

科目：152 英文教育名著

系組：教政系

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一. 請寫出中文摘要。(35%)

## LONGER TERM STRATEGY OF THE DEVELOPMENT OF PISA

20th meeting of the PISA Governing Board

3-5 October 2005, Reykjavik, Iceland

## Management structure for PISA

The Strategic Development Group considered the *design* of the current management structure, which is described in Annex A, broadly adequate but recommended the improvement of its *implementation*, most importantly by evaluating bids for future PISA assessments on how they would strengthen the capacity of the PGB to establish and monitor project priorities by improving information flows between the Consortium and the PGB, by ensuring that the expert groups represent the range of views among OECD countries on the issues involved, and by making the composition and work of the expert groups as well as the Technical Advisory Group more transparent. In particular, the Strategic Development Group recommended:

- ☐ Extending the "Forum" to the major domain of each assessment cycle.
- ☐ Appointing the Sampling Referee by the PGB and have it report directly to the PGB.
- ☐ Specify the expected analytic outcomes clearly in the terms of reference and require bidders to specify quality assurance procedures for each domain and the context questionnaires to respond to analytical demands and to avoid cultural bias.
- ☐ Enriching the composition of the PISA Technical Advisory Group to include content and questionnaire expertise, and have the TAG regularly report to the PGB.
- ☐ Maintaining the focus of National Project Managers on project implementation but allowing for more exchange between National Project Managers and the PGB.
- ☐ Establishing a closer link between the PGB and the Technical Advisory Group. To this end, technical issues that have policy implications will be brought to the attention to the PISA Governing Board. To this end, a report from the Technical Advisory Group would be

regularly presented to the PISA Governing Board, clarifying the implications of technical issues and explaining the outcomes of technical decisions. The capacity to facilitate communication between the policy and technical levels would be an important criterion for the choice of the chair of the Technical Advisory Group.

Note that changes to the roles and operation of the PISA Governing Board, PISA National Project Managers, the Expert Groups, the Technical Advisory Group and the OECD Secretariat will require unanimity in the PISA Governing Board, as stipulated in the OECD Council decision C (1997)176. Other parts of the management structure, including the composition and role of expert groups, could be changed using the normal decision-making procedures of the Governing Board.

(PROGRAMME FOR INTERNATIONAL STUDENT ASSESSMENT)

PISA Governing Board (PGB)

Technical Advisory Group (TAG)

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二. 請以英文寫出摘要，並加上中文的評論。(35%)

## Globalizing policy sociology in education: working with Bourdieu

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### Social fields and extending the scope of educational policy sociology

This section of the paper discusses some of the theoretical and methodological issues involved in using Bourdieu's frame of social fields to describe and analyse educational policy processes, both nationally and in the context of globalization. There are two particular issues raised here: the analytic gains that a Bourdieuan frame involving social fields offers and the potential for a broader reading of educational policy to encompass issues involving cross-field effects, such as the mediatization of educational policy text production (Fairclough, 2000) and those related to the global flows of policy ideas and regulatory frames (Drahos & Braithwaite, 2000).

The need to discuss the use of Bourdieu's concepts touches on empirical questions related to changes in the 'modes of domination' common to modern nation states. For Bourdieu social fields were the distinctive mode of domination of industrialized nations and the current arrangement of power that set these nations apart from others (Bourdieu, 1998c, 2004a). It is now clear that the national character expressed in this mode of domination is not the only form of domination. Indeed, the national point of reference is arguably being challenged as the main form of domination in many parts of the world, in the wake of the globalization of economic regulation, expressed in international agreements on the forms 'free trade' should take (including education), the dominance of neo-liberal ideas in the post-Cold War era, the imbrication of media corporations with politics and the consolidation of world systems of domination.

The imbrication of media corporations with politics holds some particular problems for Bourdieu's models, in that the market research driven construction of public language substitutes a generic product that speaks across fields for the specialized language products of the political field. Language takes on a more potent political message in detailing expectations of citizens under the guise of new articulations of social determinism (for example, 'new times', 'era of innovation', 'globalization' etc.).

The focus here then is on the incompleteness of Bourdieu's general theory of fields in relation to these cross-field effects and internationalization of ideas, as opposed to the coherence of his models of specific fields (for example, on the fields of art and literature see Bourdieu, 1993; on the fields of journalism and television see Bourdieu, 1998b; on the field of science see Bourdieu, 2004b). One of the broad and recurring themes is that an incomplete general theory of fields leaves open questions concerning the relations between fields, in particular their hierarchy. How do the internal logics of practice within fields connect with those in other fields? How do social fields affect other social fields? In the specific case of policy fields, how are these connected with bureaucratic fields, with the field of politics and with the fields that these are oriented towards? How does the emergence of a global educational policy field affect the nature and effects of national educational policies?

Our discussion about the incompleteness of a general theory of fields in the ways detailed above leads us to suggest a widening of Bourdieu's key concepts to include the category 'cross-field effects'. The introduction of cross-field effects is specifically useful to educational policy studies, where the effects of policy processes in

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bureaucracies, in the form of texts, statistics and practices, are intended to have impacts beyond the educational policy field, in the various fields of journalism and the fields of education (see Lingard & Rawolle, 2004, pp. 368ff. for a beginning theorization of cross-field effects). Furthermore, the logics of other fields also have cross-field effects in educational policy production, such as the development and implementation of knowledge economy policies (Rawolle, 2005). These points are skeletally developed in this section, intended as an invitation for future scholarship in the area. We will take here Ball's context of policy text production as a case to illustrate the utility of social fields and cross-field effects for policy analysis in education. We suggest the use of social fields and cross-field effects as one way of extending the policy cycle model (Ball, 1990, 1994; Bowe *et al.*, 1992) in theorizing educational policy processes. As noted above, we also suggest that the notion of different levels of educational policy fields can assist in expanding Ball's model.

From a Bourdieuan perspective, many of the public textual products associated with the processes of the bureaucratic fields may be represented as having effects in other fields. Indeed, the production of particular policies by the educational policy field and their distribution in schools is increasingly synchronous with media releases that ventriloquise for the official policy document. Policy release has become synonymous with media release. Some evidence suggests that the processes of policy text production are such that much of the mediation and mediatization of policies (Fairclough, 2000) takes place prior to any written or documented text being produced, with journalists and media advisors being called in during the actual writing phase of official policy texts (Lingard & Rawolle, 2004; Gewirtz *et al.*, 2004). This process probably has its strongest characterization in contemporary policy processes in England, with much talk about policy spin (Gewirtz *et al.*, 2004). In such cases the policy text received by teachers has been mediatized in the production process, which means that it has been affected by the logics of practice of the media field. As a result of such mediatization, these policy texts have a political intent apart from affecting teacher professional practices, related to a concern to keep 'on message' with broad political themes (Rawolle, 2005). This suggests, then, that analysis that focuses on material policy text products can miss some of the dynamics of the context of policy text production, particularly if it neglects the cross-field effects of mediatization.

Bourdieu's concept of social fields draws attention to the social conditions of policy text production, picturing the effects of the process in multiples. This multiplicity can be a useful way of grouping the different effects of the same policy processes, by focusing on the different social fields in which effects are produced, be they national, international or global in character. We are suggesting that the context of policy production involves an educational policy field, consisting of a site of contest between bureaucrats, policy advisors, politicians and 'spin doctors' and now stretched to varying extents beyond the nation, but the process also implies the involvement of other social fields in which to communicate the implications or message of these policies to principals/heads, teachers, parents and the broader public. This process is, of course, often contested by teacher unions, parent groups and so on. There are structural links both to the fields of education and the fields of journalism.

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This simplified model of the social fields in which educational policy has effects is a powerful grouping tool for both locating the effects of policies and explaining the struggle that inevitably takes place between the practices involved in the production of the text and the practices that accompany its implementation. Differences between the logics of practice in each field, which intersect in the production of policy texts and those of teacher practice, offer another useful understanding of policy text/policy practice relationships. This understanding goes beyond implementation deficit, professional mediation and refraction accounts of problems in the implementation process (Rein, 1983; McLaughlin, 1987; Elmore & McLaughlin, 1988; Taylor *et al.*, 1997). The concepts of social field and cross-field effects offer us an understanding of unintended policy effects based on fundamental differences in forms of life on which contests in each field occur: that different norms of engagement about what is important in social practices necessarily translate into different readings of policies by agents in different fields and by agents in different positions within the same field.

What we are suggesting again is the need to go beyond a straightforward internalist account of educational policy text production as located within a separate and relatively autonomous field, as argued by Ladwig (1994). Ladwig's argument about the disconnection between the field of national/federal policy production in education in the USA and educational systems, schools and classrooms administered at state and/or local levels is probably apposite in the US situation of minimal leverage for the federal government over schools apart from various forms of funding/compliance trade-off. There is also some resonance with how federal educational policy operates within the Australian political context as well. Herein probably lies some part of an explanation for the nature of the focus of such policies and, indeed, for the focus of centrally derived policies within the state bureaucracies, a focus on funding arrangements, structures and accountabilities, rather than on pedagogies. Where there is a focus on the pedagogies, either implicitly through testing or explicitly, such a focus often results in technization and detailed specifications reducing the professional autonomy of teachers (Hartley, 2003; Alexander, 2004). In this context, it is interesting that the curriculum is usually managed by statutory authorities other than the centralized bureaucratic state and that the field of curriculum studies is constituted as separate from that of policy studies in education. Educational policy as a field of academic research is thus most often taken as all of the central interventions in schools other than curriculum.

The project of a general theory of fields thus expanded to include global fields and cross-field effects also holds some potential for broadening the scope of educational policy studies. The importance of such a general theory of fields became clearer in Bourdieu's later writings, particularly when attempting to explain the role of the various fields of journalism and their effects on politicians (Bourdieu, 1998b). If educational policy is to be viewed within the Bourdieuan conceptual frame, then there appears to be a need for an explanation of pedagogic actions that occur outside the specific fields of education and, in particular, those that occur in the fields of journalism. It is clear, for example, that the role of inculcation is both something that gains a special prominence in explaining the operations of educational systems, yet is



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equally important in explaining how inculcation occurs in all other fields. Bourdieu's own analytic shorthand adopted in *Reproduction* (Bourdieu & Passeron, 1977), along with numerous other explicit references to the same effect, suggests that pedagogic action is quite fundamental to all forms of power relations and, hence, in all fields. His position here is somewhat akin to that of Foucault in his conceptualization of the power/knowledge couplet. Given this basic postulate, what, then, is specific about pedagogic action that takes place within the educational field, rather than in any other field? What are some links in common between the pedagogic action in schooling and those that occur through the mediatization of policy? Where do the limits of the educational field lie?

We have discussed some issues related to the national character of the educational policy field, while also recognizing the emergence and growing effects of a global level of such a field on national developments. As suggested above, the education field is also located in relation to other fields, two of the most important of which are the state and the bureaucratic field. Both of these fields have also been affected by the neo-liberal reading of globalization. It is to such issues that we now turn.

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## 三. 請寫出中文摘要。(30%)

HOW DOES THE  
TRANSFORMATIONAL APPROACH WORK?

## STRENGTHS

In its present stage of development, the transformational approach has several strengths. First, transformational leadership has been widely researched from many different perspectives, including a series of qualitative studies of prominent leaders and CEOs in large, well-known organizations, and has also been the focal point for a large body of leadership research since its introduction in the 1970s. For example, a recent content analysis of all the articles published in the *Leadership Quarterly* over the past decade showed that 34% of the articles were about transformational/charismatic leadership (Lowe & Gardner, 2001). In addition, there have been well over 200 theses, dissertations, and research projects conducted using this approach.

Second, transformational leadership has intuitive appeal. The transformational perspective describes how the leader is out front advocating change for others, and this concept is consistent with society's popular notion of what leadership means. People are attracted to transformational leadership because it makes sense to them. It is appealing that a leader will provide a vision for the future.

Third, transformational leadership treats leadership as a process that occurs between followers and leaders. Because this process incorporates both the followers' and the leader's needs, leadership is not the sole responsibility of a leader but rather emerges from the interplay between leaders and followers. The needs of others are central to the transformational leader. As a result, followers gain a more prominent position in the leadership process because the attributions of followers are instrumental in the evolving transformational process (Bryman, 1992, p. 176).

Fourth, the transformational approach provides a broader view of leadership that augments other leadership models. Many leadership models focus primarily on how leaders exchange rewards for achieved goals—the transactional process. The transformational approach provides an expanded picture of leadership that includes not only the exchange of rewards but also leaders' attention to the needs and growth of followers (Avolio, 1999; Bass, 1985).

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## CRITICISMS

Transformational leadership also has several weaknesses. One criticism is that it lacks conceptual clarity. Because it covers such a wide range, including creating a vision, motivating, being a change agent, building trust, giving nurturance, and acting as a social architect, to name a few, it is difficult to define exactly the parameters of transformational leadership. Specifically, research by Tracey and Hinkin (1998) has shown substantial overlap between each of the Four I's (idealized influence, inspirational motivation, intellectual stimulation, and individualized consideration), suggesting that the dimensions are not clearly delimited. There is a need to theoretically distinguish between these factors (Yukl, 1999). Furthermore, the parameters of transformational leadership often overlap with other similar conceptualizations of leadership. Bryman (1992), for example, points out that transformational and charismatic leadership are often treated synonymously even though in some models of leadership (e.g., Bass, 1985) charisma is only one component of transformational leadership.

Another criticism revolves around how transformational leadership is measured. For the past 15 years, many leadership studies have been conducted using some form of the MLQ. However, the validity of the MLQ has not been fully established (cf. Bycio, Hackett, & Allen, 1995; Tepper & Percy, 1994). In some versions of the MLQ, the four factors of transformational leadership (idealized influence, inspirational motivation, intellectual stimulation, and individualized consideration) correlate highly with each other, which means they are not distinct factors (Tejeda, Scandura, & Pillai, 2001). In addition, some of the transformational factors correlate with the transactional and laissez-faire factors, which means they are not unique to the transformational model (Tejeda et al., 2001).

These findings raise questions about the MLQ and about the clarity of the transformational leadership model. More attention needs to be given to the substance of the MLQ and how it is used in research. Although there are questions and concerns regarding the MLQ, a new, improved 27-item version of the MLQ has been developed that has promise in validating the legitimacy of the theory (Tejeda et al., 2001).