical global leaders.

Another primary reason for identifying and developing leaders very young is the incredible opportunity to gain a sizable amount of experience prior to when it is needed most and the risks are much higher. Malcolm Gladwell’s work on outliers, those who excel in their fields, notes a commonality of significant experience.¹¹ Whether it’s throwing 10,000 pitches as a baseball player or accumulating years of practice doing math problems, repetitive exercises frequently create specific expertise. The cumulative effect often results in exceptional outcomes. By providing age-sized, executive skill training curricula for preteens and teens, we can give them a 10- to 30-year head start. In so doing, we could develop effective leaders in mass, another benefit and potential income stream for cash-strapped schools.

Identifying the Gift

Are gifted leaders born or built? The answer is “yes.” As with the other domains of giftedness, we can’t specify what amounts of nature and nurture exist. A growing amount of research in the field of neuroscience indicates that a certain percent of leadership aptitude is genetic.¹²



Yet what we’ve learned in other areas of GT education would also be applicable in the domain of leadership, that assessments should consider environmental elements and factor in socio-economic and cultural issues that hinder adequate identification. For example, we’ve learned that in lower socio-economic areas (such as Hispanic field workers in California), leadership development is not valued in that many parents don’t believe their children can or should be “bosses.” Another example we learned from Southeast Asian families is that an emphasis on child compliance can mask leadership indicators we commonly see in Westernized youth. Although we believe students gifted in leadership ability exist in all demographic categories, how we go about identifying them in the future is important.

Identifying students with the O Factor is important and challenging, as with other gift domains. A multi-faceted approach is recommended. Assessments and inventories play an important part of the GT movement. When considering a diagnostic instrument to identify leadership ability, three strategic questions should be asked:

1. What is the depth of analysis?
2. Does it use self-reporting or rater responses?
3. Does it distinguish what is unique to leading?

First, depth of analysis pertains to how far an assessment goes to distinguish leadership gifts. In multi-gift inventories that include leadership, most offer 5-20 questions. Even though most GT experts recommend using assessments as only a part of the identification process, relying on a small subset of an assessment reflects a limited strategy, although they could serve as pre-qualifying tests to see if further analysis is warranted. Even though a single instrument can’t sample all possible behaviors across various contexts, a more robust assessment consisting of 25-50 questions is more realistic.

Second, a leadership ability instrument should use qualified rater responses versus self-reporting. There are three primary reasons for this. A sizable amount of leadership research notes a difference between a leader’s self-perceptions and others’ views of the leader. Granted, most of these have to do with a leader’s effectiveness, but the fact that leaders tend to see themselves differently than others offers sufficient concern for self-diagnosis.¹³ Another reason for avoiding self-assessments in this context is that preteens and adolescents are in a precarious developmental stage when self-identity and self-consciousness influence questions based on one’s relationships with others.¹⁴ A third issue relates to how viable it is for preteens or teens, who’ve rarely experienced formal leadership roles with feedback, to rate themselves on a social construct that frequently confuses adults.

Given that leadership is a social construct, whereby others follow a few toward common goals, it is unnecessary to ask a preteen's or teen's self-perceptions when you can observe the social behaviors of the subject in task-oriented activities. If others follow the student and effectively work together, chances are that you have a leader. If they don't, you do not. As someone said, "He who thinks he is leading, when no one is following, is simply taking a walk." This is the power behind 360 instruments used in organizations to assess leadership efficacy. Getting the perspectives of those other than the leaders themselves is the best tool for judging strengths and weaknesses, as opposed to gathering self-reports. Although self-responses could round out a suite of assessment tools, significant weight should not be placed on them.

Third, and most important, an instrument that reveals leadership gifting should focus on what is unique to leading. Yet most inventories confuse qualities we seek in leaders with what distinguishes those who lead from non-leaders. For example, most would agree that leaders should be good listeners, because hearing out team members harvests ideas, improves trust, and engenders commitment. But good listening is also a skill that we value in all people, not just those who lead. Therefore, listening does not distinguish what leaders do from non-leaders. Conversely, the ability to convene people, gathering them to work on a shared goal, is something that distinguishes leaders from non-leaders. The former characteristic is what we may call a Type II quality, something we want our leaders to have, but doesn't specifically distinguish what leaders do uniquely from others. The latter quality is a Type I characteristic, something that leaders typically possess that differentiates them from others (see Illus. 2.0). In this model, Type III qualities would refer to those not pertinent to the leadership process (i.e. health, math skills, art, kinesthetic skills, personality type, etc.), so we won't discuss these.



Illus. 2.0: Leader Qualities Types: Essential – Non-Essential

If you review the GT assessments with questions designed to identify leadership gifting, you'll notice that 80-100% use Type II qualities. If you're offering a 360-assessment on a leader to target areas for improvement, these types of questions make more sense. Frequently, "What do you like most in a leader?" surveys prompt researchers to look at the qualities people desire in their bosses as opposed to what actually makes leadership happen. Type II characteristics can improve leader efficacy, but they're secondary. Identification of giftedness is different from skill improvement. If you're trying to qualify children or youth with a distinct talent for organizational leading, then Type II questions don't significantly aid in that process because any number of students not gifted in leadership could do relatively well on them.

Our work the last few years in developing and implementing the Social Influence Survey (SIS), a 25-multiple choice question assessment completed by an adult on a student, offers a somewhat holistic approach to estimating organizational leadership aptitude (available free, online at www.kidlead.com). Answers are based on a 1- to 5-Likert scale, customized for each question. A consistent 6th answer option is "Unsure," providing low-level rater confidence qualification. Used by LeadYoung curricula trainers, the SIS offers a pragmatic approach in hopes of inviting students scoring over 3.70.

We are in the early stages of scientifically testing a more robust instrument, consisting of 32 multiple choice questions, called the NYLI. There is also a more involved rater survey to measure the quality of rater reliability. All of the items involve interpersonal outcomes that are loosely divided into 4 categories (see Table 3.0).

Type I Leader Qualities (NYLI)	Type II Leader Qualities
<ul style="list-style-type: none"> • P1. Persuasive: the ability to get others to see things differently and buy into your ideas and vision • P2. Propelled: internal locus of control, efficacy, achievement-oriented inspiring others to persevere • P3. Planner: comfortable with abstract thinking, can come up with ideas and assign tasks that others accept • P4. Power: exudes boldness, courage, and confidence that impresses others to notice and follow 	<ul style="list-style-type: none"> • 21st Century Skills • Critical thinker / decisive • Collaborative / relational • Creative / curious • Communicates / listens • Confident / high self-esteem • Humble / open-minded • Moral / ethical • Positive / hopeful • Charismatic / likeable • Smart / intelligent • Flexible / adaptable

Table 3.0 Examples of Type I (Essential) and Type II (Non-essential) Leader Qualities

By focusing on the must-have qualities required for leading, you avoid two common errors: false positives and confusing correlation with cause-and-effect. When too many Type II qualities are used in formal and informal inventories, you often identify students with charming personalities who are likable and have people skills, but when asked to organize people, can't. This is common in student governments where candidates get voted in by peers, based on looks, likeability, charisma, and familiarity. Although these qualities are common among effective leaders, they are not essential for leading. Thus when you ask an ASB council to plan a big event, half of the members exhibit a glazed stare, akin to the spinning circle on your computer when it's trying to reboot or locate a software program.

So while we frequently see a number of Type II characteristics evident in effective leaders that we like and admire, many of these would also be evident in highly functioning, self-actualized individuals who are ineffective leaders. Can these characteristics help a leader be more effective? They can, which is why they are often included in 360-improvement instruments, but they don't *cause* leading. They can be evident in people who do not lead at all. This is why in adult organizational life, we often recruit, promote, and hire individuals who appear to be leaders we've seen in the past but fail miserably because they do not possess the O Factor, or the essentials required to catalyze leadership. Just because a person is smart, good with others, charismatic, and ethical or has occupied a position of supervision in the past, doesn't mean s/he can lead. Many of the characteristics correlate with good leading, but they don't cause the effect we seek, creating frustration for everyone and making us wonder what went wrong in the process.

In addition to the NYLI, a suite of additional assessments might include a project-based curriculum that allows students perceived to possess the O Factor to conduct activities with peers under the observation of modestly-trained adult raters, who complete a brief qualitative survey. This learning lab provides an opportunity to see who rises to the occasion and who shrinks from it. Another assessment is to craft a peer-oriented survey that asks students who they'd like to be in charge of the class or team if the teacher or coach were to step away. Other collegial questions can offer lateral feedback on a student's capacity to lead and learn organizational supervision skills.

Talent Development Curricula

Someone suggested that identification without development is educational malpractice. S. P. Marland, while being an advocate for intellectual processes, also saw the significant benefits of active learning. Project-based methodology, whereby O Factor students lead teams of peers in goal-oriented objectives, provide opportunities for adults to provide real-time feedback and Socratic coaching.

More cognitive elements can be added during the teen years, as students become more conceptual and less concrete in their thinking. These reflect executive-caliber training intensives, utilized by much older adults, but which are applicable if age-sized for preteens and teens. Chances are the curricula will need to be professionally developed, in order to certify school staff or extracurricular members to implement these programs. A decentralized model makes the most sense if large numbers of leadership-gifted students are to have an opportunity to experience this caliber of consistent training, as opposed to annual events requiring students to travel or to hire outside professionals to run them. Hybrid models, such as LAUSD's gifted arts program where area students converge on CSU LA's campus on Saturday mornings, also make sense.¹⁵



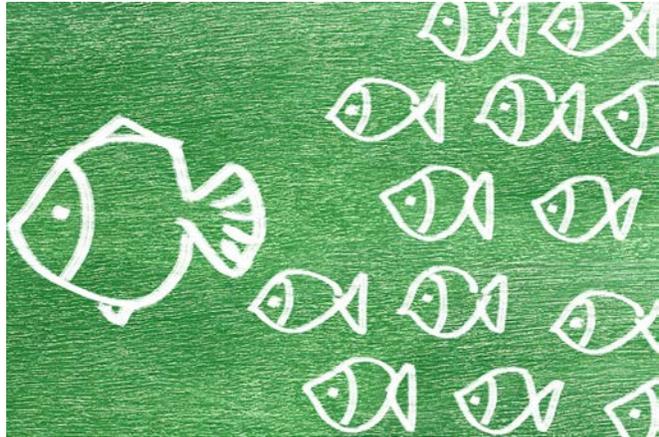
Summary

Believe it or not, 99% of the keyboards in use today were intentionally designed to slow the typing process. When typewriters first came out, the keys were arranged in such a way that over 80% of words people used could be typed without moving your hands, just your fingers. The problem is that people began typing faster than the keys could move, mangling the wiring and damaging the machine. Therefore, typewriter designers

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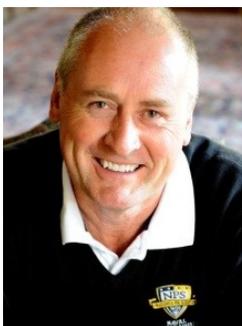
spread out the keys, making it more difficult to use and thus slowing the process. This keyboard layout is called QWERTY, named after the upper left, six contiguous letters. Technology improved, allowing the machines to handle fast typing, but people had gotten used to the slower design and resisted changing, even when it made sense and was proven to be better. This is but one of scores of examples Everett Rogers describes in his book, *The Diffusion of Innovation*.¹⁶

What schools practice is not always what we know to be true through common sense, if not through scientific proof. Our understanding of leadership from a social influence perspective and the way that students interact with each other transcends the way we treat young leaders in our classrooms. While a call for more and better research is commonly warranted, we should not assume a lack of proof is the reason new ideas are not implemented. Getting new ideas implemented beyond the early adopters is not easy.



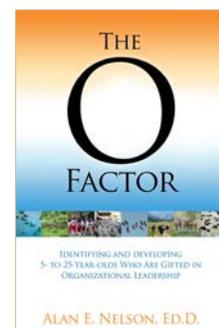
The GT movement feels this kind of resistance in the world of education. Those of us interested in identifying and developing students gifted in leadership ability sense this as well, even though we possess the technology to do better. There's a natural affinity between those gifted intellectually and those with leadership ability. Academic students are frequently misunderstood and given negative monikers, such as nerd, brain, precocious, know-it-all. In the field of leadership ability we see similar mislabeling, with words like bossy, opinionated, noncompliant, and trouble maker. Being misunderstood and mistreated are common experiences among anyone considered "different."

In most houses of education, gifted and talented education has a room, and in that room is a seat marked "leadership ability." So if leadership specialists are to transform the way we develop effective and ethical leaders, we must reach out to educators in order to understand how to work with children and youth. At the same time, educators must invite experts in the field of leadership to embrace and adapt their knowledge, for the purpose of creating assessments, tools, and curricula. Perhaps S. P. Marland's inclusion of leadership ability on his short list of gift domains was an invitation to the party. If so, here's an RSVP, belated as it may be.



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For more info on *The O Factor*, go to www.amazon.com or your favorite book provider. Bulk discounts are available by contacting KidLead, Inc. (info@kidlead.com)



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