

教育研究與發展期刊

Journal of Educational Research and Development

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國立教育研究院籌備處 主編

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發刊詞

國立教育研究院籌備處主任 何福田

● 研究是引領教育發展的最佳策略

回顧人類教育史，以經驗引領教育發展的歷史佔去太多的時間。而經驗有正有誤，因此，教育的理念與措施也就

跟著被帶到對的地方與錯的地方。假如一國的教育政策，能參考研究的結果，據以擬訂其發展方針，錯誤、無效的機率應該可以大大地減少。

因為經驗多半是個別的，而研究卻是整合的。每一個研究幾乎都做了幾個經驗的比較與整合，故錯誤的機率相對地降低。換言之，參考研究的結果，等於間接經歷了若干成功或失敗的經驗，其重蹈覆轍的可能性降低。能避免錯誤就是立於不敗之地，因為走錯路比站在原點還麻煩。

● 教育研究必須了解教育的特性

任何教育研究終歸與學生發生密不可分的關係。教育政策、課程與教學、評量與測驗、多元文化、教育生態，乃至教育哲學、教育經費的研究，哪一項與學生無關？所以，教育研究是對「人」的研究，不像自然科學是對「物」的研究。「物」是靜態且依固定程序改變的，如水（ H_2O ），不受時、空因素的影響：古代水、現代水是一樣的成分；亞洲水、歐洲水也是一樣的成分。至於「人」，那就大不相同了。「人」是動態的，不依固定程序而改變，極為複雜。因此，從事教育研究不能僅以使用研究物的科學方法為限。是故教育研究必須事先弄清楚教育的特性。

- （一）個別性－教育的對象是人，而人之不同各如其面。想以一種教育理論或措施適用古今中外的「學生」，事實上沒有可能。
- （二）地區性－地球上不同地區的居民有各自的生活方式與文化傳承，如果有人推動某項教育理念，地區居民會顯現迎拒的自主選擇能力。
- （三）時間性－古往今來，人類因為生活經驗與外來刺激的改變而有不同的主體意識。有時東西方世界同時流行某一論點；有時西方已經棄如敝屣，而東方仍然奉若圭臬；有時東方認為陳腔濫調，而西方視為金玉良言。

- (四) 交互性－教育固然有個別性、地區性、時間性，然而也具有以上三者互相影響的交互性，而且教育經常顯現交互作用的結果。
- (五) 交融性－當某一種教育思想與作為被引進某一個教育體制後，不管政策上是取代還是參考，它都是融入式的；就好像紅色融入白色而成為粉紅色一樣。只是融入份量多少以顯現粉紅色的濃淡而已，它不再是紅色，也不再是白色。譬如深受漢化的越南，接受兩百年的法國文化洗禮，越南有法國的味道，也有中國的味道，但越南還是越南，她不是法國也不是中國。

● 教育研究離不開試驗與實踐

研究是在發現問題與解決問題，甚至是在預知問題與防止問題的發生。教育既然具有前述五種特性，則吾人從事教育研究便不能棄之不顧。因此，外國的教育理論與措施直接移植到國內，是否會發生「橘逾淮為枳」的效應？甚至是否會發生水土不服的現象？吾人不得不審慎加以檢驗，無條件地引用於論文中作為關鍵性的佐證資料，是否極為危險？

由於見賢思齊的觀念，人們難免會向教育先進國家學習，也可能會立下後來居上的宏願，因而設若有人妄想藉教育之力，把我們國人變得「比美國人還像美國人、比歐洲人還像歐洲人」固然屬於崇洋媚外不會得逞，事實上，依教育特性而言，無論如何交互、如何交融，自己還是保有自己，想把自己丟棄，重新做個「別人」，根本無此可能。

先進的教育理論對值得參考與尊重，但要拿來應用與推廣，則必須經過客觀的試驗，一俟研究有正面的效果，方可「背書推薦」。教育不能兒戲，它是良心的志業，教育研究的結果也要負起良心的責任。

● 《教育研究與發展》季刊的使命

做為代表「國家教育研究院」的教育學術刊物，《教育研究與發展》季刊必須立於本土，放眼世界。所謂立於本土就是要以創發自己適用的理論，研擬自己適用的教材與教法為目標，兼及檢驗外國的教育理論是否適用於我國。至於放眼世界則是說明本刊不走閉門造車的策略，相反的，我們應該清楚教育的世界主要潮流走向，俾使我國教育研究能於不久的未來與之並駕齊驅。

編輯的話

國立台北師範學院課程與教學研究所教授 莊明貞

因應二十一世紀知識經濟的資訊革命，各國教育改革的发展重點，莫不從知識內涵的革新切入，因此也帶動了課程改革的全球化風潮。本期創刊號正逢六月國中基本學力測驗剛考完、七月大學指考開始的熱季，基於此，「教育研究與發展」季刊以「課程研究」為主軸，邀請世界主要國家的國際課程學者與本土課程研究社群菁英一起論述課程革新議題，做為掌握全球課程研究脈動，並期能以此創刊號，建構「立足台灣，放眼國際」的教育研究學術交流平台。

本期國際研究論壇特邀美國威斯康辛大學課程研究與教育改革知名學者Michael Apple教授撰寫「學校教育、市場、種族與閱聽文化」，論述閱聽文化作為大眾文化一環對學校教育的影響；其次邀請路易斯安那大學建構取向後現代課程巨擘William Doll教授撰文「使知識生生不息」的課程知識論問題，精闢入理，值得展讀；其次我們特邀加拿大敘事探究創始學者Jean Clandinin教授與Janice Huber助理教授就「深化學校改革的敘事理解」加以辨析學校故事的敘事理解如何能促進學校革新；國內這波課程改革頗受澳洲課程改革之觸動，我們也特邀澳洲在學校本位課程研究頗受國際關注的學者Colin J. Marsh教授，透過他長期的觀察，討論課程改革政策議題「課程：誰發起？誰決定？誰負責課程的成效？」希冀從澳洲課程改革經驗，釐清課程決策的運作機制係受到社會、經濟、政治等因素之影響。

為回應國際課程研究的趨勢，國內中正大學課程研究所蔡清田教授也為文撰寫「課程評鑑之規劃取向與學校課程評鑑之途徑」；香港中文大學李子建教授與尹弘飈先生也針對香港近期課程變革的教師認同議題，加以深入剖析，以瞭解教師在課程實施與實踐面向的不同；國北師徐超聖副教授與桃園縣光明國小李明芸主任針對「課程領導與教學領導關係」加以探究，以剖析課程領導與教學領導一體兩面的互動關係；中正大學課程所博士班吳裕聖老師也撰文強調以「強化課程評鑑可以落實課程發展」的重要性；最後政大張奕華助理教授與雲科大許正妹老師就「教學平台發展與設計研究」，點出課程發展研究趨勢受教育科技之影響正與日遽增，並逐漸形成所謂的賽博文化之新景像。

本刊希望透過與國際課程研究的論述平台之對話交流，可以帶給當前如火如荼進行課程改革的台灣一些啟示，並透過積極、正向地反思批判，為台灣未來教育發展建構新的願景與圖像。

SCHOOLING, MARKETS, RACE, AND AN AUDIT CULTURE

學校教育，市場，種族，與閱聽文化

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Abstract

This article provides a critical overview of the steady growth of neo-liberal and neoconservative restructurings of institutions and identities in education and in other parts of the state. It examines the hard and creative ideological work that such transformations require. In particular, I examine the growing emphasis on commodification and marketization on the one hand and the development of what I call an “audit culture” on the other. I demonstrate how they mutually reinforce each other. These dual processes are changing what counts as good curricula, good teaching, and successful schooling in general. They are having a major effect on what counts as appropriate evidence of success. The long term effects of these tendencies both on our understanding and practice of democracy can be profound.

The article then critically examines the class and race relations that have led to the development of an “audit culture” and that have been generated out of the politics of education surrounding these developments. I argue that we need a much more nuanced understanding of these politics if we are challenge the negative effects of new managerialism and of an emerging emphasis on commodification and marketization.

Keywords: educational reform, class and race in education, politics and education

中文摘要

對於在教育方面與其他方面的新自由主義與新保守主義的機構與等同性改革，本文提供一批判性的綜述。文中檢視轉型所伴隨的艱苦與具有創造力的意識型態工作，特別是一方面逐漸著重在商品化與市場導向，而另一方面又著重於筆者所稱「閱聽文化」（audit culture）的發展，並證明他們兩者如何相互強化。這些雙重作用改變了何謂之優質課程（good curricula），優質教學（good

teaching），和一般而論的成功學校教育（successful schooling）。以上所述對於謂稱合適的成功證據具有主要的效力。這些趨勢對我們的理解與民主的實踐的長期影響是具有深遠意義的。

本文亦批判性地檢視導向「閱聽文化」發展的社會階層與種族的關係，並衍生出此發展周圍的教育政略。如果我們要異議新式管理與逐漸著重在商品化與市場導向的負面效應，作者論證我們則對於這些政略需要一個更細膩的理解。

關鍵字：教育改革，在教育方面的階層與種族，政略與教育

Changing Commonsense

In a number of volumes over the past decade, I have critically analyzed the wave after wave of educational reforms that have centered around neo-liberal commitments to the market and a supposedly weak state, neo-conservative emphases on stronger control over curricula and values, and “new managerial” proposals to install rigorous forms of accountability in schooling (Apple 2000; Apple 2001; Apple et al. 2003). The first set of reforms has not demonstrated much improvement in schooling and has marked a dangerous shift in our very idea of democracy from “thick” collective forms to “thin” consumer driven and overly individualistic forms. The second misconstrues and then basically ignores the intense debates over whose knowledge should be taught in schools and establishes a false consensus on what is supposedly common in US culture (Apple 1996; Apple 2004; Levine 1996; Binder 2002). The third takes the position that “if it moves in classrooms it should be measured” and has caused some of the best practices that have been developed through concerted efforts in some of the most difficult settings to be threatened (McNeil 2000; Lipman 2004; Apple and Beane 1999). Unfortunately, all too many of the actual effects of this assemblage of reforms have either been negligible or negative (Apple 2001), or they have been largely rhetorical (Smith et al. 2004). This is unfortunate, especially given all of the work that well-intentioned educators have devoted to some of these efforts. But reality must be faced if we are to go beyond what is currently fashionable.

The odd combination of marketization on the one hand and centralization of control on the other is not only occurring in education; nor is it only going on in the United States. This is a world-wide phenomenon. And while there are very real, and often successful,

efforts to counter it (see Apple et al. 2003), this has not meant that the basic assumptions that lie behind neo-liberal, neo-conservative, and new managerial forms have not had a major impact on our institutions throughout society and even on our commonsense.

In many nations there have been attempts, often more than a little successful, to restructure state institutions (Jessop 2003). Among the major aims of such restructuring were: to ensure that the state served business interests; to have the state's internal operations model those used in business; and to "take politics out of public institutions," that is to reduce the possibility that government institutions would be subject to political pressure from the electorate (Leys 2001, p.3). Chubb and Moe's (1990) arguments about vouchers mirror this latter point, for example.

This last point, removing politics from government institutions, is based on a less than accurate understanding not only of the state but of the market as well. While most economics textbooks may give the impression that markets are impersonal and impartial, they are instead highly political as well as inherently unstable. To this, other points need to be added. To guarantee their survival, firms must seek ways of breaking out of the boundaries that are set by state regulation. Increasingly, this has meant that the boundaries established to divide non-market parts of our lives must be pushed so that these spheres can be opened to commodification and profit-making. As Leys reminds us, this is a crucially important issue. "It threatens the destruction of non-market spheres of life on which social solidarity and active democracy have always depended" (Leys 2001, p.4).

It is not an easy process to transform parts of our lives and institutions that were not totally integrated into market relations so that they are part of a market. To do this, at least four significant things must be worked on (Leys 2001, p.4).

1. The services or goods that are to be focused upon must be reconfigured so that they can indeed be bought and sold.
2. People who received these things from the state must be convinced to want to buy them.
3. The working conditions and outlook of the employees who work in this sector must be transformed from a model based on collective understandings and providing service to "the public" on the one hand to working to produce profits for owners and investors and subject to market discipline on the other.
4. When business moves into what were previously non-market fields, as much as possible their risks must be underwritten by the state.

Under these kinds of pressures, standardized and competitive labor processes begin to dominate the lives of the newly marketized workers. But this is not all. A good deal of labor is shifted to the consumer. She or he now must do much of the work of getting information, sorting through the advertising and claims, and making sense of what is often a thoroughly confusing welter of data and "products." (See Van Dunk and Dickman

2003 for how this works, and doesn't work, in voucher plans.) In the process as well, there is a very strong tendency for needs and values that were originally generated out of collective deliberations, struggles, and compromises, and which led to the creation of state services (Apple 2000), to be marginalized and ultimately abandoned (Leys 2001, p.4). Once again, in Leys' words, "The facts suggest that market-driven politics can lead to a remarkably rapid erosion of democratically-determined collective values and institutions (Leys 2001, p.4).

These arguments may seem abstract, but they speak to significant and concrete changes in our daily lives in and out of education. For more than two decades, we have witnessed coordinated and determined efforts not only to reconstruct a "liberal" market economy, but a "liberal" market society and culture. This distinction is important. In Habermas' words, the attempt is to have "system" totally colonize the "life-world" (Habermas 1971). As many aspects of our lives as possible, including the state and civil society, must be merged into the economy and economic logics. Although there will always be counter-hegemonic tendencies (Jessop 2003), our daily interactions—and even our dreams and desires—must ultimately be governed by market "realities" and relations. In this scenario—and it is increasingly not only a scenario, but a reality—a society and a culture is not to be based on trust and shared values. Rather, all aspects of that society are to be grounded in and face "the most extreme possible exposure to market forces, with internal markets, profit centers, audits, and 'bottom lines' penetrating the whole of life from hospitals to play-groups" (Leys 2001, p.35-36). As Margaret Thatcher once famously put it, "The task is not to just change the economy, but to change the soul."

Interestingly, because of the focus on measurable results and central control over important decisions, the federal government's power has actually been sharply enhanced. (Think of No Child Left Behind.) This has been accompanied by a loss of local democracy (and civil liberties as well). At the same time, the role of the state in dealing with the destructive rapaciousness produced by "economically rational" decisions has been sharply reduced (Leys 2001, p.42; see also Katz 2001 and Shipler 2004).

In attempting to understand this, in *Educating the "Right" Way* I argued that neo-liberalism requires the constant production of evidence that you are doing things "efficiently" and in the "correct" way (Apple 2001). This is going on at the same time as the state itself becomes increasingly subject to commercialization. This situation has given rise to what might best be called an *audit culture*. To get a sense of the widespread nature of such practices, it is useful here to quote from Leys, one of the most perceptive analysts of this growth:

[There is a] proliferation of auditing, i.e., the use of business derived concepts of independent supervision to measure and evaluate performance by public agencies

and public employees, from civil servants and school teachers to university [faculty] and doctors: environmental audit, value for money audit, management audit, forensic audit, data audit, intellectual property audit, medical audit, teaching audit and technology audit emerged and, to varying degrees of institutional stability and acceptance, very few people have been left untouched by these developments. (Leys 2001, p.70)

The widespread nature of these evaluative and measurement pressures, and their ability to become parts of our commonsense, crowd out other conceptions of effectiveness and democracy.

In place of a society of citizens with the democratic power to ensure effectiveness and proper use of collective resources, and relying in large measure on trust in the public sector, there emerged a society of “auditees,” anxiously preparing for audits and inspections. A punitive culture of “league tables” developed (purporting to show the relative efficiency and inefficiency of universities or schools or hospitals). Inspection agencies were charged with “naming and shaming” “failing” individual teachers, schools, social work departments, and so on; private firms were invited to take over and run “failing” institutions. (Leys 2001, p.70)

The ultimate result of an auditing culture of this kind is not the promised de-centralization that is bandied about rhetorically in most neo-liberal self-understandings, but what seems to be a massive re-centralization and what is best seen as a process of de-democratization (Leys 2001, p.71). Making the state more “business friendly” and importing business models directly into the core functions of the state such as hospitals and education—in combination with a rigorous and unforgiving ideology of individual accountability (Leys 2001, p.73)—these are the hallmarks of life today. Once again, No Child Left Behind, high stakes testing, voucher plans, for-profit ventures such as Edison schools, and similar kinds of things are the footprints that these constantly escalating pressures have left on the terrain of education.

A key to all of this is the *de-valuing* of public goods and services. It takes long-term and creative ideological work, but people must be made to see anything that is public as “bad” and anything that is private as good. And anyone who works in these public institutions must be seen as inefficient and in need of a good dose of competition so that they work longer and harder (see Clarke and Newman 1997). When the people who work in public institutions fight back and argue for more respectful treatment and for a greater realization that simplistic solutions do not deal with the complexities that they face every day in the real world of schools and communities, they are labeled as

recalcitrant and selfish and as uncaring. Sometimes, as in the case of US Secretary of Education Page's public comments to what he thought was a sympathetic audience, they are even called "terrorists." And these "recalcitrant, selfish, and uncaring" employees—teachers, administrators, social workers, and almost all other public school employees—can then have their labor externally controlled and intensified by people who criticize them mercilessly, often as in the case of major corporations while these same businesses are shedding their own social responsibilities by paying little or no taxes.

I noted earlier that it is not just the labor of state employees that is radically altered; so too is the labor of "consumers." When services such as hospitals and schools are commodified, a good deal of the work that was formerly done by state employees is shifted onto those using the service. Examples of labor being shifted to the "consumer" include on-line banking, airline ticketing and check-in, supermarket self check-outs, and similar things. Each of these is advertised as enhancing "choice" and each comes with a system of incentives and disincentives. Thus, one can get airline miles for checking in on one's computer. Or as some banks are now doing, there is an extra charge if you want to see a real live bank teller rather than using an ATM machine (which itself often now has an extra charge for using it).

The effects of such changes may be hidden but that does not make them any less real. Some of these are clearly economic: the closing of bank branches; the laying off of large numbers of workers; the intensification of the work-load of the fewer workers who remain. Some are hidden in their effects on consumers: exporting all of the work and the necessary commitment of time onto those people who are now purchasing the service: searching for information that was once given by the government; doing one's banking and airline work oneself; bagging and checking out at supermarkets.¹

This all may seem so trivial. But when each "trivial" instance is added up, the massiveness of the transformation in which labor is transferred to the consumer is striking. For it to be successful, our commonsense must be changed so that we see the world only as individual consumers and we see ourselves as surrounded by a world in which everything is potentially a commodity for sale.

Mark Fowler, Ronald Reagan's Chair of the Federal Communications Commission, once publicly stated that television is simply a toaster with pictures. A conservative media mogul in England seemed to agree, when he said that there is no difference between a television program and a cigarette lighter (Leys 2001, p.108). Both positions are based on an assumption that cultural form and content and the processes of distribution are indeed *commodities*. There are few more important mechanisms of cultural choice and

¹ Of course, this is a differentiated experience. Supermarkets are less apt to even be found in inner city neighborhoods populated by poor persons of color.

distribution than schools. And under this kind of logic, one might say that schools are simply toasters with children. There is something deeply disturbing about this position.

Of course, many of us may be apt to see such things as relatively humorous or innocuous. Aren't market-based proposals for such things as schools and health care just another, but supposedly more efficient, way of making services available. But not only are these ideologically driven "reforms" not all that efficient (Apple 2001), the process of privatization is strikingly different than public ownership and control. For example, in order to market something like education, it must first be transformed into a commodity, a "product." The product is then there to serve different ends. Thus, rather than schooling being aimed at creating democratic citizenship as its ultimate goal (although we should never romanticize an Edenic past when this was actually the case; schooling has always been a site of struggle over what its functions would actually be, with people of color being constructed as "not quite citizens." See Apple [2000]), the entire process can slowly become aimed instead at the generation of profit for shareholders (Leys 2001, p.211-212). The fact that such things as the Edison Schools have not caught on as much as their investors had dreamed of means that the process of commodification is at least partly being rejected. For many people in all walks of life, the idea of "selling" our schools and our children is somehow disturbing, as the continuing controversy over Channel One, the for-profit television station now in 43% of all public and private middle and secondary schools in the United States, amply demonstrates (Apple 2000). These intuitions demonstrate that in our everyday lives there remains a sense that there is something very wrong with our current and still too uncritical fascination with markets and audits.

David Marquand (Marquand 2000) summarizes these points in the following way:

The public domain of citizenship and service should be safeguarded from incursions by the market domain of buying and selling...The goods of the public domain—health care, crime prevention, education—should not be treated as commodities or proxy commodities. The language of buyer and seller, producer and consumer, does not belong in the public domain; nor do the relationships which that language implies. Doctors and nurses do not "sell" medical services; students are not "customers" of their teachers; policemen and policewomen do not "produce" public order. The attempt to force these relationships into a market model undermines the service ethic, degrades the institutions that embody it and robs the notion of common citizenship of part of its meaning. (pp.212-213)

In my mind, public institutions are the defining features of a caring and democratic society. The market relations that are sponsored by capitalism should exist to pay for these institutions, not the other way around. Thus, markets are to be subordinate to the

aim of producing a fuller and thicker participatory democratic polity and daily life (see Skocpol 2003). It should be clear by now that a cynical conception of democracy that is “on sale” to voters and manipulated and marketed by political and economic elites does not adequately provide for goods such as general education, objective information, media and new forms of communication that are universally accessible, well-maintained public libraries for all, public health, and universal health care. At best, markets provide these things in radically unequal ways (Katz 2001), with class, gender, and especially race being extremely powerful markers of these inequalities. If that is the case—even if the definitions of the “public” were and often still are based on the construction of gendered and raced spaces (Fraser 1989; Kelley 1993)—the very idea of public institutions is under concerted attack. They need to be provided—and defended—collectively. Such things are anything but secondary. They are the defining characteristics of what it means to be a just society (Leys 2001, p.220).

Unfortunately, the public has gotten increasingly used to the language of privatization, marketization, and constant evaluation. In many ways, it has become commonsense—and the critical intuitions that something may be wrong with all of this may slowly wither. Yet, in many nations where conditions are even worse, this has not necessarily happened (Apple 2003). We can learn from these nations’ experiences and we can relearn what it means to reconstitute the civic in our lives (Skocpol 2003). Education has a fundamental role to play in doing exactly that. But it can only do so if it is protected from those who see it as one more product to be consumed as we measure it.

Race and Markets

So far I have discussed the general tendencies surrounding the increasing marketization of everyday life and have argued that such tendencies will have deeply problematic effects. However, we need to be careful not to romanticize a past in which the state was supposedly responsive to all its citizens. As Charles Mills so powerfully argues, underlying our very idea of the modern liberal state and underlying the social commitments for which it supposedly stands is a racial contract (Mills 1997; see also Omi and Winant 1994). Further, as Gloria Ladson-Billings and others have claimed, in education as in so much else, “Race is always already present in every social configuring of our lives” (Ladson-Billings 2004, p.51). For these very reasons, it is imperative that we take a second look at the ways in which markets and audit cultures function—this time placing race at the center of our analysis, since different social positionings in society may give different meanings to neo-liberal and neo-conservative policies.

The criticisms of market relations and logics that I and others have made (see, e.g.,

Apple 2001; Marginson 1997; Marginson and Considine 2000; Gillborn and Youdell 2000; Whitty, Power, and Halpin 1998) are powerful. But these criticisms often carry a number of unacknowledged assumptions about race. The market has been much less responsive to particular groups than others. Indeed, the subject position of “consumer” has been much less available to African Americans and Latino/as than it has been for dominant groups. Thus, being actually seen as a “consumer,” as someone who is a “rational economic actor,” does have progressive tendencies within it when this position is compared to the histories of the ways people of color have been socially coded in the United States and elsewhere. When people of color actively take on this different coding, they are not simply being incorporated into dominant economic discourses and relations; they are also partly engaged in a form of counter-hegemonic action, one employing dominant economic discourses to subvert historically powerful racializing views that have had immense power in society (Apple and Pedroni in press; Pedroni 2003). Let us examine this somewhat more closely.

At the outset, and as I show elsewhere, race has always been a key presence in the structures of feeling surrounding markets and choice plans in education. Many of the strongest proponents of vouchers and similar plans may claim that their positions are based on a belief in the efficiency of markets, on the fear of a secularization of the sacred, or on the dangers of losing the values and beliefs that give meaning to their lives. (These latter two fears are especially pronounced among the authoritarian populist religious conservative who are among the strongest proponents of both vouchers and home schooling. See Apple 2001 for more on this.). However, historically, neither the economic nor the moral elements of this critique can be totally set apart from their partial genesis in the struggles over racial segregation, over busing to achieve integration, and in the loss of a federal tax exemption by conservative—and usually white only—religious academies. In short, the fear of the “racial other” has played a significant role in this discursive construction of the “problem of the public school” (Apple 2001).

Having said this, however, there is also increasing support for voucher and similar choice plans among “minority” groups. Given the fact that so much of the conservative tradition in the United States was explicitly shaped by racist and racializing discourses and practices,² and by a strongly anti-immigrant heritage as well, and given the fact that much of the current neo-liberal and neo-conservative attacks on the public sphere have had disproportionate effects on the gains of poor communities and on communities of color, the existence and growth of support among some members of dispossessed groups is more than a little striking.³ A complex process of discursive and positional disarticulation and

² “Progressive” traditions in the United States were not free of such racializing and racist logics. See, for example, Selden (1999).

rearticulation is going here, as dominant groups attempt to pull dispossessed collectivities under their own leadership and dispossessed groups themselves attempt to employ the social, economic, and cultural capital usually possessed by dominant groups to gain collective power for themselves. As we shall see, the label “conservative” cannot be employed easily in understanding the actions of all of the dispossessed groups who do ally themselves with conservative causes without at the same time reducing the complexity of the particular social fields of power on which they operate.

Perhaps the most interesting example of the processes of discursive and social disarticulation and rearticulation that one could find today involves the growing African American (at least among some elements of the African American community) support for neo-liberal policies such as voucher plans (see, e.g., Moe 2001). A key instance is the Black Alliance for Educational Options (BAEO), a group of African American parents and activists that is chaired by Howard Fuller, the former superintendent of Milwaukee public schools, one of the most racially segregated school systems in the United States. BAEO provides vocal support for voucher plans and similar neo-liberal proposals. It has generated considerable support within Black communities throughout the nation, particularly within poor inner-city areas.

A sense of the language that underpins BAEO’s commitment can be seen in the following quote:

Our children are our most precious resource. It is our responsibility to love them, nurture them and protect them. It is also our responsibility to ensure that they are properly educated. Without a good education, they will [not] have a real chance to engage in the practice of freedom: the process of engaging in the fight to transform their world. (BAEO website)

BAEO’s mission is clear.

The Black Alliance for Educational Options is a national, nonpartisan member

³ That, say, a number of African American groups, ones that are making alliances with distinctly conservative movements, exist and are growing says something very important about the fascination with identity politics among many progressive scholars and activists in education and elsewhere. Too often writing on identity (wrongly) assumes that identity politics is a ‘good thing’, that people inexorably move in progressive directions as they pursue what Nancy Fraser would call a politics of recognition. See Nancy Fraser (1997). Yet, any serious study of rightist movements demonstrates that identity politics is just as apt to take, say, angry and retrogressive forms—anti-gay, racist nativism, anti-women, etc. For many such people, “we” are the new oppressed, with that “we” not including most people of color, feminists, “sexual deviants,” immigrants, and so on. Yet, as I noted earlier, even people within these “despised”

organization whose mission is to actively support parental choice to empower families and increase educational options for Black children. (BAEO website)

The use of language here is striking. The language of neo-liberalism (choice, parental empowerment, accountability, individual freedom) is re-appropriated and sutured together with ideas of collective Black freedom and a deep concern for the community's children. This creates something of a 'hybrid' discourse that blends together meanings from multiple political sources and agendas. In some ways, this is similar to the long history of critical cultural analyses that demonstrate that people form bricolages in their daily lives and can employ language and commodities in ways undreamed of by the original producers of the language and products (see, e.g., Willis 1990).

While this process of rearticulation and use is important to note, it is equally essential to recognize something that makes the creative bricolage in which BAEO is engaged somewhat more problematic. A very large portion of the group's funding comes directly from conservative sources such as the Bradley Foundation. The Bradley Foundation, a well-known sponsor of conservative causes, has not only been in the forefront of providing support for vouchers and privatization initiatives, but also is one of the groups that provided significant support for Herrnstein and Murray's book, *The Bell Curve* (1994), a volume that argued that African Americans were on average less intelligent than Whites and that this was genetic in nature.

Thus, it would be important to ask about the nature and effects of the connections being made between rightist ideological and financial sources and BAEO itself. It is not inconsequential that neo-liberal and neo-conservative foundations provide not only funding but media visibility for "minority" groups who support—even critically—their agendas. The genesis of such funding is not inconsequential. Does this mean that groups such as BAEO are simply being manipulated by neo-liberal and neo-conservative foundations and movements? An answer to this question is not easy, but even with my cautions stated above it is certainly not a simple "yes."

In public forums and in discussions that Tom Pedroni and I have had with some of leaders of BAEO, they have argued that they will use any funding sources available so that they can follow their own specific program of action. They would accept money from more liberal sources; but Bradley and other conservative foundations have come forward much more readily.⁴ In the minds of the leaders of BAEO, the African American activists are in control, not the conservative foundations. Thus, for BAEO, they see themselves as strategically positioning themselves in order to get funding from conservative sources.

⁴ In this regard, Tom Pedroni's ongoing research on BAEO and similar groups is of considerable importance. See Pedroni (2003). See also, Apple and Pedroni (in press).

What they do with this funding, such as their strong (and well advertised in the media) support for voucher plans (although this support too is contingent and sometimes depends on local power relations), is wholly their decision. For them, the space provided by educational markets can be re-occupied for Black cultural and/or nationalist politics and can be employed to stop what seems to them (more than a little accurately in my opinion) to be a war on Black children.

However, while I have a good deal of respect for a number of the leaders of BAE0, it is important to remember that they are not the only ones strategically organizing on this social field of power. Like BAE0, groups affiliated with, say, the Bradley Foundation also know exactly what they are doing and know very well how to employ the agendas of BAE0 for their own purposes, purposes that in the long term often may run directly counter to the interests of the majority of those with less power at both the national and regional levels. Is it really in the long-term interests of people of color to be affiliated with the same groups who provided funding and support for books such as Herrnstein and Murray (1994) *The Bell Curve*? I think not, although once again we need to recognize the complexities involved here.

I am certain that this kind of question is constantly raised about the conservative stances taken by the people of color who have made alliances with, say, neo-liberals and neo-conservatives—and by the activists within BAE0 itself. When members of groups who are consistently “othered” in this society strategically take on identities that support dominant groups, such questioning is natural and I believe essential. However, it is also crucial to remember that members of historically oppressed and marginalized groups have always had to act on a terrain that is not of their choosing, have *always* had to act strategically and creatively to gain some measure of support from dominant groups to advance their causes (Lewis 1993, 2000). It is also the case that more recently national and local leaders of the Democratic Party in the United States have too often assumed that Black support is simply *there*, that it doesn’t need to be worked for. Because of this, we may see the further development of “unusual alliances” over specific issues such as educational policies. When this is coupled with some of the tacit and / or overt support within some communities of color not only for voucher plans but for anti-gay, anti-abortion, pro school prayer, and similar initiatives, the suturing together of some Black groups with larger conservative movements on particular issues is not totally surprising (see Dillard 2001).

The existence and growing power of committed movements such as BAE0, though, does point out that we need to be careful about stereotyping groups who may publicly support neo-liberal and neo-conservative policies. Their perspectives need to be examined carefully and taken seriously, not simply dismissed as totally misguided, as people who have been duped into unthinking acceptance of a harmful set of ideologies. There are

complicated strategic moves being made on an equally complex social field of power. I may—and do—strongly disagree with a number of the positions that groups such as BAEO take. However, to assume that they are simply puppets of conservative forces is not only to be too dismissive of they're own attempts at social maneuvering, but I also believe that it may be tacitly racist as well.

Saying this doesn't mean that we need to weaken the arguments against audit cultures and the marketization and privatization of schooling and the larger society that I articulated earlier in this paper. Voucher and tax credit plans (as I noted, the later ultimately may actually be more dangerous) will still have some extremely problematic effects in the long term. One of the most important effects could be a demobilization of social movements within communities of color. Schools have played central roles in the creation of movements for justice. In essence, rather than being peripheral reflections of larger battles and dynamics, struggles over schooling—over what should be taught, over the relationship between schools and local communities, over the very ends and means of the institution itself—have provided a crucible for the formation of larger social movements toward equality (Hogan 1983; Apple et al. 2003). These collective movements have transformed our definitions of rights, of who should have them, and of the role of the government in guaranteeing these rights. Absent organized, community-wide mobilizations, these transformations would not have occurred.

This is under threat currently. I have argued elsewhere that definitions of democracy based on possessive individualism, on the citizen as only a “consumer,” are inherently grounded in a process of de-racing, de-classing, and de-gendering (see Apple 2001 and Ball, 1994). These are the very groups who have employed struggles over educational access and outcomes to form themselves as self-conscious actors. If it is the case, as I strongly believe it is, that it is the organized efforts of social movements that ultimately have led to the transformation of our educational system in more democratic directions (Apple, 2000)—and this has been especially the case for mobilizations by people who have been labeled as society's “others”—the long-term effects of neo-liberal definitions of democracy may be truly tragic for communities of color (and working class groups), not “only” in increasing inequalities in schools (see, e.g., Apple, 2001; Lipman 2004; McNeil, 2000; Gillborn and Youdell, 2000), but in leading to a very real loss of the impetus for collective solutions to pressing social problems. If all problems are simply “solved” by individual choices on a market, then collective mobilizations tend to wither and perhaps even disappear. Given the crucial role played by organized movements surrounding education in the formation and growth of mobilizations among African Americans, Latino/as, and many other communities of color against the denial of their rights, this is not something to be welcomed. If history is any guide here, the results will not be pleasant. Thus, although short term support for neo-liberal and neo-conservative policies may seem

strategically wise to some members of less powerful groups, and may in fact generate short-term mobilizations, I remain deeply worried about what will happen over time.⁵ It is the long-term implications of individuating processes and ideologies, and their effects on the necessity of larger and constantly growing social mobilizations that aim toward substantive transformations within the public sphere, that need to be of concern as well.

Other points should be added here about what might be called the political economy of everyday life. I argued earlier that marketization and commodification, when accompanied by the shrinking of state responsibility, intensifies the labor of the “consumer.” This process relegates to the individual or the family all of the tasks of information gathering and evaluation. This often entails an extensive amount of work, especially for those communities and families with fewer economic resources, less technical skill, under-resourced or closed libraries and social service centers, and the emotional and physical burdens of simply providing for human needs in an unforgiving economy. Since, as VanDunk and Dickman (2003) show, the major urban areas where marketizing tendencies such as vouchers are now in place are doing a very poor job of making information on schools, curricula, teaching, etc. easily available to the public and especially to poor persons of color, this puts these “consumers” at a serious disadvantage.

Even with these difficulties, there is something much more complicated ideologically than meets the eye going on here. As I noted and as Pedroni and I have discussed at greater length (Apple and Pedroni in press; Pedroni 2003), when persons of color take up the position of “rational economic actor,” of consumer, this does have counter-hegemonic possibilities and does provide for opportunities for different social codings. However, while noting this—and it must be noted--possibilities are just that, possibilities. They require objective material conditions and resources in people’s lived environments to in order for them to be acted upon. Such possibilities may not be easily acted upon under the conditions of neo-liberal restructuring in the economy, in social and cultural services, health care, and in so much more in urban and rural communities populated by those who are seen as the constitutive outsides in this society (see Katz 2001).

⁵ Dillard (2001). Angela Dillard is very fair in her assessment of what the implications of such support may be. She nicely shows the contradictions of the arguments and logic of the people she focuses upon. In doing so, she draws upon some of the more cogent analyses of the relationship between democracy and the maintenance of the public sphere on the one hand and an expansive and rich understanding of what it means to be a citizen on the other. Readers of her discussion would also be well served to connect her arguments to the historical struggles over the very meanings of our concepts of democracy, freedom, and citizenship such as that found in Foner’s (1998) illuminating

Conclusion

I began this paper with a critical overview of certain tendencies within our societies. I pointed to the steady growth of neo-liberal restructurings of institutions and identities, and to the hard and creative ideological work that such transformations require. In the process, I noted that commodification and audit cultures tend to reinforce each other and that these processes are played out on multiple terrains, with education being one of the most significant.

There has been exceptional work done on the ways in class works in altered contexts such as these. For example, middle class parents often have a store of cultural and social capital that enables them to employ such things as “choice” in education as part of complex conversion strategies that guarantee their own children’s advantage (see, e.g., Ball 2003; Power, Edwards, Whitty, and Wigfall 2003; Gillborn and Yourdell 2000). There is also an emerging body of work on how this is related to gendered labor, particularly the work of mothers (see, for example, Griffith and Smith in press). However, there has been less attention paid to the ways in which members of historically oppressed “minority” groups, particularly poor persons of color, strategically deal with issues of marketization, privatization, and “choice” in the United States.⁶

Part of my interest in this paper is to provide a context for a serious discussion both of the meaning and the effects of such strategic actions on the parts of those who must act on a terrain in which historically grounded power relations and struggles take on even more complicated forms. They require a much more nuanced reading than our usual critical appraisals are apt to do. We must continue to engage in the critical work of detailing the ways in which conservative modernization is restructuring our lives and institutions. But this needs to be done with a thorough, and historically grounded, understanding of the need to broaden the “we” and, hence, to recognize the contradictory and multiple daily realities that govern these effects.

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⁶ There has been some discussion of the dangers of voucher plans by African American nationalist activists and scholars. See Bush (2004). On Black activism and the ways in which consumer struggles have led to positive effects both within dominant white controlled economic and political institutions and within Black mobilizations as well,

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KEEPING KNOWLEDGE ALIVE

知識的生生不息

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Abstract

Over a century ago, the noted philosopher, educator, mathematician Alfred North Whitehead (1861-1947) declared that the education universities, colleges, schools were providing was “dead, barren, lifeless, useless,” and “full of mental dry rot.” His complaint was that such institutions were teaching facts and only facts, unrelated to either life or to the field in which the facts were embedded. Memorization was the one and only way to “learn,” and for him such was not learning.

In order to keep knowledge alive, Whitehead proposed that we in education teach only a “few ideas,” the “main ones,” and that we “throw these ideas into every combination possible.” This suggestion was then, and still is now, a radical one; albeit an eminently sensible one, especially as we struggle in our post-modern world to find a viable way to educate. Whitehead’s suggestion involved looking upon education as having stages or periods: one of romance (playing with ideas), one of precision (exactness), one of generalization (abstracting general principles).

This paper itself suggests that interplay of these three stages or periods -- play, precision, principles -- can be useful guides for those wishing to devise curriculum designs and instructional strategies, a century after Whitehead first made his proposal. The paper explores each of the stages and their interrelationship.

The paper ends with an examination of Whitehead’s worry about “too good teaching,” and with suggestions for what Whitehead has to offer teachers today.

Keywords: Curriculum, Learning, Teaching, Whitehead

中文摘要

一世紀多前，著名的哲學家、教育家、及數學家 Alfred North Whitehead (1861-1947) 公開宣稱大學、學院、以及學校所提供的教育都是「死亡的、貧乏的、無生氣的、無益的」，並且是「充滿思想的乾腐」。他的抱怨意指如此的

學術機構教導事實並且僅僅只有事實，完全無關乎生活或者該事實所嵌入存在的領域。記憶（Memorization）是一學習的途徑並且是唯一的途徑，對他而言，這樣的學習並不能稱得上是學習。

為了使知識生生不息，Whitehead 提議身於教育界的我們應當僅教導「幾個觀念」（few ideas），但卻是「主要觀念」（main ones），而我們將這些觀念儘可能的進行組合。這個建議雖是過去的根本概念，但對現在來說依然是；這個建議儘管是出眾的明智，尤其是當我們處於後現代世界裡掙扎以試圖尋找一個可行的方法來教育。Whitehead 的建議更涉及把教育看作有階段或者時期：一為浪漫期（觀念逗玩，playing with ideas），一為準確期（精準，exactness），一為類化期（抽取一般原則，abstracting general principles）。

在 Whitehead 最初提出建議的一世紀後，文中提議所述三個時期的相互作用—遊戲、準確、原則—對於那些期望修改課程設計與教學策略會是一個有幫助的規準。文中亦探索這三個時期與其之間的相互關係。

最後，以檢視 Whitehead 擔憂的「完美教學」（too good teaching）以及給現今教師的建議作為本文的結束。

關鍵字：課程，學習，教學，Whitehead

The problem of keeping knowledge alive, of preventing it from becoming inert...is the central problem of all education. (Whitehead, 1967 [1929], 5)

This statement by Alfred North Whitehead in his short 1917 essay, “The Aims of Education,” has been a challenge to educators and curricularists for almost a century. It is not usual for us in education to consider that the ideas we expound are “dead,” “inert,” “useless,” “lifeless,” “barren,” and full of “mental dryrot.” Yet, this is the charge and challenge Whitehead has given us educators. In the Preface to the book *Aims of Education* (1967 [1929]) he states that “the whole book is a protest against dead knowledge” (v); and in his essay of the same name mentions the need to avoid “inert” ideas no less than seven times in the first three paragraphs. Ideas are inert when they are “disconnected,” atomistic, isolated; related neither to the practicalities of life, nor to an individual’s own interests, nor to the field in which they exist. Then they become monads without souls, floating through time and space. Relationality is, of course, a key theme in Whitehead’s cosmology; it is what he calls the “really real” (*Modes of Thought*, 1938,

205–06) and forms the heart of his “Philosophy of Organism” (*Process and Reality*, 1978 [1929], especially Ch. 2.)¹ Whitehead had a formula for keeping knowledge alive: the integration of the three teaching/learning modes of romance, precision, generalization (1967 [1929], Ch. 2), along with his wonderful teaching aphorisms: “Do not teach too many subjects”; “What you teach, teach thoroughly”; “Let the main ideas...be few and important”; and “Let them [the ideas] be thrown into every combination possible” (2). Before elaborating on and exploring these three “stages of mental growth” and the concomitant aphorisms, I’d like to describe a bit the educational system Alfred North Whitehead received at Cambridge—one he felt filled him with dead, lifeless, inert ideas.

Cambridge, the university not only of A. N. Whitehead but also of Gregory Bateson, Bertrand Russell, and Ludwig Wittgenstein—individuals who directly or vicariously were connected to the ideas of Whitehead—was a traditional, Victorian institution in 1880. Whitehead entered Trinity College, Cambridge that fall to pursue a B.A. degree in Mathematics. He had been a strong “maths” student at Sherborne, a minor but good English public school, preparing (mostly East Kent) students for the universities of Oxford or Cambridge. As was common for undergraduates in those days, Whitehead avoided as many of the university lectures he could and spent three full years with a mathematics “coach,” training for the all-decisive Tripos—named not after the examination’s three parts but after the three legged stool on which the candidate sat while disputing with *his* examiners.²

As Victor Lowe (1985, Ch. VI) tell us, Parts I and II of the Tripos were traditionally “sat for”—five and one-half hours per day for three days in a row—in late May of the candidate’s third year. A week or so separated the Part I sitting from the Part II sitting. Part I was heavily Newton—the first three sections of Book One of his *Principia*³—while Part II focused essentially on the calculus, trigonometry, and analytic geometry. The candidate needed to know these areas quite completely (today we’d say “cold”), for the exam was mostly doing “riders” (intricate problems) attached to each question. Speed was

¹ As a mathematician, interested in geometry, it would be natural for Whitehead to be interested in relations. Lowe (1985) says that Whitehead came upon the importance of relations fairly early in his professional publishing career. [Whitehead did not begin serious academic publishing until he was in his late 30s. Two of his first academic articles were on what today we’d call chaos mathematics or nonlinear dynamical theory: the flow of fluids]. In a talk with Lowe, late in his life, Whitehead said the only original thought he really had was that the “stuff” of space—material objects (entities)—should be seen not individually or atomistically but “as a set of relations” (296-97).

² While women from the nearby, self-contained colleges of Girton and Newnham were allowed, in 1881, to sit for the Tripos, and while a few could, with their chaperones, sit in the back row of some lecture halls, Cambridge prizes were not awarded to women until 1928 and degrees were not granted until after World War II (1948). See Lowe, 1985, 214–17 and 88–89.

of the essence,⁴ for one advanced to Part III by doing more riders successfully than one's fellow candidates. It was for speed in problem solving, "tricks" as it were, that one hired a coach and worked with him weekly for three years. As Lowe (1985) says:

The man who had to stop and think about the bookwork [Euclid, Newton, etc.] would not get far; his fingers ought to be dispatching it while he was thinking about the rider. (101)

Dr. E. J. Routh, F. R. S., lead Wrangler (successful mathematics candidate) in the year Clerk Maxwell was second, was Whitehead's coach, as he had been for generations of Trinity mathematicians. His task was not to inspire his pupils with the beauty or usefulness of mathematics—for that "he would have been laughed" out of his profession—rather he was paid to drill his students "in tackling problems with precision and [in] finding the shortest [and most efficient] proofs" (101). In sum, Routh was a trainer, a coach, and a good one, in teaching for the test. It is this university experience which Whitehead (1967 [1929]) said lead British university students to a "paralysis of thought" brought on by "the aimless accumulation of precise knowledge, inert and unutilized" (37). As a Cambridge Don—a position Whitehead assumed after defending his thesis for Part III of the Tripos (taken seven months after the first two parts) on Clerk Maxwell's *Treatise on Electricity and Magnetism* (1873)—Whitehead worked hard and successfully to reform the Mathematical Tripos. In 1907 the Tripos was eliminated in mathematics, twenty-four years after Whitehead was fourth Wrangler (Lowe, 1985, 213).⁵

Of the triumvirate of romance, precision, generalization—the interplay of which Whitehead believed would keep knowledge alive—I'd like to begin with precision. This is the stage we understand best today. This stage forms the heart of any scientific or empirical research we do in education, and in our test oriented society is well prized.

³ The quantum revolution of the early twentieth century, which destroyed the Newtonian world-view, hit Whitehead especially hard. Whitehead had for his Tripos spent three years prepping on the first three sections of Newton's *Principia* (Newton I, II, III, it was called). As Lowe (1985) points out, this was for the Cambridge aspiring mathematicians their foundation (101). The "crumbling of this scientific rock" was, Whitehead said, "one of the crucial experiences of my life" (188). This experience affected Whitehead's relations to religion and ultimately led him to become agnostic. The crumbling of scientific certainty led him to question religious certainty: "How can they (Canterbury or Rome) be so sure," he asked. (In addition to Lowe, 1985, Ch. X, Section ii, see Price, 1954, "Dialogues," XXVII and LXII).

⁴ During the last week of May, Cantabridgians raced their oared shells against Oxfordians, but Tripos candidates "raced" against each other with the dining hall waiters taking bets as to how various candidates would place. Whitehead, as he predicted, placed fourth (Lowe, 1985, 102-03).

It is the stage our schools honor the most and the stage we ask teachers to develop the most. Romancing (playing with) knowledge or generalizing (abstracting) knowledge are not concepts we easily understand. While we do understand precision, “the aimless accumulation of precise knowledge” (Whitehead, 1967 [1929], 37), or “training” alone (35), or “precision imposed” too early (33) is self-defeating. Thus, the art of teaching is one of timing, of placement, and of judicious use. In his comments on precision—“The Rhythm of Education,” 1912; “Aims of Education,” 1917; “The Rhythmic Claims of Freedom and Discipline,” 1922—Whitehead never says he is opposed to precision, far from it. He is not opposed to precise knowledge, to training, or even to imposition. He is opposed to these done at the wrong time (too early before romance has “run its course,” 33) or in the wrong way (“discipline when it comes should satisfy a natural craving,” 32). When “the intermediate stage of discipline” (precision) does come for Whitehead, around age 14, it comes with a firmness, even with a ruthlessness. As Whitehead says:

[In contrast to the area of romantic knowledge], the area of precise knowledge...can be, and should be, definitely determined...A certain *ruthless definiteness is essential* in education. I am sure that one secret of a *successful teacher* is that he *has formulated* quite clearly in his mind *what the pupil has got to know in precise fashion*. (36; emphasis added)

Whitehead, thus, sees the role of the teacher as one of integrating the development of personal interest—this is what the romance stage is all about—with training in the field studied. These two, interrelated, are absolutely necessary Whitehead believes if one is to move beyond “mere precision” to the generalization stage where knowledge is “utilized” (3), not in the sense of simple or direct application but in a deeper sense where one can make the main ideas of a subject “one’s own” (2). Here one can *be creative* with the ideas. This sense of creativity, of course, sends one to Whitehead’s cosmology, that for which he is so famous.⁶

Victor Lowe in his biography of Whitehead (1985, vol. 1; 1990, vol. 2) tells us repeatedly that in Whitehead’s own personal teaching he followed the maxims he put forward, especially the one of needing “exact knowledge,” of always “push[ing] on to definite knowledge” (Lowe, 1980, 58; Whitehead, *Essays in Science and Philosophy*, 1948, 128 [reprint of a 1911 essay]). And, of course, this sense of exactness permeates Whitehead’s own work in *Process and Reality* (1978[1929]) when in his endeavor “

⁵ Cambridge, I suspect even more that Oxford, prided itself on keeping tradition. W.T. Costello (1958) says of Cambridge in the early 17th century, “[T]he scholastic statusquo at Cambridge was ...to be jealously guarded...[T]he authorities at Cambridge were to concern themselves not at all in changing a subscript iota of tradition” (7–8).

to frame a coherent, logical, necessary system of general ideas in terms of which every element of our experience can be interpreted” (3), he argues that “[t]he scheme should be stated with the utmost precision and definiteness” (9).⁷

I emphasize this notion of definiteness in Whitehead’s precision stage, not merely to help us be aware that he is not a “soft or mushy” liberal, advocating that “anything goes” in the teaching/learning situation but rather to prepare us, as readers, for the formidable challenges Whitehead saw coming in the then vaguely visioned post-modernist world. This challenge, as I see it, is how can we be certain, precise, definite, logical in a universe which we now realize is by its nature, by its reality, always in creative process, thus being uncertain, imprecise, indefinite, and non-logical? The answer to this question lies for Whitehead, I believe, in his concept of generalization/abstraction, and goes to the heart not only of his cosmology (including his metaphysics and theology), but also of what he feels any teacher needs to wrestle with if s/he is to be a “serious” teacher. Whitehead was a serious teacher; his craft was most important to him.

A serious teacher, though, is a playful teacher—one full of play—and so before delving into Whitehead’s concept of generalization/abstraction, I’d like to comment on his first stage, that of romance. As an aside, an important one, while I am most interested in Whitehead’s triune concept of romance/play, precision/definiteness, and generalization/abstraction, I do not take to his linear ordering of these groupings, to his calling them stages, nor to his assigning ages to them. Rather, I prefer to consider these three as ways or modes of teaching/learning and of the interrelating of all three continually. In this latter view, I have support from Whitehead himself who at the end of his “Rhythm in Education” essay (1967 [1929]) says:

Of course, I mean throughout a distinction of emphasis, of pervasive quality—romance, precision, generalization, are all present throughout. But there is an alternation of dominance. (28)

⁶ Lucien Price (1954) in his last “Dialogue” with Alfred North Whitehead captures remarks by Whitehead on his belief in the creativity inherent in the universe in most poetic terms:

God is in the world, or no where, creating continually in us and around us. This creative principle is everywhere, in animate and so-called inanimate matter, in the ether, water, earth, human hearts. But this creation is a continuing process, and the ‘the process is itself the actuality,’ since no sooner do you arrive than you start on a fresh journey. Insofar as man partakes of this creative process does he partake of the divine, of God, and that participation is his immortality, reducing the question of whether his individuality survives death of the body to the estate of an irrelevancy. His true destiny as co-creator in the universe is his dignity and his grandeur. (371)

And a bit later,

The romantic stage [in one subject] should persist for years after the precise stage [in another subject] has commenced. (38)

For me it is not so much an alternation as a dynamic integration: all three continually interplaying among themselves.

Romance is Whitehead's word for his first stage of the teaching/learning process, or as he calls it the "first apprehension" (17); whereas play is my own word—influenced as I've been by both John Dewey and Ludwig Wittgenstein. I believe, though, that Whitehead's concept of romance and what I have to say about play can be synthesized. Whitehead says that the romance stage concerns itself with "unexplored connexions," with "possibilities half-disclosed...and half concealed" (17). In this stage there needs to be enough freedom, freedom from set methodologies or "systematic procedures" to allow "an awakening to the *apprehension* of objects and to the *appreciation* of connexions" (18–19). The essence of this stage is one of "browsing" (22)—what Judith Genova (1995) borrowing from Wittgenstein, calls "playing with" (123–24). The territory which this stage, really mode of thinking, explores "is large, ill defined, and not to be controlled by any explicit boundary" (Whitehead, 1967 [1929], 36).⁸ This stage is important, not only as a precursor of precision but as its fountainhead: "There is no comprehension apart from romance" (33). This is why precision that comes too early is so dulling. As Whitehead says, drawing on his own years of experience:

If you have much to do with the young as they emerge from school and from the university, you soon note the dulled minds of those whose education has consisted in the acquirement of inert knowledge. (32)

⁷ The issue of the degree of precision and definiteness raises, as the French poststructuralists would say, a problematic. Too much precision limits creativity. Creativity seems to need a certain broad degree of looseness, of flexibility, of vagueness, of abundance (maybe even excess). Whitehead, himself, seems to realize this. In one of his later Dialogues (1954) with Lucien Price, Whitehead remarks that Aristotle's ideas "are admirably definite" while Plato's "tend, in comparison to be vague." He then says "But I prefer the vagueness" (344). This issue will arise again in his remarks about romance/play, especially as this stage is a necessary precursor to the one of precision, or as I'd prefer to say, a necessary ingredient in the interplay between romance/play and precision/definiteness.

⁸ The concept of play being brought forth here is much akin to that Bruner, Jolly, and Sylva bring forward in their comprehensive work, *Play: Its Role in Development and Evolution* (1976). It is also akin to what the late Stephen J. Gould says in his provocative article, "An Earful of Jaw," *Natural History*, March 1990 (12-23). My own remarks on the role of play in cognitive development can be found in Doll (1979), "Play and Mastery"

The art to working with and within the romance mode, though, is not—as so many romantic progressives have done and still continue to do—to leave the child or learner alone to explore as s/he wishes. As Whitehead says:

This initial stage of romance requires guidance...accordingly, a certain pointing out [by the teacher] of important facts, and of simplifying ideas, and of usual names really strengthens the natural impetus of the pupil. (33)

This view of the human mind as curious and inquisitive and of the teacher's role as aiding and helping the learner transform this inquisitiveness and blossom this curiosity is very Deweyan (1964 [1916], Ch. 10, 12, 13 especially). The human being, Whitehead (1967 [1929]) believes, craves to explore, to discover, to know—to investigate “curious thoughts, to shape questions, to seek for answers” (32). This “general process [that humans are curious and creative] is both natural and of absorbing interest” (32). But as Dewey has pointed out, this interest needs development; it needs to move from a stage dominated by “wonder” to one dominated by precision and definiteness. When this rhythm occurs, when the stage of romance (or play) has “run its course” (33), then there is a natural movement—indeed “a craving”—to move to the next, different, more complex and challenging, stage. In this manner the desire for precision, for definiteness, for understanding beyond mere fascination, emerges naturally from (*stimulated*) *exploration*. The teacher has a definite role in stimulating this exploration. The teacher aids, helps, guides, stimulates the student in exploration. The teacher does not impose precision too early (33) but guides the student in exploration as both teacher and student, cooperatively, throw ideas “into every combination possible” (2). In this way, nascent (romantic/playful) interest grows into mature interest (12). It is this personal interest which is the “*sine qua non*” for all further development; without which there can be no “mental development” (p. 31). The difficulty is, though, that personal interest needs careful development; but even in our best of intentions to develop that interest, we educators often kill the very process we wish to develop: “It is the unfortunate dilemma that initiative and training are both necessary, and that training is apt to kill initiative” (35).

A solution, if there is one, to this dilemma lies, I believe in Wittgenstein's notion of play, particularly as this has been developed by Judith Genova (1995) and M. Jayne Fleener (2003). In his works, particularly in *Philosophical Investigations* (1958), Wittgenstein talks of “play.” While Wittgenstein uses examples of playing as a way to talk about order and “rules” without being confined by the narrow boundaries of logic—“Now everything is different” (II, 180)—Genova sees important differences among these examples. “Playing at,” especially playing at language-games is somewhat metaphoric play—as in playing at tea or playing school. Here the rules are loosely defined by those

playing. “Playing in,” takes on a more formal structure, akin to playing a well-known game (or engaging in a set subject, like mathematics) with a definite structure and history. “Playing with,” that which I see as the most powerful for integrating training and initiative, is where one is aware of the rules (of a game or subject) and purposefully pushes against them, maybe to test them or to extend them or to transcend/transform them. In any event, in “playing with” rules and structures, one acquires an understanding of these at a deeper level than merely playing at or in. Creativity comes, but is certainly not guaranteed, by one exploring the boundaries of a structure. One makes a subject or bit of knowledge “one’s own,” (Whitehead, 1967 [1929], 2) as one is able to play with the subject or bit of knowledge: “inert ideas...are [those] merely received into the mind without being utilized, or tested, or thrown into fresh combination” (1). I am saying, in most simple terms, that “playing with” ideas, subjects, bits of knowledge is necessary for making said ideas, subjects, bits of knowledge, one’s own.

M. Jayne Fleener, Andy Carter, & Stacy Reeder, (2003), in their research have found most teachers working inside the “playing in” frame and consciously or unconsciously staying away from the “playing with” frame, one of throwing ideas into “every combination possible.” In one instance, the authors continually saw a teacher wanting students to acquire the vocabulary (or language-game) of the subject (here fractions) as she saw it. The teacher did not “see,” in Wittgenstein’s sense, the potential for understanding, indeed a deeper understanding, the students were displaying as they struggled with the very concept of what a fraction was. The teacher wanted the students to acquire the “correct” vocabulary—to play “in” the field—rather than to help them develop their nascent potential for a deeper understanding as they (unconsciously, but definitely) “played with” the subject of fractions. In focusing on the students’ “mistakes,” she failed to “see” what was there before her very eyes. Precision too early imposed really does make us blind to the potential existent in most every teaching situation. Both Wittgenstein — himself an Austrian schoolteacher for eight years—and Whitehead saw this clearly. Whitehead died in 1947, Wittgenstein in 1953.⁹

Generalization is the “final stage,” it is the “final success,” a return to the exploration of romanticism [Whitehead, 1967 [1929], 19), to the seeing of connexions, but with the power of knowledge not had in the first encounter.¹⁰ One is now able to focus on

⁹ While I have put Whitehead and Wittgenstein together here, regarding playing with ideas, Lowe (1985) points out that “Whitehead did not think well of Wittgenstein or of his ideas, and seems never to have been influenced by them. There was opportunity” (277). Essentially Whitehead, a consummate Englishman, was annoyed by Wittgenstein’s Austrian and Habsburg arrogance, his linguistic approach to philosophy, and of his driving a wedge between science and philosophy. Reading Allan Janik and Stephen Toulmin’s *Wittgenstein’s Vienna* (1973) helps one understand the difference between the English and Austrian “mind.”

relationships, to see patterns among the facts studied. This new level gives the student not only knowledge but wisdom (29). The reason for throwing ideas (and facts) into various combinations has been to help the student “see” relationships, interconnections, patterns. It is at this level of thought that Whitehead believes one begins to “make knowledge one’s own.” One can now use the knowledge one has, for one has acquired not just facts but the power of knowing itself (26–27).

There are a number of interesting aspects about this stage. One is that this stage arises only after one has been able to go beyond what one has been taught. As Whitehead says:

Your learning is useless to you till you have lost you textbooks, burnt your lecture notes, and forgotten the minutiae that you learnt by heart for the examination. (26)

And, in the same paragraph:

The function of a University is to enable you to shed details in favour of principles.

In his sixth “Dialogue” with Lucien Price (1954), Whitehead goes further and states that “static ideas,” those which are dead, inert, lifeless, actually accompany “too-good teaching” (63). That is, teaching, in both schools and universities, has a tendency only to impart information, thereby “congealing creative intelligence.” It is, of course, not congealing but developing creative intelligence that is Whitehead’s great passion, of keeping knowledge alive, vital and full of power. I know not if Whitehead was directly opposed to the Methodization movement, promoted so heavily by Peter Ramus and his disciples from the late sixteenth century on—a movement which was strong in Puritan times in both Cambridge, England and Cambridge, Massachusetts¹¹—but Whitehead certainly fits in with those so opposed. His comment on textbooks, the signature of the Ramists, was that “knowledge...[of this sort] marks an educational failure” (1967

¹⁰ Robert Brumbaugh (1982) in his writing on Whitehead’s three stages calls the generalization stage “satisfaction” (177 ff.). In so doing, he emphasizes the sense of practical “success” or satisfaction an individual has in “making knowledge one’s own.” Throughout his writings on education Whitehead emphasizes the practical aspect of generalization—which he calls “the active utilization of well understood principles” (1967 [1929], 37). Acquiring these well-understood principles, though, is a different (but complementary) process—it is the “active adventure of thought itself” (37), of putting such thought “on a higher plane” (40). In short, of taking ourselves via (abstract) speculation beyond ourselves while at the same time being grounded in the reality of practical research. This dualness of generalization—the practical integrated with the theoretical (to form a unified wholeness) is best found in Whitehead’s writings on mathematics. In Chapter II of his *Science and the Modern World* (1967 [1925]), “Mathematics in the History of Thought,

[1929], 29). Such knowledge then, as now, is very constricting and does dull the creative intelligence, which Whitehead believed we all possess.¹²

Another aspect of Whitehead's generalization is that this mode is not purely abstract. The abstract is where imagination, relationships, creativity, patterns all intermingle. But one is never to be merely abstract or theoretical. A disciplined mind, says Whitehead, "should be both more abstract and more concrete" (12). His strong insistence on "utilization" (1, 3, 32) is characteristic of how he believed one could make knowledge one's own. Knowledge not used is "barren knowledge"; and our schools have too much of it, he believed. Whitehead, as we know, left Cambridge England to go to London since he was finding himself in a rut at the University (Lowe, 1985, Ch. XV). In London he accepted a position at the University of London as Lecturer in Applied Mathematics and Mechanics (Lowe, 1990, Ch. I). The practical application of knowledge was most important to him, his was not merely an ivory tower pedagogy. In his more philosophic writings he tackles this practice/theory distinction head-on. In *Process and Reality* (1978 [1929]), he says:

It is a complete mistake to ask how concrete particular fact can be built up out of universals. The answer is, "In no way." The true philosophic question is, How can concrete fact exhibit entities abstract from itself and yet participated in by its own nature? (20)

The educational issue I see here is how can the facts we teach be seen to exhibit patterns of relationships, patterns removed from, or on a cognitive level above, the facts and yet found in the very nature of the concrete fact? The answer, I believe, lies in the

" Whitehead says: " The paradox is now fully established that the utmost abstractions are the true weapons with which to control our thought of concrete fact". (32). To keep knowledge alive, the habits of mentality need to move beyond the (isolated) concrete to the (generalized) abstract but not to lose touch with the "brute facts" of the concrete. It is in the interplay of this relational duality that creativity lies, and in emphasizing the role of creativity in keeping knowledge alive, I have focused on the process of generalization/abstraction. For more on this uniting see not only Ch. II of *Science and the Modern World* but also Victor Lowe's comments on both mathematics and abstraction in his *Understanding Whitehead* (1962), and Robert Palter's essay, on which Lowe draws, "The Place of Mathematics in Whitehead's Philosophy" (1961).

¹¹ For some history on this movement, still dominating much of our curriculum thought today, see Stephen Triche (2002) and myself (2001 and 2002).

¹² Creativity is, for Whitehead, the ultimate process. Our universe is a creative universe. In the early pages of *Process and Reality* (1978 [1929]), he says: "In all philosophic theory there is an ultimate . . . In the philosophy of organism this ultimate is termed 'creativity'" (7), and "The creative action is the universe always becoming one . . . (57).

notion that a fact by itself is really nothing; it acquires its “factness” only as it enters into relationships with other facts, only as it is contextualized.¹³

What Does Whitehead Have to Offer Teachers Today?

The pedagogical issues that Whitehead raised in the early twentieth century are just as important, I believe, in the early twenty-first century. And the analyses he made of these issues and the solutions he suggested continue not only to be valid but are reinforced, I believe, by the writings of others during this past century. So his message, as I see it, is even stronger and more poignant now as then.

Whitehead was passionate in his opposition to the type of learning and teaching he saw going on in schools, colleges, universities. He felt the knowledge dispensed, not by “bad” teaching but by what we would usually call “good” teaching, was dead, lifeless, barren. Thus, the challenge he presents to all who read him for educational purposes is to reconsider the very act of teaching. What should this act comprise? For him, it should not be dispensation of idle facts; such barren dispensation actually works against developing creative intelligence. As he says in a quote already given from one of his “Dialogues” with Lucien Price (1954):

I have a horror of creative intelligence congealing into too-good teaching—static ideas. . . Teachers should be acutely conscious of the deficiencies in the matter taught. . . They should be on their guard against their materials and teach their students to be on their guard against them. Once learning solidifies, all is over with it. (63)

This is not advice we in education usually hand out to our pupils. Yet, without paying attention to this advice, we easily become caught up in the routine of textbooks and tests—two particular issues Whitehead felt were a detriment to learning.

I can find nowhere that Whitehead was aware of the Ramist Methodization movement with its development of textbook learning which swept northern Europe, particularly among Puritan educators, in the late sixteenth and most all of the seventeenth centuries and which continues as a, really the, dominant educational influence today. A reading of literature on this movement,¹⁴ though, would help educators wishing to understand

¹³ Two recent books which deal with this barrenness and meaninglessness of an isolated “fact” are M. Jayne Fleener, *Curriculum Dynamics* (2002), and David Jardine, Patricia Clifford, and Sharon Friesen, *Back to the Basics of Teaching and Learning: Thinking the World Together* (2002).

¹⁴ For reading on this Methodization movement I would suggest the following: David Hamilton (1990); Walter Ong (1983); Stephen Triche (2002); and myself (2002)

how we came to consider textbook teaching and testing as the paragon of good teaching. Whitehead's alternative, of course, designed to keep knowledge alive and to actually develop the creative intelligence he believed the human species to possess, was to approach teaching and learning from the tripartite perspective of romance, precision, generalization. With my own penchant for alliteration, I would call these the 3 P's of teaching/learning: Play, Precision, Patterns (or Principles). To play with ideas, to be precise with one's facts, and to see these facts related into a set of patterns showing us principles is the way, I believe, of keeping knowledge alive.

At this point, I'd like to give an example:

I was talking with a young math teacher about ways of teaching multiplication facts. I suggested that 12×12 could be played with, could be looked at as 6×24 , or even as $6 \times 6 \times 4$ (which of course could be factored into even more combinations). He was quite excited about this and we conversed. Then I asked him if he could see a pattern (or a metapattern) in what we were doing—one way to do this would be to go to the general factoring of numbers, another would be to see the principle that the heart of mathematics (as Whitehead states in his very early writings)¹⁵ is intricate and precise relationships.

Here, unfortunately, the conversation stopped! The quality for the abstraction of general principles was not part of his mental habitus.¹⁶

We who are in teacher education have a long way to go to truly educate our future teachers, as our teachers have a long way to go to truly educate our future leaders and

¹⁵ Actually it was Bertrand Russell who first developed the notion that relationality would be a basic—"It is . . . the logic of relations which must serve as a foundation for mathematics" (quoted in Lowe, 1985, 236). Whitehead, though, not only "felt that his former pupil was on the right track" (237), he also made relations the heart of his cosmology (*Process and Reality*, Ch. 1, Section VII and *Science and the Modern World*, Ch. X).

¹⁶ Ideally this conversation should not have stopped here. To truly make knowledge one's own, to keep it alive, it is necessary, as Whitehead points out, to bring such knowledge, or cycle it, back to the practical, to the doing (gerund here). In his *Science and the Modern World* (1967 [1925]) Whitehead makes the fascinating observation that we "cannot think without abstractions." But for just this reason we must be "vigilant in critically revising our modes of abstraction"; for any "civilization which cannot burst through its current abstractions is doomed to sterility" (p. 59). He picks up this same theme at the end of the book when he says, "true rationalization must always transcend itself" (p. 201). Thus we cycle back to romance/play, but in so doing reassess the very abstractions/generalizations we have just developed; and this reassessment is now done with an eye toward beauty, intuition, the aesthetic and the artistic. The cycle is endless and in an evolutionary sense leads us on to ever greater depths and heights.

citizens. There is, though, a developing literature to help us, a literature that is most complementary to the position which Whitehead lays out. Gregory Bateson, a neighbor of the Whitehead's in Grantchester, presents provocative ideas on difference, the role of perturbation in learning, and on patterning. John Dewey, of course, has a message about interest and its development that is strongly allied with Whitehead. Ludwig Wittgenstein's notions about language and play are seminal, if a bit obscure. Here Judith Genova and M Jayne Fleener have been helpful. David Jardine and colleagues have done fine work in helping us reassess what is basic in teaching and learning, and in bringing forward the aesthetic and spirit-ful, important points in Whitehead which I did not address in this essay. Finally some of my own work has thrown, I hope, a bit of light on modernity's methodization movement and its metaphysical base in the classical physics, Whitehead saw, a century ago, as being outmoded. This leads to the exciting, provocative and yet still speculative movements in chaos and complexity theories,¹⁷ which draw much of their emphasis from Whitehead's own work. Indeed Alfred North Whitehead is a wonderful guide to anyone willing to re-look at the very foundations of teaching and learning, to question fundamental assumptions, to create the yet-to-be.

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William E. Doll 教授今年獲得「美國教育研究學會」(AERA, American Education Research Association)「組群B：課程研究」(Division B: Curriculum Studies) 頒贈「終生成就獎」(Lifetime Achievement Award)，在此和我們的讀者共同分享這個好消息與榮耀。

AERA 年會在美國教育界是最重要的年度學術盛會，成立於1916年，學會會員超過23,000人，議題完整、論文評選嚴謹，美加及國際所有教育社群莫不以能於此會議中發表研究成果為榮。(AERA學會網址：<http://www.aera.net/>)

「教育研究與發展」期刊創刊號，得執行編輯莊明貞教授的促成與協助，承蒙多位國內外學界泰斗青睞賜稿，至為榮幸！其中更包含了兩位 AERA「終身成就獎」得主：除了甫出爐的 William E. Doll 教授外，本刊亦獲悉 Michael W. Apple 教授亦於1998年獲同一獎項表彰其傑出教育研究貢獻。

Running Head: Narrative Understandings of School Reform

Interrupting School Stories and Stories of School: Deepening Narrative Understandings of School Reform

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學校故事和學校中的故事：深入學校改革的敘事理解

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Abstract

In this paper we explore school reform in terms of possibilities for interrupting school stories and stories of school. Drawing on a narrative reconceptualization of school reform, we use two narrative accounts from two school settings, we offer an understanding of interruptions to school stories as momentary, gradual, and always in motion. Further we explore questions around spaces of contradiction and their place in school reform. We see spaces of contradiction as spaces where teachers and principals might re-imagine their professional lives and, in doing so, stay wakeful to the reforming of their identities, their stories to live by, in relation with school stories and stories of school.

Keywords: School reforms, personal practical knowledges, stored school languages, narrative inquiry, teacher identity

中文摘要

本文中我們以可能探究學校故事（school stories）和學校中的故事（stories of school）探討學校改革，並從兩個不同學校場域的敘事例子以再概念化來闡述學校的革新。我們了解學校故事（school stories）的中斷性為瞬時的、漸進的、並且總是不斷運行的。再者，本文探討矛盾的空間（spaces of contradiction）及其矛盾在學校改革所佔的地位的相關問題。關於學校故事（school stories）和學校中故事（stories of school），文中視矛盾空間（spaces of contradiction）存在於教

師與校長可能會再次想像他們的專業生活，藉由如此，時時警惕他們自我認同的改造以及他們的生活故事。

關鍵字：學校改革，個人實務知識，故事化學校語言，敘事探究，教師認同

Interrupting School Stories and Stories of School: Deepening Narrative Understandings Of School Reform

In this paper we further explore an emergent narrative understanding of school reform (Clandinin & Connelly, 1998; Steeves, 2000). Attending from the perspective of storied lives on storied school contexts we draw on the reconceptualization of school reform developed by Clandinin and Connelly. As Clandinin and Connelly (1998) noted, in recent years, writers on school change revised their conceptions of change from the grand schemes and projects of the 1960s to school-based curriculum development and person-oriented accounts. Hollingsworth and Sockett (1994) describe the grand-schemes approach as a “control paradigm”, committed to “(a) generalization about context rather than to contexts themselves, (b) a hierarchical view of theory/theorists and practice/practitioners, and (c) agenda driven by bureaucracies rather than by teaching professionals” (p. 2).

Fullan (1994) outlined a different view of school reform as he shifted from a more centralized systemic view of reform backed up by implementation strategies (the concern of his earlier writing), to a focus on the individual. He said: “It’s individuals, working, first of all, despite the system, and secondly, connecting with other kindred spirits, that will begin to develop the critical mass that changes the system” (1994, p. 2). Fullan’s shift marked a more general shift in school reform to school-based reform, action research, teacher research, and so on. Clandinin and Connelly (1998) argued, however, that a theory of the individual is not an adequate basis for re-imagining school reform. They argued both against a grand-schemes, theory-driven approach in which practice was shaped by ideas from above and from the outside, and against various versions of a practice-driven approach with a focus on an individual or a group of individuals as creators of self-made school environments. Although practice driven approaches affirm a more central place for local practitioners in school reform, both “grand schemes” and “individual initiatives” are dominated by agenda driven orientations controlling others. Clandinin and Connelly began to re-imagine school reform from a different perspective, from the place of teachers’ knowledge embedded in context such that teacher voice might be a shaping influence

on both theory and practice. Shifting attention towards teachers and their knowledge in context revealed gaps in prevailing views of school reform. They (Clandinin & Connelly, 1998) outlined four missing elements from prevailing views of school reform:

(1) a recognition that school reform is a complex practice/theory social process in which undirected change is inevitable; (2) a recognition that schools and their participants have narrative histories; (3) a comparable recognition that the educational reform literature dates to the last century and is, in turn, preceded by a relevant, generations-older, philosophical literature; and (4) a recognition that school reform is an epistemological matter that involves issues of practitioner knowledge. (p.155)

Drawing on an analysis of these four missing elements and working from a narrative view of teacher knowledge, they shifted the way we look at school reform. The fourth missing element they identified is particularly important to this paper. Fundamental to the work of Connelly and Clandinin (1988) is the centrality of practitioner knowledge.

To undertake a reform is to undertake change in how people know and live in their professional school worlds. Without an epistemological sense of school reform, reform is mostly treated as entailing changes in people's attributes and skills, which may be added to, subtracted from, modified and so on. Knowledge, which is commonly thought to be at the heart of educational reform, is treated as an attribute that teachers and others can learn. But, from an epistemological point of view, knowledge is this and much more as well. In truth, teachers and others can learn new knowledge and accumulate it as a personal attribute but still not change the way they "know" their classrooms, their schools, their children, their colleagues, and their professional lives. At one level it will appear that the teachers have changed because they hold new knowledge as an accumulated attribute. But at the level of knowledge as expressed in practice little may have changed. (Clandinin & Connelly, 1998, pp. 156-157)

Clandinin and Connelly draw our attention to a view of knowledge as teacher knowledge, knowledge narratively embodied in how a person lives in the world. Knowledge as attribute can be given; knowledge as narrative cannot. The latter needs to be experienced in context.

Understanding school reform in terms of control and initiatives [and as knowledge for teachers] is deeply embedded in the knowledge and practices of all educators.

It is not just a matter of theorists, policymakers, and administrators inappropriately manipulating people who have less control. Our studies have shown that teachers also know reform in terms of initiative and control as strongly as do theoreticians. Following the theologian Crites (1971), we called these pervasive views that influence theoreticians' and practitioners' "sacred stories". The universality and taken-for-grantedness of understanding school reform in terms of initiative and control has the quality of a sacred story. Initiative and control are two of the main terms in the prevailing stories of school reform. (Clandinin & Connelly, 1998, p-157)

As Clandinin and Connelly reconceptualized school reform, they stayed awake to the degree to which the idea of theory-driven practice marks the ideas of educators at all levels. This notion structures teachers' personal practical knowledge and the professional knowledge landscape of teachers and policymakers.

Narrative Understandings of Teacher Knowledge

Connelly and Clandinin define teacher knowledge as:

A term designed to capture the idea of experience in a way that allows us to talk about teachers as knowledgeable and knowing persons. Personal practical knowledge is in the person's past experience, in the person's present mind and body, and in the future plans and actions. Personal practical knowledge is found in the person's practice. It is, for any one person, a particular way of reconstructing the past and the intentions of the future to deal with the exigencies of a present situation. (Connelly & Clandinin 1988, p. 25)

For them, teacher knowledge is seen in terms of narrative life history, as storied life compositions. These stories, these narratives of experience, are both personal and social, they reflect a person's life history and they reflect the milieux, the contexts in which teachers live.

Attending to these contexts, they adopted a metaphor of a "professional knowledge landscape" that "allows them to talk" about space, place and time. Furthermore, it has a sense of expansiveness and the possibility of being filled with diverse people, things and events in different relationships. Understanding professional knowledge as comprising a landscape calls for a notion of professional knowledge as composed of a wide variety of people, places and things. Because we see the professional knowledge landscape as composed of relations among people, places and things, we see it as both an intellectual and a moral landscape. Understanding contexts as professional knowledge contexts enabled Clandinin and Connelly to see them epistemological terms. (Clandinin & Connelly 1995, pp. 4-5)

This narratively constructed landscape has a history with moral, emotional and aesthetic dimensions. It is “storied”. To enter a professional knowledge landscape is to enter a place of story. The landscape is composed of two fundamentally different places, the in-classroom place and the out-of-classroom place. The out-of-classroom place is particularly significant in a consideration of school reform because it is a place where teachers have not historically belonged. Teachers have traditionally attended to the out-of-classroom places as:

[a] place filled with knowledge funneled into the school system for the purpose of altering teachers’ and children’s classroom lives. Teachers talk about this knowledge all the time. We all make reference to “what’s coming down the pipe?”; “what’s coming down now?”; “what will they throw down on us next?” In these metaphorical expressions we hear teachers express their knowledge of their out-of-classroom place as a place littered with imposed prescriptions. It is a place filled with other people’s visions of what is right for children. Research, policy makers, senior administrators and others, using various implementation strategies, push research findings, policy statements, plans, improvement schemes and so on down what we call the conduit into this out-of-classroom place on the professional knowledge landscape. We characterize this theory-driven view of practice shared by practitioners, policymakers and theoreticians as having the quality of a sacred story. (Clandinin & Connelly, 1996, p. 25)

In-classroom places are:

For the most part, safe places, generally free from scrutiny, where teachers are free to live stories of practice. These lived stories are essentially secret ones. Furthermore, when these secret lived stories are told, they are, for the most part, told to other teachers in other secret places. When teachers move out of their classrooms onto the out-of-classroom place on the landscape, they often live and tell cover stories, stories in which they portray themselves as expert, certain characters whose teacher stories fit within the acceptable range of the story of school being lived in the school. Cover stories enable teachers whose teacher stories are marginalized by whatever the current story of school is to continue to practice and to sustain their teacher stories. (Clandinin & Connelly, 1996, p. 25)

Soltis (1995) summarized their language of the landscape as “a language of ‘secret places’, ‘sacred stories’, ‘cover stories’, the ‘conduit’ and its ‘rhetoric of conclusions’, categories designed to penetrate our social construction of the reality of teaching and

schooling” (p. vii). In addition to the secret, sacred and cover stories that make up the landscape, Clandinin and Connelly also differentiated stories told about people and about institutions as teacher stories and stories of teachers, school stories and stories of schools.

We adopt the ideas of stories of school and school stories from Clandinin and Connelly’s (1995, 1996) metaphor of a professional knowledge landscape. School stories and stories of school, an interconnected set of stories, are one way to understand the professional knowledge landscape of a school. Clandinin and Connelly describe school stories as stories told by people within the school and as shaped when policies and mandates intersect with the unfolding histories of school landscapes and with the lives of those who live on them. Stories of school are stories told about a particular school by people within schools as well as by those such as school board officials, parents, and practitioners in other school contexts.

Narrative Understandings of School Reform

Clandinin and Connelly with their view of teachers as holders of personal practical knowledge and as living in a landscape, both with narrative histories, are the starting points for their reconceptualized view of school reform. Each teacher and principal come to a school landscape living and telling a complex set of interwoven stories of themselves as teachers, of children in this school, of the community, of the school board and of successes and failures. As they (Clandinin & Connelly, 1998) wrote:

Their individual stories are shaped by living in a narrative landscape with its own network of stories: other teachers’ stories, school stories, stories of school, stories of how this school is thought of by the administration, stories of what parents think of the school, stories of children and so on. As the teachers and principal live together in a landscape, each with their own stories in a landscape of stories, a story of school begins to emerge that draws from the web of stories. These stories are rooted temporally as individual stories shift and change in response to changing events and circumstances. Changes in the story of school ripple through the school and influence the whole web of stories. Others, such as parents, also influence, and are influenced by, the shifting story of school...The landscape is a living place, a place with a history, with dynamic internal goings-on, with continuing interactions and exchanges with community—all of it aimed into the future in sometimes cloudy and sometimes clear ways. It is a place of relationships among people and their stories positioned differently in the landscape, among the past, present and future. (1998, pp. 160-161)

Clandinin and Connelly 1998 characterized this shifting landscape using Geertz's (1995) metaphor of a parade. Each participant in the landscape, in the parade, has a particular place and a particular set of stories being lived out at any particular time. Each person's influence in the landscape, in the parade, is uncertain. The parade proceeds whether participants wish it to or not. Clandinin and Connelly suggest that as people, whether teachers, principals, external agents or others, enter into the professional knowledge landscape intent on improving schools, they join the parade. Given a notion of the landscape as a parade, as a changing organism composed of multiple nested stories interacting and changing over time, a narrative map might be a way of getting a sense of the changing parade. They describe reform as best accomplished by walking along with participants, trying to hear their stories, trying to tell our own stories, and then trying, with them, to understand the interconnected web of stories, and, in so doing, to gain some sense of the interwoven narratives.

Such narrative mapping offers the possibility for noting the moments when possibilities for new stories bubble up. These moments, which they characterize as reform moments, are moments when it might be possible to shift the course of a story. This more relational sense of coming into a school and joining an already ongoing set of interwoven stories on an always shifting, always changing, storied landscape gives a sense of being part of the landscape.

The storied professional knowledge landscape in which we all live our lives, understood from a narrative knowledge standpoint, becomes "a space for negotiation, a middle ground for understanding how to shift the parade in more imaginative ways. In such a view, school reform becomes a question of the possibility of school participants re-imagining their professional lives" (Clandinin & Connelly, 1998, p. 162).

Adding to these Narrative Understandings of School Reform

In this paper, we reconstruct two narrative accounts of school reform. The first is drawn from Steeves' (2000) dissertation where she explored stories of transition from the perspectives of herself as narrative inquirer, a principal new to the school and a teacher continuing to work in the school. This narrative account is laid alongside a narrative account from the Greenville¹ School landscape. The longer time frame that our first narrative account is stretched across offers a broad perspective of a school landscape over time. The second account provides an in-depth look at a school landscape as experienced by teacher researchers at the school.

Narrative Account One:

Over a two and a half year period, Steeves (2000) listened to and learned from the experiences of two co-researchers as they lived stories of transition within the same school context. Steeves was interested in the qualities of the school landscape (Clandinin & Connelly, 1995), composed of people, things and places that might enable or disable growth (Dewey, 1938) for a teacher and principal in a school experiencing transition. Steeves worked with a teacher and principal in order to inquire from two perspectives. The following narrative account was constructed from the principal's experiences as represented by Steeves. Although we recognize the complex nature of schools — seeing these landscapes as filled with many diverse people and layers of complex, interwoven and at times, disparate stories — we explored the following story of school from the vantage point of only one practitioner. We realize that other tellings could be told from alternative positionings.

Right from her first days at her new school, Jeanette's² door was always open. She wore track suits and sneakers and various teddy bear pins placed close to her heart. Upon entering her office, visitors had to step around papers piled high on the floor and plunk down in a chair at a large circular wooden table in the center of the room. The table was covered with a dazzling array of papers, colored markers, beautifully illustrated picture books, half filled coffee cups and a few toy action figures belonging to her son. Looking around, visitors might notice a large old comfortable armchair draped with a cozy shawl, shelves crammed with books and mementos, photos and colorful cards from friends. Children's artwork covered the walls. But what was most striking were all the bears. There was a whole den of them. They were propped on shelves, squatted among children's books, and dancing around a wallpaper strip encircling the room. It was a space where children seemed to feel at home. Indeed, a kindergarten child once introduced Jeanette to her father as "the bear girl." But, to others, Jeanette was met as principal on this school landscape.

Jeanette believed in the power of relationship to guide her interactions. She

¹ Greenville School is the name we gave to the mutual urban school where our second story unfolded. Located in a Canadian city, the community is nestled on the edges of the downtown core. Located in a former "industrial" area of the city, the Greenville neighborhood is described in city documents as poor, with both small family homes and low-rental accommodation. Major traffic routes mark its boundaries and, although the neighborhood is described as ethnically diverse, the school population is described as 40% Aboriginal with an ethnic mix of Portuguese, Asian and other groups.

² Pseudonyms have been used to protect the identities of those made visible in our stories.

did not want to follow the expected principal plotline of taking power and making decisions. Often, she thought back to the former school where she was principal and recalled images of a rainbow community where everyone contributed their unique gifts to enrich the school landscape. She also remembered how talk around what really mattered for children, families, teachers and administrators was threaded through out-of-classroom places such as the staff room, hallways, library, and office spaces. She remembered how these conversations shaped staff meetings. It was within this school setting that Jeanette learned that stories of school could be otherwise.

Carrying this remembered knowing forward guided how Jeanette negotiated this new school context. At her last school there were no school stories in place when she arrived because it was a new school. She, alongside other colleagues, students and families, started at the beginning to build school stories together. Now, on her current school landscape, Jeanette arrived in the midst of stories and traditions yet, she did not know the school stories living behind these traditions already in place. For example, she encountered staff meetings very different from those she grew used to on her former school landscape. Within this new school context, staff meetings felt more shaped by stories of school, they were formal and filled with requests for rules, regulations, and reporting deadlines. Questions about recess and outdoor shoes needed answers. Documents from central office demanded explanation.

Jeanette tried to open up conversation. She began staff meetings by reading carefully chosen picture books. She hoped that she and the teachers might begin educative inquiries through the heart of children's literature. She often asked staff to work in small groups or to engage in conversation with guest speakers. Yet it did not seem to matter what Jeanette tried ... her colleagues often responded to her practices with raised eyebrows and silence. For example, when she presented a work-in-progress school plan to staff, her intentions were to provide spaces where the plan would be negotiated as a community and re-formed together. Staff members responded to her invitation by asking what the plan was supposed to look like. For their part staff were used to perceiving prescribed outcomes as "orders of the day". Jeanette felt the staff room and out of classroom places had a history of being principal territory and as such staff expected to be told the answers. She found teachers with strong beliefs but felt they directed these beliefs inward to their classrooms. It seemed to Jeanette that teachers and other school staff did not feel safe in whole group staff meetings to reveal the passions in their hearts. She attempted over and over to dislodge the hierarchical culture entrenched in this out of classroom place. This bumping up of who Jeanette wanted to be as

principal on this new school landscape against the stories of school and school stories already in place, made Jeanette feel as though she was expected to fit into an established plotline of “principal-in-charge.”

Jeanette resisted this plotline but the tension of trying to live her story of who she was as principal in the midst of stories of school surrounding her wore her down. Often tears welled in her eyes when she talked about how hard it was, how tempting it was to go into “the principal box” and simply issue edicts and expect compliance. As she talked with me, she imagined “stories of what might be”. Her story of what might be was a story that ran counter to the stories surrounding her. She wanted to create new school stories with staff, not mandate that they follow what she wanted as the story.

After a one and a half year period of trying to open up conversation in staff meetings, Jeanette moved away from seeing these meetings as places of possibility and began to notice the increasing numbers of teachers stopping by her cozy office space to engage in passion-filled conversations. For Jeanette, she was beginning to feel a change in direction but she could not pinpoint it. Many more months of informal office gatherings began to gather momentum. Finally Jeanette was able to name the shift. Finally Jeanette was finding a space where she and her teacher colleagues could engage together in stories of what might be. She and the teachers began inquiring into their beliefs about learning and the living soul of school landscapes, the diverse lives of children and families and their own lives both in and outside of school.

These office space gatherings were impromptu, not the official one-on-one teacher/principal meetings mandated in her school system. They were becoming the space Jeanette had initially hoped whole group staff meetings would be. As her second year in this school unfolded, whispers of new school stories borne in conversation and inquiry, and shaped by an increasing number of school participants, were beginning to emerge. (Narrative account based on field texts, 1998-2000)

Our storied reconstruction made visible the complexity of stories on the school landscape Jeanette and the teachers were living within. We saw Jeanette living in the midst of stories of school and school stories while, at the same time, newly created school stories such as gatherings in her cozy office space were emerging.

We lay this reconstruction of re-forming stories, where changes evolve over time, alongside Clandinin and Connelly’s (1998) conceptualization of traditionally conceived notions of planned and mandated school reform.

Attending to Clandinin and Connelly’s (1998) research on school reform we noticed the places of tension in our narrative account of Jeanette’s experiences. We saw these tension-filled places emerging when the stories Jeanette imagined herself living on her

new school landscape intersected with the school stories and stories of school shaping her school context. As our narrative account shows, Jeanette moved to this school imagining spaces where she and colleagues would come to know each other and where, alongside one another, they could create school stories meaningful to who they were becoming as professionals and to the children and families with whom they worked. Jeanette took great care in transforming her principal office into an informal space reflective of her self and, then, opened the door and invited others inside, invited others to begin to know her and she, to know them. She also tried, many times and in diverse ways, to create meaning-filled conversation spaces in staff meetings — spaces where, as a whole group, she and her colleagues could explore stories they were living. Jeanette's ways of living on this school landscape showed that she, from her position as principal, was not interested in perpetuating a more dominant story of school where principals were scripted to live plotlines of “domination, oppression, and exploitation in the desire for ‘power over’ others” (Alter, 1993, p. 3).

The responses of raised eyebrows and silence Jeanette received, also made visible in the narrative account, helped us understand that the former school story of principal was different from the new story Jeanette was attempting to live out. Perhaps to some, both within her school context and across the school district, Jeanette might have been seen as not conforming to the dominant script. However, living out the scripted school story of principal meant that she, from her position at the top of the school hierarchy, was in control of, and responsible for, the school. Unraveling the plotlines of this scripted story of principal-in-charge, we saw that had Jeanette's beliefs about education been otherwise, she could have mandated either a “practice driven approach” of school reform focused solely on her own story of what might be, or a “grand schemes theory-driven approach” funneled in from above.

Jeanette's desires to live alternative story lines of shared conversation, authority, and decision-making interrupted the school stories shaping this professional knowledge landscape. In similar ways, the school stories interrupted her desires. As we carefully attended to these places of interruption, we saw how Jeanette began to notice new school stories emerging. They were not stories borne in whole group staff meetings as Jeanette imagined they might be. Instead new stories glimpsed on the border of her vision, only barely recognizable at first, began to draw her attention to what was happening right in front of her. Over time both Jeanette's and her colleagues' attention was shifting. In the shift they were re-imagining their professional lives as co-authors of school stories in Jeanette's cozy office space. It was here, not the staff room previously imagined, that new intimately significant, yet tentative school stories were re-forming.

Jeanette's shift in attention intrigued us. The new school stories were not evolving

in the staff room where she was attending, where she expected them to evolve. What, we wondered, caused her to shift her attention to the re-forming possibilities bubbling up in her cozy office space? Over time, as she began to attend to her school landscape, was she beginning to attend more closely to the parade in motion within this school context and how it was shaping, and being shaped by, the diverse stories she and other school participants were living? If so, was she learning to dance more wisely within this particular parade, awakening to possibilities living on the periphery (Bateson, 1994), possibilities that perhaps she was unaware of?

Narrative Account Two

Our first narrative account illuminated ways interruptions to stories of what might be create openings for more responsive stories, reflecting the evolving school landscape, to break through. In this second narrative account, lived on another school landscape, teacher researchers, Janice and Marilyn Huber reconstruct their memories of a staff meeting at Greenville school, a school where many new teachers were trying to re-form or change the story of school. Unlike our first narrative account unfolding over a longer time frame, our second narrative account unfolds moment to moment. We imagined that inquiring into the plot lines of this memory reconstruction might open up possibilities for further understanding school reform narratively from a place of teachers' lives as they danced along in the parade.

It is late August. We are gathered around tables in the meeting room, slogging through agenda items we didn't get to yesterday. Many of us new to this school context are still smarting from the words and images given yesterday in response to our attempts to open up conversation. The walls feel like they're moving inward. We're onto the next agenda item—signing up for the extensive list of committees included in the school binder, section two: committees/calendar. There is no discussion around the work of these committees. Hands pop up here and there as the list is read. Someone records who will do what.

Moving right along, the next item is "Meet the Teacher Night—September 21." We are told that the school newsletter, to be sent home on the first day of school, will inform families of this upcoming event. The sketch for the evening, already outlined in the newsletter and being re-presented at the meeting is that staff and parents will first gather in the library. Following a 30-minute power point presentation given by the school principal and vice principal, parents will be directed to classrooms where teachers will tell them about the curriculum concepts to be covered this year. Children will not be encouraged to come ... at a former Meet the Teacher, child care was provided ... children were unruly ... there's no point in trying to provide child care again ... it's more efficient if only parents come.

The silence in the room roars as eyes look into eyes across the space created by the arrangement of tables. In an act of courage, one teacher tries to reshape the silence. He talks about a prior commitment for the evening of September 21—a commitment to attend a 20-year reunion of the school where he worked over the past six years. His story, like most other response to the list of agenda items, is not directly attended to and, instead, feels ignored and unimportant as the march of information continues.

We will be asked for input on Meet the Teacher at another time. Right now, we're moving on to the next item. Another teacher tries, again, to interrupt the agenda. Her voice, trembling slightly when she first speaks, says that she is deeply troubled by how insignificant it seems that one of our colleagues has a prior commitment on the night already set for Meet the Teacher. She continues by saying that one of the many reasons she felt so strongly drawn to this school context was that she understood that practices, structures, that life in the school would be negotiated. She says that on each of her previous school landscapes she yearned for a relational way of living. She wonders if she was mistaken in her understanding of the philosophy of this school, a school landscape she and nine colleagues in the room are just moving onto this fall. A fragile crack of possibility is created by her words—other teachers begin to speak. Wonders are voiced about how to move away from the “stand up and deliver” of traditional Meet the Teacher evenings. “Let's have food,” someone suggests. “Yes,” says someone else, “And invite the whole family.” “Yeah, it'll be more like a family night then ... a time for us to begin to know the children's families.”

Becoming increasingly multi-voiced the new narrative continues to unfold. “What about a barbeque?” someone else wonders. “We could open up the sliding doors on the lunch room ... it could be like a whole school community gathering, like a backyard barbeque.” Another voice wonders if the band one staff member is part of would consider playing. The staff member says he'll check into it.

These possibilities are momentarily interrupted as some tell stories of parental irresponsibility. We hear that parents will only come for food ... they will leave before the presentations of curriculum can happen ... some parents will send their children to get a free meal but they, themselves, will not come ... it's too much work to prepare all the food ... no one has time to do it.

However, the newly emerging story, shaped by collective wonderings about the often unquestioned practices associated with “Meet the Teacher,” has created a sense of excitement. People seem unprepared to let it go. Voices rise and fall as conversation continues, “It seems more important to have a whole school-family gathering rather than teachers feeling uncomfortable about standing

up and delivering polished speeches about curriculum ... it would be great to do something informal instead—to share a meal together and to invite children to bring their families into the school and classrooms.”

A doubting voice, although quieter now, persists, “But the newsletter has already been printed ... it outlines Meet the Teacher night as something very different than what we’re talking about now.” There is thoughtful response to this worry, “We could send a note home saying that the initial information about Meet the Teacher has changed—both the date and tone of the evening” ... “Instead of gathering parents into the library and later in classrooms, the evening could be an opportunity for the staff (the majority of whom are new to the school) to begin developing relationships with families.” Someone asks for a quick show of hands to see if the evening of September 14 conflicts with schedules. None of the staff have prior commitments for that evening. If we shifted the gathering to one week earlier, we would also be honoring our colleague’s relationships on his former school landscape.

The next agenda item is introduced; yet, people are still focused on the upcoming evening. In small groups around the table, whispers tell that this new story—a story of welcoming families—is a story more fitting with the majority of people gathered here. A sense of excitement seems to have threaded its way into the room. (Reconstructed field note, September, 2000)

Trinh (1989) described a communal gathering place where diverse people come together to discuss matters of importance for the good of their community. Within this village gathering place, Trinh showed conversation as evolving. There was no imposed agenda or time frame. Issues and concerns came forward when they were ready. All voices were attended to. Her description reminded us of our memories of the staff meeting where “Meet the Teacher” shifted to “Welcoming Families.” In our narrative account of this event, there was a sense, that as conversation opened up, as we told and retold stories of what “Meet the Teacher might be”, the traditional format of this event became reshaped, re-formed. It moved from a story of school where teachers tell parents what the agenda will be, to a newly emerging school story of welcoming children and families. This reshaping might be understood as Clandinin and Connelly’s (1998) narrative mapping, to “noting the moments when possibilities for new stories bubble up. Moments when it might be possible to shift the course of a story” (p. 161). Initially, the format of the staff meeting was pre-determined and ordered, conversation had no space on the agenda. The meeting seemed to begin with tones of “received knowing” (Belenky, Clinchy, Goldberger & Tarule, 1986) where those in positions of authority passed down the necessary knowledge and correct answers to those positioned under them. However,

as the staff meeting unfolded, the school story of authority shifted as teachers broke free of the silence surrounding them. As their chorus of voices grew, there was a sense that increasing numbers of staff started to re-negotiate matters important to who they were as a group of people.

Exploring the plot lines in this memory fragment further, we also noticed shifts in other school stories as they, too, were interrupted. Similar to Trinh's (1989) experience, new stories began to circulate "like a gift; an empty gift which anybody [could] lay claim to by filling it to taste, yet [could] never truly possess. A gift built on multiplicity" (p. 2). Moment by moment, we sensed that the former school story of staff meetings was shifting. Initially one teacher's attempt to open up conversation around his previously scheduled commitment seemed to pass unnoticed. Yet, as the staff meeting moved forward, the school story of personal and professional lives being distinct and separate, was questioned. This questioning seemed to open up a space where the personal and professional became momentarily interwoven. Similarly, as conversations opened up around what might be more fitting, more meaningful and more welcoming for children, families, and practitioners, school stories and stories of school, like stories of parents being irresponsible and disinterested in their children's school experiences and stories of children as irresponsible and unruly, also seemed to change. New stories crept in, stories where families and staff could come to know one another, stories of respect and of sustaining relationships. As we considered how the plot lines made visible in this memory reconstruction were being interrupted, that is, plot lines of the separation of the personal and the professional, plot lines of principal as authority, plot lines of teachers informing children and families of the curriculum, plot lines of parents as irresponsible and disinterested and plot lines of children as irresponsible and unruly, we wondered, were the teachers in this memory fragment interrupting school stories as a way to re-imagine their professional lives (Clandinin & Connelly, 1998).

Resonant Possibilities Across the Two Accounts

To deepen our understandings of school reform as practitioners re-imagined their professional lives, we turned to Connelly and Clandinin's (1999) exploration of practitioners' knowing as entwined with their narrative histories as "stories to live by." To understand this conceptualization further, we looked again at the two narrative accounts. In the second narrative account we glimpsed one teacher's stories to live by when she talked about being deeply troubled by the lack of response given to her colleague's concern around the initial plan of Meet the Teacher conflicting with a prior personal commitment. This same teacher's stories to live by were also visible when she expressed that one of the many reasons she

felt so strongly drawn to this new school context was that she understood that practices, structures, that life in the school would be negotiated — a relational way of living she yearned for on each of her previous school landscapes. In similar ways we saw Jeanette's stories to live by, in the first narrative account, made visible through her resistance to fitting into a scripted story of principal-in-charge. Instead of conforming to this expected plotline, she focused on ways to open up and negotiate spaces where she, her colleagues and other school participants could come to know one another and where, together, they could engage in re-forming the school stories surrounding them.

Attending to the stories to live by of both Jeanette, in our first narrative account, and a teacher in our second, helped us see how their stories conflicted with the plotlines of the school stories surrounding them. Uncovering these conflicts, we wondered, if interruptions in school stories occur in places of contradiction, spaces where the stories shaping school landscapes rub up against the stories to live by of teachers, principals, families and children whose lives meet within these diverse social contexts. Did the stories of parents as disinterested and irresponsible emerge from the rubbing up of parents' diverse stories to live by at previous Meet the Teacher events? Were the stories of children as unruly and irresponsible also shaped by similar rubbings, as the stories to live by of diverse children rubbed up against previous school stories of Meet the Teacher as events where their knowing and the knowing of their families was excluded? Similarly, did Jeanette's colleagues respond with raised eyebrows and silence to Jeanette's practices of shared conversation, authority and decision-making because they rubbed up against their knowing of staff meetings as places where their voices were excluded, places where principals were expected to be the one in charge?

Initially we were unsure about how to understand the rubbing up of stories. Did these rubbings create miseducative spaces (Dewey, 1938) where school participants felt an overwhelming sense of needing to conform with school stories and stories of school? Could we understand the spaces of their rubbings as spaces of contradiction? What might spaces of contradiction mean in terms of understanding interruptions to school stories and stories of school as reform moments? Reflecting across the hierarchical and often silencing structures that, at times, dominated our lives as teachers, we thought about the necessary courage and vulnerability it took to not turn away from spaces of contradiction on school landscapes. What, we wondered, happened to school participants' stories to live by, the stories to live by of diverse children, families, teachers and principals, when the risks seemed too pervasive? Yet, as we continued to trouble our memories of these uneasy spaces, we also wondered, were spaces of contradiction a way for school participants to learn to dance more wisely in the parades unfolding on their diverse school landscapes? Did attending to these spaces open up possibilities for new school stories to evolve, stories more intimately connected with the diverse life experiences of children, families, teachers, and principals as school participants?

Spaces of Contradiction as Shaping New Possibilities

Thinking further about how these two narrative accounts help us see school reform as emergent and as shaped in spaces of contradiction, spaces which interrupt and cause gradual yet contextual and meaningful shifts in school stories and stories of school, we wondered, what we might learn by laying these understandings alongside other plotlines of school reform “learning from letting them speak to one another” (Bateson, 1994, p. 14). Recognizing how different this type of school reform was from other reform conceptualizations (Clandinin & Connelly, 1998), we thought again about times when we, as teachers on diverse school landscapes, experienced grand-schemes, theory-driven and practice-driven approaches to school reform. Telling our memories of these stories of reform to each other, we saw common plot lines woven across our tellings. We imagined that in each of these story lines, intentions were to fix schools quickly and efficiently by merely replacing old, less desirable stories of school with newly reformed ones. New policies or visions were simply set down in place. As we troubled these methods of decreeing new reform stories, we saw how they covered over and blanked out (Anzaldúa, 1990) the stories to live by of those living on school landscapes as well as the narrative histories of schools. We doubted if spaces of contradiction could be a part of such reform mandates.

As we awakened to how spaces of contradiction opened up ways to dance along more wisely in the parade, we came to understand these spaces as educative (Dewey, 1938) places of possibility, spaces where school participants interrupted school stories by re-imagining their professional selves within their particular school contexts and, by doing so, creating openings for new, more intimately connected school stories and stories of school to evolve. Still, we wondered about the continuity of these newly emergent school stories. Would they, too, become reified stories that simply replaced and covered over former school stories and the evolving stories to live by of school participants? What conditions would be necessary to keep shaping emergent, re-forming school stories and stories of school that were responsive and contextual?

Reconsidering our two narrative accounts, we are struck by the improvisatory nature of school reform when understood and lived out from a narrative perspective. School participants were enabled to co-author school stories responsive to their own stories to live by and the stories on their shifting school landscapes when they could improvise.

In this paper, we saw how school participants re-imagined their professional selves in shifting moments responsive to both their unfolding school landscape and their own stories to live by. We noticed how shifting moments often occur in places of contradiction. Rather than turning away from these tension-filled places we saw that moments of

contradiction could interrupt the flow of a story of school and enlarge the space for new improvised stories co-authored by school participants re-imagining their professional lives.

From this narrative perspective of school reform as evolving from rather than replacing existing stories, we are drawn back, again, to Trinh's (1989) description of communal gathering places, spaces where conversation evolves, where all voices are honored, spaces where there are no imposed agendas. For us, attention to these kinds of spaces, spaces built on multiplicity, help us to understand school reform narratively, as fluid, shifting and attentive to context and the lives of those who meet on school landscapes.

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Curriculum: Who initiates? Who determines priorities? Who is responsible for what happens? Lessons from Australia

課程：誰發起？誰決定優先順序？誰負責所發生的？ 澳洲的經驗

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Abstract

Curriculum decisions in Australia are largely the result of education decisions made at state and national (federal) levels. Although education is a state responsibility, in recent years the federal government has had a growing influence. It exerts influence in various ways such as by sponsoring or creating new programs, providing incentives for schools and providing disincentives/incentives for state education systems by withholding or not granting funds for particular programs.

Political bargaining has no sacrosanct rules. It is pertinent to examine four highly political questions commonly asked about curriculum decision-making to understand some of the processes. The four questions relate to initiating, determining, implementing curriculum and who has responsibility.

The federal government continues to take initiatives to develop new programs such as a national curriculum, national literacy and national benchmarks. The determination of policies is less clear. Although federal agencies attempt to wield influence through their financial incentives or disincentives, the directors of state education systems are still able to make major decisions about curriculum structures, quality standards, and assessment. Teachers and school principals continue to be the major persons responsible for the implementation of curricula. Responsibility for curricula can involve personnel at school-level and at system-level who monitor student achievements.

These four questions help us to unpack some of the complexities of curriculum decision-making. Not all decision-making in curriculum is ever reasonable or even wise. Many decisions are made which turn out to be short-lived but then others persist which continue for many decades and in turn become very difficult to overturn.

Keywords:

Curriculum initiatives

Curriculum priorities
Curriculum implementation
Responsibility for curriculum

中文摘要

澳洲的課程決定大多取決於州以及國家（聯邦）層級。雖然教育屬於州層級的職責，但最近幾年聯邦政府對課程決定已有越來越多的影響，並以多元的方式施加影響，誠如藉由贊助或籌設新的計畫方案、提供誘因給學校、以及靠著扣押或不允准特定計畫方案的經費來提供對州層級教育體制的障礙因素／誘因。

政治協商沒有極神聖規則。為了解某些過程，研究一般常被詢問有關課程決定的四個高度政治問題是中肯的。而這四個問題與發起（initiating）、決定（determining）、落實課程（implementing curriculum）、責任歸屬（who has responsibility）有關聯。

聯邦政府持續主動致力於發動新的計畫方案，如國家課程、國家閱讀寫作能力指標、國家規範。然而背後的政策決定似乎不甚清楚。雖然聯邦局透過他們的財政誘因或者障礙因素試圖施加影響，但是州層級教育體制的理事仍然保有對課程架構、品質標準、和評量方面主要決定的權利。教師和學校校長仍舊是負責課程實施的主要人員；課程方面的責任則涉及學校層級人員和監控學生成就的體制層級人員。

這四個問題幫助我們解開些許課程決定的複雜性。然而並非所有課程方面的決定都總是合理的或甚至是明智的。雖然許多已作出的決定是曇花一現，但是仍然也有持續了數十年的決定，最後反而變成很難去推翻。

關鍵字：課程倡議、課程優先、課程實施、課程責任歸屬

Introduction

Teachers operate in school situations which tend toward “centralized” or “decentralized” forms of decision-making. There are no pure versions of “centralised” or “decentralised” and the emphasis on one or the other can change drastically in just a few years, as witnessed by the major movements from decentralised to centralised in the United Kingdom since 1988.

Within Australia, state education systems have oscillated between these two forms, although since the mid-19 90’s there appears to have been mainly centralised forms emerging in terms of policy frameworks with opportunities for decentralised decision-making in terms of instruction modes and delivery.

In its pure form, centrally-based decision-making refers to head office personnel in an education system making decisions about “what” is to be taught, and often “how” it is to be taught and “how” it is to be assessed. Based on a pure form of centrally based decision-making, there are a number of advantages, including it provides a uniform delivery system (promotes uniformity, encourages standardization of curricula, enhances equity in allocation and distribution of scarce resources); it saves time (avoids detailed analysis of the needs of individual schools, is efficient and easy to manage, saves time, energy and funds); it ensures continuity (if policies can be maintained over a number of years, if students and parents can be assured that the policies will be the same even if students move schools); it concentrates expertise (enables teams of experts to be used, enables sufficient funds to be provided to produce quality materials); provides “tighter coupling” between the school and the system (if central office can control activities in individual schools, if central office can require schools to reach certain goals).

However, there are also a number of disadvantages of centrally based decision-making systems including they provide little teacher initiative (teachers are mere technicians, there is no scope for teacher involvement in planning); they often lack implementation strategies (insufficient attention is given to implementation strategies at the school level, central office personnel are not involved in monitoring implementation); they increase standardization (they can lead to narrow goals, they assume that schools are more alike than dissimilar); they depend on a rational planning model (they assume that school personnel will want to implement policies developed centrally).

Decentralised forms of decision-making occur when school communities (principal, teachers, students and parents) are responsible for the planning, design, implementation and evaluation of school programs. Some of the advantages of a decentralised approach include that it enables schools to be responsive to their environment, it enables shared decision-making between local stakeholders, it is more motivating for teachers, it

produces a conducive working environment.

Notwithstanding this, there are disadvantages associated with a decentralised approach, including there is insufficient time for stakeholders to plan, there is insufficient local expertise, it requires strong leadership to marshal the energies of disparate interest groups.

As we are experiencing the first decade of the third millennium it is important to analyse current forms of decision-making.

In Australia, all state education systems are moving toward central control of curriculum policy and procedures and assessment, but permitting various levels of decentralised decision-making relating to use of school resources and modes of delivery. Initiatives by the Education Department in Victoria (Education Victoria 1998) have created considerable attention with the emphasis on Schools of the Future and Self-Governing Schools whereby individual school communities have considerable budgetary control (including hiring of staff) within central parameters of a Curriculum Standards Framework, and state-wide assessment measures (Caldwell, 1998).

Political issues are inherent in the basic nature of curriculum decision-making. Theoretically, a curriculum could be created by a single person, usually a teacher. Such a curriculum might be an ad hoc creation intended only for a single student on a single location. Ordinarily, however, curricula are intended for more than one student and for repeated use, and careful coordination becomes increasingly important as a curriculum extends beyond the purview of a single teacher to be shared across classrooms, schools, states or an entire nation. Recent ideas about curriculum planning and development attempt to take into account the complexity that results when the people involved in making decisions about planning, implementing, evaluating, and changing a curriculum pursue these tasks jointly. Cooperation is necessary, but often frictions occur, no matter how well defined the roles of each participant seem to be. In reality, questions always arise about who should make what decisions, when, and on what basis. There is no one right answer for these questions, but different answers have different consequences, which may not be equally acceptable to participants in the process. By its very nature, therefore, curriculum planning and development is as much a political process as it is a theoretical or practical process.

The politics of curriculum decision-making is not a well-defined area within the general study of curriculum, and researchers have described what happens in different ways. Donmoyer (1990), for example, portrays participants as being involved in building coalitions with other self-interested actors, engaging in deliberation using practical reasoning, or using traditional operating procedures as a basis for resolving specific problems and conflicts. Similarly, Elmore and Sykes (1992) contend that participants either use rational means and goal-directed behaviour to achieve mutually agreeable ends

or else political bargaining occurs with actors advocating their own political interests. However, Lawton (1980) and Fullan(2000) both point to some of the least-desirable characteristics of the politics of curriculum decision-making. Lawton suggests that control is the key concern of most participants. He contends that case studies reveal comparatively little partnership among participants and more emphasis on accountability as a means of dealing with their dissatisfaction and distrust. Fullan(1991) describes “negative politics -power most often used not to do things” (p. 582), which leads inevitably to resistance, self-protection, and avoidance.

Clearly some people enter into curriculum deliberations openly and cooperatively, while those who see the process as largely hostile and competitive may participate primarily to protect their own interests (Smyth, McInerney, Hattam, Lawson, 1998). The best interests of students may be one motivation behind curriculum decisions but it is seldom the only one.

In a formal sense, curriculum decision-makers can be defined as those individuals or groups who, because of their professional status or positions of authority, wield influence and have some degree of power to determine courses of action to be followed in schools. Their influence on curricula is not casual or incidental. Teachers always make decisions about how curricula are enacted in their classrooms. Principals can and do make decisions that affect the planned and the enacted curricula in their schools. Superintendents often make decisions that affect the curricula in use in a number of schools and the activities of hundreds of teachers and students.

Although such decisions are part of their professional roles, teachers may themselves be influenced by their students, principals by parents and superintendents by prominent members of the community. In general the influence of students, parents, and members of the community remains indirect, and such individuals or groups cannot be considered curriculum decision-makers unless they have some kind of official status within the curriculum deliberations of the school, such as being members of a curriculum committee.

At the school level, teachers and principals are mainly concerned with decisions that are directly related to day-to-day teaching. Teachers tend to focus on the curricula of their own classrooms and the classrooms of other teachers with whom they work most closely. Principals tend to be more concerned with coordination within curricula or across grade levels (Ornstein and Hunkins, 2004; Louden , 2000). At the state or sometimes even the Federal level, officers of educational agencies make policy decisions about establishing or terminating total programs, such as programs for intellectually talented students.

Curriculum decision-makers-teachers, principals and administrators-do not operate in a vacuum since they are indirectly influenced by many other individuals and groups. This influence may be great and may arise in many ways, ranging from informal conversations to meetings with special interest organisations or to information passed on by the media.

Sometimes influential individuals and groups may simply make their own views known in a general way. At other times they may have a specific agenda, such as including certain kinds of topics within a curriculum or ensuring that a curriculum is taught from what they considered to be the proper point of view. Some groups may be satisfied if the language in which a curriculum is written includes key terms or slogans that they wish to promote. Others may wish to influence the processes or procedures under which decisions about the curriculum are made. Still others may wish to influence the content of the curriculum itself.

Groups that are concerned about language, procedures and substance and that deliberately set out to promote their own agendas are commonly termed *pressure groups*. They have specific goals in mind and have devised appropriate methods to achieve these goals. Even when they do not have official status within curriculum deliberations, pressure groups often exert powerful influences on participants and on their decisions.

Most of the groups discussed above influence curriculum decisions predominantly at the state and national levels. However, their influence (like the influence of students, parents, and the local community) can be profoundly felt by local educators. Further complicating the picture in recent years has been the growing influence of the federal government. The federal government in Australia has no authority over the running of schools within the respective States but it does exert influence in various ways. It has sponsored or created entire programs, provided incentives for schools and provided disincentives by withholding or not granting funds for particular programs.

Considering the complicated influences of different groups and the different levels on which they can work, remembering that the influence of various groups waxes and wanes over time and in different contexts and understanding that political bargaining has no sacrosanct rules, it is pertinent to look at four highly political questions commonly asked about curriculum decision-making:

Who initiates the curriculum?

Who determines priorities?

Who implements the curriculum?

Who is responsible for what happens?

Who initiates the curriculum?

The answer to the question of who initiates the curriculum was once very simple and definite. During the first half of the 20th century in Australia, the persons who made decisions about particular curricula were the senior officials in state departments of education—usually superintendents and curriculum directors.

In Australia, state laws require certain subjects to be taught in all schools, but these laws are usually sufficiently non-specific so that superintendents and curriculum directors can define for the teachers in their districts the particular topics that the subjects should include.

In the latter half of the 19th century in Australia, following the lead from the USA, the question of who initiates the curriculum became a little more complicated. During the late 1950s and the 1960s in the USA, university academics working on high - powered teams sponsored by the federal government, attempted to initiate curriculum change via subject-centred projects. Their brief was to produce the best curricula possible within their respective subject disciplines (Tanner and Tanner, 1995). Kliebard (1986) notes that the entry of the federal government into *curriculum* curriculum through its massive funding of projects altered the relative strength of the various groups that previously had influenced local curriculum development. Local efforts at curriculum revision and change were often superseded by centrally controlled endeavours.

In Australia during the 1960's and 70s some attempts were made to initiate curriculum projects through a national curriculum agency, the Curriculum Development Centre. These were not necessarily at the same level as those in the USA, and only a relatively small number of university academics were involved. Typically senior teachers in each state worked in teams to produce the curriculum project materials.

During the 1970s in Australia, curriculum initiatives became increasingly politicised with the state ministers of education taking charge. It was not a noteworthy period of major changes apart from a heavy emphasis upon literacy and numeracy reforms.

The 1990s in Australia were far more active and ambitious, but on this occasion, it was the Federal Minister of Education who took the initiative and state ministers followed along. John Dawkins, as Minister for Education in the 1980s, initiated a move to establish a national collaborative curriculum project. By using "crisis rhetoric" he steered state ministers into collaborative efforts to produce national statements and profiles in eight learning areas.

Dawkins asserted "we need a curriculum that is relevant to our time and place in the world: a curriculum that is sound in content and which instills positive habits of learning, and attitudes and values such as initiative and responsibility, the pursuit of excellence, teamwork and competitiveness.

What is required is the development of a common framework that sets out the major areas of knowledge and the most appropriate mix of skills and experience for students in all the years of schooling, but accommodates the different or specific curriculum needs of different parts of Australia. There is a need for regular assessment of the effectiveness and standards of our schools. A common curriculum framework should be complemented by a common national approach to assessment. We need to examine how schools can

report to parents and the community on their aims and achievements; how school systems can report on a broader range of objectives, strategies and educational outcomes; and we need to develop a method of reporting to the nation on how well our schools are performing against established goals” (Dawkins, 1988, p.4-5).

These assertions by Dawkins seemed to indicate that the current standards of education in states and territories were not high enough and that details of student achievements were not being reported adequately to parents and the community. Yet it was not clear whether education in terms of current curriculum content and school organisation was in crisis or not. It may have been that the rhetoric of educational reform was more significant than the reality.

As Kennedy and Hoppman (1992) have noted, “the federal government encouraged the development of a new layer of policy formation that complements but also influences existing structures” (p. 4). Using the Australian Education Council (AEC) as a vehicle to transform his rhetoric into action, Dawkins championed the concept of a national collaborative curriculum. He had the commitment and could marshal the necessary resources to develop a detailed common curriculum framework. He cleverly maneuvered policy structures so that existing formal state/territory level curriculum structures were kept intact. Over the period 1991-1993 considerable progress was made in the development of National Statements and Profiles in eight distinct Key Learning Areas. Whilst each of the eight Australian States and Territories contributed to the development of National Statements and Profiles, the adoption of these policies was at the discretion of state/territory governments.

The AEC committee continued on relentlessly to produce national statements and profiles for the eight learning areas. There was considerable optimism that the total package of eight national statement and profiles would be approved by state ministers at the July, 1993, AEC meeting in Perth. However, this was not to be. Some state governments had changed between 1989-1993, and as a result “the power patterns at subsequent AEC meetings also varied. Add to this some intensive lobbying by several high status subject associations and subject professors, together with some inflammatory journalism from state and national newspapers, and the resulting cocktail was very powerful indeed” (Marsh, 1994, p. 152).

Other Federal ministers also took initiatives to develop new programs. Building on state literacy testing programs, then the Federal Minister, David Kemp, persuaded all states and territories to be involved in literacy testing linked to national benchmarks. He did so by releasing the results of a National English Literacy Survey and described the results as “a national disgrace—the scandalous state of children's literacy and how parents are being deceived” (*Weekend Australian*, September 20, 1997, p. 16). This initiative by the Federal government to move into hitherto state education domains was an interesting development and reminiscent of John Dawkin's initiatives in the 1980s.

More recently, the current Federal Minister for Education, Brendon Nelson, has also taken some initiatives to try to establish nationally consistent curriculum outcomes. He has asserted that it is necessary to develop four domains of learning, namely English, mathematics, science, civics and citizenship. Statements of learning for each of these four domains are currently being developed. The minister has used the World Wide Web to promote his latest initiative. Using the Department of Education, Science and Technology website he has presented a range of arguments for a national education framework for schools (Nelson, 2004). His title “Taking schools to the next level: the national education frameworks for schools” is in itself likely to be provocative to state systems who jealously guard their sovereign rights over schools. Although states might try to downplay these initiatives, the Web presentation is readily available to a wide range of audiences.

Who determines priorities?

The question of who determines priorities is similarly controversial. On the surface of things, the persons who initiate a curriculum might seem to be the ones who also determine priorities. This might be the case generally, but there are numerous exceptions that should be considered.

Federal ministers for education role in determining priorities has already been detailed above. As might be expected, ministers for education at the state-level have also become very dominant and directly involved in decision-making over the last decade. After all, the education budget is extremely large and the general public have been demanding much higher levels of accountability. State ministers and their staff are now making significant inroads into major policy and curriculum matters at the state level. It appears that politicians have taken initiatives to change and exclude some traditional decision-makers—senior educators and academics.

The most senior officer of each education system is typically given the title of Chief Executive Officer, Director-General or Executive Director. They are responsible for implementing decisions, regulations and enactments of the government relating to educational matters. They can delegate authority in various ways and degrees throughout the education system but, formerly, they are still responsible for all educational activities, though under the direction of the state minister who may, from time to time make the decisions unilaterally.

Directors-general are becoming increasingly under siege. Reduced funding in each successive year has required drastic cuts in programs. Although education systems have not been subjected to direct economic evaluative criteria, demands for higher standards continue unabated. Not surprisingly, incumbents in the position of directors-general have had short periods of tenure and there has been a tendency in many systems to hire

management specialists rather than senior educators.

Notwithstanding, directors-general still wield considerable power in terms of decision-making. Within their respective executive teams they continue to make major decisions relating to staff deployment, curriculum structures, quality standards and assessment and distribution of resources that affect directly the working careers of classroom teachers.

Devolution to schools has been a major strategy in all states and territories since the 1980s, although it would seem to be as much an economic and political strategy as an educational strategy. In the name of devolution, “regions” have been established with Regional Directors charged with the responsibility of monitoring the activities of a small cluster of local schools. The range of their decision-making powers appears to oscillate with increases or declines in the annual budget, but these senior officers are responsible for accountability standards in their respective cluster of schools (Grove, 2002). They coordinate professional development activities for teachers and initiate procedures for implementing head office curriculum policies.

In addition to the powers and influences developed by the groups described above, there are other forces that should be mentioned such as textbook writers and the World Wide Web. Textbook writers can be very influential especially at secondary school levels because they can often produce the *de facto* curriculum—the “legitimate” knowledge (Apple 1998). Teachers will rely heavily on a good textbook and students and parents are accustomed to systematic study of textbooks (Glatthorn and Jailall 2000). Print versions of textbooks continue to be a major element in the classroom because they provide:

- a core of import learning
- up-to-date information
- instruction on basic skills
- an introduction, a summary or an overview of particular topics

Publishers of educational textbooks, with an eye to maximising sales, endeavour to produce books that appeal to a wide audience, concentrate on traditional—well established topics and themes and generally avoid topics considered to be of a controversial nature. Textbooks therefore can have a restraining impact on teachers if they rely heavily on their use in classrooms.

The World Wide Web (WWW) is the fastest-growing segment of the Internet. Schools are using the WWW as another important source of information together with print tutorials. The WWW has many advantages. It can provide data from a variety of sources all over the world and is available 24 hours a day. Most importantly, it is a cheaper form of accessing data than traditional sources and so is likely to become increasingly attractive for education systems.

Who implements the curriculum?

The question of who implements the curriculum is by far the easiest of the four questions to answer. Although much can be made of the curriculum priorities set by the pronouncements of political leaders and official memoranda distributed by senior education officers, the actual impact of curriculum on students depends upon the persons responsible for curriculum implementation—teachers primarily, but also principals and other support personnel in individual schools. It is still teachers who ultimately enact curricula and create the conditions under which curricula are experienced by students.

Although teachers are subject to constraints such as teacher competency tests and student achievement tests, they can and do make highly sophisticated and intelligent decisions about what they teach and how. Teachers are the filters through which externally planned and mandated curricula pass. They make necessary adjustments and act as a filter to things such as the stated objectives of the curriculum in order to implement what they believe will be the most appropriate curricula for their individual students.

Apple (1990) is optimistic about teachers themselves but he is pessimistic about the erosion of their freedom to make decisions about implementation. He argues that teachers face the prospect of becoming increasingly deskilled because of the encroachment of a technical rationale into education and concomitant efforts to standardise and control everything that teachers do in the name of raising standards in promoting efficiency. It is likely that teachers in the future will be subjected to further pressures towards uniformity and standardisation. Thus the question of who actively implements the curriculum is likely to become more difficult to answer in the future, particularly if there is less room for creative enactment by teachers.

Fullan (1993) is also cautionary when he notes that teachers have the potential to be the major decision-makers in implementing curricula but it depends on the extent to which they have been able to succeed with their inner learning (learning to cope with the immediate environment even if it is adverse) and with their outer learning (being able to work, learn and network with colleagues).

The emotions of teaching is also an issue taken up by Hargreaves (1998). Leadership by teachers in periods of rapid change is affected greatly by issues of emotion. “Teaching is a form of emotional labour and teaching and learning involves emotional understanding” (Hargreaves 1998, p. 319).

Not only the nature of the job itself, but the working conditions on the job, force most teachers to make decisions on the run. The reactions of students to a lesson may cause a teacher to make hasty alterations to a plan or an ongoing activity. The demands generated by a roomful of students tax a teacher’s resourcefulness and ingenuity to the full, and the

teacher may consequently relegate to the “too hard” pile many ideals and theories about what teaching should or could be about.

Furthermore, much of the planning done by individual teachers is done in isolation. A teacher seldom has adult observers, so there is little opportunity to obtain feedback about particular classroom activities, apart from student reactions. Because of time constraints, a teacher may have no opportunity—and perhaps not the inclination, to discuss planning of curriculum implementation with colleagues. Recently, massive intensifications of teachers’ workloads have occurred in many Western countries (Easthope and Easthope, 2000), further, compounding the problem.

McMahon (2000) identifies the drives to micro-manage schools and to raise standards as counter-productively placing new strains on how teachers use their time.

Notwithstanding, many Australian schools continue to operate where teachers’ decision-making is typically confined to the classes they teach and does not affect their fellow teachers. If decision-making occurs across grades then a number of teachers become involved and time is required to develop collaborative procedures. The rewards have to be substantial for teachers to commit the necessary energy and extra time as well as to allow themselves to be diverted from their major focus of teaching and their allotted classes.

Who is responsible for what happens?

The education of students is becoming increasingly results driven, and consequently, attention is focused on the quality of teachers and how they perform in teaching students.

It seems that many stakeholders want to measure/appraise the quality of teaching that occurs in schools. According to Burnett and Meacham (2002) the stakeholders “range from governments, who are keen to dispel beliefs concerning the decline in the quality of public instruction; school administrators wishing to derive maximum benefit from their staffing dollar; professional teaching bodies looking to enhance the professional status of their members; individual teachers desiring job security and promotion on merit; parents wanting the best for their children; to the students themselves” (p. 141).

As professionals, teachers are constantly monitoring their work and that of colleagues working at the same school. In some schools, site-based initiatives have involve more formal monitoring of teachers’ contributions. Whether all states and territory systems will move to formal teacher appraisal schemes in the future is uncertain but highly likely, given their prominence in the United Kingdom and the United States. A number of educators argue that teacher appraisal schemes have the potential to improve teaching (Down et al 2000).

How persons define teacher appraisal will depend on their attitudes and values. Parents at local social events often swap stories about “good” and “bad” teachers. They apparently have criteria for making these judgments and see appraisal as a means of getting rid of the “bad” teachers who teach their children!

In private industry and increasingly in the public service, “performance appraisal” activities are commonly undertaken. These involve managers and staff in planning particular targets. Criteria are used to judge levels of performance of staff in achieving or working towards these targets. In these situations the targets are clearly defined and so the measurement of achievement is usually easily prescribed. Wragg (1987) argues that an interpolation of “performance appraisal” to teaching is very problematic. He asks: do we really know what effective teaching is and can we recognise it when we see it? Danielson (2001) contends that teacher appraisal has only one purpose and that is quality assurance; “as trustees of public funds who are responsible for educating a community’s young people, educators in public schools must ensure that each classroom is in the care of a competent teacher. Most educators recognise that teaching is a complex activity and that a simple, brief observation of a teacher in the classroom is not enough. An evaluation system should recognise, cultivate and develop good teaching” (p. 13).

In Australia, teacher appraisal is evolving on a number of fronts but is still embryonic in terms of major developments. A recent development was for teacher professional associations to enter into partnership with universities to develop subject specific sets of professional standards in English and Literacy, Mathematics and Science. These standards appear to be modelled on those developed by the National Board for Professional Teaching Standards (NBPTS) in the United States.

What is certain is that if new methods of performance assessment for certification and developed nationally, it will be a powerful incentive for teachers to engage in the programs. It is highly likely that employing authorities will give recognition (and financial awards) to teachers to obtain the certification.

Concluding comments

The use of these four questions about curriculum helps us to unpack some of the complexities of the decision-making involved. Not all decision-making curriculum is reasonable, or wise. Many decisions are short lived.

We do not know what the future holds for decision-making in curriculum. It may be that centralising pressures will prevail, or it might be the case that society will recognise the value of decentralising tendencies and autonomy and independence. What we can be certain of, however, is that those people who plan and enact curricula, particularly

teachers and other curriculum specialists will continue to weigh alternative approaches and the issues that choosing among alternatives entails.

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課程評鑑之規劃取向與學校 課程評鑑之途徑

The planning orientation of curriculum evaluation in compulsory schooling and the approaches to school curriculum evaluation

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中文摘要

「評鑑」，是由評鑑者針對特定接受評鑑之對象施展一種是非善惡與績效優劣之考核判斷，具有一種價值引導的意義與目的。就「課程評鑑」的意義而言，顧名思義，課程評鑑係評鑑在課程領域之應用，是教育人員蒐集有關課程資料，判斷課程材料或課程活動的價值，指出教育內容和活動改革方向。本文從探究國民中小學九年一貫課程改革的評鑑規劃取向、學校課程評鑑的範疇與途徑，以引導課程評鑑概念的再概念化，特別是探究以學校課程方案為焦點的課程評鑑途徑、以學校課程計畫為焦點的課程評鑑途徑、以學校整體課程發展為焦點的課程評鑑途徑等三個範疇的課程評鑑途徑等，進而論述如何落實學校課程評鑑，作為日後更進一步實施教學評鑑、學習評鑑與學校教育評鑑之參考。

關鍵字：學校課程方案、學校課程計畫、學校整體課程發展、課程評鑑

Abstract

Evaluation is to evaluate a particular event or object and to judge its weakness and strength. The meaning of curriculum evaluation is to apply the concept of evaluation in the area of curriculum studies. Educators could collect

information and to judge the value of curriculum activities and materials, and suggest the education content and direction of education reform. Firstly author in the article explores the planning orientation of curriculum evaluation of compulsory school education reform in Taiwan; and secondly the author explores scope and approaches to school curriculum evaluation, i.e. evaluation of school program, evaluation of school curriculum plan, and evaluation of whole school curriculum development. In particular, the author outlines the approach to school curriculum program-focused curriculum evaluation, the approach to school curriculum plan-focused curriculum evaluation, the approach to school curriculum development-focused curriculum evaluation.

Keywords: school program-focused curriculum evaluation, school curriculum plan-focused curriculum evaluation, school curriculum development-focused curriculum evaluation, curriculum evaluation

壹、前言

就「評鑑」(evaluation)的意義而言，評鑑可以是進行一種考試或測驗，評鑑也可以是目標和表現一致程度的確認；評鑑也可以是專業的批評判斷品質，指個人或團體對某一事件、人物或歷程的價值判斷歷程 (Posner, 1995)，有系統的評估某一對象的價值或優缺點，並指向優點和缺點的確認，藉以提供改進的方向與積極回饋的複雜工作 (黃光雄與蔡清田，1999)，也是判斷學習經驗是否已經達到預期教育目標的歷程，涉及了優劣的辨別 (Tyler, 1949)。因此評鑑包括品質的描述與數量的描述，評鑑對象可以是個人特質，也可是課程方案；而評鑑的目的可以協助教育人員進行品質評鑑，不只可以「證明」(prove)評定績效，更可作成更佳決定，促成「改進」(improvement)。

簡而言之，「評鑑」是由評鑑者針對特定接受評鑑之對象施展一種是非善惡與績效優劣之考核判斷，具有一種價值引導的意義與目的，然而，評鑑卻往往讓接受評鑑者感到有一股讓人望之儼然而卻步三分的權力運作與被壓迫感，因此，「評鑑」一詞有時令受評者聞之色變感到害怕驚悚，更讓無知者不知所措而極盡推託之詞企圖逃避評鑑，未能冷靜地思索評鑑的意義及其

目的。是以，評鑑者與接受評鑑者雙方都應該慎思熟慮評鑑的意義與目的為何？評鑑的目的究竟是追求績效？或是追求改進？這是一個值得深究的問題。

就「課程評鑑」(curriculum evaluation)的意義而言，顧名思義，課程評鑑係評鑑在課程領域之應用(黃光雄與蔡清田，1999)，是教育人員蒐集有關課程資料，判斷課程材料或課程活動的價值，指出教育內容和活動改革方向(黃政傑，1987)。換言之，「課程評鑑」是一種價值引導的構想(歐用生，1999)，透過建構及分配資訊，以引導某種特定課程計畫方案或教育系統的行動(Norris, 1990)。有趣的是，「課程評鑑」更是一個往往為人所忽略的冰山之一角，饒富課程研究之深層意義與價值。

就課程評鑑的目的而言，課程評鑑可以有助於診斷並修正課程發展的問題，指出課程的內在價值，進行比較與判斷結果，以便作成選擇與決定。特別是課程領域的評鑑，可以作為教育人員進行課程慎思熟慮構想的思考平台與媒介，一方面提升教育人員的課程專業思考並促進教育人員的課程理解，以展現課程專業的素養與效能，另一方面可以進而協助教育人員以積極而健康的態度面對課程發展所遭遇的問題，進而研擬可能解決課程問題的行動方案，展現課程發展的專業績效，是以，教育人員可以秉持相互信任與彼此尊重關懷的態度，將課程評鑑比擬為一種課程發展的健康檢查，讓課程評鑑成為教育人員課程專業生活當中的一部分，其目的乃在幫助課程政策決定者、學校教育行政人員、教師、家長或社會人士了解課程發展的特色與時空背景，並將證據公開化，進而認識課程價值(陳伯璋，1999)，可提供教育人員、學生及家長一種心理保障，促成課程發展合理決定，提昇課程之品質。因此，主管教育行政機關，不應該為了評鑑而進行評鑑，應規劃適切的課程評鑑，獲得有效的具體證據，並依據評鑑結果，提供具體的改進措施，改進課程發展品質，證明課程改革的效能(蔡清田，2003)。

是以，本文探究國民中小學九年一貫課程改革的評鑑規劃取向與學校課程評鑑範疇與途徑，以引導課程評鑑概念的再概念化，特別是探究學校課程方案為焦點的課程評鑑途徑、以學校課程計畫為焦點的課程評鑑途徑、以學校整體課程發展為焦點的課程評鑑途徑等面向，進而論述如何落實學校課程評鑑，作為日後更進一步實施教學評鑑、學習評鑑與學校教育評鑑之參考(蔡清田，2004)。

貳、國民中小學九年一貫課程改革的評鑑規劃取向之探究

由於過去多年的努力，台灣地區已於1968年實施九年國民義務教育，在學校數量擴充方面已有可觀的成就。但學校課程改革速度及幅度均遠不及社會變遷的需求。尤其台灣社會在政治解嚴之後，急遽邁向多元、開放、競爭與富裕，學校課程更顯現與社會脫節的嚴重現象。因此，目前台灣地區推動國民中小學九年一貫課程改革方興未艾，甫進入學校課程發展「深耕計畫」階段，需搭配「基本能力測驗」與「入學管道多元化」，授權進行學校本位課程發展，發揮教師課程設計專業能力（黃光雄與蔡清田，1999）。所謂深耕易耨，課程政策決定者不宜急功近利揠苗助長，更不宜急於短期績效而催促學校教育人員提前收割或驗收成果。課程改革是一個牽涉層面非常廣泛複雜的過程，容易產生許多迷思，甚至陷入陷阱而不自知，因此課程改革的評鑑十分重要。然而，這是我國課程改革中最被忽視的一環（歐用生，1999）。

教育部公佈「國民中小學九年一貫課程綱要」，詳列課程改革基本理念、國民教育目的、課程目標、基本能力，可見國民中小學九年一貫課程具有課程學者泰勒（Ralph W. Tyler）的目標模式精神（Tyler,1949），而且其課程評鑑也具有美國在1930年代「八年研究」（the Eight Year Study）之目標獲得模式特色（黃光雄與蔡清田，1999；黃政傑，1987；Madaus & Stufflebeam,1989；Tyler,1949），旨在確認課程方案達成目標的程度。教育目標的建立是引導課程發展最重要的工作，而評鑑則必須按照預定的目標，蒐集適切的資料證據，以確定目標達成與否。具體言之：

一、建立廣泛的目的或目標

「國民中小學九年一貫課程綱要」指出跨世紀的國民教育課程應該培養具備人本情懷、統整能力、民主素養、鄉土與國際意識，以及能進行終身學習之健全國民（教育部，2003）。整體而言，國民學校教育目的在透過人與自己、人與社會、人與自然等面向與人性化、生活化、適性化、統整化、與現代化之學習領域教育活動，傳授基本知識，養成終生學習能力，培養身心充分發展之活潑樂觀、合群互助、探究反思、恢弘前瞻、創造進取的健全國民與世界公民。

上述學校教育目的，便是根據前行政院教育改革審議委員會與教育部推動教改的理念，指出國民中小學課程以人的生活為中心，配合學生身心能力發展歷程；尊重個性發展，激發個人優良潛能；涵泳民主素養，尊重多元文化價值；培養科學知能，適應現代生活需要。上述國民教育目的是政府進行課程規劃的依據，並且合乎以生活為中心進行課程規劃（行政院教育改革審議委員會，1996），可以做為九年一貫課程評鑑的主要依據。

二、將目標加以分類

國民中小學九年一貫課程，最明顯的變革之一，是建立國民教育九年一貫的學校課程目標，將過去傳統國民中小學分別列舉的學校教育目標，統整為國民教育學校教育目標（教育部，1998），從人與自己、人與社會、人與自然等三個面向來探究人的生活，引導學生致力達成下列課程目標：

（一）「人與自己」的面向

1. 增進自我了解，激發個人潛能。
2. 培養表達溝通、創作及審美能力。
3. 獲得運動常識與技能，陶冶體育情操。

（二）「人與社會」的面向

4. 培養負責守法、積極參與、團體合作的民主法治知能。
5. 發展互助合作的群己關係，重視倫理價值，提昇道德判斷能力。
6. 啟迪包容異己，尊重多元文化，恢弘國際視野。

（三）「人與自然」的面向

7. 啟發探究興趣、批判反思、創造發明等科學態度。
8. 學習科學方法，理解科學概念，注重科學實驗，應用科技新知。
9. 了解自然環境，維護自然生態。
10. 掌握科技資訊，培養終生學習意願。

就課程目標連續原則而言，第 1 至第 3 條的目標是屬於「人與自己」的面向，強調個體身心發展的關係，促進個體身心發展；第 4 至第 6 條目標則是屬於「人與社會」的面向，強調社會與文化的關係，增進社會與文化參與；第 7

至第 10 條目標則是屬於「人與自然」的面向，強調自然與環境的關係，正確認識自然與環境並適切運用。這些國民中小學之課程目標，依據九年一貫之整體原則，以生活教育、品德教育、健康教育、民主法治教育與反省批判思考為發展重點，培養活潑樂觀、合群互助、探究反思、恢弘前瞻、創造進取的健全國民與世界公民。

另一方面重視生活實用的能力，特別強調生活實用能力的培養，在其總綱內規定以統整的精神設計課外活動，輔導學生積極參與社團與服務社區，並對當前社會關注的主要議題；資訊教育、環保教育、兩性教育、人權教育、宗教教育亦融入課程中，以培養學童當前社會實用的生活能力。

上述國民教育學校課程目標是政府進行課程發展的依據，頗能掌握理想教育目標之理念（行政院教育改革審議委員會，1996），也可以做為九年一貫課程評鑑的主要依據。

三、運用基本能力的行為術語具體指標界定目標

以往中小學課程標準所制訂的教育目標陳義甚高，或不夠具體，而且受升學主義及聯考的影響，學習大都偏重知識記誦方面，無法與社會實際生活配合，造成「學非所用」或流於偏狹（陳伯璋，1999）。國民中小學九年一貫課程綱要，進一步將國民教育學校課程十項目標轉化為基本能力，以培養現代國民所需的十大基本能力（教育部，1998；2003），包括（一）了解自我與發展潛能，（二）欣賞、表現與創新，（三）生涯規劃與終身學習，（四）表達、溝通與分享，（五）尊重、關懷與團隊合作，（六）文化學習與國際瞭解，（七）規劃、組織與執行，（八）運用科技與資訊，（九）主動探索與研究，（十）獨立思考與解決問題。

基本能力是一系列目標的組合，皆由學生行為的改變，作為學校課程目標的具體教育指標，如同泰勒在「八年研究」，設計「可欲改變的學生一般行為組型」之具體目標（Tyler, 1949），可協助課程設計人員，依據課程目標，發展出更明確的指標，並可進一步再加以細部設計教材內容與學生的「學習經驗」，以達成一套預期的學生學習結果。此種基本能力的設計，以學

生將來所要表現的具體行為，作為課程設計依據，流露出目標模式本質（黃光雄，1996），更反映出能力本位的精神（陳伯璋，1999）。

基本能力是基於社會變遷及未來生活需求所做的評估，雖有理想色彩，但基本能力比課程目標更為具體，可以作為編制教材與評鑑教育績效的指標，旨在說明各級學校必須達成的基本目標或最低標準，此不僅為各學科內容編輯的基準，同時配合未來的基本能力測驗，引導學生進入更高學習階段（陳伯璋，1999）。

四、尋找能顯示目標達成程度的情境

九年一貫課程綱要規定，國民教育自一年級至九年級，均提供語文、健康與體育、社會、藝術與人文、數學、自然與生活科技及綜合活動等七大學習領域（教育部，2003），增進課程結構的銜接與連貫，落實國民教育法第七條：「為培育身心健全的國民，國民小學及國民中學……注重其連貫性」的規定，強化國民教育階段課程連貫性（林清江，1998；陳伯璋，1999）。從課程發展的觀點而言，九年一貫課程改革人員從人與自己、人與社會、人與自然等人類生活面向之廣域課程出發，規劃七大學習領域，取代只重視升學準備考試之傳統學校科目，統整學習科目知識與學生生活經驗，避免科目分立，知識支離破碎，兼顧科目課程與活動課程的理論與實際，作為實踐課程目標之重要依據（林清江與蔡清田，1997）。

而且十大基本能力，都是學生在七個學習領域所必須學習的亦需在七大學習領域中將此十個基本能力轉化為「能力指標」，以社會學習領域的能力指標為例：

表1 基本能力與社會學習領域的關係舉隅（教育部，1998）

指 標 基本能力	領 域 社 會
（一）了解自我與發展潛能	<ul style="list-style-type: none"> · 具有積極自信的態度 · 瞭解自己的特性與能力 · 達成自我實現 · 發展自我價值體系 · 瞭解個人與生活環境間之關係
（二）欣賞、表現與創新	<ul style="list-style-type: none"> · 關懷並認同本土 · 具有發揚我國文化的能力
（三）生涯規劃與終身學習	<ul style="list-style-type: none"> · 具有獨立學習的能力 · 具有價值澄清及判斷的能力
（四）表達、溝通與分享	<ul style="list-style-type: none"> · 有效地表達與溝通 · 具有開放的態度 · 瞭解他人的特性與能力
（五）尊重關懷與團隊合作	<ul style="list-style-type: none"> · 具有尊重、平等及人權觀念 · 遵行法治精神 · 具有團隊合作能力 · 體會民主精神 · 進行適當的道德判斷並遵守合理的社會規範
（六）文化學習與國際理解	<ul style="list-style-type: none"> · 瞭解人與社會、文化及生態環境之間的多元關係 · 關懷人類福祉 · 認識本土及其他社會文化或生態環境的特色 · 形成世界觀 · 瞭解國際人權宣言及童權公約的內容
（七）規劃、組織與執行	<ul style="list-style-type: none"> · 發展負責任的態度 · 具有社會正義感 · 具有社會參與及實踐的能
（八）主動探索與研究	<ul style="list-style-type: none"> · 發展研究的能力 · 發展研究的興趣 · 發展創造力 · 瞭解個人的社會角色和權利義務
（九）獨立思考與解決問題	<ul style="list-style-type: none"> · 具有問題解決能力 · 具有批判思考能力 · 具有作合理決定的能力
（十）運用科技與資訊	<ul style="list-style-type: none"> · 擁有處理資訊的能力與策略 · 瞭解並應用基本的社會科學知識

這一方面可為課程設計之依據與學習成效評估的重要參照指標，進而實施補救或充實教學。另一方面更可以此發展為基本學力測驗，替代入學考試，結合能力指標的測驗，將使課程、教學與評量有更好的配合，這對教育改革

成效的提升將有助益，更可做為學校評估成效的尺度，評估學校辦學績效，反應「績效責任」的精神（陳伯璋，1999）。然而，如何在七大學習領域當中，透過學習單元的精心設計，將學習內容轉化成為具有連貫與統整的組合，反應能力指標，引導學生獲得基本能力，將是一項具有挑戰性的艱鉅任務。

五、發展或選擇測量的技術

依課程綱要的規定，各學習領域課程綱要之研定，應列出該課程的定義與範圍、教學目標、基本能力等，以作為教學評量之參照。而且九年一貫課程評鑑的選擇發展和選擇測量技術由中央、地方政府和學校分工合作，各依權責實施（教育部，1998）。教育部建立各學科學力指標，並督導地方及學校課程實施成效；地方政府則負責辦理與督導學校的課程實施及各學科表現的測驗，此部分有待規劃更明確的行動方案與策略步驟；學校則負責課程與教學的實施，並進行學習評鑑，各個學校亦需組織「課程發展委員會」審查全校各年級的課程計畫。而且中小學教科用書應依據課程綱要的規定編輯，並經由審查機關審定通過後，由學校選用。

六、蒐集學生表現的資料

依課程綱要的規定，九年一貫課程的評鑑方法應採多元化方式實施（教育部，1998；2003），收集學生學習結果與平時學習情形的表現資料，同時注重質與量的評鑑，兼重形成性和總結性評鑑，並定期提出學生學習報告。評鑑的內容須涵蓋認知、技能及情意等方面，而教學評量，同時可按學科性質與評量目的之差異性，掌握適當時機採用觀察、實作、表演、口試、作業、練習、研究報告、筆試等各種多元而變通之評鑑方式（林清江與蔡清田，1999）。

七、將蒐集到的資料與具體目標的行為指標進行比較

教育目的明確化，可以形成詳細的課程目標與基本能力等具體目標或行為目標，因此，透過建立明確目標，便可預測、控制各種課程設計的現象。甚至，就連課程評鑑的方法途徑也有一定的遵循標準，進而判斷其達成課程目標的程度，作為課程修訂的參考依據。因此，課程目標具有統一教育目標、

而且容易進行課程評鑑的優點，重視課程目標的明確性與可觀察性，採取可觀察或可測量的形式的課程評鑑，指出學生學習的終點，以引導教學活動之進行，所以相當強調績效與科技取向。

九年一貫課程評鑑結果的利用，包括改進課程、編選教學方案、提升學習成效，以及進行評鑑後的檢討（教育部，1998）。可見評鑑具有價值判斷、決定與方案改進之意義，其評鑑功能，也包括「診斷」、「修正」、「預測」、「確立」等，藉由評鑑促進課程設計，達成目標（黃政傑，1987；Eisner, 1994）。因此，教育行政主管機關進行課程評鑑，以課程目標與基本能力為課程評鑑之依據，一方面可指出並判斷學生學習經驗的有效性，更可作為修正教科用書與建議教師教學與學校辦學之依據，顯示達成目標與否及其達成程度。

值得注意的是，評鑑往往被視為一種「強化品質控制的程序」（House, 1974），評鑑可以提供資訊，協助中央政府國家教育決策人員、地方政府教育官員、學校教師與社會大眾及家長等，進行課程決定（Simons, 1971）。例如英國「國定課程」的課程評鑑，基本上是一種政治控制的手段（蔡清田，1999）。中央政府欲圖透過「教育標準局」的視察，督導學校辦學效果（呂木琳，1999；謝文全，1999），特別是執行「國定課程」的「學習方案」之成效（蔡清田，2003），企圖在學生七歲、十一歲、十四歲與十六歲時進行全國性四個關鍵階段國家考試，旨在評定學生可測量的預定學習結果，以瞭解「成就目標」的達成程度與「學習方案」的實施情形，考核學校教師教學與學生學習成果，並檢視其達成預定「成就目標」的符合程度。

此種重視目標獲得模式的評鑑，強調由上而下的行政強制評鑑方法，就如同一種「科層體制的評鑑」（bureaucratic evaluation）途徑（MacDonald, 1974），課程評鑑人員必須順從中央政府的「法定命令」之政治權威，經由教育行政手段以達成國家既定政策目標，強調教師教學的結果，但是卻忽略了課程發展的動態過程，更漠視教室情境中動態的複雜因素（蔡清田，2003），因此，課程評鑑的模式也由「形成性評鑑」轉移到「總結性評鑑」（Norris, 1990），這是一種非常

狹隘的課程評鑑觀。事實上，課程目標與基本能力絕對不是評鑑的唯一依據，仍須注意不受目標約束的基本能力以外的相關因素（黃政傑，1987；歐用生，1996b），方可確保評鑑更加嚴謹與完備。

參、學校課程評鑑的範疇與途徑之探究

課程的良窳，關乎教育至深且鉅，而欲針砭課程的好與壞，則端賴評鑑工作的進行（Willis, 1998）。然而課程評鑑與課程的意義範圍關係密切，要確定課程評鑑範圍，首先需了解何謂「課程」。在課程實務中，最常被採用的課程概念，是指課程標準或課程綱要所規範的一切「課程方案」或「科目」或「學習領域」教材大綱內容。九年一貫課程綱要指出，教科用書的審查應以符合課程綱要的精神與內涵為原則，提供多元化教材的發展空間，審查標準由教育部另定之（教育部，1998）。在教科書評鑑規準方面，目前國立編譯館雖有制訂審查辦法，卻缺乏明確具體的判斷規準，特別是配合教科書開放政策，需建立公正客觀而合理的審查制度，由公正機構執行（陳伯璋，1999）。至於教科書的選用方面，究竟是由學校或學區或以縣作為選用單位，更是缺乏評鑑規準，必須針對其利弊得失審慎決定。因此，委託學術機關或鼓勵學者專家先研究發展共通性的評鑑規準，然後再進而建立各學習領域教科用書的評鑑規準，有其重要性（陳伯璋，1999）。

然而課程不只是教科書，更是學校教育的主要內涵，亦是達成教育目標的手段。特別是教育部希望透過九年一貫課程的人類生活經驗廣域課程，取代過去只重視升學準備考試科目之傳統學校課程，避免科目林立與知識支離破碎，因應終生學習社會來臨之教育改革理想。是以，如將科目或教科書視為全部課程，將導致課程評鑑窄化。因此，除了視課程為「科目」或「學習領域」之外，尚有課程計畫與課程發展之定義。評鑑的範圍可以包括課程教材、課程計畫、實施成果等，換言之，課程評鑑也應指出學生因素之外的課程發展過程、課程本身、課程實施、課程效果等內容因素及範圍項目之價值優劣。而且課程評鑑應被視為整個課程發展過程當中每一步驟的必要工作。

因此，學校課程評鑑的範疇與途徑，至少應可包括以學校課程方案為焦

點的課程評鑑途徑、學校課程計畫為焦點的課程評鑑途徑、學校整體課程發展為焦點的課程評鑑途徑等三個範疇。然而，一般人往往不易加以區分，三者是否為不相同？或有概念的重疊？簡而言之，三者之間的關係是逐漸加深加廣的課程發展理念，課程評鑑的焦點有些差異；茲就下列三面向加以探討說明如次：

一、以學校課程方案為焦點的課程評鑑途徑

學校課程方案（program），又稱學習程式（learning program）簡稱為學程，可為特定學習者提供的一套學習內容（Eisner, 1994），例如國民小學語文領域課程方案、國民中學數學領域課程方案等等。為了達成學校願景與整體課程目標計畫，必須適切設計方案（program design），以落實學校願景目標與課程計畫（蔡清田，2002）。因此，課程方案目標如何選擇組織、教材內容先後順序、以及時間表和資源供應如何安排？工具和材料、環境、相關教學人員如何進行部署和角色界定，這些都是方案設計所涉及的問題（Skilbeck, 1984）。特別是學校應該透過何種方法，來引導教師從事方案設計？教師是否要以小組方式一起設計？課程方案內容要如何分配到各個年級與各個領域？這些都是進行方案設計時應該考量的問題（蔡清田等譯，2002）。

方案設計，是針對語文、數學、自然與生活科技、社會、健康與體育、人文與藝術、綜合活動等正式課程方案與教務、學生事務、輔導、總務等各處室的非正式活動課程方案，進行選擇、調整與創造等設計，這是學校課程的主要構成要素。在性質上，「方案設計」是擬訂學生學習目標與選擇組織安排活動的「科學技術」，較關心具體可見而實用的課程決定「產物」之製成。方案設計係指以學科知識、學生興趣、社會需求、文化要素等作為理論基礎來源並依照課程理論基礎，對課程因素進行選擇組織與安排（黃光雄與蔡清田，1999）。

學校課程評鑑可以指出課程方案教材本身、課程方案設計過程、課程實施、課程效果等內容因素之價值優劣。課程材料是學習概念、原理、原則、方法等的媒介，往往是教學過程中師生接觸時間最多的東西。不良的課程方案材料，不但無法發揮教學效果，更可能導致錯誤學習。因此，為了確保學習品質，課程方案材料一定要慎重評鑑。

（一）課程方案教材的評鑑

課程評鑑，可以是各學習領域課程方案的教科用書經由審查選用的價值判斷過程，進而改良課程方案、提昇學習成效，將評鑑結果再回饋到課程方案中，不斷修正（蔡清田等譯，2002）。就課程方案材料的評鑑，可參考黃政傑（1991）所提出的歷程，特別是確定評鑑目的與範圍、組織評鑑小組與委員會、接近課程材料、分析課程材料、建立評鑑規準、進行課程材料評鑑、提出評鑑報告。

各學習領域小組或各處室，應仔細評鑑該領域方案或活動方案所使用的教科用書，特別是就國立編譯館編輯或審查通過之各出版社教科用書，加以評鑑與選用（教育部，2003），並將評鑑結果呈報學校課程發展委員會審查。當對於確定的學習領域或活動的主題範圍和順序時，也應仔細評估是否符合課程綱要的能力指標，判斷教材可對學習者達到學習目標做出多少貢獻？並考慮教材本身是否為高品質？此教材是否可以被有效地實施？可參考下表的規準（Glatthorn, 2000, 130）：

表2 評鑑教材的規準

格式、外觀、持久性

是否具有高品質教材的物理屬性：清楚的格式，外觀引人注目，耐久的材質

體裁

教材對讀者而言，是否具可讀性但又不會太過度簡單？

教材是否避免性別、種族與年齡的偏見？

內容

教材內容是否能適當反應國家文化的多樣性？

版權日期可以指出是否為最近更新的教材內容？

教材內容與課程是否維持一致？

教材內容對於所處理的題目是否相關而且具有足夠的深度？

作者

作者是否包含了此領域的學者，以及教學經驗豐富的班級教師？

評鑑

課程材料是否已經在實際教學現場嚴謹測試過？

另外，「教材方案目標」的評鑑重點，也要注意教材方案目標是否符合教育目標？是否兼顧認知、情意、技能三個領域？是否兼顧社會及學生需求？

「教材方案內容」的評鑑重點，也要留意課程內容是否與目標一致？內容的難易度是否適當？內容是否實用？課程內容是否均衡？是否有多樣化的活動

內容？值得注意的是，並不是每次進行課程評鑑時，都需要去評鑑所有課程方案教材，換言之，每年可以只針對一項重點教材進行評鑑。例如，第一年進行低年級的閱讀方案，第二年進行中級數學方案的評鑑。但是，在一個大型學校當中，學校可能一次要評鑑更多的學習領域內容，並逐年選擇針對某一項重點課程方案教材，追蹤其所有資料。

（二）課程方案設計的評鑑

由教師的學習領域課程方案設計，可以看出教師的問題解決與課程思考，顯示教師如何作成這些課程方案設計的決定，教師選擇強調某種特定教材，或者教師如何詮釋方案設計和學生之間的關係（蔡清田等譯，2002）。

就評鑑課程方案的問題而言，此種評鑑當中，教師本身扮演重要的角色。評鑑課程方案時，可以考慮下列的問題（Henderson & Hawthorne, 2000）：教師如何詮釋課程方案設計的目的、基本理念與主要特色？教師如何詮釋其學生參與方案學習內容與思考形式的相關興趣與準備度？教師是否對該方案的內容知識、學習策略與所要使用的教材，感到有信心？

就評鑑課程方案的探究形式而言，所用來蒐集課程方案設計的探究形式，可以包括：分析教師的札記或日誌的內容，以指出所考慮的觀念，以及所用來拒絕或接受某種方案選擇的規準；訪問教師，請教師說明在某一特定的教學段落期間為何選擇做出某種課程方案的教學決定；小型的焦點團體時段，讓教師共同分享其札記或日誌與設計的歷程。特別是對參與課程方案設計的教師而言，小型的焦點團體時段，可以協助探究其方案設計的詳盡細節。

此外，如果要深一層進一步地探究教師的課程方案設計，則可參考Connelly與Clandinin（1988）的研究，其用來評鑑教師的課程方案品質之規準，亦即，活動的適切性、內容的真實性、活動與教材的想像力、教材對所有學生的可接受性、涵蓋面、無偏見的教材等等。

二、以學校課程計畫為焦點的課程評鑑途徑

學校課程方案為主的評鑑，可為特定學習者提供一套學習內容，所謂的特定學習者例如中輟生、特教學生或特定年級或特定班級的學生；學校課程方案為主的評鑑與學校課程計畫評鑑的區別在於，前者是針對特定學習者（

如一年級），而後者可能是針對一般學生（如一到六年級），另一方面學校課程方案為主的評鑑比較偏重於教科書（教材）的選擇，而學校課程計畫評鑑的焦點則是強調以學校願景、目標、計畫為原理原則，來選擇課程方案。

課程是達成學校願景與教育目標的通道，因此必須透過事前「課程規劃」（curriculum planning）的「慎思熟慮構想」（deliberation）（蔡清田，2001）。「課程規劃」是學校課程發展的要素，乃是學校課程發展的經營團隊，從計畫觀點，進行課程發展的「築夢」行動，特別是透過課程發展委員會，根據社會文化價值、學科知識與學生興趣，針對學校願景、整體課程目標、課程計畫、課程方案架構與進程等因素，進行一系列選擇、組織、安排之規劃建構（蔡清田，2002），呼應課程綱要的呼籲，審慎規劃學校課程計畫（教育部，2003）。因此，學校課程計畫應該符合課程綱要精神，配合學校本位特色主題並融入六大議題教學，配合地方文化和生活經驗相結合而且具有彈性的配套措施，以因應教師專長自編教材與協同合作教學，實施前適時呈報主管機關備查。

學校課程計畫本身是一種書面紀錄，是一項可被加以分析的資料，評鑑者可以指出其差異與意義。國民中小學九年一貫課程綱要指出課程評鑑應由中央、地方政府和學校分工合作，各依權責實施，而且九年一貫課程綱要建立學校課程報備制度，在課程實施前，學校應將課程計畫呈報主管機關備查（教育部，2003）。

學校課程計畫的評鑑重點宜包括，計畫是否有理論依據？計畫的目標是否適當？計畫的原則是否適當？計畫的架構是否適當？課程計畫的績效（如時間的掌握）如何？因此，學校課程計畫的評鑑，可以結合認可模式（accreditation model）（黃政傑，1987），一方面採用內部評鑑，由學校內部的「課程發展委員會」之學校行政人員代表、年級及學科教師代表、家長及社區代表與學者專家，辦理校內自我評鑑，列管各項重點工作，進行評鑑，提供回饋，掌握教育績效（林清江與蔡清田，1997）；另一方面並配合地方政府與中央政府進行外部評鑑，若合乎評鑑指標便予以認可，若未達指標，則請學校限期改善（林清江與蔡清田，1999）。

（一）學校課程計畫的評鑑工具

我國國民中小學課程綱要的實施要點，指出學校應負責課程與教學的評

鑑，並進行學習評鑑，且要善用評鑑以作為改進課程。特別是學校課程發展委員會的任務包括：核定學校課程發展的方向與內涵、審定年級課程計畫、規劃學習領域節數、評鑑學校課程實施狀況、評鑑年級課程發展計畫實施成效（教育部，2003）。課程評鑑者可參考表3，運用一個暫訂的協議標題，就學校課程計畫的情境立場與課程計畫結構的清晰度、課程實施說明的關聯性、組織結構的一致性、以及計畫內容的富想像力程度等等加以評鑑（Henderson & Hawthorne, 2000, 129）。

表3 學校課程計畫之評鑑協議

請檢核下列描述語，指出覺得最能代表學校課程計畫的品質				
	十分同意	同意	稍微同意	不同意
課程計畫合乎學校情境立場：				
建構主義原則	_____	_____	_____	_____
適切進行發展	_____	_____	_____	_____
涵蓋所有學生	_____	_____	_____	_____
協同合作學習	_____	_____	_____	_____
課程計畫的用語清楚明白				
課程組織結構看起來似乎				
具吸引力能令人興奮	_____	_____	_____	_____
能邀請學生參與投入	_____	_____	_____	_____
真實性	_____	_____	_____	_____
課程計畫的內容是				
強而有力的	_____	_____	_____	_____
正確的	_____	_____	_____	_____

評鑑學校課程計畫品質的最重要資料，是來自於教師和其他根據課程計畫，進行課程實施的相關人員，因為他們會和學生一起發展課程。因此，透過個別方式或採取向三、四位教師進行焦點團體的訪談，將能夠引導出有價值的資訊，特別是可向這些成員詢問有關其對學校情境、學校願景、課程目標與方案特色等等概念的認知。如果訪談結果沒有實用價值，則可以參考表4，進行一份簡短的問卷調查，詢問教師，請其就一對相反的形容詞，指出其對學校課程計畫的最佳反應，並就所獲得資料，進行分析與必要修正（Henderson & Hawthorne, 2000, 130）。

表4 學校課程計畫的意見調查

請在下列每對語詞之間的連續部份，劃上一個「×」以表達對該語詞的最佳反應。舉例而言，如果此對語詞是「有用的」與「無用的」，而評鑑者覺得該課程計畫是非常有用的，則請在最靠近「有用的」連續空間末端部位，劃上一個「×」。

評鑑者發現課程計畫的陳述是：

清楚的	_____	不清楚的
無想像力的	_____	有想像力的
有用的	_____	無用的
有趣的	_____	無聊的
有挑戰力的	_____	無挑戰力的

並請提出建議，作為未來修改的參考：

課程計畫必須透過規劃設計實施，才能達成課程改革的願景與目標。更必須進行課程計畫的評鑑與回饋，實踐課程改革的願景與目標。因此，學校應該瞭解教育部與教育局有關學校課程計畫的評鑑規準，蒐集資料與證據，提出報告。

根據課程綱要的規定，各校應成立「課程發展委員會」，於學期上課前整體規劃、設計教學主題與教學活動（教育部，2003），審慎規劃全校課程方案和班級教學方案，訂定學年課程實施計畫，發展學校本位課程（王文科，1997；黃政傑，1999；Eggleston, 1980；Skilbeck, 1984）。因此，學校課程計畫的評鑑，也可以參考如表5所指出的語言與思想的清晰度、完整性、可行性、聯貫性、效率性、關懷度等等相關評鑑指標（Henderson & Hawthorne, 2000, 131）。

表5 學校課程計畫的評鑑規準

- **語言與思想的清晰度**：是否有三位或以上的讀者獲得課程計畫的重要意義之相同理解？
- **完整性**：課程發展的所有重要層面都被考慮過，而且都呈現在課程計畫的陳述當中。
- **可行性**：教師擁有進一步設計與實施該項課程計畫所需要的技能與知識，所需要的適當時間也是或可能是可得到的，而且重要的材料與設備也是或是可能得到的。
- **聯貫性**：此項課程計畫的元素與基本理念是有意義的，而且形成一個合理的整體。
- **效率性**：此項課程計畫是在適當時機下被發展出來，而且能夠馬上被師生用來規劃、在合理的資源分配下，可將課程付諸實施行動。
- **關懷度**：課程計畫的立場、教室與學校生活的圖像，可勾勒描繪出所有參與各方的人際互動情境都是相互支持接納，並促進個人成長的氣氛與願景。
- **真實性**：學生認為課程計畫的活動是合情合理與實際的，他們相信所思考的內容與方法，都是充實而有用的與誠實真摯的。
- **參與度**：師生認為課程計畫當中所呈現的組織核心和活動，都是具有高度吸引力而令人興奮的，而且也能讓人維持相當長久的時間之參與投入。
- **心靈開放度**：課程計畫的理念、觀點、思考方式與創造方式，呈現了求知與感知的另類變通與多元途徑。
- **無壓迫感**：課程計畫的內容與活動並未意含某一種政治的、宗教的、文化的或社會的詮釋是優於所有其他的觀點或詮釋。
- **均等**：該課程計畫所規劃的活動與觀念都是人人可得到的，而且學習的脈絡情境、策略與評鑑，對男女生、所有種族語文化背景的個體、不同性別取向的個人與所有不同社會階級的所有學生而言，都是公平的。

學校不應只公開辦理課程方案的教科用書之評鑑，更進一步，學校更應透透「課程發展委員會」發揮專業自主的彈性空間，就正式課程與其他的鄉土教育、環境教育、兩性平等教育、安全教育、多元文化教育等相關的非正式課程與彈性學習節數的空白課程等，進行學校課程計畫的規劃，落實學校教師共同發展課程之理念，發展以學校為焦點的課程規劃，建立學校辦學特色，以作為學校課程評鑑之參考依據（Simons, 1987）。

（二）根據評鑑結果，作為改進與做為審查新學年度學校課程計畫之依據

學校願景與學校教育目標是擬定學校課程計畫之要素，更是評鑑學校課程之規準。特別是學校共同願景，可成為用來評鑑所有課程的一種指標（Glatthorn, 2000）。「學校願景」即為學校課程經營重要工作之一，學校願景的達成與否，與行政效能控管、教師專業成長、課程設計能力、教學效能

提昇、班級經營、親師溝通技巧等方面，有密不可分的關係。換言之，學校經營是否能支持學校課程發展與實施？包括人的整合、物的整合、時間彈性化等等因素，都是評鑑學校課程計畫的參考依據。評鑑的目的不僅在證明，也在促成改進（Cronbach，1963），評鑑結果的利用，可以改進學校課程計畫，提升學生學習成效，並作為評鑑後檢討，以及擬定新學年度學校課程計畫之依據。

三、以學校整體課程發展為焦點的課程評鑑途徑

學校整體課程發展為焦點的評鑑重點在於強調課程發展的整體性，學校課程計畫偏於書面資料，忽略教師教學過程之動態活動，而學校整體課程發展則重視除書面資料外的教師教學過程以及學校整體課程的動態發展過程與永續經營。

學校課程的評鑑，不只是課程方案的評鑑以及書面課程計畫的評鑑，更需要留意長期進行課程發展的歷程。當課程方案材料與書面課程計畫是靜態的，但是，課程發展的過程，是不斷進行開展的，如果缺乏學校整體課程發展配套措施，恐將導致事倍功半（蔡清田，2002）。

（一）學校整體課程發展的評鑑

學校課程發展的評鑑活動需要較廣泛的評鑑（黃光雄，1988；Skilbeck，1984）。課程評鑑所涉及的層面，包括廣泛的結果，如學生的態度、其他教師的反應、課程改革對整體學校組織的影響，不僅包括獲得學生成就的測驗分數而已，更涵蓋探究課程本質與品質等層面，以便協助教育人員得以繼續進行課程規劃設計實施。換言之，就評鑑內容而言，必須呈現學生學習效果、教師教學成效、行政系統的支持與課程方案成效等面向，以符合檢視學校課程不同層面的需要，並提供豐富的回饋資訊，以提昇下一個循環的課程發展品質。簡而言之，學校課程評鑑回饋的要項可以摘述如下表 6 所示

表6 學校課程評鑑的回饋

階段	課程評鑑推動策略	課程評鑑行動綱領	主要參與成員
5. 課程評鑑	5.1評鑑學生學習效果。	5.1.1進行形成性與總結性之學生學習成效評鑑。 5.1.2善用多元方式進行學生學習成效評鑑。	學校課程發展委員會成員與課程設計小組成員，可以結合校外的課程評鑑人員，共同組成課程評鑑小組，合力進行課程評鑑工作。
	5.2評鑑教師教學成果。	5.2.1評鑑教師的個別方案教學成效。 5.2.2評鑑教師的整體教學表現。	
	5.3評鑑行政支援成效。	5.3.1內部行政自評。 5.3.2外部行政評鑑。	
	5.4評鑑課程方案效益。	5.4.1評鑑課程方案教材。 5.4.2評鑑課程方案設計。 5.4.3評鑑潛在課程可能影響。 5.4.4透過行動研究評鑑課程方案。	
	5.5評鑑整體課程成效。	5.5.1綜合各項課程評鑑成效資料。 5.5.2根據評鑑結果改進學校整體課程。 5.5.3總結課程發展成果與經驗，做為審查新學年度課程計畫之依據。	

特別是學生學習的評鑑重點要注意學習評量的方式是否合理？學習結果是否達課程目標？作業評鑑是否合理？評量的回饋與處理如何？而「學習成效」的評鑑重點要注意學生的學習表現如何？學生的學習感受如何？學生對學習結果的應用（如應用於日常生活中）如何？

課程評鑑，不只包括課程方案教材與書面課程計畫成果，課程評鑑應被視為整個課程發展過程當中每一步驟的必要工作，換言之，情境分析、願景建構、方案設計、解釋實施等步驟都是課程評鑑的對象（黃政傑，1987；Prideaux, 1985）。特別是課程發展的情境分析要研究影響學校課程發展的優劣機會與威脅等內外動的動態情境因素，進行學校課程發展的需求評估，以瞭解學校課程發展的問題與需要是什麼？而課程發展的願景建構，則透過課程研究的情境分析與需求評估，導出學校共同願景與整體課程目標的慎思構想，引導整體課程目標的前進方向與預期的學習結果；課程發展的方案設計包含成立學習領域與活動課程的方案設計小組，進行教學活動的設計、教材的編選設計、學生的分組、教學內容的範圍、順序與組織，以及空間、資源

與設備的配置等；課程發展的執行實施，需透過教育人員在職進修與學校組織發展，進行專業反省與溝通，化解歧見，充實課程實施必要的知能，以使方案順利實施；課程發展的評鑑回饋，需要蒐集適當而充分的證據，以判斷並改進課程過程與成效，結合教育行動研究建構不斷循環的評鑑系統，以發揮評鑑回饋的功能。

此種課程評鑑，與英國的賽蒙思（Helen Simons）所提出以學校為個案研究焦點的課程評鑑（Simons, 1987）相似，並與「整體的評鑑」（holistic evaluation）途徑相互呼應（蔡清田，2002），不只是判斷目標的達成程度，而且也嘗試透過評鑑人員的專業知識以發現課程問題的疾病症狀，並偵測診斷課程發展失敗之所在及其負作用的原因（MacDonald, 1971），改進課程發展，並促成學校發展。

（二）課程評鑑的利用

課程評鑑宛如身體健康檢查一般，透過評鑑機制來檢視學校願景、課程計畫目標方案之達成度，提供回饋機制，保障學校辦學績效；同時，透過此一機制來檢視學校的課程規劃設計、實施歷程與效能等（Skilbeck, 1984）。事實上，課程應該在發展的每一個過程中受到評鑑。在規劃課程發展時間表之時，教育工作人員便應該進行事前的情境分析與需求評估。當設計課程方案的範圍及順序時，應該評估課程方案的一貫性、協調性與發展重點。不僅在規劃設計中所發展出的方案應該受到評估，而且班級層面實施的課程也要加以評鑑，因此學校人員應該共同合作對課程品質進行審慎的評鑑，並善用其評鑑結果，進行小幅改變課程方案或更新或重新建構學校課程計畫的過程。

（一）小幅改變課程方案

評鑑結果可能指出現有大多數課程方案可達成學校願景與課程計畫，則只需小幅改變少數課程方案。例如，增加一個新課程、刪除一個現有課程、修正現有科目、將兩三門課程結合、修正要求與時間配置、改變學校日程表、藉著產生新教學團體與修正教學團的組織方式以改變教學組織。其更新程序首先決定評鑑課程方案的規準；其次針對每一個規準指出蒐集資料的方法，如調查、訪問、觀察、文件分析；第三是整理資料並將評鑑報

告轉為正式的公開文件，報告應包含摘要、運用的方法、針對每一個規準所做的評鑑、對執行的建議；最後是將評鑑結果與家長、教師討論並準備行動的策略（Glatthorn, 2000）。

（二）更新或重新建構學校課程計畫

學校重組可能影響其原有的課程計畫、人事、資源設備及其整體運作。學校重組，通常稱為再結構化，其改變的要素，可能包括教導某一學生團體的所花的教學時間單位、教學團體的種類與規模大小、個別教學或團體教學制度。特別是開放空間教育、協同教學、不分年級學制、彈性課表等等允許較為鬆散的課程組織，允許學生可以不同方式運用學習時間，或將每一個上學日，區分為不同的學習時段，因應個別經驗進行時間分配，並且增加分配方法的彈性與新學習設施與材料。

當學校面對是否符合課程綱要的檢核時，學生的成就無法滿意地提升之時，新的學校領導營造改變氣氛等等情境之下，學校會更新或重新建構課程計畫。其更新程序，第一是確定教育目標與透過課程方案所要達到的計畫成果；第二是檢視教育目標與決定何者為主要精熟課程的目標；第三是確定哪些新課程能達到主要精熟課程的目標；第四是透過腦力激盪，指出哪些現存課程計畫能達到主要精熟課程目標；第五是分別針對每一個課程計畫方案，指出能較有效率的教學模式；第六是發展一週日課表作為學期或學年課程計畫的參考範本；第七是發展新課程計畫的水平範圍圖表與垂直銜接圖表，並以新課程計畫的水平範圍圖表與垂直銜接圖表為基礎，撰寫新的學習單元（Glatthorn, 2000）。

總之，整體課程發展的評鑑包括形成性評鑑與總結性評鑑，形成性評鑑在課程發展過程中進行，隨時回饋調整課程發展的歷程；總結性評鑑則是在實施後檢核是否順利達成課程目標，做為修正計畫方案與重新研究規劃設計實施的參考依據。這都可利用「課程評鑑」的歷程或結果，來評鑑學生十大基本能力學習進步成果、學校課程計畫的學習節數分配、各學習領域課程方案設計、選用或自編教材的適切性、各項課程與活動設計教學進度與成效、行政支援成效，以控制課程發展之品質。

肆、結語

課程評鑑是學校課程發展不可或缺的一環，但卻往往是被忽略的冰山一角，透過課程評鑑，可以協助學校課程發展相關人員系統思考檢討學生學習成效、各課程方案教學成效與行政支援措施成效，進而總結評鑑整體課程之成本效益，考量正式與非正式課程等課程方案的影響，分析成效評鑑結果，修訂學校整體課程，總結成果與經驗，做為審查新年度全校各年級各領域科目活動課程計畫之課程發展依據，透過行動研究，持續進行學校課程發展的評鑑，進行永續經營。

國民中小學九年一貫課程綱要指出課程評鑑應由中央、地方政府和學校分工合作，各依權責實施。雖然一方面指明中央政府必須建立各學科學力指標，並督導地方及學校課程實施成效。然而，並未指明其課程評鑑的專責機構，因此是否必須積極籌設「課程研究發展中心」的國家教育研究機構，或成立「九年一貫課程評鑑專案小組」的任務編組，加強課程評鑑角色，針對九年一貫課程持續進行評鑑。其次，課程綱要雖然指出地方政府負責辦理與督導學校的課程實施及各學科表現的測驗，卻未指明地方政府是否必須成立專責單位，或加強教育局的功能，以辦理課程評鑑事宜。又如課程綱要雖然說明學校課程發展委員會透過多元方式實施學習評鑑，卻忽略如何透過適當途徑，增進學校教育人員的課程評鑑專業知能，這些都是可以結合行動研究，繼續加強之處（蔡清田等譯，2004）。

「行動研究」可作為評鑑的一種形式（Elliott, 1998），不僅可以針對學校課程方案、學校課程計畫與學校整體課程發展歷程，進行評鑑，協助教育實務工作者進行課程發展的永續經營（蔡清田，2002）。「課程」可以提供教師進行「行動研究」的參考架構方案（Stenhouse, 1975），以發展教育知能，鼓勵學校教育人員根據學校教育的行動實務，考驗教育理論與課程知識。從行動研究的觀點而言，課程是一種教育行動媒介，「課程」是一種在特定的時間與空間範圍之內的教育行動說明，學校教育人員不應將「課程」視為一種由上而下的科層體制行政命令或權威規定。課程是一種可供質疑與驗證

的行動研究假設，必須透過教學將課程方案與課程計畫所蘊含的教育理念與知識本質付諸實際教育行動，並將其視為可以進一步探究的研究假設或行動研究媒介，是開放的、值得質疑的，不是理所當然的，需要被評鑑的（蔡清田，2000），有待在其學校教育實驗情境當中進行實地考驗，並且可以根據學校教育實驗室情境當中所蒐集到的證據資料，進一步修正的行動研究媒介（蔡清田，2001）。

課程方案與課程計畫，並不只是有關教育目的、教學原理與學習內容的說明，也是針對教育目的、教學原理、學習內容、實施策略等教育實踐行動，進行反省思考與討論對話的「行動研究媒介」；課程方案與課程計畫更是一種「課程發展行動研究」的媒介，協助學校教育人員透過學校課程評鑑，針對課程發展的情境分析、願景建構、方案設計、執行實施、評鑑回饋、配套措施等等，進行學校課程發展的慎思熟慮構想，進行提升學校教育的品質（蔡清田，2002）。因此，本文特別探究國民中小學九年一貫課程改革的評鑑規劃取向、學校課程評鑑的範疇與途徑，以引導課程評鑑概念的再概念化，特別是探究以學校課程方案為焦點的課程評鑑途徑、以學校課程計畫為焦點的課程評鑑途徑、以學校整體課程發展為焦點的課程評鑑途徑等三個範疇焦點的課程評鑑途徑，進而論述如何落實學校課程評鑑，作為日後更進一步實施教學評鑑、學習評鑑與學校教育評鑑之參考。

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教師對課程變革的認同感和關注： 課程實施研究的探討

Teacher Receptivity to and Concerns about Curriculum Change:
An Exploration of Research on Curriculum Implementation

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摘 要

對教師個人因素的關注是實施研究的一個新的發展趨勢。然而，現有的教師個人因素的分析大都採取了認知取向的研究策略，其研究對象也主要集中在教師的認知領域，對教師的情意因素關注不夠。在針對教師情意因素進行的實施研究中，認同感與關注階段是兩個值得我們注意的課題。本文首先簡要整理了認同感與關注階段的理論脈絡；然後結合近年來的一些實證研究結果，尤其是香港和大陸的經驗，對課程實施中的這兩種教師情意因素做出了初步分析；其次，作者從理論架構和實證研究兩個角度嘗試分析了認同感與關注階段之間的關係；在結語部分，本文總結了認同感與關注階段研究給課程實施帶來的啟示，並提出了認同感與關注的實施研究在未來的發展方向。

關鍵字：認同感、關注階段、課程實施、情意因素

Abstract

Focusing on teachers' personal factors is one of the new trends in implementation research. However, most of the existing inquiries on teachers

personal factors adopt a cognitive approach, which pays much more attention on teachers' cognition than their affective and conative factors. In the implementation researches on teachers' affective and conative factors, receptivity and Stage of Concerns (SoC) are two special and important issues. First, this paper introduces the theoretical frameworks of receptivity and SoC in brief. Then, we discuss the two factors' role in implementation research based on the empirical studies recently published, especially the experiences in Hong Kong and Mainland China. Third, we make a preliminary analysis on the relationship between the two factors from the theoretical and empirical perspectives. In the last part, we conclude the practical implications of receptivity and SoC researches to curriculum implementation, and bring about some directions and issues for future researchers to explore.

Keywords: receptivity; Stage of Concerns; curriculum implementation; affective and conative factors

壹、導言

課程實施研究興起於上世紀60年代末期人們對課程變革的反思和理解之中。1970年代以來，得益於全球持續不斷的教育改革浪潮，課程實施也一直受到眾多學者的密切關注。目前，課程變革與實施已經成為課程知識領域中的一個重要範疇（Behar, 1994 : 26）。

在新世紀的開始，Richardson & Placier（2001 : 907）回顧了三十餘年來的課程變革與實施歷程，將其歸納為三個發展階段。第一個階段即 Fullan（1992 : 21）所謂的「採用時期」。它以上世紀 60 年代的課程變革為代表。這些變革把焦點集中於發展「防範教師的」（teacher-proof）的課程套，極少考慮教師與課堂教學的實際情況；在變革的實施方面奉行「忠實取向」，認為課程實施是一個按部就班的線性過程，教師在這個過程中的任務只是忠實地執行變革方案的規定和要求（Snyder, et al., 1992）。在這一階段，課程實施被視為一種行政命令和技術性的工作，並沒有變革的宣導者當作一個問題。第二個階段以上世紀 70 年代伯曼與麥克勞夫林（Berman & McLaughlin）等人主持的蘭德計畫為開端。他們的研究結果表明，學校的組織結構是決定

課程實施能否成功的最重要的因素（Berman & McLaughlin, 1976）。在這一階段中，「相互調適取向」逐漸得到了研究者的認同。人們意識到課程實施並非如原來所假定的那樣是自然而然地發生的，而是課程方案和特定的學校脈絡之間的相互調適過程（Snyder, et al., 1992）。在這個過程中，作為實施者的教師扮演著重要角色。因此，教師對課程實施的影響開始受到人們的關注。在近來出現的第三個階段中，課程實施研究開始朝著兩個方向發展：一個繼續關注學校的組織和結構變革，另一個則集中於影響教師轉變的個體因素。Goodson（2001）也曾強調，千禧年以來的教育變革需要重新思考變革的內部事務、外部關係與個人因素之間平衡，分析變革時應該把個人轉變放在首要位置。只有當教師的個人投入被視為變革動力及其必要目標時，教育變革才最有成效（Goodson, 2001: 60）。

對教師個人因素的關注可謂是今天課程變革與實施研究的一個新的發展趨勢。然而，現有的課程實施中教師個人因素的分析大都採取了認知取向的研究策略，其研究對象也主要集中在教師的認知領域，如教師的知識、信念、理解等，對教師的情意因素關注不夠。究其原因，這種研究取向主要受制於當前西方的教育主流思想，即從研究到教學等教育工作，都著重於理性分析，講求教育及其發展的邏輯性、目的性和準確性，而忽視人的情緒、感覺、道德和工作價值等（黃錦樟，1999）。與這種主流思想的相對應，教育和組織變革也經常被視為是追求理性、知識的理性的、認知的過程，很少考慮教師的感受、情緒、動機、態度等因素。Hargreaves（1998a, 1998b）指出，情感是教育變革中最受忽視的維度之一。即使情感得到承認，它也只是被當作人際關係或者背景氛圍，而學習、教學和領導中那些更難以預測的情感方面通常被排除在變革圖景之外。

但是，課程實施並不只是理性的、認知的過程，課程變革也不只是技術工作或行政手段（李子建，2001）。若要使課程變革取得更大的成效，使課程實施更加趨於人性化，使我們對課程變革與實施的理解更加豐富全面，我們就必須超越認知取向，在更大的範圍內關注教師對變革的個人投入，思考教師的情意因素對課程實施的影響，如感受、情緒、態度、動機等。簡言之，課程實施研究需要進一步豐富和擴展我們對教師情意因素的認識。

貳、教師在課程變革中的情意因素：認同感與關注階段

儘管目前有關課程實施中教師情意因素的研究不多，但在這些為數有限的研究中，有兩個研究課題卻值得引起我們的注意，即教師的認同感（receptivity）與關注階段（Stage of Concerns, SoC）。前者涉及教師對課程變革的態度，後者考慮的是教師在課程實施中的感受和情緒體驗。與同類研究相比，這兩個課題的特殊之處在於：首先，認同感與關注階段都有堅實的理論基礎，並且都具備一套相對完整而嚴密的理論架構；其次，二者都有較為成熟的研究方法論，而且發展出了信、效度較高的測量工具；再次，對教師認同感和關注階段的討論具有很強的持續性和連貫性。長期以來，學者們在多個國家和地區驗證並改進了前人提出的理論模式和測量工具，從而使這兩項研究相對於其他有關情意因素的討論來說顯得更加繁榮。另外，這兩項研究近年來也頻繁出現在中國大陸與香港地區的課程實施文獻中，這不僅表明我國課程學者對教師情意因素的研究興趣正在增加，而且也要求我們對認同感和關注階段進一步做出討論。有鑒於此，本文擬以認同感和關注階段為例，結合近年來的一些實證研究結果，尤其是香港和大陸的經驗，對教師的這兩種情意因素做出初步分析，最後總結和展望情意因素的實施研究在未來的發展。本部分旨在簡要整理教師認同感和關注階段的理論脈絡。

一、教師認同感的理論架

一般而言，認同與抵制（resistance）是教師在面對課程變革時自然而可預測的兩種共生反應，前者表示教師在心理上對變革所持的傾向程度，後者則關注教師外顯的負面行為反應（Kazlow, 1977）。然而，即使是教師的抵制對課程變革來說亦有其積極意義，例如它表明改革者應該先處理一些前提條件：讓教師有權力、時間去進行規劃、發展課程或使用新的教學法（Gitlin & Margonis, 1995）。

認同感又稱接受度，是指教師對課程變革表現出的正面的態度和行為意向（李子建，1998）。Punch & McAtee（1979）在對認同感的早期研究表

明，教師對變革的知識、教師參與變革、教師對教育的一般態度是影響認同感的三個主要因素，它們與教師的性別、職級、任教科目以及學校規模等情境變數共解釋了近40%的認同感差異。

在回顧已有文獻的基礎上，Waugh & Punch (1987) 建議了一個認同感的綜合模式，認為影響認同感的主要因素有6種：(1) 對教育的基本態度；(2) 緩解教師對變革的憂慮；(3) 變革的實用性；(4) 對變革的期望；(5) 學校對教師的支持；(6) 教師對變革的成本效益評估。後來，一些學者依據此模式編制了認同感問卷或問題檢核表 (checklist)，用量化或質化方法分析了教師課程變革的認同感 (Waugh & Godfrey, 1993, 1995; Lee, 1995)。量化研究表明，這些引數對認同感具有良好的解釋能力，並且效度分析也證實了問卷的心理測量素質。此外，在以往的認同感研究中，學者們還發現教師的性別、教齡、職級以及學校的類型、規模等個人與情境屬性也會影響教師對變革的認同程度，如職級較高的教師更支持變革 (Kata, Dalton & Giacuinta, 1994)、學校規模較小的教師更接受變革 (Punch & McAtee, 1979) 等。

基於這些研究，我們可以用下圖 (圖1) 簡要呈現教師認同感的理論模式：

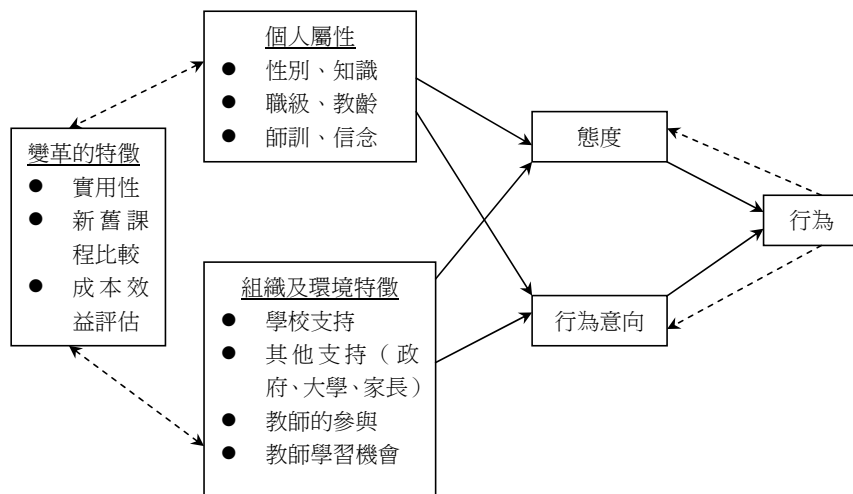


圖1. 簡化的認同感模式

二、教師關注的發展階段

教師關注（concerns）是指教師對某一特定問題或任務的情緒、疑慮、想法和思考（Hall et al, 1977: 5）。上世紀70年代，霍爾（Hall, G. E.）等人將富勒（Fuller, F.）的教師關注發展理論應用到課程變革與實施研究中，提出了「關注為本採用模式」（CBAM）。這一模式被認為是以忠實取向評定實施程度的最綜合與清晰的理論（Fullan & Pomfret, 1977）。關注階段（Stages of Concerns, SoC）、使用水平（Levels of Use, LoU）與革新形貌（Innovation Configurations, IC）是該理論在個體水平上測量變革實施程度的三個維度。

關注階段描述的是教師在實施變革時所要經歷的不同階段中的情緒、動機、挫折感和滿足感（Snyder et al., 1992）。CBAM認為，教師對變革的關注也會經歷一個由自我關注到任務關注、再到影響關注的發展過程，其中包括低度關注、資訊的、個人的、管理、後果、合作與再關注共7個階段。各階段的特徵及其典型的表達方式如下表（表一）所示。在教師關注階段的評定方面，CBAM提供了三種方法，即短時晤談、開放性陳述和問卷調查。相對而言，關注階段問卷（SoCQ）是最正式與精確的方法。

表1. 變革中教師的關注階段（Hall & Hord, 1987, 2001）

階 段		特 徵	表 達
影響 關注	階段6：再關注 （refocusing）	探討革新帶來的更普遍的優點，包括採取主要變革或用另一方案取代這一革新的可能性，並且他／她對替代性方案有明確的想法	我有一些或許更好的主意
	階段5：合作 （collaboration）	關注在使用革新時與他人的合作和協調	我關心怎樣把我的教學和同事所做的事情聯繫起來
	階段4：後果 （consequence）	集中注意革新對學生的近期影響上，關注課題為革新對學生的適切性、評價學生成果（包括表現和能力）、以及改善學生成果所需的變革等	我的使用會怎樣怎樣影響我的學生
任務 關注	階段3：管理 （management）	注意力集中在使用革新的過程和任務，以及最大限度地利用資訊和資源，極力關注有關效率、組織、管理、時間需要及安排等問題	我似乎為它花費了我所有的時間

自我關注	階段2：個人的 (personal)	個人尚未確定革新對自己的要求、他們能否應付這些要求、以及他們在革新中扮演的角色。他／她開始分析自己在組織中的角色，並考慮實施新方案後需要做出的決策和現存結構可能引起的衝突等	使用它會對我造成哪些影響？
	階段1：信息的 (informational)	對革新表示普遍關注，有興趣瞭解革新的實施特點，如一般特徵、影響、使用要求等，但他／她並未關注自己和革新之間的關係	我想更多地瞭解它
階段0：低度關注 (awareness)		對革新很少關注，或很少涉入革新	我並不關心它

來源：Change in Schools : *Facilitating the Process*(p.60), by G. E. Hall & S. M. Hord, 1987, Albany: SUNY Press; *Implementing Change: Patterns, Principles, and Potholes*(p.61), by G. E. Hall & S. M. Hord, 2001, Boston: Allyn and Bacon.

參、認同感與關注階段研究的新進展：香港與大陸的經驗

一、認同感研究的發展

就認同感研究的發展脈絡而言，較早對認同感進行探討的當屬北美學者（Giacquinta, 1975; Kazlow, 1977）。上世紀80年代以來，以沃（Waugh, R.）等人為代表澳洲學者對認同感展開了深入細緻的分析，確立了認同感的基本架構和研究方法論，並進行了大量的實證研究。他們考慮了課程變革中不同階段之間的區別，把認同感研究從實施階段擴展到變革的啟動階段。例如，Collins & Waugh（1998）曾以一項有關年級調整的變革的背景，對啟動階段的教師認同感做出分析，其中涉及的引數因素有總體信念、緩解憂慮以及變革的實用性。研究發現，儘管這三個變數與教師的認同感有顯著相關，但以後的研究還應該再考慮一些其他因素的作用。

1990年代中期以來，伴隨著中國大陸與香港的課程改革浪潮，認同感研究被引入到中國的實施研究之中，並獲得了一些發展。李子建（1998）比較了香港小學教師對目標為本課程和常識科兩項變革的認同感。研究發現，教師在各個分量表上的得分均有顯著差異，教師對常識科的認同感（包括態度和行為意向）高於對目標為本課程的認同感。這說明教師並非一味地反對變革，而是對不同的變革項目表現出不同接受程度。在採用變革之前，教師會衡量變革的可行性和帶來的後果，才決定支持與否，而且教師在支持一項

變革的同時，也會否定另一項變革。因此，我們不能認為教師在面對變革時總是保守的。

李子建（Lee, 2000）還分析了香港小學教師對實施環境教育的認同感。研究發現，認同感問卷具有較好的信度，成本效益、關注事項、實用性、學校支持以及校外支持等 5 個因素分別解釋了 34% 的態度變異和 50% 的行為意向變異，並且教師的成本效益評估對認同感的這兩個方面都有較大的解釋能力。然而，高的認同水平只是高水平的使用和組織參與的必要而非充分條件，即高認同感並不一定導致高水平的課程實施。此外，研究者還建議以後的認同感研究除了分析原有的 5 個因素之外，還應考慮變革日程安排、工作負擔分配、變程式的清晰性、任命協調員等因素對教師的影響。

近來，尹弘飈等人（2003）還以個案研究的方式分析了內地兩所中小學教師對課程改革的認同感。研究結果支持了認同感問卷的測量素質和成本效益分析對認同感的解釋能力，並且發現小學教師對新課程改革的認同水平顯著高於中學教師。參照 Pratt（1980：427）提出的人們在面對變革時的態度分佈模型，研究者比較了小學和中學教師對新課程改革的態度。結果表明，儘管兩所學校的大部分教師都是變革的「支持者」，但小學和中學還是呈現出不同特徵：小學中「熱誠者」的比例明顯高出中學，而中學還有相當數量的「沉默者」，並且「拖延者」和「反對者」的比例也較小學為多。

除此之外，近年來的認同感研究又表現出一個新的趨勢，即不僅關注教師的個人感受、信念對態度的影響，而且開始考慮一些學校組織結構變數，如工作組織、學校文化與認同感之間的關係。Moroz & Waugh（2000）在分析教師認同感時使用了兩類變數，一類是原有的引數因素，另一類是三項工作組織變數。研究發現，工作組織變數對教師的行為意向和實際的實施行為都有顯著的預測能力。顏明仁、李子建（2002）以教師同儕觀課教學為背景，採用大規模問卷調查的方式，初步探討了教師認同感與學校文化之間的互動關係。研究發現，教師對課程改革的認同感會影響學校文化，同時學校文化也造就大環境，從而使教師對變革的認同感有所轉變。具體而言，學校文化的得分越高，教師面對變革的信心也越大；教師對學校的期望越高，就越關心學校中的變革項目。

二、關注階段的修正

自從關注階段提出以來，許多國家和地區的研究者都採納了霍爾等人的主張，將其引入到課程變革與實施研究之中。學者們指出了關注階段自身的一些問題，並且進一步完善和發展了原有的理論模式。Bailey & Palsha (1992) 檢驗了SoCQ的測量素質。他們支持了教師關注具有一個發展序列的基本假設，但是建議用一個 5 階段的模式取代原有的 7 個階段。然而，這項研究在新問卷的效度檢驗方面並沒有使用驗證性因素分析，因此結論的可靠性還有待考慮。

長期的實證研究經驗表明，關注階段理論具有很多文化偏見，因此運用於不同的文化情境會得到不同的結果。1990年代以來，比利時與荷蘭學者對關注階段展開了大量研究，他們在自己的文化情境中檢驗了原有的理論假設，發展出具有本土特色的關注階段模式。van den Berg (1993) 基於比利時與荷蘭的研究經驗，提出了一個新的 7 階段模式，其中包括：(一) 低度關注；(二) 個人的／資訊的；(三) 對學生的後果 (consequences for pupils)；(四) 管理；(五) 協作；(六) 基於學生經驗的再關注 (refocusing based on experience with pupils)；(七) 再關注。

近十年來，香港學者開始注意結合中國這一特殊的文化脈絡來使用和驗證由西方學者提出的關注階段理論。李子建 (Lee, 1996) 曾分析了香港小學教師在實施環境教育中的關注階段。他基於前人的研究，發展出一份包含 18 個題項、6 個階段（不包括階段 0）的關注階段問卷。研究發現，教師在階段 1（資訊）和階段 4（後果）上表現出較高的關注，而在階段 2（個人）上關注程度相對較低。然而，教師在階段 1 至 階段 6 的各階段上的 Likert 七點量表得分都高於 5。其結果如下表所示（表2）：

表2. 香港環境教育實施中教師的關注階段 (Lee, 1996 : 289)

關注階段題項 (Hall & Hord, 1987; Bailey & Palsha, 1992)	平均值 (n=1687)	標準差
1. 我關心學生對環境教育的態度	5.26	1.15
2. 我擔心我每天沒有足夠的時間	5.34	1.31

3. 我希望在環境教育的教學中幫助其他同事	5. 39	1. 02
4. 我想知道引入環境教育對我專業地位的影響	5. 07	1. 36
5. 我想知道我的利益與責任之間的衝	5. 31	1. 35
6. 我關心如何調整我對環境教育的教學	5. 46	1. 07
7. 我關心環境教育對學生的影響	5. 61	1. 02
8. 我想知道在環境教育中誰來做決策	5. 29	1. 29
9. 我願意討論在我的學校中實施環境教育的可能性	5. 66	1. 05
10. 我想知道如果我採用環境教育，那麼有哪些資源可以使用	5. 85	1. 02
11. 我願意調整我對環境教育的教學方式	5. 34	1. 02
12. 我願意基於學生的經驗調整我對環境教育的教學	5. 37	1. 01
13. 儘管我對環境教育瞭解不多，我仍關心有關環境教育的問題	5. 39	1. 11
14. 我願意鼓勵我的學生參與環境教	5. 52	0. 97
15. 我願意與其他同事進行協調，以盡量擴大環境教育的成	5. 43	1. 00
16. 我想知道其他同事如何教授環境教育課	5. 22	1. 13
17. 我想知道當我教授環境教育時我需要如何轉變我的角色	5. 50	1. 09
18. 學校中人與事的協調工作已經占去了我太多的時	5. 37	1. 45
階段1：資訊關注（題項9，10，13）	5. 63	0. 85
階段2：個人關注（題項4，8，17）	5. 29	0. 98
階段3：管理關注（題項2，5，18）	5. 34	0. 97
階段4：後果關注（題項1，7，14）	5. 47	0. 84
階段5：合作關注（題項3，15，16）	5. 35	0. 87
階段6：再關注（題項6，11，12）	5. 39	0. 87
總體（階段1－階段6）	5. 41	0. 69

來源：Environmental education in the primary curriculum in Hong Kong(p.289), J. C. K. Lee, 1996, Hong Kong: Chinese University of Hong Kong.

張善培等人（Cheung et al., 2001）以香港的目標為本課程改革為背景，系統地比較了已有的四種 SoCQ 的測量素質，發展出一個包含了 22 個題項、5 個階段的關注階段問卷。這五個階段是：（一）低度關注；（二）資訊的／

個人的；（三）管理；（四）後果／協作；（五）再關注。他們使用了驗證性因素分析檢驗這個新問卷的測量素質，結果表明這個新的 5 階段模式比其他四種模式具有更好的信度和結構效度。然而，他們指出「低度關注」可能並非一個合理的結構，或者在「低度關注」和「資訊的／個人的」之間還存在著其他階段。基於這一研究，張善培（Cheung, 2002）同時使用問卷調查和開放性陳述兩種方法，進一步分析了香港教師對變革的關注。研究發現，在階段 0（低度關注）和階段 1（資訊的／個人的）之間還應該增加一個新的階段——評價（evaluation）。在這一階段上，教師會做出接受還是拋棄改革理念的決策。如果接受，教師關注會繼續向高級階段發展，否則教師的關注階段就會止步不前。

肆、認同感與關注階段的關係

若將認同感和關注階段加以比較，我們不難發現二者有著一些顯著而重要的區別：首先，關注階段假定了教師關注的一個層次性的發展序列，因此可以作為測量實施程度的維度，而認同感沒有這種理論假設，因而也不能用以測量實施程度。其次，現有的認同感研究都是針對中央集權教育體制下的大規模課程變革，並且研究者也一再表示其結果僅適用於這種系統範圍的變革（Waugh & Punch, 1987; Waugh & Godfrey, 1993, 1995; Collins & Waugh, 1998），而關注階段在這方面具有更大的適用範圍，既可用於自上而下的課程變革，又可用於自下而上的草根式變革。

雖然存在這些區別，但它們處理的都是情意領域的教師個人因素，並且二者在理論架構方面也具有相當密切的關係。Ebersole（1989: 15-16）指出，認同感的引數因素與不同的關注階段之間存在許多相似性。結合其他學者的一些研究，我們可以把認同感與關注階段之間的聯繫歸結為下表（表3）：

表3. 認同感與關注階段之間的相似性 (Lee, 1996:103-104)

認同感 (Waugh & Punch, 1987)	關注階段 (Hall & Hord, 1987)	解釋 Ebersole (1989)	Fullan & Pomfret (1977)	Berman & McLaughlin (1976)
對教育的基本態度	階段2：個人的 階段6：再關注	強調教師認同感與組織氛圍之間的關係； 教師對評價自身角色轉變以及達致學生與學校之最優結果的參與。		參與變革的個體投入與動機 地方組織氛圍
緩解憂慮與不確定	階段1：信息的 階段2：個人的 階段3：管理	教師參與變革規劃與負責變革的其他人士的溝通強調回饋。	教師參與決策的必要性； 有效的實施要求人際互動 (p. 391)	教師參與日常決策是成功實施的重要影響因素
變革的實用性	階段2：個人的 階段3：管理	強調那些與使變革配合現有行為模式的評估與後勤 (logistical) 問題。	變革的特徵：方案對使用者而言的清晰度和明確性； 變革越複雜，不同群體的實施程度之間的差異就越大。	包括變革措施、資源水平於變革範圍在內的方案特徵； 對參與者有意義，而且不會過於複雜或過於狹窄的變革實施起來成功的可能性更大 (p. 358)。
對變革的期望	階段2：個人的 階段4：後果	配合校區的變革歷史； 基於過往經驗而消除對變革的誤解。		
學校行政支持	階段5：合作 階段6：再關注	強調行政支持； 校長、政府官員與教師的積極支持。	時間、物質等資源支持； 提供持續的教師培訓，以解決實施中的問題。	教師培訓的必要性 (p. 360)； 變革參與者的自我發展 (p. 361)。
成本效益評估	階段2：個人的 階段4：後果	強調激勵或動機 (incentives)	減少變革成本：減少教師在學習新事物時的時間和困難對促進變革來說十分有益。	

來源：Environmental education in the primary curriculum in Hong Kong (p.103-104), J. C. K. Lee, 1996, Hong Kong: Chinese University of Hong Kong.

由上表可見，認同感與關注階段在理論架構上具有很多共通之處，這意味著我們有可能透過瞭解其中一種情意因素而推測另一種情意因素的發展狀況。然而，值得我們注意的是，在進行這種推測時我們必須十分謹慎，因為認同感的各要素與關注階段的理論架構之間並不存在線性的對應關係：同一種認同感要素往往能夠引起多個階段上的教師關注，並且這些階段之間並非總是相互銜接的，而是跨越了教師關注發展的某些層次。例如，「對教育的基本態度」會引起「個人的」（階段 2）和「再關注」（階段 6）兩個階段上的教師關注；「對變革的期望」和「成本效益評估」會引起「個人的」（階段 2）和「後果」（階段 4）兩個階段上的教師關注。前文已述，認同感與關注階段的一個首要區別就是前者不具有後者所假定的發展序列。顯然，上表所做的分析驗證了二者的這個區別。

鑒於認同感與關注階段在理論架構上的這種密切聯繫，我們也有必要從實證研究的角度探討二者之間的關係。在這方面，已有學者做出了初步的探索。Wade, Welch & Jensen（1994）曾以為特殊學生提供融合教育為背景，分析了教師對教師與專家合作的認同感。在這項研究中，他們把認同感定義為「興趣水平」和「關注類型」兩項因素，其中前者借鑒了CBAM中的使用水平，後者則根據關注階段修正而來。他們一方面基於CBAM理論，認為教師關注與興趣水平之間有某種匹配關係；另一方面又借鑒了Waugh & Punch（1987）的觀點，提出了一個包含5種類別、非等級性的「關注類型」：（一）與教師基本價值、態度、角色期望與經驗的匹配；（二）對變革的擔心與不確定；（三）對自治和參與決策的關注；（四）對學生和學校的影響；（五）個人成本評估（Wade et al., 1994: 184-187）。這種做法無疑是試圖通過消除關注階段中的層次序列而把教師的認同感與關注結合起來。資料分析表明，雖然教師的興趣水平存在著層級發展序列，但教師對合作的關注並沒有按照預期的那樣表現出清晰的類別，而是體現為一種「總體關注」（overall concerns）。不難理解，造成這一結果的原因也在於認同感與關注階段之間不同的理論假設。由於「關注類型」是基於認同感的假設而提出的，而認同感研究一方面沒有層次性的發展序列，另一方面它也是通過探討一些

影響因素來瞭解教師對變革的總體態度，因此研究者未能按照預期的那樣發現「關注類型」。這一研究提醒我們，儘管認同感與關注階段存在很多聯繫，但它們仍然是兩種獨立而不可替代的心理結構（constructs）。

在近年來所做的一項針對中國大陸新課程改革的研究中，研究者也同時使用了認同感和關注階段對兩所學校的課程實施情況進行了個案分析。研究者首先使用問卷調查的方法分析了兩所學校的教師對新課程改革的認同感；然後分別在兩所學校中選擇了部分教師，用開放性陳述的方法探討了他們的關注階段。研究發現，兩所學校對新課程改革的認同感存在顯著差異，甲校教師在各個分量表上的得分都顯著高於乙校教師（見表4）：

表4. 甲、乙兩校認同感及其影響因素的 t 值分析表
（尹弘飈等，2003：27）

變項	平均值		t
	甲校	乙校	
態度	5.7263	5.1901	3.065**
行為意向	5.9366	5.1778	4.524***
成本效益	6.1057	5.4741	4.062***
實用性	5.5268	5.0489	3.017**
關心事項	5.2154	4.6111	3.065**
校內支持	5.6620	4.7873	4.800***
校外支持	5.2927	4.3156	5.170***

p<0.01; *p<0.001

來源：“中小學教師對新課程改革認同感的個案分析”，尹弘飈、李子建、靳玉樂，2003，比較教育研究，24（10），頁27。

對兩校部分教師關注階段的分析則有以下發現（靳玉樂、尹弘飈，2003）：（一）就發展程度而言，甲校教師的關注階段主要集中在「後果」（階段4）上，但已經具有明顯的「合作」（階段5）傾向；乙校教師的關注階段也主要集中在「後果」（階段4）上，但還有許多「管理」（階段3）痕跡。比較而言，甲校教師的關注階段略高於乙校教師。（二）就教師關注的內容而言，甲校教師的關注內容更為豐富和全面。以課程評價為例，儘管這是兩校教師共同關心的問題，但乙校教師關注的只是如何評價學生，而甲校教師在考慮學生評價的同時也關心如何評價教師。

雖然這項研究沒有細緻深入地分析認同感和關注階段之間的關係，但這些結果表明，認同感與教師關注有可能存在一種正向的相關關係，即伴隨著高水平的認同感，教師關注也會發展到較充分的、較高的階段。不過，綜而觀之，目前將認同感與關注階段結合使用、探討二者關係的實證研究還很少，還沒有形成一些較成熟的研究結果。

伍、結語：認同感與關注研究的實踐啟示

一、課程實施之規劃與評定

長期以來，關注階段研究在課程實施的評定中都扮演著重要角色。它與使用水平、革新形貌一起組成了關注為本採用模式（CBAM）測量課程實施程度的基本工具。經過各個國家和地區課程學者的持續努力，關注階段在今天仍然是我們在評定課程實施時的首選理論之一。此外，在課程實施的規劃及其改進方面，關注階段研究也能給我們許多啟示。儘管著眼於校區、學校整體脈絡的變革規劃也能促進課程實施，但改進實施狀況的最佳策略莫過於促使個體教師發生合意的變化。然而，教師關注的發展不是一個自然而然的過程，而且並非所有教師都會經歷後果、合作、再關注等高級階段，這需要變革促進者提供有效的支援和干預。霍爾等人（Hall & Hord, 1987, 2001）曾描繪了四種典型的教師關注階段剖面，即非使用者、缺乏經驗的使用者、經驗豐富的使用者以及創新的使用者（renewing user）。針對這些不同情況，他們提出了一系列干預策略以促進教師關注發展到理想狀態。關注階段研究可以使實施規劃考慮更多的個人因素，從而更有效地改進課程實施。

相對而言，認同感研究在評定課程實施時發揮的作用較為有限，但它在改進實施規劃方面的作用卻歷來為人們所重視。研究者指出，變革規劃需要充分考慮以下三類因素，即變革的成本和收益、變革的性質以及變革的使用脈絡（Morris, 1987; Lee, 1996）。透過分析教師的認同感，我們可以同時瞭解上述三類因素對教師的影響，例如新課程的實用性（變革的性質）、教師的成本效益評估（變革的成本和收益）、學校內外的支持（變革的使用脈

絡)。在近來的一項研究中，Waugh（2000）認為變革規劃者可以把認同感作為一份成分檢核表（checklist），對照各個因素來分析自己對變革的規劃是否妥當。另外，他還建議研究者從理想觀點（「我希望如何規劃變革」）、真實觀點（「我認為變革是如何實施的」）和實際行為（「我對變革的實際行動」）三個角度測量教師的認同感。他認為，假如變革規劃是完善的，測量所得的三種認同感應呈現一種輕微遞減的趨勢；如果變革規劃不當，這三種認同感就會呈現一種不規則的大幅度遞減趨勢（Waugh, 2000: 360）。儘管他建議的這種做法目前還沒有實證研究驗證其成效，但這至少為我們思考如何改進實施規劃又提供了一種可能性。

二、教師發展專案的設計與檢驗

在CBAM問世之初，霍爾等人就指出關注階段可以為我們設計教師專業發展項目的依據。簡言之，通過理解和評定教師的關注階段，我們可以瞭解教師當前所關心的問題。然後，我們可以從這些問題出發，為教師設計更加個人化和針對性的專業發展項目。例如，假若教師關注集中在「個人」階段（階段2），我們就應該讓教師瞭解變革要求教師做出的轉變，如教學觀念、角色行為以及個人在組織結構中的作用等；如果教師關注集中在「評價」階段（階段4），我們就應該幫助教師發現變革對學生學習的效應，如學習成果、學習能力的改善等。在第二代CBAM研究中，學者們更強調關注階段在檢驗教師發展項目之成效中的作用。Peers（1990）曾使用開放性陳述的方法評定了教師在培訓期間關注階段的變化。對這些質化資料的分析表明，儘管這些教師的關注沒有達到最高階段，但教師關注表現出整體的發展趨勢，開始關注課程對學生的影響（階段4）、關注與同事的合作（階段5）等問題。範登堡等人（van den Berg et al., 2001）則使用關注階段問卷評定了教師發展項目對關注發展的影響。研究發現，在接受過為期兩年的專業支持項目之後，教師關注呈現了預期的發展趨勢：教師在資訊／個人、管理等低級階段上的關注降低，而在合作、基於學生經驗的再關注以及再關注等高級階

段上的關注顯著升高。這些結果證實了教師發展專案的有效性。

近年來，也有學者開始使用認同感研究來檢驗教師發展項目的成效。在最近的一項研究中，夏秀禎等人（Ha et al., 2004）以香港的體育科課程改革為背景，對 183 位小學體育教師在參與培訓項目前後分別使用認同感問捲進行調查。資料分析結果如下（見表5）：

表5. 培訓前後體育教師認同感的變化（Ha et al., 2004 : 427）

變項	前測	後測	顯著水平
態度	5.1060	5.1941	0.421
行為意向	4.6644	4.9614	0.042*
非金錢成本效益評估	5.1396	5.4107	0.021*
課程的實用性	4.8897	5.1591	0.011*
學校支持	4.5632	4.6688	0.462
校外支持	3.5862	4.3040	0.000**
關注事項	3.8759	3.5159	0.032*

* $p < 0.05$; ** $p < 0.01$; 7點Likert量表

來源：“Teachers’ perceptions of in-service teacher training to support curriculum change in physical education: The Hong Kong experience”, by Ha et al., 2004, *Sport, Education and Society*, 9, p.427.

由表 5 可見，教師在接受培訓後對課程改革的行為意向有了顯著增加，而且在成本效益評估、課程的實用性、校外支持以及關注事項方面也有了積極變化。顯然，教師培訓已經取得了成效。這項研究表明，使用認同感研究檢驗教師發展專案的成效也是一種可行之舉。

綜上所述，對教師認同感和關注的研究已經在很大程度上擴展了我們對教師情意因素的理解，並且也不斷豐富著課程實施研究的洞察力。然而，正如前文所指出的那樣，對課程實施中教師情意因素的探討還是一個初步的、開放的、有待不斷深入的課題。在未來的研究中，我們應該在以下幾個方面有所突破：

- 個體／群體教師關注與文化脈絡之間的互動；
- 多個角度的教師認同感對改進實施規劃的作用；
- 教師認同感與關注階段之間的關係；

- 以認同感、關注為代表的教師情意因素對教師認知因素的影響；
- 擴展情意因素的研究範圍，分析認同感、關注與教師的情緒、動機之間的互動，及其對課程實施的啟示。

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課程領導與教學領導關係之研究

The Analysis of the Relationships between Curriculum Leadership and Instructional Leadership

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摘 要

課程與教學領導為現代校長領導的核心任務現已為大部分人所接受，然而課程領導與教學領導之間的關係並不易釐清。本文主要從課程領導與教學領導之發展及課程領導與教學領導概念之關聯探究來分析「課程領導」與「教學領導」的彼此關係。本文主要發現為「課程領導」與「教學領導」息息相關，彼此關係密切而複雜，彼此之間存在著二元關係、同一關係、交集關係、階層關係及互動關係。基於「課程領導」與「教學領導」其關係是密不可分，因而本文基本上主張應融合「課程領導」與「教學領導」為「課程與教學領導」，進而整體去思考領導者的課程與教學領導的相關議題，如「課程與教學領導」的意義、目的、角色、功能、內涵、行為、實踐策略、困境、解決途徑…等等。

關鍵字：課程領導、教學領導、課程領導與教學領導、課程與教學領導

Abstract

The purpose of this study is to do the analysis of the relationships between curriculum leadership and instructional leadership based on the literature review

about the development of the curriculum leadership and instructional leadership and the key concepts of curriculum leadership and the concepts of instructional leadership. Based on the analysis, we propose curriculum leadership and instructional leadership should be merged into one--“curriculum and instructional leadership”.

Keywords: curriculum leadership, instructional leadership, curriculum leadership and instructional leadership, curriculum and instructional leadership

壹、緒論

校長在學校中扮演了領航者的角色，人們常說「有怎樣的校長，就有怎樣的學校」，此具體說明了校長的影響力與重要性。而九年一貫課程實施後，加入了許多不同於以往的理念，如學校本位課程發展（school-based curriculum development）、課程統整（curriculum integration）、多元評量及協同教學等。雖然我們可說「課程改革，人人有責」，但在現行體制下，校長仍是一校之長負有領導全校校務之責，為落實這些課程革新概念，校長的領導效能仍被視為學校有效推動各種改革最重要而不容忽視的因素。

然而，Kmetz和Willower，Leitwood和Montgomery及Martin和Willower卻指出：校長將大部分時間花在處理一般性事務、做好人際關係及服務學生上，他們很少督導教學，更少在教學領導上作出努力（引自李安明，1998）。而長久以來，國內校長也跟國外發現一樣係以執行教育政策與學校行政的事務領導為主，實際從事課程與教學方面的領導較少，而較忽略了自身應在課程與教學領導上的作為與身為首席教師的角色。鮑世青（民90）也認為國內以往各級教育行政單位普遍忽視學校校長教學領導角色與功能，使得教學領導在校長的表現領域中成為最弱一項。鮑世青所指的雖是校長教學領導的角色問題，但是自九年一貫課程實施後，學校已面臨重大的挑戰，如科目的整併、課程的統整、教學時數的調整，以及與其他教師進行協同合作等，因而校長事實上同樣也碰到課程領導與教學領導的角色問題。因此，今日的校長

除了讓學校行政運作維持順暢外，校長更要能重新定位自己在課程與教學領域的角色與任務，突破傳統只以行政管理領導為重的舊思維，而要視課程與教學領導亦為校長領導的核心任務，如此方能實現此波課程革新的目標。

課程與教學領導為校長領導的核心任務現已為大部分人所接受，然而課程領導與教學領導之間的關係並不易釐清。魯先華（民91，頁60）甚且認為既然課程與教學本是密切相關，或許可進一步融合二者為「課程與教學領導」，然後從目標訂定、課程規畫設計到教學實施、評量一系列的活動中，去整合出校長所應扮演的角色與功能。然而此兩者的關係究竟為何，應如何釐清，本文將進一步去探討。本文探討的重點分為三部分，第一部分探討課程領導與教學領導之發展；第二部分分析課程領導與教學領導之關係；第三部分為結論。

貳、課程領導與教學領導之發展

根據課程領導與教學領導的文獻分析，一般而言教學領導的研究發展歷史，比課程領導的研究較早。因此以下將先介紹教學領導的發展，再對課程領導的發展做說明。

一、教學領導的發展

校長教學領導理念的發展起源自美國，此一概念演進李明芸（民93）指出可區分為四個階段，分別為第一階段一九六〇年代、第二階段一九七〇年代、第三階段一九八〇年代及第四階段一九九〇年代。以下將依據李明芸之研究整理說明如下：

（一）第一階段：一九六〇年代

美國自從一九五七年在蘇俄史布尼克（Sputnik）人造衛星事件之後，聯邦政府積極致力於學校課程的革新，而學校課程的改革很理所當然的由校長負責推展。一九六〇年代早期，美國聯邦政府針對數學和自然投入大量資金予以改革推動，課程的修訂遍及學校和校長（李安明，民86）。又依楊振

昇（民88）指出，一九六六年美國柯爾曼（Coleman）提出一份報告書，該報告書是柯爾曼根據四千多所學校的六十四萬五千多名學生的資料，分析當時美國教育機會均等的情況，不僅使學生的成就表現逐漸受到重視，也因而促使許多學者進行一連串有效能學校（effective school）的研究，形成所謂「有效能學校運動」（effective school movement），而該運動所獲致的主要結論，則強調校長教學領導的角色與功能。並歸納出有效能學校普遍具有以下幾項特色：（一）校長能擬訂學校明確的發展目標；（二）校長能主動積極參與課程與教學的相關活動；（三）校長對於教師的教學與學生的學習有高度的期望；（四）校長能表現高度的行政領導與教學領導知能。

（二）第二階段：一九七〇年代

一九七〇年代中期，幾乎很少校長能夠避免掉實施方案和課程管理的責任，校長在督導聯邦方案上幫助成員發展，以及對教師教學提供直接支援上，承擔了一個新的功能轉變，相對於他們以前維持現狀的角色，已隱約可見校長角色朝向學校改革邁進。由於聯邦方案的增加，校長已然成為「方案代理人」（李安明，民86）。

（三）第三階段：一九八〇年代

一九八〇年代，許多行政研究學者，鑑於課程改革期間，學校雖然投入了大量的人力和物力，但達成的目標有限，於是開始探究改革成功學校與不成功學校的差異，許多學者乃從「效能」的觀點來探討學校課程改革的成果，認為校長的教學領導，是影響學校效能的重要因素之一（李玉林，民90）。Edmonds（1979）指出「強的行政領導」是學校有效能（instructionally-effective）學校，他同時指出有效能的校長必需是要能夠平衡管理和教學兩者的技巧。這個論點，鼓勵了學校校長更加關注學校教學方案和促使成員關注學生成就的領導。專業的規範以不能再接受校長只扮演維持學校的平順和方案管理的角色。Edmonds更進一步建議校長要去扮演教育改革的中心角色。

（四）第四階段：一九九〇年代以後

一九九〇年代強調校長轉型領導者的角色，轉型領導雖然改變了領導

的觀點，但並沒有因此而放棄了校長教學領導的重要性（李新寶，民90）。Hallinger（1992）也明確的指出校長的教學領導角色已成為校長領導的新標準。可見，無論領導的觀點及技術如何的轉移，校長的教學領導仍是不可忽視的一環。

綜上所述可知，美國校長教學領導概念的起源可溯自一九六〇年代，至今已有一段時間的歷史。相較於美國對教學領導概念的推展與研究，國內興起校長教學領導概念此一領域起步較晚，國內學者鄭進丁在民國七十五年始引用「教學領導」一詞（鄭進丁，民75）。根據他的論點，國內的教育法令對校長職務之概括規定為「綜理校務」，因此學校所有事務皆屬校長的職責範圍，他將國中小校長所履行的角色歸納為「行政主管」與「教學領導者」。張清濱（民77）提出十項全能的校長角色，其中之一為教學領導者。楊百世（民78）從校長教學視導角色出發，視教學視導係以改進教學為目標的教學領導，而校長即是主要的視導人員。

而在國內針對我國校長教學領導，最早進行有系統的調查研究者為魯先華（民83）之研究，之後相關研究隨之興起。如校長教學領導行為與學校效能之研究（李玉林，民90；張慈娟，民86）、校長教學領導與教師效能（李新寶，民90；李清華，民91；李雲漳，民91；陳美言，民87；陳慧敏，民92）及校長教學領導與教師專業發展（吳雨錫，民91；謝建成，民90）等。而李隆盛（民92）及張志豪（民93）則把教學領導者擴及到學習領域召集人的教學領導。另外國內對國中或國小校長教學領導進行研究，大多以量化研究為主，質性方法研究較少（王宗平，民92；林明地，民89a；蔡玲玲，民92）。可見教學領導概念在國內雖起步較美國晚，但似乎已受到重視與發展，而在研究方法上則以量化研究為主。

二、課程領導的發展

黃旭鈞（民92，頁2-5）認為課程領導的發展可追溯到一九七〇年代，其發展可分四個時期，要素確立期、概念發展期、模式建立期及實際應用期。以下將引用他的研究觀點分四階段說明如下：

（一）第一階段：要素確立期

此時期最主要的發展在確立課程領導的要素及其特徵，黃旭鈞引用Pickering及Ross的研究，說明了課程領導在此時期主要在釐清課程領導的主要因素，包括了課程要素與領導要素，而其中課程要素主要在課程發展與管理，領導要素則包括了支持課程發展的團隊合作、激勵、溝通等行政領導要素。

（二）第二階段：概念發展期

此時期最主要的發展在確立課程領導的功能與任務，黃旭鈞並指出Bradley的課程領導者的六項任務研究、Glatthorn的課程領導者的十一項職責研究、Hatfield的實施同儕課程領導者的六項組織要素研究、Fielding的課程領導者的四項任務研究及Bailey的十二項課程領導守則研究為此階段較具代表性的論述。

（三）第三階段：模式建立期

此時期主要是指課程領導的概念發展已漸趨完整，而逐漸建立一些課程領導模式。黃旭鈞舉美國的「課程領導中心」（CLI）模式及加拿大的「DIME模式」為例來說明。前者的「CLI模式」指美國Kansas州的Emporia州立大學和幾所公立中小學所組成的團隊所成立的「課程領導中心」（Curriculum Leadership Institute, CLI），而後者的「DIME模式」指加拿大薩克其萬省教育廳所發展的模式，該模式指出新課程發展經過四個時期：發展（Development）、實施（Implementation）、維護（Maintenance）和評鑑（Evaluation）。

（四）第四階段：實際應用期

此時期指課程領導模式建立完成後，如「CLI模式」和「DIME模式」都已加以推廣實施且行之有年。透過課程領導模式的實際應用，可指引課程領導實務的進行，驗證與修訂課程領導模式，縮短課程領導理論與實踐之間的差距，至此課程領導模式已邁入實際應用時期。

黃旭鈞（民92，頁10）並進一步指出，課程領導相關研究的國內外發展概況。他指出相較於教學領導的相關研究而言，有關於課程領導的研究顯

得較少。在國外主要出現在一九八〇年代以後，尤其在一九九〇年代之後有逐漸增加的趨勢，焦點集中在相關人員（校長、教育行政人員、教師等）對課程領導者的角色、角色知覺與行政責任等之研究。而國內的校長課程領導研究，主要是隨著九年一貫課程的實施後逐漸受到重視，除一些學者（林明地，民89b；徐超聖，民88；高新建，民90；單文經，民90；黃旭鈞，民90；黃政傑，民88；黃嘉雄，民88）陸續發表過相關的文章外，也陸續有研究生的論文（王月美，民90；王霄燕，民90；潘慧貞，民90等）以此主題做研究。不過整體而言，有關校長的課程領導事實上仍在起步階段。

三、課程領導與教學領導的近期發展

從以上教學領導與課程領導的發展來看，教學領導的研究已行之有年，而從教學領導的內涵來看，課程方面的事務係包含在內的。正如 Macbeath, Moos 和 Riley（1996）所指，在北美有關領導的研究文獻，尤其在1980年代有相當多是與教學領導有關，因而其發展應比課程領導較早。而在國內情況亦有類似狀況，教學領導的研究已行之有年，而課程領導的研究主要是隨著九年一貫課程的實施後逐漸受到重視。

以國內近期的發展來看，課程領導的相關研究角度確比教學領導更見多元與蓬勃。例如有從哲學和社會學角度來探討課程領導者，如林文生（民92）實踐的智慧（*phronesis*）和實踐（*praxis*）與課程領導的研究、陳伯璋（民92）實踐智慧與校長課程領導的研究、歐用生（民92a）課程慎思與課程領導的研究、歐用生（民92b）教師聲音和主體與課程領導的研究及歐用生（民93a）敘說研究與課程領導的研究；有從美學角度來探討課程領導者，如李玲惠（民92）、吳順火（民92）詩性智慧與課程領導的研究；有從教師專業來探討課程領導者，如黃旭鈞（民93）教師專業主義與課程領導的研究；有從道德反省角度來探討課程領導者，如歐用生（民93b）從超越企業領導論課程領導的道德蘊義的研究。而歐用生（民93c）並進一步從課程理論、課程政策、課程慎思、轉型領導道德領導、詩性智慧、敘說研究等主題去探討整個課程領導的趨勢與議題。從以上各種不同理論角度來跨界研究課程領

導現象來論，課程領導研究跟哲學、社會學、美學、道德及教師專業議題已有初步的連結，充分展現出課程領導理論研究的多元豐富性、實驗性與想像性。

而有關教學領導的研究，依國家圖書館所收錄的全國博碩士論文及中文期刊的研究題目來看，主要以教學領導行為指標建構、教學領導與教師專業、教學領導與教師教學效能或學校效能關係之研究為主。相較於課程領導研究從更理論面的哲學、社會學、美學或道德的研究角度（而課程領導部分若同樣依國家圖書館所收錄的全國博碩士論文及中文期刊的研究題目來看，課程領導主題亦有與教學領導類似的課程領導行為及與教師教學效能或學校效能關係之研究），教學領導似乎較偏重於教學領導的實務面，而較少從教學領導的哲學、社會學、美學或道德的角度去研究。

有關教學領導與課程領導的近期發展將簡要分兩方面來討論。

（一）課程領導與教學領導研究和行政領導研究同樣受重視

前已論及自九年一貫課程實施後，學校面臨科目的整併、課程的統整、教學時數的調整，以及與其他教師進行協同合作等重大問題，因而校長已面臨課程領導與教學領導的角色問題。因此，對今日的校長而言課程領導與教學領導和行政領導一樣重要。游家政（民91）就指出尤其在當前的教育改革倡導學校本位課程發展之際，學校的領導者就更不能畫地自限在狹隘的「課程行政」和「教學領導」，而必須擴大為「課程領導」。Aspin（1996）亦論及校長對知識的概念會影響課程設計及領導作為，而校長面對達成學校教育目標的重要手段的課程，必須瞭解課程的本質為何，然後透過合作的互動關係為學校發展課程。因此，校長的領導除行政領導外，已明顯包括學校課程與教學事物的管理與領導。

學校領導者不能只重視行政領導，而要同時注重教學與課程的領導，此點事實上Brubaker 和Simon早就指出。他們指出自1647年開始，校長的領導角色已產生轉變：校長兼教師（1647-1850）、一般管理者（1850-1920）、專業與科學管理者（1920-1970）、行政與教學領導者（1970-1990）及課程領導者（1990到未來）（轉引至Owen, 1988, 29-31）。此外Lunenburg 和

Ornstein (2000) 在他們屬於教育行政的專書中《Educational administration: Concepts and practices》已列專章討論課程發展與實施(第13章), 並提及課程與教學領導者角色的概念。由此即可看出課程與教學領導已是教育行政領域所同樣要探討的主題, 因而他們主張校長亦需扮演「課程與教學領導」(curriculum-instructional leadership) 者的角色(pp.334-335)。同樣的, 在課程領域的專書也開始重視課程領導議題。如課程領域的著名學者 D.F. Walker 在1990的《Fundamentals of curriculum》一書中並未討論課程領導議題, 但在其2003年二版的《Fundamentals of curriculum: Passion and professionalism》一書已增列學校課程領導的相關議題, 包括除校長係扮演最重要課程領導角色外, 學校的資深教師、輔導諮商員、學校心理學家或圖書館員也可在學校課程的事物上扮演課程領導角色(p.192); 課程領導的相關工作內容(pp.198-205); 課程領導者需具備的九個特質(pp.205-207) 以及課程領導重要性的論述(p.315)。

(二) 課程領導與教學領導研究對象兼及校長以外人員

有關課程領導與教學領導者的研究, 基於課程領導與教學領導人人有責的理念, 目前均有從過去以校長為主的研究轉到兼及校長以外人員的研究趨勢。以下分課程領導與教學領導兩部份論述。

在課程領導方面, 課程領導對象除校長外, 林明地(民89b)指出從學校現有非正式組織的角度而言, 學校中的領導現象及領導影響力的發揮是分散在各個角落的, 並非集中在校長身上, 因此校長在課程領導時應促進學校其他成員的課程領導, 包括教師、家長或社區人士等。同樣的Bernhardt, Hedley, Cattaro 和 Svolopoulous (1998) 一書中收錄課程領導者從各種與課程領導相關的議題(如學生的成就與表現、評量趨勢、建構主義與協作取向課程的實施、教學系統與學習方法、科技的使用...等等), 去思考學校發展以表現為本(performance-based)的課程時的課程領導問題。他們指出在發展此種課程時, 需要依賴教師與校長的同僚關係(collegiality), 他們都對學校的事務有很大的管控力量, 他們既是管理者也是教學領導者。而有關前者所述的管理者與教學領導者部分, 以校長的課程領導而言, Preedy

(2002)是交互用「課程管理者」(curriculum manager)與「課程領導者」(curriculum leader)來說明負責學校課程決定的人員的，因此宜注意「課程管理者」(curriculum manager)與「課程領導者」有其同義的關係。

又國內陳榮昌(民93)已對國民小學教務主任課程領導行為進行研究，陳世修(民93)則針對「學習領域召集人」的課程領導進行實際的問卷調查研究。另陳美如(民93)從十一個向度針對「教師課程領導」的角色與任務提出理論分析，而楊美惠(民94)則進一步首度對國民小學教師的課程領導行為進行實際的問卷調查研究，徐超聖及楊美惠(民94)則從教師課程領導角度去討論課程改革”。而在國外，也早已開始研究類似國內「學習領域召集人」的「學科領導」(subject leadership)的議題(Bell & Ritchie, 1999; Busher & Harris, 2000; Harris, 1999)。惟「學科領導」係屬於教學領導或課程領導的領域，在他們的研究裡其實並未做清楚而嚴格的區分，或可視為教學與課程領導的共同議題。

而在教學領導方面，李隆盛(民92)已對「學習領域召集人」的教學領導進行探究，探討學習領域召集人的教學領導的信念、能力與績效指標等問題。其中在信念上共有六項，在能力上則列有十大項的指標，而在績效指標上則有十七項。其中十大項的能力指標為：1.理解課程綱要及其配套文件；2.理解學生成長與發展的現代理論；3.理解學習理論的應用；4.理解動機理論的應用；5.理解課程設計、實施、評鑑與修訂；6.理解有效教學原理；7.理解科技在促進學生學習中的角色；8.理解教育的哲學與歷史；9.理解資訊來源、資料蒐集與分析；10.理解儀式、例行事務和慶祝活動的重要性。除此之外，張志豪(民93)則以問卷調查及專家訪談法探討國中自然與生活科技學習領域召集人角色與職責問題。而楊振昇(民91，頁46)更將教學領導者從校長擴及到院轄市及縣市教育局長、督學、輔導團輔導員、大專院校有關教授、學校校長、主任以及各校教學上之資深優良教師。而國外目前逐漸重視的「教師領導」(teacher leadership)(Frost & Durrant, 2003; Harris, 2003; Muils & Harris, 2003; Poetter & Badiali, 2001; York-Barr & Duke, 2004)的議題，即是從教師是領導者的觀點來看學校的領導。而事實上「教師領導」

與前述的「學科領導」研究一樣，在此類研究裡其實並未做清楚而嚴格的課程與教學的區分，因此「教師領導」研究應可同樣視為教師可擔任課程領導者的重要立論基礎研究。

綜上有關能擔任課程領導者與教學領導者研究可知，實際上能擔任課程領導與教學領導者的相關人員並不限於校長。而除以上所列的各相關人員外，在課程領導與教學領導領域共生社區中，家長及學生亦是重要一份子，未來如何形成家長及學生對課程領導與教學領導行為的意義的論述，亦是未來值得去研究的重要議題。

從以上有關課程領導與教學領導的近期發展可知，教學領導的研究發展歷史，比課程領導的研究較早，惟近年來課程領導的研究似乎更為蓬勃，尤其國內在推動九年一貫課程後，課程領導的研究更見豐富而多元。此種重視課程領導與教學領導研究的現象表示，現代學校的領導者已不能只重視行政領導，校長的領導除行政領導外，亦應包括學校課程與教學事物的管理與領導。此外值得注意的是，能擔任課程領導與教學領導者的相關人員亦並不限於校長，。由於課程領導與教學領導關係密切，因此未來對課程領導與教學領導的研究應該同時並重而不宜偏廢。

參、「課程領導」與「教學領導」概念之關聯探究

在探討「課程領導」與「教學領導」關係之前，或許應先釐清教育、學校教育、課程與教學等名稱的意義及範圍。一般而言，課程與教學乃是學校教育的核心活動，而學校教育又只是一般教育的一環。而當這些名詞加上領導後，其間的關係可以彭富源（民92）在其對國內「課程領導」學位論文之分析一文中，對「教育領導」、「學校領導」與「教學領導」、「課程領導」所繪的地位圖來了解之。其彼此關係如圖1所示。

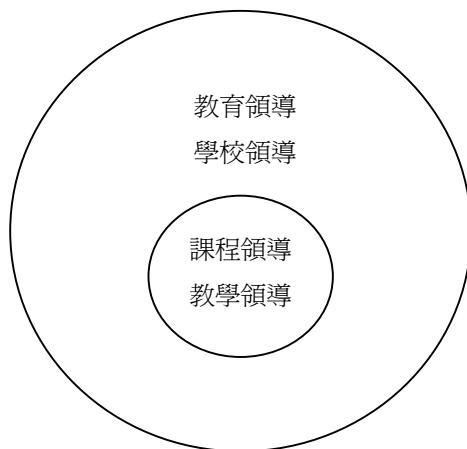


圖1 課程領導、教學領導地位圖（彭富源，民92，頁58）

由上圖可知課程領導與教學領導同為一圓且涵蓋在教育領導與學校領導之內。因此，課程領導與教學領導應可視為教育領導與學校領導的下位概念。而課程領導與教學領導既為同心圓，本質上自有其密不可分之處，以下將簡要討論。

首先在探討「教學領導」時，游家政（民91）認為「教學領導」為「課程領導」的一部分。而若依魯先華（民91）對教學領導文獻的歸納，教學領導的整體內涵包括二個層面，一為直接針對課程、教材、教法、教室互動、師生關係等的教學管理層面；另一則是包括目標、決策、校風、紀律、資源分配、人事安排、社區關係等間接支援教學活動的學校管理層面。意即從訂定學校教育目標，到課程設計，到實施與評量等所有直接、間接相關之事務均納入教學領導的範疇，因而如此之定義內容似就與課程領導的觀點產生了部分的重疊與雷同。依其論點，我們似可認定「課程領導」為「教學領導」的一部分。而陳世修（民92）訪談課程學者歐用生，依其訪談所示，「課程領導」與「教學領導」兩者之間應是互為一體，它們雖各具獨特性，但彼此更具關聯性，二者概念既是關聯且互為因果的。由上述可知，學者們對「課程領導」與「教學領導」的關係尚未有一致的共識，但是較獲共識的是「課

程領導」與「教學領導」的關係一如「課程」與「教學」，二者關聯密切。

而既然課程與教學本就密切相關，徐超聖（民86）及魯先華（民91）有關課程領導與教學領導的論點就值得特別注意。徐超聖（民86，頁18）認為課程領導與教學領導雖在概念上與字面上不同，但具體的領導活動內容上，卻不易明確劃分，因而把課程與教學領導並列使用，而把課程與教學領導視為一般的教育領導（educational leadership）的特定部分。魯先華（民91，頁60）也主張既然課程與教學本就密切相關「課程領導」與「教學領導」或許進一步融合為「課程教學領導」。而丁一顧、張德銳（民91，頁23）綜合比較校長角色職責的相關研究後，提出校長的主要角色職責有五項，其中有關課程與教學的領導方面亦將兩者並稱為「課程與教學領導」。

又國外學者Lunenburg 和Ornstein (2000, p.334) 在討論學校校長的角色時，亦認為校長需要扮演課程與教學領導者的角色，而視「課程與教學領導」（curriculum-instructional leadership）角色為校長的主要責任。他們同時把研究教學領導的著名學者J. Murphy在1990年發表的六個校長的教學領導角色，即促進有品質的教學（promoting quality instruction）、監督與評鑑教學（supervising and evaluating instruction）、分配和保障教學時間（allocating and protecting instructional time）、協調課程（coordinating the curriculum）、促進學習內容的涵蓋性（promoting content coverage）及監控學生進步（monitoring student progress）視為校長「課程與教學領導」的角色（p.335）。同樣的，York-Barr 和 Duke（2004, p.265-266）在論及「教師領導」（teacher leadership）的三個主要工作內涵（指教學領導、專業發展及組織運作）之一的「教學領導」時，事實上是處理學校或學區的課程事務來界定教學領導的工作內涵。因此，在討論「教師領導」的「教學領導」時，我們可視其領導行為內涵與課程領導大致相同。

由以上可知，在分辨「課程領導」與「教學領導」概念時，實難以二分法來將之明確的劃分。為進一步釐清兩者的關係，本文將以圖示區辨「課程領導」與「教學領導」之關係，期能對兩者的關係有更進一步的瞭解。以下分別以獨立圓、同心圓、相交圓、包含圓及循環圓來分析課程領導與教學

領導之二元關係、同一關係、交集關係、階層關係及互動關係，分析角度包括兩者的定義、目的、內涵、研究主題、領導策略、領導行為、相關實證研究及領導者實踐反思等層面。

（一）二元關係

「課程領導」與「教學領導」是各自獨立互不關聯的領域，彼此各為一獨立系統，彼此不太會有重大的相互影響。此點若從兩者的定義來論較為清楚。

一般而言，課程領導與教學領導的定義，均有狹義與廣義。而若從廣義來論，「教學領導」、「課程領導」、「行政領導」和「教育領導」彼此之間多所重疊。而若從狹義的定義來討論，彼此則為各自獨立互不關聯的領域。依Glatthorn（2000）的看法，課程為學習的內容，教學則是對學習內容的教授，若以此觀點，課程領導即可視之為對教學內容與教材規劃所發揮的影響，而教學領導則是對學習內容如何教的規畫。又楊振昇（民86）指出就狹義來論教學領導時，係指校長所從事與教師教學或與學生學習有直接關係的行為或活動；而所謂廣義的教學領導則是包括所有能協助教師教學與學生學習的相關活動。因而當以狹義的定義來論教學領導時，其範圍主要涵蓋教師的教學行為活動的動態歷程，而較不涉及課程的規劃。因此，若從狹義的角度來論課程領導與教學領導時，彼此可視為各自獨立之領域，以圖表示為兩個沒有交集而各自獨立的實體，如圖2。

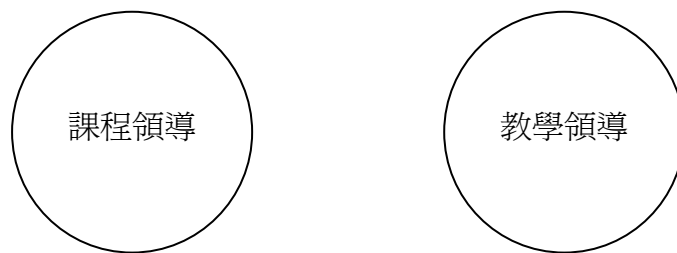


圖2 課程領導與教學領導二元關係圖

（二）同一關係

「課程領導」與「教學領導」是同一的關係，彼此所指涉幾乎相同。

例如課程領導與教學領導的實施在過程、做法、投注的重點可能有所偏重，但以目的而言均是透過領導作為來促進學生學習成就，以提昇教學品質進而實現學校教育目的。高新建（民91）亦持同樣看法，認為二者目標均是為了提昇學生的學習品質及學習成效。因而從其共同提昇教學品質進而實現學校教育目的達成教育目標的觀點而言，課程領導與教學領導的關係極為密切，以圖表示其兩者關係，兩者為一同心圓的關係，如圖3。



圖3 課程領導與教學領導同一關係圖

（三）交集關係

「課程領導」與「教學領導」是彼此交集的關係，兩者所指涉有部分重疊交集。此點在兩者的定義、目的、領導內涵、研究主題、領導策略及領導行為為都可發現其重疊交集處。其中定義與目的正如前節已論，從定義而言，若從廣義來論，「課程領導」與「教學領導」彼此之間多所重疊。從目的而言，均是透過領導作為來促進學生學習成就，以提昇教學品質進而實現學校教育目的，因而彼此有交集甚至是同一的關係。

若從領導內涵來論，課程領導內涵主要為校長基於課程專業知識，協助教師改善課程品質，提昇學生學習效果課程任務，包括課程願景、課程發展、決定、規劃、設計、實施、評鑑等。而教學領導內涵主要可歸納為依其教育理念與學校成員共塑教學目標與願景，確保課程與教學品質，活絡學校學習氣氛、樹立教師專業進修的組織文化及建構支持性的教學環境；因此，二者在理念、願景、目標均是為求教育之成效，課程領導則以發展課程為核心任務並擴及學生學習成效；教學領導重視教師的教學成效，學習氣氛、教師

文化與教學環境。

若從研究主題來論，課程領導為研究主題，有教師專業成長（朱湘慈，民92；張瑞財，民92；黃超陽，民92；龔素丹，民91）及提供支持性環境（張瑞財，民92；黃超陽，民92；龔素丹，民91）為部分內涵。而以教學領導為研究主題而言，亦有提昇教師專業成長（張碧娟，民88；楊振昇，民88；趙廣林，民85）及提供支持性環境（李安明，民86；張慈娟，民86；張碧娟，民88）為部分內涵者。是故，二者有重疊之處。校長課程領導與教學領導皆是校長發揮領導的功能，展開積極作為。

若從領導策略來論，校長課程領導在策略上大致以校長本身的領導能力為主，包括充實相關知能，溝通、協調、成立相關課程組織、協助教師專業成長等；而校長教學領導的策略亦為透過直接或間接的領導行為，直接主導、影響、參與、示範或授權他人從事與學校教學活動相關措施，包括溝通、視導、評鑑、支持、促進教師專業成長、營造學校學習氣氛發展公共關係。

若從領導行為來論，比較龔素丹（民91）建構的校長課程領導行為指標與李安明、鮑世青（民91）建構的校長教學領導行為指標，可發現校長課程領導與教學領導的具體行為中共同的部分為：學校成員共塑願景、建立具體可行目的、觀察教室教學、鼓勵教師進修、進行行動研究、組織專業成長團體、爭取設資源並獲家長及社區認同等。因此，可認定教學領導與課程領導二者在領導行為上都是以校長領導行為為核心，兩者的領導行為有相當程度之重疊。

因此，綜上所論，課程領導與教學領導在定義、目的、領導內涵、研究主題、領導策略及領導行為都可發現其重疊交集，因而兩者是有交集的二個圓，如圖4所示。

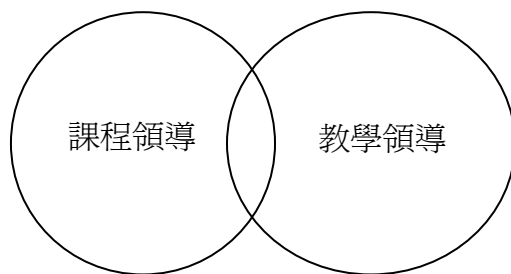


圖4 課程領導與教學領導交集關係圖

（四）階層關係

「課程領導」與「教學領導」彼此存在著階層關係。在圖5中，課程包含教學，教學為課程的次級系統（subsystem）；而在圖6中，則教學包含課程，課程為教學的次級系統。例如在課程領導的實證研究中，有多位學者將教學領導所論及教學方法方面融入至課程領導的內涵中（潘慧貞，民90；龔素丹，民91；何泰昇，民91）。是故，由課程領導的實證研究似乎將教學領導融入於課程領導，以圖表示則為教學領導為內圓，而課程領導為包含內圓之外圓，如圖5。

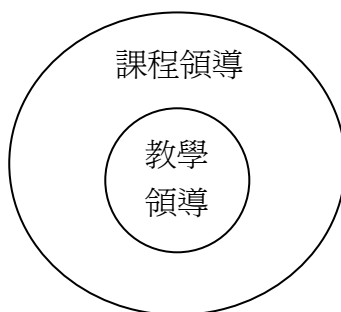


圖5 課程領導與教學領導階層關係圖（教學領導為內圓，課程領導為外圓）

惟在教學領導的實證研究中，亦有多位研究者均將確保課程品質包含在其中（李玉林，民90；李安明，民86；李新寶，民90；張慈娟，民86；歐曉玟，民90）。因此，由教學領導的實證研究可說是將課程領導視為教學領導的下層概念，以圖表示則為課程領導為內圓，而教學領導為包含內圓之外圓，如圖6。

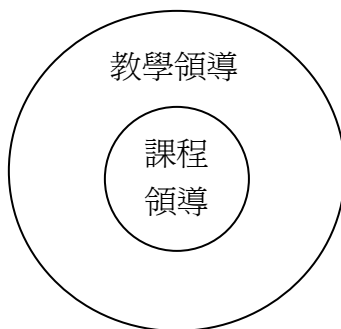


圖6 課程領導與教學領導階層關係圖（課程領導為內圓，教學領導為外圓）

（五）互動關係

「課程領導」與「教學領導」雖然各自獨立，但彼此也會有持續性的循環相互影響關係。因此，課程領導會影響教學領導，教學領導也會影響課程領導，而且這個過程是持續的、循環的且不終止的，因而呈現彼此不斷的調適與改善的循環特性。亦即學校領導者在實踐課程與教學的領導時需依據學校情境綜合判斷並適時調整策略，並在二者之間相互取得平衡，同時反思領導實踐的歷程與結果，再進行批判、反省與檢討，重新調整領導策略，以取得新的平衡。因此若從領導者的實踐反思層面而論，課程領導與教學領導是相互影響，相互調適的循環歷程，其關係如圖7所示。

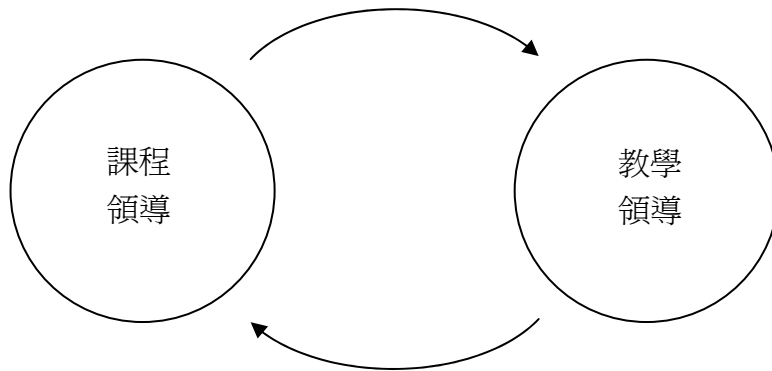


圖7 課程領導與教學領導互動關係圖

由以上之討論可知「課程領導」與「教學領導」息息相關，彼此關係密切而複雜，彼此之間存在著二元關係、同一關係、交集關係、階層關係及互動關係。在概念上，課程領導與教學領導或可分析其差異性，但在學校教育現場實際操作時，學校領導者在實施課程與教學上的領導，實難只領導教學或只領導課程，其差別只是在「課程領導」與「教學領導」運作的重點、深度與廣度上的不同而已。

因此，談教學領導不可能乎忽略課程領導；探討課程領導也不會漠視教學領導。此點正如前已提及的陳世修（民92）訪談課程學者歐用生的主張

一樣，歐用生表示「課程領導」與「教學領導」實為一體之兩面，教學領導必需兼具課程領導的理念，課程領導也應涵蓋教學實施。是故，校長在實施教學領導時仍應兼具課程領導層面；實施課程領導時也應兼重教學領導層面，惟其輻合程度如何，領導者在何種情形下該如何調整最為理想，或者融合二者為一主題進行探討，則有待更進一步之研究。

綜合上述，本文基於發現「課程領導」與「教學領導」之關係是密不可分，因而基本上主張未來應融合「課程領導」與「教學領導」為「課程與教學領導」，進而整體去思考領導者的課程與教學領導的相關議題，如課程與教學領導的意義、目的、角色、功能、內涵、行為、實踐策略、困境、解決途徑..等等。而有關「課程與教學領導」的相關議題，如意義、目的、角色、功能、內涵、行為、實踐策略、困境、解決途徑..等等，將成為本研究未來需要進一步澄清的主題。

伍、結論

本文主要從課程領導與教學領導之發展及課程領導與教學領導概念之關聯探究來分析「課程領導」與「教學領導」的彼此關係。本文主要發現「課程領導」與「教學領導」息息相關，彼此關係密切而複雜，彼此之間存在著二元關係、同一關係、交集關係、階層關係及互動關係。基於「課程領導」與「教學領導」其關係是密不可分，因而本文基本上主張應融合「課程領導」與「教學領導」為「課程與教學領導」，進而整體去思考領導者的課程與教學領導的相關議題，如「課程與教學領導」的意義、目的、角色、功能、內涵、行為、實踐策略、困境、解決途徑..等等。

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強化課程評鑑以落實課程發展

Strengthen Curriculum Evaluation to fulfill Curriculum Development

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摘 要

本文旨在強化課程評鑑以落實課程發展。首先，說明實施評鑑是早期板橋課程發展的特色，進而說明課程評鑑在課程發展中的地位與功能。並藉由實地訪談及文獻探討指出當前學校本位課程及書商在課程發展與課程評鑑須檢討的部分。接著針對其檢討的部分，提出強化課程評鑑以落實課程發展的參考作為。這包括：以評鑑專業的學習為樞紐，由做中學中不斷地回饋與改進課程發展；以巨觀的評鑑詮釋，關注整體社會脈絡的課程發展；以內外部評鑑互補的樞紐，採合作評鑑方式的多元作法，因應當前差異多元社會，以促進課程發展。並展望評鑑能重視評鑑專業人員的培育、制度的配合及謙虛反思整個評鑑歷程等關鍵策略，以落實課程發展。

關鍵字：課程、課程評鑑、課程發展

Abstract

The main purpose of this thesis is to strengthen curriculum evaluation to fulfill curriculum development. First, it is explained that the practice of the evaluation is the characteristics of the curriculum development in the early ages of Panchiao Model. Second, it is explained status and functions of curriculum evaluation in curriculum development. Third, it is tried to explore and discuss the points of the current school-based curriculum and bookman in the terms of curriculum development and curriculum evaluation by field interviews and literature review.

Finally, the thesis will provide some suggestions for strengthening curriculum evaluation to fulfill curriculum development after discussing these points. The suggestions will be included of (1) improvement curriculum development by learning by doing and continuous feedback in a specialized field of evaluation; (2) paying close attention to the curriculum development which is suitable for the whole social context by macro-view evaluation and interpretation; (3) promoting the curriculum development by adopting both internal and external evaluation and multi-way of cooperative evaluation in order to fit social diversities. It is prospected that curriculum evaluation can be focus on nurturing the professional personnel of evaluation, a matching system, and a perfect modest reflection course of evaluation so that the curriculum development can be practicable.

Keywords: curriculum, curriculum evaluation, curriculum development.

壹、前言

隨著課程權力下放，中央對課程控制減弱，允許地方或學校自編課程，但當前的課程或教科書只重視「編」得出來，並不重視「課程發展」的概念，民間教科書為了趕在年度內送審，皆以最快的方式編完。由於缺少課程實驗和評鑑的過程，致使教科書內容雜亂不銜接，淺化不深入，這是當前教科書良莠不齊，為人垢病的主要原因。

以評鑑來落實課程發展，在早期的「板橋模式」即是採此作法，因此其發展出來的教科書頗受好評。其作法是先由研究小組人員與小學教師共同發展初稿，再由各大學的學科專家、課程、心理學者等組成的指導委員會審查，成為實驗本，此實驗本要在每一縣市指定一所學校進行實驗，經評鑑修正才成為試用本。試用本送請國立編譯館試用後，才成為正式的教科書。「板橋模式」在課程發展的過程中，以評鑑作為機制，來強化課程發展品質。其課程評鑑主要是利用下列幾種方式：（1）擬定單元評鑑表，供實驗班級教師填寫，寄回後加以分析；（2）舉行分區教學研討會，邀集一區內的實驗學校校長和教師，經由觀摩教學或座談、研討等方式，提出問題，交換意見和經驗；（3）舉行評鑑會議，適時邀集所有實驗班教師，共同研討，搜

集資料；（4）研習會研究小組或指導小組委員適時到實驗學校參觀、座談、了解問題；（5）利用電話或其非正式方式，獲取課程實驗有關的訊息。實驗本經由這些方式加以評鑑、修正以後，才改編成試用本（引自歐用生，1996：83-84）。由上可知，不斷的進行課程實驗和評鑑，利用各種可能的方式來進行評鑑是板橋模式的特色，其目的在促進課程不斷的發展，形成早期較為人稱道的課程發展。

然當前國內所推動的國民教育階段九年一貫課程改革，強調課程自由化，我們所面臨的課程發展也較板橋模式的課程發展複雜，可能的挑戰是，如何發展具有理念與特色的課程？教科書與相關教材如何設計和選擇、學習活動如何安排等。這不僅要隨著社會思潮的變遷也要隨著評鑑理論的發展，在既有的評鑑基礎上，作質的提升，以發展更適宜地方的課程和教科書（周淑卿，1995；歐用生，1996）。

本文旨在強化課程評鑑以落實課程發展。首先，藉由上述板橋模式所累積的課程發展經驗及闡明評鑑在課程發展中的地位與功能，進一步針對當前九年一貫課程改革，學校自主課程及書商課程發展之現況，採實地訪談及參考文獻等檢討其困境，並根據現狀提出強化課程評鑑機制以落實課程發展。

貳、課程評鑑在課程發展中的地位與功能

課程發展強調演進、生長的課程觀念。它不同於強調方法技術的課程設計。其重點是課程目標、內容、活動、評鑑程序所發展的「歷程」。而這樣的歷程也是一種充滿政治氣氛的知識權力互動發展歷程，存在著許多觀點理念的矛盾與利益衝突。因此，事實上，課程發展也是一種需要各級政府、教育學者、學科專家、課程教學顧問、學校行政人員、教師與家長、以及社會人士互相合作，彼此溝通協調的一種教育事業，以促進課程發展的良性演進與生長歷程（黃光雄、蔡清田，1999）。課程發展包括四個連續性的階段，此四個階段，並可經由評鑑進行不斷的回饋與修正（黃政傑，1987，1991）。第一是研究階段：包含問題檢討、需求評估、文獻探討。第二是發展階段：

包括了發明、設計、試用修正、定型。第三是推廣階段：包含傳播、示範、訓練。第四是採用階段：包含再試用、安裝、實施、鞏固。由上可知評鑑在課程發展中的地位，這種地位是相當重要的，這有別於一般人誤將評鑑置於整個課程發展過程的最後一步，認為課程實施之後才要評鑑。我們可以這樣說課程發展工作做得愈好，課程實施的困難愈少，學習愈易成功。而課程發展要做得好，有賴於每階段不斷地實施評鑑。

事實上，課程發展過程中實施評鑑對每一階段都是有用的。學者（黃政傑，1991：352；黃光雄、蔡清田，1999：256）即歸納出七個功能。第一個功能是「需求評估」：在課程方案設計前，先調查社會及學生的需要所在，做為規畫的依據，若未實施需求評估便著手設計課程，可能昧於社會及學生的需要。第二個功能是「缺點診斷」：旨在搜集現行課程之缺點及其成因，做為課程改進之用。第三個功能是「課程修訂」：課程修訂人員藉由評鑑方法，反復尋找方案的優缺點，試用擬就新方案以達到完美境地。第四個功能是「課程比較」：係藉由評鑑來了解不同課程目標、內容、特點和效果。第五個功能是「課程方案的選擇」：旨在藉由評鑑，來判別課程方案的優劣價值，以便作成選擇的決定。第六個功能是「目標達成程度的了解」：係以評鑑來比較課程目標和課程效果，探討目標達成了多少。第七個功能是「績效判斷」：旨在藉由評鑑了解課程設計及實施人員的績效。上述，評鑑七個功能，不僅顯示課程評鑑在課程發展中的地位，也顯示課程發展過程中為什麼要實施評鑑的原因和必要性。

參、檢討學校本位課程發展及其課程評鑑困境

國內當前所推動的國民教育階段九年一貫課程改革，一改過去「由上而下」的課程改革，轉而推動「由下而上」的課程改革，例如：「學校本位課程發展」即是，這可讓課程發展落實到基層，促使學校成為改革的基地，既能符應世界潮流，又能反映各地的特殊需求，促使學校教育人員直接參與課程發展活動。相較於國家課程發展委員會而言，學校是比較穩定而持久的

課程發展機構，又比較不會受到太多的政治干預，學校實際上最適合於建構特定課程計畫與教學方案的場所。再加上，課程決策乃是教師專業自主的一項重要成分，推動學校課程發展有助於教師專業自信、自我實現和成就感（甄曉蘭，2002；Marsh, 1992）。

然而，這種改革理念卻對教育實務者造成極大的專業挑戰。筆者依文獻探討（吳麗君，2002；歐用生，2002；甄曉蘭，2002）及實際經驗和走訪九年一貫課程試辦學校，得知絕大部分學校是為了回應上級改革的要求或怕被扣上不願配合改革或試辦初期為爭取必要的經費而參與（如：與一所初期試辦九年一貫課程的校長聊天談到其試辦的目的之一，乃是想先爭取到50萬經費，因為第二期只剩30萬元補助，等到九十年全面實施時，既沒有經費補助也得要做，所以早點做既有經費補助還可提前摸索。取自：談話於2000年4月），僅有少數抱著專業發展的自發性學校。在課程發展的運作模式上，也以「行政主導模式」為主，少見「教師專業主導模式」，換句話說，大都以校長、教務主任或教學組長負責扛起課程規劃、決策事宜，而教師仍是被動地負責完成行政人員所交辦的課程計畫編寫等。甚至於，只作紙上作業備查，形成這種事實，其因素是相當複雜，而且各校的生態也不同，所遇到的瓶頸也不盡然相同，在此則試著把常遇到的困境提出來討論，或許可以據此提出一些有效的因應策略（李順詮、王月美，2002；甄曉蘭，2002）。下面就依課程發展各階段，提出課程發展所碰到的困難。

在研究階段：此階段重點理應擺在問題檢討、需求評估、文獻探討（黃政傑，1991：351）。然而當前碰到的困境，一方面，是教師對課程發展的知能較欠缺且對課程發展認知偏差，另一方，是學校本身的需求未評估也未確立課程發展的走向（甄曉蘭，2002）。

由於大多數教師在師資培育過程未接受過任何有關課程發展的訓練，在推動過程中學校不知如何進行課程規劃或發展，而且誤以為課程發展，就是學校老師自行研發設計教材，這是對課程發展認知的偏差，事實上，學校本位課程發展型態其實包括：現有課程材料的探究、選用、調整及新課程

材料的創新四個層面（甄曉蘭，2002；March, Day, Hannay & McCutcheon, 1990）。此外，學校本身並未針對學校文化、社區資源、教師專長及教師負擔等作評估，只求在縣、市教育局的要求下，提出學校願景、課程發展委員名單、呈報課程計畫、辦教師研習計畫等，但卻不知學校課程發展的方向，甚至流於各校間版本的複製。

在發展階段：理應強調課程的發明、設計、試用修正、定型（黃政傑，1991：351）。可是這一部分對許多教師而言，由於習慣於疏離的教學生態環境，較不習慣合作共同規劃設計和發展學校整體課程，一方面，長期挪出大家共同的時間、精力是一大考驗。另一方面，礙於相關法令限制，未能充分授權，對學校的課程發展綁手綁腳（例如，成立課程研究發展組，沒有法令依據，沒有經費，無法減課），這種要馬而肥又不給馬兒吃草，終不易持久發展，若要進一步作課程的試用修正、定型，更是一大挑戰。

至於課程發展在「推廣」、「採用」階段：流於「能編出即採用」，欠缺示範、訓練、再試用等步驟，如此一來，課程只能說停留在「編」，而不能「推廣」；這種不考慮到實務層面的訓練和再試用，形成課程發展的殘缺，甚至於扭曲使用。不僅對課程品質的發展不利，更危及受教學生的權益。

針對上述，學校課程發展的困境，其解決之道固然很多，但我們思考的焦點是，難道沒有特別的回饋機制嗎？一定要等事情擴大了，才來亡羊補牢嗎？事實上，課程發展的每個階段皆可採取有效的評鑑機制來回饋修正（黃政傑，1991；黃光雄、蔡清田，1999），例如：課程研究階段，有賴各領域教師提供實際使用的情形，共同研討交換意見；也有賴行政人員的參與了解問題所在，安排進修研究時間，給予教師實質的支援；在發展階段，針對各領域實際使用情形提出可改進的意見，以及不能改進的原因說明，可改進的地方加以修改，若不能改進則割愛，另考慮設計再試用修正；在推廣、採用階段，加強小型局部的課程試驗、示範、訓練和再試用逐步擴大推廣採用，形成紮實的課程發展。可惜的是連課程評鑑機制都未適時使用或使用不當，以至於應有的回饋、修正或溝通、對話等品管也就無法發揮功效。且當前的評鑑也存在著一些缺失，如以量化為取向，只看結果不注重形成性的評鑑，

不能適時提供計畫、改進的資訊；且太仰賴外來評鑑，不重視內部評鑑；忽視做中學仍是學習如何評鑑的最好方法；此外，忽視有意義的評鑑需要動員許多可供選擇之工具，以及來自行為科學與研究領域使適合學校需求之方法等（歐用生，1996；Nevo, 1995）。因此，要如何增強評鑑應有的功能，以回饋修正課程發展，也就顯得特別重要。

肆、檢討民間書商課程發展及其課程評鑑困境

除了學校本位課程發展外，尚有各家書商的課程發展等，其中書商對教科書所發展的品質因直接影響全國中、小學師生使用的權益，因此，其發展品質也顯得特別重要。當前各家書商的課程發展及其評鑑機制又如何？有無值得檢討之處？針對此，筆者採實地訪談並輔以文獻探討來瞭解。在訪談對象方面，包括實際參與課程編輯的二位朋友、及某書商國小編輯部文教組長、審查教科書的周委員。訪談先採半結構式問題－以課程評鑑及課程發展的問題為主，接著是聊到其它相關的開放性問題，聆聽對方願意分享的話題。本研究者採一對一訪談就教的方式，試圖從編審不同角度來瞭解課程發展與評鑑的情形，以下簡述訪談內容大要：

第一位是陳老師（簡稱），負責三下綜合領域課程的編輯。是九年一貫課程種籽教師，曾參與三峽九年一貫課程研習及榮獲彈性課程教材設計獎，有二十年以上的教學經驗，是位資深優良教師。訪問於九十二年十一月十一日。訪談時間四十分鐘（並輔以電話訪話）。

第二位是張老師（簡稱），負責三下綜合領域的課程編輯。是九年一貫課程種籽教師，參與三峽九年一貫課程研習及獲得Power教師獎、特殊優良教師，有二十五年以上的教學經驗，是位資深優良教師。訪問於九十二年十一月十二日。訪談時間四十五分鐘。

第三位是黃組長（簡稱），實際負責國小編輯部文教業務，在此家書商（發行數量是全國數一、數二）已有五年以上的服務經驗，熟悉課程及教科書的編、審、選等實際業務。訪問於九十二年十一月十九日。訪談時間三小時三十分鐘。

第四位是審查委員周委員（簡稱），屬社會科審查委員，在國小任教社會科多年，教學經驗豐富，為縣市社會科輔導員，獲地方推薦到國立編譯館當審查委員。訪問於九十二年十二月十六日。訪談時間二小時。

以上從不同編輯群及編、審不同立場的角度，來了解民間書商課程發展及其評鑑的實際現況，雖只訪談一家稍嫌不足，但此家書商其教科書發行量在市場上卻占屬一、屬二。加上訪談的對象熱心誠懇、詳實告之其實際經驗，對研究主題的資料大有助益，以下針對書商課程發展及課程評鑑的實際困境來檢討。

（一）課程發展的歷程，並未透過課程計畫人員與課程研發人員的慎思規劃。因迫於人才、時間及課程實施採跳躍式等：人才難找是其原因之一。書商黃組長提到：「以課程編輯而言，既要有教學經驗且要懂得教材教法，這種人才已限於某種範圍內，再要尋找有編寫經驗者更不易，因此尋找方向大致以師範院校為尋找對象」（訪編輯部黃組長，2003/11/19）。事實上，除課程編輯人才缺乏外，研發、評鑑人才更是缺乏，所以，此家書商採取變通的作法，以兩個模式來處理，第一種模式，是先由大會（各領域各有一主編教授，其下有三、四位指導教授，而每一指導教授各又帶領三、四位撰稿教師集合共同開會）討論，再經各小組（即一位指導教授與其所帶領的三、四撰稿老師）編輯發展，最後再提大會討論。這種模式的優點是：開頭有彈性，要編寫時文章點子豐富多樣。但缺點是：開會不易集合，效率低人多口雜。模式二，先小組發展，再約好全部各小組集會時間，討論大方向有無問題，共同負責審核工作。接著，再找核心小組（即指導教授），來修改課文，採二週開會一次，開會討論完再修改，修改可能是局部修改，或是大改，若是大改則改發回編輯人員來。這種模式的優點是：書編完距國立編譯館審核時間較遠，有充裕時間發展和修改課程，且較易凝聚共識。但缺點是：整個版本會較統一，課程內容不會那麼豐富。目前採第二種模式來發展課程（訪書商編輯部黃組長，2003/11/19）。時間的壓縮是第二個原因，也是課程發展的致命傷之一。九年一貫課程的教科書在編輯、送審、歷經期間反覆回審、修正，至正式取得執照、印行也大約一年，因此新課程教材能「編」得出來

已相當不簡單，別奢望課程能「發展」出來。第三個原因，九年一貫課程實施期程採跳躍式，同階段內並無訂出能力指標先後順序，不利於課程銜接，影響課程發展的品質。編輯陳老師這樣說：

「剛開始撰寫時因三上、四上課程已完成撰寫，卡在中間只能找出指標中不重疊的部分，而且內容及活動又不能比三上簡單又不能比四上困難的部分來撰寫，所以很難寫。如果是自己班級的設計就好寫了，因為要寫全國性的，包括都市、山上等不同水準考量，實在不好寫，修改很多次。」（訪編輯陳老師，2003/11/11）。

編輯部黃組長也提到類似觀點：

「九年一貫新課程在第四年的銜接最困難，這一批學生在前三年所學的國語是八十二年版舊課程的底子，此時國語單字要依課程來編恐怕這批學生無法銜接，而先前已實施的新課程在二、三年級又已編好。因此卡在新舊課程間到底要依新或依舊課程來編真得很難編。」（訪書商黃組長，2003/11/19）。

上述原因在藍順德（2001，2003）的研究中同樣指出：九年一貫課程分三階段實施，業者必須組成不同的團隊進行編輯，凸顯了國內教科書編輯專業人才的匱乏，加上課程實施緊迫，壓縮了業者規劃教科書編輯的時間，業者與編者同時承受相當大的時間壓力，在如此情況下所編出來的教科書品質堪慮。

（二）課程發展的歷程，並未透過學校教師在教室的情境中進行課程實驗或試用。「書商基於財政經費考量是主要原因之一，因試教時必須提供周邊設計，包括VCD、圖片、教具等都要做。另方面，學校和家長不願意孩子冒這個險，成為試驗課程的白老鼠，且試驗課程有可能隔年選用為正式課程時，這批學生又有重覆學習之險」（訪書商黃組長，2003/11/19）。目前書商的變通做法是由主編結合核心小組來自己先審，然後再請有實際教學經驗的老師過目提供意見（訪書商黃組長，2003/11/19）。

（三）在送審內容方面，編輯者與審查委員的意見常相左，雙方的溝

通或對立不時呈現出知識文化價值觀、意識型態、教學觀、道德觀參照點的不同（周淑卿，2003；藍順德，2003）。其實在個人訪談編輯群、書商、審查委員也得到同樣的反映。

編輯陳老師說：

「我們是實務者最瞭解整個學校脈絡和可行性，要放進這麼多的內容和活動，老師們一定會唉唉叫、上不完，可是審查委員卻說基於綜合活動綱要的精神，要求內容要有「實踐與體驗」，所以這些內容和活動省不得，最後還是不得不接受審查者的意見來修改，因我們考慮到過關的問題。」（2003/11/11）

編輯張老師這樣說：

「每次近一小時的溝通發現審查委員已和上次委員有些不同，本沒有問題的這次變成有問題，要求修改或重編。問及審查委員何以會如此？審查委員通常回答說：這次已發現有問題不講出來說不過去，到時候會被人家說成把關不嚴。」（2003/11/12）

書商編輯部黃組長也有類似觀點：

「開放性問題納入課程編輯的分量多寡也為難著編輯者。一方面是審查委員基於課程綱要的精神，例如，要求社會科的問題多一些開放性題目，以及內容要注意活潑性。但另一方面，教師們則希望開放性議題的分量不要太多，因為學生有的根本不會寫，會寫的常是家庭背景較好而父母可以協助者，然而，會幫忙的父母長期協助下來，也會累也會叫，反映予學校或要求出版業者不要如此編；相對於忙於三餐奔波的家庭，孩子的功課常不寫也加重老師的負擔，而且長期對這些孩子的學習機會也不公平，因此目前的做法，先依審查委員要求，再蒐集基層教師的意見反映給審查委員參考。...再則，希望審查完將各家書商的評鑑結果或報告能公開，以利各家書商事先可預防，避免日後犯同樣錯誤，然審方有其考量並未公開」（2003/11/19）

再聽聽審查委員的看法，他們也有壓力和困境。周委員這樣說：

「審查的分量多且要在一定時間內審完（一審是一至二週內），以便於書商有時間修改、重編。對於審查把關方面，又怕把關太嚴，被說成以審代編，但不嚴又說無把關，真難為...，以目前社會學習領域審查的標準來說，主要依下列五項（1）課程綱要精神與階段能力指標方面（2）課程架構方面（3）教材內容方面（4）圖表方面（5）教學活動設計方面。……分別由學科及課程專家、現職教師、行政人員等八人至十八人組成，採合議方式來審查，審查人員盡量以不換人來增進彼此間的默契。……然審編雙方對於能力指標的解讀常無共識，有「路」和「線」之爭，即同一條指標有的解讀為很廣寬有的解讀很窄小，因此從書商方面所發展出來的內容也就不同，再加上編審雙方的意識型態、對國號等看法不同，彼此溝通有時變成彼此對立、爭辯。」（訪審查委員，周委員2003/12/16）

基於上述，我們不難發現編審雙方各有其困境和立場，然值得努力的空間也不少。書商在課程發展方面，較弱的一環是自我評鑑機制，仰賴編纂會議（即該領域的三、四位教授和其下十五位撰稿教師）（因每位指導教授其下帶領三、四位撰稿教師）及大會討論，藉開會來提供意見，可是大會的成員集合不易，效率低，不得不以主編結合核心小組來自己先審，這樣的做法是否容易發現自己的盲點，值得考慮，而其中最大的隱憂是缺乏評鑑人才，再加上樣本書未經實驗、試用修正，即逕行送審，這對審方的把關無形中也加重負擔。可是，偏偏審查委員又礙於時間和壓力，加上委員本身也是一年一聘，非專責機構，如此審查機關本身的體質已存在著不可克服的因素，因此審查機關也希望書商先行仔細檢查再送審，可是書商也有時間壓力，急於編完、送審、取得執照，那有時間仔細檢查，這種缺乏自我評鑑機制，在加上短視的行銷和市場競爭的利潤考量，又把內部把關工作踢回審查委員來作，且更依賴外部審查把關，因為書商們瞭解到，只要審查一過關，表示可以大量印書給予全國中小學生使用，而不需浪費自己的時間、人力、金錢在自我評鑑上，如此一來，內部應有的評鑑機制功能喪失，外部的評鑑把關也有隱憂，那麼全國中小學生所使用的課程品質也就堪憂，而這種堪憂要如何

對症下藥呢？以下提供可行途徑供參考。

伍、強化課程評鑑以落實課程發展的可行途徑

針對上述學校本位的課程發展或書商的課程發展之隱憂，其關鍵乃在於評鑑的回饋機制未能發揮應有的功能，要如何強化評鑑回饋機制，以落實課程發展。這就如同身體接受健康檢查，如何有效且有意義的反映於受檢者，達成預防、健康的目的。因此，受檢者要重視健康檢查，而健檢單位本身要有使人信服的专业能力，雙方願採合作式作全身持續及追蹤檢查。同樣的課程發展有賴於學校及書商等重視評鑑及良好的評鑑機制，採內外部人員合作的評鑑，共同為課程的持續發展而努力。亦即，視評鑑為專業，願意虛心於評鑑專業的學習，重視系統化課程評鑑；且以巨觀的評鑑詮釋，重視評鑑的脈絡性及整體層面的評鑑，關注到整體課程發展的動態歷程；採合作式的評鑑，重視人員的參與、溝通、協調，受評者願意接受評鑑，同時願意以內、外評鑑共同參與合作來發展課程，以促進課程發展的良性演進與成長歷程（黃光雄、蔡清田，1999）。以下進一步說明強化課程評鑑以落實課程發展的幾項作為：

一、克服書商或學校成員缺乏評鑑人才，可經由評鑑專業的學習，進行不斷地回饋與改進課程發展

以評鑑專業學習為樞紐，解決目前內外部評鑑的無力感。其無力感包括，內部的書商或學校成員缺乏評鑑人才的专业訓練，其評鑑自然不具客觀性與公信力，甚至於無法作基本的評鑑，只好仰賴外部評鑑；而外部評鑑如教科書的審查委員（或評鑑小組）並非常設機構成員，審查委員平時也很忙，臨時成立審查小組，在審查（評鑑）之前是否有足夠時間作審查（評鑑）前的講習、溝通評鑑共識，恐成問題。加上時間、經費等限制，無法長期觀察，以致在缺乏對書商或學校脈絡的瞭解與短暫的評鑑時間限制下，無法精確的反映學校或書商現況與需求。因此，企盼透過內部評鑑成員的專業學習，以為內外部評鑑的樞紐，使內外部評鑑的對話成為評鑑專業的交流，為內外部

評鑑的互補性尋得了著力點，克服內外長久以來南轅北轍、互守殘缺的窘境，也確定了學校、書商自我評鑑在課程發展中的角色與定位（郭昭佑，2000；Nevo, 1995; Lau & Lemahieu, 1997）。因此，評鑑專業的學習實有必要，而「做中學」乃是學習如何評鑑的最好方法。

具體而言，需要成員至少具有某種最低程度必備的評鑑技巧，以從事系統的努力。避免快速而直覺的判斷所做的評鑑。那麼評鑑人員必須學習處理認識論、證據通則、資訊科學、溝通及其它複雜的領域，在所有這些領域要運用其技術的良好能力，同時對於可能有用的科技發展保持消息靈通。評鑑人員應當學習熟練的技術包括：晤談、撰寫、內容分析、觀察、成本分析、調查研究、個案研究、不涉目標的評鑑、正反兩造的聽證、建議小組、檢核表、系統分析、理論建立等等，以及這些技術在不同評鑑情境的適用情形（Stufflebeam & Shinkfield, 1985/ 1989：10）。評估那些技術在每個評鑑情境下可能有用的程度，以及那些技術最有助於達成某一評鑑的特殊目的。換句話說，當我們重視課程評鑑專業，可以透過「做中學」的方法，學習如何設計一個評鑑與擅用不同的評鑑技巧於不同的課程發展階段及情境時，並學習如何收集資料與分析資料，使評鑑能滿足有用的（useful）、可行的（feasible）、倫理的（ethical）、精確的（accurate）（Stufflebeam & Shinkfield, 1985/ 1989：12；Nevo, 1995）。這不僅有助於課程品質發展，也強化了評鑑本身的功能，且提昇評鑑人員的自信心。

二、巨觀的評鑑詮釋，關注整體課程發展層面

由於學校和書商的課程評鑑，太仰賴外部評鑑，而且評鑑偏重於結果部分，忽略歷程的部分。形成不重視課程演進、生長、實驗、試用的觀念，無視於課程設計因素之間的交互作用，也無視於課程決定互動與協商的複雜現象。這樣的課程發展是不務實和不實際的教育慎思。事實上，課程發展歷程，是一個具有彈性、變化和反覆的動態發展歷程，充滿著知識、權力、利益、價值、意識型態的複雜歷程（李子建、黃顯華，1996；黃光雄、蔡清田，1999；Schwab, 1971）。更須要各階層人士的合作和關心來促成良性的發展。

這不能以膚淺的結果來評鑑，而必須關注整個發展歷程，關心整體社會脈絡，付諸同理的理解，採取較巨觀的評鑑詮釋，以追求理想的課程決定。因此，課程評鑑者要思考並質疑下列問題：當前課程綱要是否透過理性辯證或者充滿意識型態而影響學校本位課程與書商的課程發展？能力指標是如何產生？指標有無優先順序？學校本位課程及書商的課程發展是如何解讀指標？何以教科書編審間會形成「編者編得無奈，審者審得無趣」之問題？而這些被視為理所當然，不被質疑的、根深蒂固的利益、意識型態、知識觀、假定、世界觀等觀點其影響課程發展更深，更應該加以揭露，使其顯露出來。否則在課程發展歷程當中，易受其宰制而不自知，流於表面評鑑而不自覺。而評鑑方式可採取批判性的反省來發現隱含假定、知識、合理化和意識型態。換句話說，評鑑不僅要關心結果也要關心歷程；不僅要關心明顯量化的資料更要關心潛藏的、質的問題。唯有重視評鑑的脈絡性及整體層面，才不至流於評鑑孤立的行為及評鑑的技術性（歐用生，1996）。

評鑑者若忽略巨觀評鑑的觀點，則評鑑結果可能「譴責受害者」。例如，學校本位課程發展有問題是由於學校教師不實行專業主導模式、不進行課程規劃或發展，而不深究教育結構不平等、師資培育機構未受訓練、配套措施不足等因素；書商課程發展有問題是因為它唯利是圖，不研發、不試驗試用、不修正，而不探討九年一貫課程實施期程採跳躍式、研發編輯印行時間的壓縮等原因。因此，錯誤都在被評鑑者的身上，他們都該被譴責。如此一來，評鑑並未超越形式的合理化，走上實質的合理化，而這種帶有偏見的評鑑也不是真評鑑（Stufflebeam & Shinkfield, 1985/ 1989）。要跳脫此種片面評鑑的弊病，須改行所謂「巨觀的評鑑詮釋」、「整體性的評鑑」，考慮學校扮演的社會角色，深入教育中，利用批判反省、俗民誌、訪問、三角交叉檢證等方法，探討師生的生活經驗，並從整體社會觀點將這些現象加以批判加以詮釋。關注整體課程的評鑑，瞭解各層面的課程發展並不是脫離環境脈絡，而是嵌進原有的制度結構內，是在整體社會文化脈絡下有著密切的關聯。研究的概念和用語要從心理學名詞轉變為政治、倫理、美學等用語（歐用生，1996：92-93；Posner, 1995）。當我們行使巨觀、整體的評鑑時，不僅有助於蒐集完整的資料作有意義的詮釋，且可使評鑑過程人性化，這對全面落

實課程發展是相當重要的（Patton, 1990/1995）。

三、採不同的合作式評鑑，以內外部評鑑互補的樞紐，促進課程發展

內外部合作評鑑方式具有互補優劣的精神，並依不同需求和條件採用不同的合作作法，解決學校本位課程或書商課程的發展困境是具有實用性。不僅具有板橋課程發展模式所強調的評鑑精神，且對於當前差異多元社會背景下，更具有多元性和適用性的作法。

大體言之，內部評鑑較適用於「提供回饋服務以改進」課程，使其趨於完美的形成性目的，外部評鑑較適用於「提供資訊以判斷」效果與價值，以便抉擇、採用、推廣的總結性目的。前者，評鑑者乃在課程發展中的一員；後者，評鑑者乃置身於課程發展之外。這不管是內部評鑑或外部評鑑，也不管是形成性評鑑或總結性評鑑，皆須利用課程評鑑的歷程或結果，以控制課程設計發展的品質。兩者同為評鑑重要功能缺一不可，因此許多學者認為結合內、外部評鑑，可以互補長短，是較為理想的評鑑方式（Nevo, 1995）。至於以何種方式結合內、外部評鑑，以達成互補的精神，學者間有不同的看法。針對國內、外學者（周淑卿，1995；郭昭佑，2000；黃政傑，1987；黃光雄、蔡清田，1999；蔡清田，2000；Lau & Lemahieu, 1997; McKernan, 1996; Nevo, 1995; Torres, 1996）不同的看法，加以歸納成二種主要合作式評鑑：一為內外部評鑑者混合評鑑方式，另一為評鑑專業的支持與學習方式。

所謂「評鑑者混合評鑑方式」，是由評鑑者的角度思考，內外部評鑑者間最理想的不是非此即彼的選擇，而是兩種人員的混合，即不論形成性或總結性評鑑，最好兩種人員都納入評鑑體系之中，透過民主化的團體歷程、溝通、討論、決定，以進行評鑑工作（黃政傑，1987）。而所謂「評鑑專業的支持與學習方式」，其作法又分為四種：第一種是內外部評鑑者共同克服劣勢共享利益。此即由專業評鑑人員進入學校中，長期的觀察以瞭解學校問題與需求，而在脈絡熟悉的情形下進行評鑑，以解決外部評鑑的弱點；另由內部評鑑人員學習評鑑專業知能，且在專業人員協助下進行評鑑，克服內部評鑑最為人詬病的專業

與客觀性不足的問題（郭昭佑，2000）。第二種作法是，考量內部評鑑比外部評鑑更具成本效益。此種考量是基於聘請諮詢者要比聘請一個永久且全職的評鑑者要來得經濟。顯然的，克服內部評鑑專業問題，可能較解決外部評鑑脈絡熟悉問題經濟得多，也較可行（Torres, 1996）。第三種作法是，內外部評鑑同時執行，各自獨立但彼此互動，不斷對話。此強調內外評鑑都很重要，外部評鑑傾向官僚化、過度簡化及被受評者知覺為威脅，但外部評鑑可以提供刺激，改進內部評鑑活動的品質；而內部評鑑傾向於無害的、非判斷性的活動，但內部評鑑有保護外部評鑑免於過度簡化及創造成員對評鑑的正向態度。因此，在作法上鼓勵內部評鑑與外部評鑑對話，共同使用評鑑以發現解決困難問題的方法（Nevo, 1995）。第四種作法是，行動研究取向的合作評鑑。外部評鑑者不僅是從事評鑑工作，同時視教師（內部人員）為行動研究者，希望教師界定自己的教育問題，進行研究，採取行動，監督執行結果。外部人員主要是提供諮詢、資料，進行協調與協助（黃光雄、蔡清田，1999；蔡清田，2000；Lau & Lemahieu, 1997; McKernan, 1996）。

上述，內外部合作評鑑的二種方式及其多元作法，對於突破當前國內學校本位課程及書商課程發展的困境帶來另類生機，以下進一步說明不同的需求，如何使用內外部評鑑的幾項基本參考作為：

（一）假如，課程發展歷程中「政治導向、社會導向、與價值導向」是我們所要強調的，那麼可考慮評鑑者混合評鑑的方式，因此種方式，考慮評鑑是一個與眾人有關的歷程，應回歸眾人的基準，賦予參與評鑑者具有相同的權力，並能平等合理的行使權力。且從不同的角度去思考，在差異的理論視野交融後，輔以彼此協商、溝通、論辯的歷程，而建構意義。它兼顧到基礎的價值與規範的選擇，及在同意的原則下進行評鑑過程中的監視（郭昭佑，2000；盧增緒，1995；House, 1980）。但缺點是要付出冗長的時間代價，因共識是民主過程所強調，但要多人形成共識不易，因而討論溝通作決定花的時間也要特別多，雖然如此，其價值卻瑕不掩瑜，擺脫運作過程之「黑箱內」的動態關係，進行協商與溝通為核心，實具有第四代評鑑特點，學校本位課程發展等可考慮採用。

(二) 假如，課程發展歷程中以「成本」為首要考量，那麼「聘請諮詢者要比聘請一個永久且全職的評鑑者要來得經濟」，這種聘請諮詢者的作法可配合當前書商所採用「邊發展邊實驗」的課程發展方式，相互持續增強，既提昇課程發展的品質也考量到成本效益，倒不失為一可行的策略，是當前書商可以試行的策略。

(三) 假如，課程發展以「做中學、研究發展」為訴求，那麼可採「內外部評鑑同時執行，各自獨立但彼此互動，不斷對話」的評鑑作法。此作法重視內外部評鑑人員雙向交流、公平對待，共負責任。首先，透過在職訓練工作坊階段，使內部人員（如學校校長或教師）對評鑑產生興趣。其次，建立學校評鑑團隊，參與工作坊訓練者在訓練結束後，可依學校管理風格來決定是否成立，如要建立可選擇評鑑客體來練習內部評鑑，由外部評鑑指導者作專業協助，練習內部評鑑能力，實際學習如何進行評鑑。再其次，進入評鑑制度化階段，經歷幾個不同計畫的評鑑，藉由內部評鑑執行，認同評鑑的有效性，此時已到了評鑑制度化時機，擴大內部所有成員皆有參與學校評鑑團隊經驗。最後，建立內外部評鑑的對話階段。此階段是學校內部已準備好且能運作，才接受外部評鑑。這四個評鑑階段分別提供學校層級課程發展四個主要活動，即計畫一個教學單位、發展單位的第一個草圖、發展成一個實驗版本、發展單位最後版本（Nevo, 1995: 112-117）。這是一種重視在職工作為導向的實施方式，不僅適合學校內部職場的評鑑，同樣，適用於書商評鑑。採行做中學的課程評鑑來做課程發展，事實上也是學習如何評鑑的最好方法。這對於學校或書商等層次的課程發展具有實用性，同時達成內外部真誠交流的密切關係。

(四) 假如，課程發展歷程中「專業成長及改善實務」是我們首要考量，那麼可以採取「行動研究取向的合作評鑑」作法。以實務工作情境中的內部人員為研究主體，參與實務，改進實務、革新實務，由實務工作者的觀念立場出發，進而努力研究改進其專業領域的社會歷程。此種行動研究比其他研究更具有社會過程、參與投入、合作的、解放的、批判的、反省的特徵（蔡清田，2000；歐用生，1999：5；McKernan, 1996）。學校本位的教師

以課程當作有待實地考驗的暫時性研究假設，置身於教育情境當中的教育實務工作者，可以進行學校層面與教室層次的「課程行動研究」，以教育實務考證課程當中所蘊含的教育理念，並根據學校層次與教室層次「課程行動研究」結果，修正或否證課程中的教育理念（蔡清田，2000：44）。此種行動研究也正是一個繼續不斷的教育評鑑或課程評鑑的歷程，而課程評鑑亦成為課程發展之必要條件（盧增緒，1995；McKernan, 1996）。教師不僅獲得專業成長，且成為一個真正的課程評鑑者，這正是學校本位課程發展的根基，實值得採用。

（五）更重要的，它可以綜合多種合作評鑑方法加以靈活應用。在國外已有先例，如英國學者Ackland於一九九二年在英格蘭西南部地區進行一項「合作式的學校本位課程評鑑」（周淑卿，1995：209）。即採用「內外部評鑑者混合評鑑方式」，及「評鑑專業的支持與學習方式」下的「課程行動研究」，是兩種作法的靈活運用。其目的在協助新任教師熟悉學校課程狀況，及協助學校進行課程方案革新。所以成員混合內外部評鑑人員，括地方教育當局人員參與、學校有經驗的教師、新進教師、大學院校的學者專家。所有參與評鑑的成員都參與了計畫、觀察、資料蒐集、解釋、批判反省與實踐行動，也因而發現許多意義。學者專家的主要工作是協助學校訂定評鑑計畫，全程督導與記錄各個評鑑階段所發生的事情，包括確認識題、資料蒐集分析、解釋、及評鑑報告的呈現都在其督導範圍內；並在評鑑結束後共同討論課程改進方式。因此，教師對評鑑工作有歸屬感、也感覺自己能掌握評鑑的過程，此種一體的感受讓課程革新的力量來自教師對實際教育工作的評估與界定，所以課程評鑑的有效性較高。發現此種合作評鑑方式對學校成員而言，不管對評鑑性質與概念之覺知、教學活動之覺知或整體問題之覺知皆有正面影響。

由上述內外合作評鑑方式的應用中，顯示其運作之妙，端賴不同的課程發展需求、條件、及層級現況，而作靈活彈性應用，愈能提供真實有效的回饋，愈有利於課程發展。

陸、展望：重視改進課程評鑑以落實課程發展的關鍵策略

上述，強化課程評鑑以落實課程持續發展的可行途徑，分別經由課程評鑑專業的不斷學習、關注巨觀評鑑詮釋及內外部合作的評鑑機制，以促進課程發展。而這些可行的參考作為，其背後讓我們關心的關鍵因素是人、制度和反思工夫。人，包括課程評鑑人才培養、人才素質、人的正確觀念等議題。其次，制度的配合，也是不可忽視的助力，有充足支援的環境下，才易進行課程評鑑。此外，時時反思課程評鑑是否有瑕疵，這也是一種不斷追求強化評鑑活動以落實課程發展的必要工作。因此當我們在實施課程評鑑時，這些關鍵策略也應一併考慮，分述如下：

一、課程評鑑專業人才的培育

課程評鑑者的專業知能將影響評鑑結果的信服度，及對課程的回饋功能。若不用心於評鑑人才的培育，還奢望課程回饋品質的提昇，那是一種天方夜譚。評鑑要如何有效回饋於課程發展？在研究者訪談書商、編輯群、國立編譯館審查委員，和走訪學校本位課程發展委員與文獻探討後，深覺當前人才之匱乏，培育人才之必要。沒有課程評鑑專業人才，即使有評鑑的理念，也無法有高品質評鑑的作法，更遑論評鑑指標、設計等的發展（黃光雄，2003：21）。因此，成立教育或課程評鑑相關研究所，長期培養專業評鑑人員，及短期能為外部或內部評鑑人員，在研習課程裡頭開設課程評鑑，使具備課程評鑑專業知能，有了評鑑知能，才可能去做評鑑，這是相當重要的（潘慧玲，2003；蘇錦麗，2003）。

二、制度的配合支援評鑑，使評鑑能真正回饋於課程發展而不流於口號

評鑑專業人才須要一個能發揮其專業知能的環境，而不是一個綁手綁腳缺乏配套措施的環境，因此提供制度的配合來支援也是必要的。在評鑑的

制度上，可朝向法制化的作法，制訂一個整體性、持續性、彈性和鼓勵性的法條，讓經費、資源與行政措施等無後顧之憂，且適度整合各評鑑，全面性、連續性的實施，使評鑑形成一常駐性評鑑機制，真正地持續回饋課程發展（黃光雄，2003；蘇錦麗，2003）。

三、反思整個課程評鑑過程，力求課程品質的精進

課程評鑑的目的，是有助於「學生個人決定」及「課程決定」（Posner, 1995: 224），其最重要的意圖是為了改進（Stufflebeam, 1971）。以此而言，課程評鑑既有助於課程發展，應廣受大家歡迎才對，假如事實不是如此時，這就值得我們反思整個評鑑過程，到底是那個地方不妥，例如：

（一）為什麼受評者會有心理上的抗拒或不信任？是受評者對評鑑觀念未釐清還是評鑑人員的專業知能和操守不被信任；或是質疑指標不適合個別學校；亦或是評鑑過程未能真誠溝通；還是名次重於改進的決策。（二）為什麼評鑑規劃常是外部較內部評鑑受到重視？是內部成員對評鑑方式與技巧不瞭解，還是評鑑制度過於依賴外部評鑑使然；或是心態上認為內部脈絡的瞭解不及外部評鑑的公信力重要；亦或是形成性的評鑑不及總結性評鑑重要。

（三）評鑑本身是否進行了評鑑？在評鑑本身的規劃、設計及實施是否完善是否有可改進的空間；如何避免來年重蹈覆轍等。如果我們願意面對整體評鑑歷程，謙虛的反省思考，不斷力求改進，那麼課程發展的品質將可持續精進。

柒、結語

實施評鑑是板橋課程發展的特色，其實施方式在目前雖然不能照單全收，然其以評鑑促進課程發展的精神，值得我們參考，因此可加強這方面的作為。針對當前課程權力下放後，學校本位課程及書商課程發展的困境作一整體的檢討。提出以評鑑專業的學習，從做中學中不斷地回饋與改進課程發

展；以巨觀的評鑑詮釋，關注整體社會脈絡的課程發展；及採合作評鑑方式的多元作法，在當前差異多元社會下，以內外部評鑑互補的樞紐，來促進課程發展。更展望評鑑能重視評鑑專業人員的培育、制度的配合及謙虛反思工夫，以落實課程發展。

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教學平台發展與設計之研究： 以 Blackboard 和中山網路大學為例

The Development and Design of Teaching Platform:
Taking Blackboard and NSCU Cyber University as Examples

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摘 要

隨著網際網路的發達以及使用人口與日俱增，使得不受時間與地域限制，並具有雙向互動特性的網路化教學方式，如雨後春筍般的展現。而多媒體技術的進步，促使網路教學環境更趨完備，也造成網路化學習成為另一種新型態的學習模式，網路大學因此應運而生。本研究透過內容分析法，輔以研究者留美網路上課經驗、國內網路大學選課心得以及電子郵件訪談等方式，探究網路大學的教學平台發展與設計。本研究發現：（1）網路大學在世界各國不但蓬勃興盛，成為一種終身學習的方式，也提供學生獲取學歷的另一種方式；（2）教學平台須透過軟體的支援才能發揮教學功能，而支援的軟體需能提供使用者功能完整及方便使用為最大目標；（3）個案中的平台設計大致符合了建構式學習環境的模式，惟若能提供相關案例及有效的學習輔助工具，則更有利於學習成效的提升。

關鍵字：網路化學習、網路大學、教學平台、遠距教學

Abstract

The 21st century is a new era of knowledge-based economy. The global village has been curtailed space and time due to the mobile information and computer technologies. Thanks to Internet development and greater technological flexibility, cyber universities have been made over the years. The purpose of this study was to explore the cyber university, an alternative learning paradigm in higher education. The important issues in this study include: the history of web-based learning, the current development of cyber universities in the US, UK and China, the reasons for the rapid development of cyber universities, the current development of cyber universities in Taiwan, the software supporting the web-based learning platforms, and the design of CLE platform.

Keywords: web-based learning, cyber university, teaching platform, distance education

壹、緒 論

一、研究動機

隨著網際網路技術的進步，以電腦為基礎的遠距教學蔚為一股風氣，應運而生的網路大學（cyber university）更是開創了高等教育和終身教育的新型態學習方式。網路大學強調科技的導入與應用，適用於遠距教學與終身學習，是一種數位化與多元媒體組合教材的教學模式，也是一種提升教學資源分享的新型態（蘇榮俊，2001）。近年來，國內外以高等教育為主的網路學習平台，逐漸受到重視，例如國內的中山網路大學（以下簡稱中山網大）、政大公企網路學院及美國的鳳凰城網路大學等。網路大學在當今世界各國如此蓬勃興盛，其源起及發展現況如何，為本研究的研究動機之一。

所謂的網路大學係指由實體大學所創辦，並提供學員從中取得學分證明或專業學程證書的網路教學平台系統（中山網大，2004a；姚永錫，2002）。上述以網路教學平台系統為主的學習模式，不僅顛覆了傳統面對面的教學方式，更讓學習者多了一種新選擇。然而，網路教學平台能夠提供師生作為一

個教與學的知識交流環境，是否須具備一些支援軟體？因此，瞭解網路教學平台的支援軟體是研究動機之二。

放眼國內外的網路大學，能夠受到學界及市場的重視和歡迎，重要的因素之一是它不但提供了彈性的學習方式，更能夠達成良好的學習成效，而影響學習成效甚大的平台設計即是非常重要的關鍵。有鑑於此，應用建構式學習模式於教學平台設計，才能建構有意義的學習環境，以增進學習成效。因此，本研究以建構式學習模式來評析國內外網路教學平台的設計，期能提供建議以促進網路大學的發展為本研究動機之三。

二、研究目的

研究者留美（密蘇里大學哥倫比亞校區，以下簡稱密大）期間，曾經透過以Blackboard和WebCT所建置的e化學習系統（e-learning system）上課，體會到新模式的學習平台，也確實感受到學習方式的彈性與便利。誠如WebCT公司指出目前計有超過七十個國家的百所學院和大學，正透過WebCT擴張教與學的邊界（WebCT, 2005）。研究者回國之後，曾經在中山網大的教學平台選修過線上課程，也獲得類似的體驗。因此，本研究基於上述動機與網路教學平台使用經驗，採用內容分析法與電子郵件訪談（email interview）方式，探究網路大學教學平台設計所扮演的功能與角色。具體言之，本文之研究目的有三：（1）瞭解國內外網路大學的源起與發展現況；（2）探討網路教學平台的支援軟體及其種類；（3）應用建構式學習模式評析網路教學平台的設計及其改進之處。

貳、文獻探討

首先，簡述網路化學習之源起；其次，以美、英和中國大陸為主，撮述網路大學之發展現況；再次，論述網路化教育興盛之原因；復次，描述我國網路大學發展現況；最後，依次析述網路化學習平台之支援軟體、網路化

建構式學習平台，並舉例解釋Blackboard與中山網路大學教學平台之設計，以及提出結論與啟示。

一、網路化學習之源起

網路化教學的興起源自於遠距教學，其發展時間甚久；約在十九世紀後期，遠距教學的形式是以函授教學（correspondence）的方式進行，即以郵寄方式克服遙遠的距離，將講義與教材寄給每位求學者，供學習者自行進修閱讀。伴隨著無線廣播與電視的發明，遠距教學發生重大的變革，更將遠距教學帶到一個具備視覺與聽覺學習方式的新階段。有鑑於此，世界各國紛紛成立遠距教學的專責機構，將遠距教學規劃為教育體系的新成員，以彌補傳統學制所不及的部份，並逐步推演出終身學習的教育目標（彭耀政，2001）。

以美國為例，1965年高等教育法案（Higher Education Act of 1965），將「第四條學生獎助」（Title IV Student Financial Assistance）的規定限制在遠距教學課程（distance education programs）（US Department of Education, 2004a）上。而1998年高等教育修正法案（Higher Education Act Amendments）授權十五所機構參與1999年7月1日開始實施的「遠距教學示範計畫」（The Distance Education Demonstration Program），並在2001年7月1日甄選額外機構加入該示範計劃。到目前為止，美國境內共計有來自20個州（包括哥倫比亞特區）的100所機構，例如美國洲際大學（American InterContinental University）、布萊瓦社區學院（Brevard Community College）、凱佩拉大學（Capella University）參與該計劃（US Department of Education, 2004b）。

受到世界潮流之影響，我國在1986年8月成立國立空中大學（以下簡稱空大），空大是國內第一所採用視聽傳播媒體教學的大學，創立宗旨在辦理成人進修及繼續教育，實現全民終身學習的理念。空大教學特色是多元媒體的教材與多元管道的學習途徑，所提供的教材包括教科書、錄影（音）帶、光碟片等。教學方式以隔空教學為主、面授教學為輔，透過電視、廣播、電

腦和網際網路等管道播送教學內容；學生可以定時或隨時透過「網際網路即時播放系統」，點選收看和收聽教學節目（國立空中大學，2004）。

以研究者留學美國的密大為例，校內教師結合「資訊與存取技術部門」（Information & Access Technology Services，簡稱IATs）、ET@MO（係為Educational Technologies at Missouri之簡稱）學術科技單位、MU Direct（係為密大提供線上課程給商業機構、專業組織的單位，亦提供課程給國際學生）和The Reflector（係為多媒體電腦實驗室的名稱）（MU Direct, 2004; University of Missouri-Columbia, 2004a）等單位，促進網路課程的蓬勃發展。密大教育學院所屬的資訊科學與學習科技研究所（School of Information Science and Learning Technologies）在The Reflector的支援之下，提供各式證照及學術網路課程（例如Master's Programs, Specialist Program, Doctorate Program, Certificate Program, School Librarian Certification）（University of Missouri- Columbia, 2004b），讓資訊科技的能量發揮到淋漓盡致。除密大之外，印第安那大學布魯明頓校區（Indiana University at Bloomington）的教學系統科技學系（The Instructional Systems Technology Department），則提供了碩士與證照網路課程（Indiana University Bloomington, 2004）。此外，喬治亞大學（University of George）的遠距教育，則提供了豐富的網路課程，例如成人教育碩士網路課程（Adult Education Online Master's of Education Degree Program）、特殊教育網上訓練（Special Education Training on the Web）、喬治亞線上互動式獸醫教育（Georgia On-Line Interactive Veterinary Education）等（University of George, 2004）。

隨著網路化課程如雨後春筍展現之際，網路化教學平台之設計也日新月異；近代網際網路的普及和多媒體呈現技術的躍進，促使網路教學的環境更趨完備。網路教學具有雙向互動及不受時間地域限制的特性，這對倡導終身學習的現代社會而言，已成為重要的學習工具；其中網路大學的形成更是網路教學應用的典範（姚永鋈，2002）。綜上所述，網路化學習的發展源自於早期的函授教學（郵寄教材）、遠距教學（電視廣播）到網路化（線上互動式）教學平台為主的網路大學；其發展的過程除了說明科技的創新發展之外，更充分展現高等教育學習新典範的來臨。

二、國外（美、英、中國大陸）網路大學之發展現況

在1970年代美國佛羅里達州的諾瓦大學（Nova University），現已改為諾瓦東南大學（Nova Southeastern University），可以稱得上是開發遠距教學的先鋒；目前的諾瓦東南大學透過遠距教育傳遞系統（distance education delivery systems），提供29個學位（大學、碩士、博士）課程（Nova Southeastern University, 2004a, 2004b）。其他的大學，例如賓州州立大學（Penn State University）、佛羅里達州立大學（Florida State University）、肯德基州立虛擬大學（Kentucky Commonwealth Virtual University）、紐約州立大學（State University of New York）、馬里蘭大學（University of Maryland）以及西部州長大學（Western Governors University）等高等教育機構，都和諾瓦東南大學一樣在發展網路教學（樂為良，2002）。其中西部州長大學讓學生可以同時學習美國西部各州所有加盟大學的課程，就像在一所單一的院校一樣，充分發揮現有傳統大學體系的教育技術投資的效益和優勢（中國教育和科研計算機網，2003）。

此外像阿波羅集團（Apollo Group's）的鳳凰城大學（University of Phoenix）、瓊斯國際大學（Jones International University）、渥登大學（Walden University）等都是提供課程與學位的「網路大學」，其他如貝伯森學院（Babson College）亦提供了網路課程教育。在上述所提及的大學中，強調「遠距教學不是隔離與孤立，而是開放與接納」教學理念的美國鳳凰城網路大學（University of Phoenix Online）（輔仁大學，2004；樂為良，2002），是目前被視為世界上最會經營的網路大學。鳳凰城網路大學成立於1976年，在1989年成為美國第一批被認可提供網路學位教育的學校，在美國計有28州承認其學歷；經由超過100處的校園與教學中心（位於美國、波多黎各、加拿大）的設立，迅速推展遠距教育，至今有超過15萬名的學生，每天在網路上接受遠距教育學程，比學校本身所收的「實體」學生數量還要多。鳳凰城網路大學為網上學

生提供24小時線上服務，大量的顧問與老師靠電話與email就能協助學生學習（包括選課、實習等），連註冊、繳學費、圖書館、教學研討、完成作業、考試與評估、畢業典禮等都可在網上完成，畢業生人數已經超過了幾十萬人（University of Phoenix, 2004；聯合報，2003）。此外，馬里蘭大學學院（University of Maryland University College）從事遠距教育已有30年歷史，學生可以自主選擇參加面授或上網學習；在全校18個碩士學位、17個大學學位的所有550門課程，都有一一對應的網上學習資料。馬里蘭大學的學習支持服務包括教材、教學文件、面授輔導、教學設施等多方面，同時還利用網路接受入學申請、審查入學資格、收繳學費、舉行畢業典禮、頒發畢業文憑，以及提供選課與課程註冊的方便、提供學習技能的培訓、提供與系主任和教師的溝通管道、提供求職諮詢等。而波士頓大學不但網上教學資源內容豐富，而且注意提高製作技術（溫仲端，2003）。上述美國網路大學的興起與發展現況，代表著學習型態的革命，亦即教室裡面對面的傳授教學系統，已不再是唯一的方式；而網路大學如雨後春筍般的成立，意味著學位的市場需求與獲取學歷方式的改變。

在美國以外，英國的網路大學亦發展迅速；英國全球網路大學（UK eUniversities Worldwide，以下簡稱UKeU¹）是由英國政府聯合劍橋大學等幾十所英國著名高等學校共同組成，並由英國政府資助6200萬英鎊（£62m）。UKeU的任務是傳遞線上和世界性的（online and worldwide）學位以及與學位相當的知識（UKEU, 2004）。亦即UKeU致力於向全球提供英語、科技和工商管理等一系列的大學、碩士網路課程；其頒發的學歷、學位證書與在校生完全一致。根據英國政府網路大學教學計劃，學生可以通過網路聊天

¹ UKeU包括雪菲爾哈倫大學(Sheffield Hallam University)、約克大學(The University of York)、諾丁漢大學(University of Nottingham)、德比大學(University of Derby)、南安普敦大學(University of Southampton with other members of the Worldwide Universities Network)、中蘭開夏大學(University of Central Lancashire)、空中大學與劍橋大學(The Open University in association with the University of Cambridge)、伯恩茅斯大學(University of Bournemouth)、里茲都會大學(Leeds Metropolitan University)、里茲大學(University of Leeds)、曼徹斯特大學(The University of Manchester)、哈佛特郡大學(University of Hertfordshire)、密德塞克斯大學(Middlesex University)等大學（UK eUniversities, 2004）。

室和老師討論課程，掌握學習進度。雖然不是所有課程都可以在網路上完成，但學生將從基本課程中受益，並能就近在考場參加傳統考試。目前，英國UKeU與北京外國語大學網路教育學院，就留學預備英語課程（English for Academic Purposes，以下簡稱EAP）項目展開全面合作。EAP項目主要為那些準備去英國或其他英聯邦國家攻讀學位課程，或是希望不出國門而能在UKeU攻讀網路學位課程（即不想親自去英國讀學前班）的人所設計。課程結業之後可獲得15個英國高等教育學分或7.5個歐盟課程學分互認體系（European Credit Transfer System，簡稱ECTS）學分，並可進入UKeU學習英國知名大學的大學或碩士課程。EAP目前已獲得包括諾丁漢大學（University of Nottingham）在內的幾十所英國及英聯邦高校的認可（李茂峰，2004；張曉，2003）。

近年以來西風東漸，網路大學亦在海峽兩岸陸續成立。在對岸的中國大陸的網路教育愈趨向活絡，並朝向分門別類的方式進行中，例如人民大學網路教育學院（綜合類學歷教育的課程包括會計、金融、市場營銷等）、對外經貿大學遠程教育學院（經貿類學歷教育的課程包括經貿、金融、國際商法、商務英語等）、北京外國語大學網路教育學院（外語類學歷教育的課程包括英語專業學歷教育、英語專業研究生教育）等（在線教育資訊網，2004a）。截至目前為止，共計有六十七所網路大學在中國大陸營運，而網路大學的教學模式亦為學習者最為關切（在線教育資訊網，2004b）。

綜上言之，以網路式學習為主的網路大學，已蔚為學習的新典範；其中，所提供的課程以符合終身學習為主。而上述所提及的網路大學正在美、英和中國大陸等國逐漸深化之中。

三、網路化教育興盛之原因

網際網路改變社會的運作模式，許多大學紛紛以提供各式各樣的學習環境來迎接這個資訊爆炸的時代，網路化教育正是其中之一。自1990年代開始，大學利用網路進行遠距教學已成為全球趨勢，其原因包括資訊科技快速

發展、環境促成全球資訊網、多媒體及超媒體蓬勃發展，使網際網路發展形成；豐富性的教育內容、多元性的學習資源、個人化的學習需求、開放式的學習環境、超越時間與空間的限制、兼具同步與非同步的學習方式，形成了以網路為主的學習環境，並益增「以網路為主」的教學模式的重要（王梅玲，2002）。而Aggarwal（2000）分析網路教學發展的原因指出，傳統大學面臨到新世紀電子數位環境所帶來的衝擊，再加上網際網路的推波助瀾之下，使得傳統大學的教學環境勢必走向以網路、電子數位化環境為基礎的趨勢（引自王梅玲，2002）。除上述網路教學發展原因之分析，McCormick和Jones（1998）認為，網路教學由於具有不同於傳統教學的特性及優點，例如降低成本、無時空之限制、內容即時可靠、地點的獨立性、時間的獨立性、以電腦為媒介、多元媒體組合、強大的連結性、以學生為中心、主動式的學習方式、教學活動的多變性、個別化的學習環境以及社群性、合作性，教學資源共享等，以致能快速興盛（引自陳文誌、游萬來，2001）。

此外，Farrell（1999）指出，促成高等教育機構推展網路學習的因素包括：（1）資訊與通訊科技應用在教育上所發揮的能力、彈性與適切性逐漸提升，而硬體設備的成本卻逐漸降低。（2）傳統上需由學校機構提供的行政服務功能（如註冊選課、學籍管理、成績登錄等）等逐漸由科技代勞而完成工作。（3）知識成長迅速，使得傳統的教育模式感受到愈來愈多的革新壓力，學習者多在尋求終生學習的機會與彈性的學習管道。（4）傳統教室使用網路來獲取資訊愈來愈頻繁，而且傳統的遠距教育環境也採用科技，透過互動與合作式的學習來改進學習。（5）學習者要求更多的公平接觸管道與服務，科技使得偏遠地區的學習地點也可享有與市區學校相同的教學資源。

（6）許多機構（尤其是歐洲與北美的機構）了解到在日趨競爭的環境中，應用資訊與通訊科技使其市場佔有率增高。（7）學校管理者擔心如果學校無法達到預期的水準，則招生、募款及補助經費都會減少，因此學校需要跟得上競爭的速度。（8）學校決策者期望以發展虛擬教育來減少成本、增加生產力，並繼續擴展使成本不上揚（引自陳姚真，2003）。

綜上所述因素可以了解，高等教育機構發展網路化教育，與科技的革新、全球化的趨勢、學習管道的彈性、競爭力的提昇、時空藩籬的突破、成本的降低、豐富的多媒體內容等因素息息相關。

四、國內網路大學發展現況

由前述可知，美國網路大學的發展，以鳳凰城網路大學和馬里蘭網路大學最為成功，而預估在網路教育機構就讀的學生將從2002年的二百萬人成長到2006年的六百萬人（姚永鋈，2002）。受到國際潮流的影響，網路大學在台灣也有風起雲湧之現象，從1999年起由中山大學率先建置網路大學並開始招生，陸續有台灣大學、清華大學、政治大學、朝陽網路大學、崑山網路大學、銘傳網路大學、中華技術學院網路大學、國立中央大學網路大學、龍華網路大學、屏東網路大學等學校投入網路教學的領域；以目前在台灣而言，計有中山網路大學等十幾所網路大學在營運。

有關國內網路大學發展現況，以中山大學推動網路教學九年的經驗為最久，從過去의 同步網路教學開始，到七年前開始嘗試推動非同步網路教學，並於西元1999年9月開辦第一期非同步網路碩士學分班，至今已開設第九期，並共招收約2000名的學分班學生，另有二萬多名校內學生上網修習過其他網路課程。其他的網路大學，例如中央網路大學，即是以網際網路為基礎（基於提供互動的交流空間、提供隨選的學習空間、提供無遠弗界的資料空間、教育資源分享、終身學習的系統優點），應用網際網路的普及性、便利性與互動性，提供即時的教師上課情形、上課講義、師生與同學的互動討論以及廣大的網路資源，突破學習的時間與空間的限制，讓學員只要打開電腦，隨時隨地皆可學習（國立中央大學網路大學，2004）。

五、網路化學習平台之支援軟體

有關網路大學之學習平台設計，以國外而言，主要是利用課程軟體公司所生產的工具。例如Blackboard平台為教師提供的服務內容，包括使教師能夠在課程中添加網路內容，或在網路上主持整門課程。即使教師不具備任何網頁設計知識，也可以透過Blackboard公司的幫助創建自己的網站，透過網路為課程教學提供學習資料、課堂討論和線上測驗。例如Convene.com是一家服務性公司，幫助教師自己建立網上課程，與教師合作改進遠程學習教學計劃，使之適合個別學習的需要，並為班級網頁提供伺服器 and 網路管理。

而EMBANET是現場和遠程教育服務提供商，為學校建立虛擬校園提供指導，幫助大學提供網路課程，以及開展教師和學生培訓，教他們如何利用技術，並提供適時的技術支持服務（朱雪文，2002）。在台灣，中山網路大學系統可說是各大專院校網路教學系統中，最為完善，支援度最廣的一套系統，原因在於該系統能充分利用網路特性，結合教學理論相互印證與實踐，不僅是在技術上有重大的突破，更能兼顧學習者的方便和需求（洪明洲，1999）。中山網大所使用的網路教學平台為旭聯科技公司所研發的「智慧大師Wisdom Master 2.1」，其建構於Unix 網路作業系統之上，經測試能夠同時承載 1000 人以上上線學習，並符合教育部「非同步（網路）遠距教學需求規格」，是一套具備完整功能之網路教學平台環境（王梅玲，2002）。其他各軟體公司所支援的網路教學平台如表1所示：

表1. 各軟體公司所支援的網路教學平台

軟體公司／網址	網路教學平台	數量
旭聯 LearnBank 菁英線上 http://www.sun.net.tw	政大公企網路學院、清大科技管理學院、輔大數位內容網路學院、美國紐約州州立大學石溪分校。	4
旭聯智慧大師（智慧大師教學平台，2005） http://www.sun.net.tw	台灣大學、中山大學、政治大學、清華大學、成功大學、世新大學、台北科技大學、台北商業技術學院、東南技術學院、彰化師範大學、台北師範學院、台中師範學院、台東大學、屏東科技大學、高雄第一科技大學、樹德科技大學、中原大學、澎湖技術學院、南華大學、環球技術學院、中洲技術學院、靜宜大學、建國技術學院、實踐大學、中興大學、台北藝術大學、吳鳳技術學院、虎尾科技大學、聯合大學、聯勤技術、逢甲大學、文藻外語、高雄餐旅、大同商專、慈濟大學、慈濟技術學院、中國技術學院、台北商專技術學院、和春技術、高雄大學、德霖技術、輔英、花蓮師院等。	43
肯心資訊科技 http://www.canthink.com.tw/client.htm	國立台灣師範大學、淡江大學、醒吾技術學院、台灣科技大學、基隆市立中山高級中學、中華大學、慈濟技術學院、中原大學資管系。	8
億網科技 http://www.ewan.com.tw/	朝陽科技大學網路大學。	1
艾康科技股份有限公司 http://www.ikon.com.tw/tcl/introduce/index.htm	紐約大學、嶺東技術學院、國立空中大學。	3

六、網路化建構式學習平台

網路化學習已蔚為全球化的趨勢，象徵著新興科技所帶來的學習革命；而網路化學習應強調的是教師致力於建構有意義的學習平台，讓學生能在此學習環境中，增進學習的效益。傳統或客觀主義者的學習理論認為，知識是由老師直接傳輸給學生。然而，建構式學習理論假設知識是學習者憑藉他們的經驗，並經由個人與社會互動建構而成（Jonassen, 1999）。此外，建構主義者相信知識建構的結果，是從活動中以及定著（anchored）於該活動情境中而來。當學習者被問及一個問題而需要他們反思及表達所學時，他們才會將其所學意義化（Peck, Jonassen, & Wilson, 1999）。文獻中關於建構式學習環境有助益於學生成就之研究（Adams, 1997; Beckett, 1999; Colledge, 1998; Craven, 1997; Freed, 1998; Gibbs, 1999; Lieu, 1997; Soeharto, 1998; Tillotson, 1996; Wilkens, 1999）不勝枚舉，其中Jonassen（1999）對於網路化建構式學習環境（constructivist learning environment，以下簡稱CLE）提出一套模式：（1）以問題或計畫（problem / project）為學習環境之核心；（2）提供相關案例（related cases）；（3）提供訊息資源（information resources）；（4）提供認知工具（cognitive tools）；（5）提供對話及合作的工具（conversation & collaboration tools）；（6）社會的或情境化的支持（social / contextual support）系統。在執行CLE過程中，學習環境宜能提供教學活動的支持，諸如示範（modeling）、指導（coaching）及鷹架式輔助（scaffolding）等教學策略。

以下就Jonassen 的「設計建構式學習環境之模式」中的六個成份及支持執行CLE之三個教學策略，分述如次：

一、設計建構式學習環境之模式的六個成份（Jonassen, 1999, p.218）

（一）問題 / 案例 / 計畫

CLEs支持問題導向式（question-based）、議題導向式（issue-based）、案例導向式（case-based）及計畫導向式（project-based）的學習。問題或議題導向式學習，起始於問題之不確定或爭議性的答案；換言之，CLEs強調

建立一個能讓學習者試圖去解決案例或問題的學習環境。同時，在此案例或問題導向式的學習環境中蘊藏了學習目的。而有意義的學習之關鍵，係學習者對問題或學習目標之擁有感（ownership）。因此，教師宜設計引起學習動機的、有趣的及結構不良的問題。缺少了對問題的擁有感，學習者將無動機去解決問題。質言之，CLEs中的問題宜包含三個成份：（1）問題情境（problem context）--應描述環繞在問題周圍之物理的、社會文化的及組織的氣氛；（2）問題表徵或模擬（problem representation / simulation）--問題必須是真實的，或與真實世界的案例相類似；以及（3）問題操弄空間（problem manipulation space）--學習者宜有處理、解決問題及接受回饋的空間。

（二）相關案例

理解任何問題需要經歷問題及建構心智模式，生手最欠缺的就是經驗，而此經驗卻是解決問題最重要的關鍵。CLEs中提供相關案例的設計，能夠提供生手一些參考經驗；透過案例式推理（case-based reasoning），提供學習者必要的參考經驗或鷹架式輔助，以了解或解決問題（Schank, Berman, & Macpherson, 1999）。藉由提供問題的多元觀點，將使這些案例增強了認知彈性（cognitive flexibility）（Spiro, Vispoel, Schmitz, Samarapungavan, & Boerger, 1987），以及傳遞知識領域（knowledge domains）的複雜性。此外，描述相關案例之目的，在於協助學習者了解問題表徵中的外顯議題。教師宜提供不同角度的相關案例，以協助學習者深入了解問題。

（三）訊息資源

為了協助學習者調查或探究CLEs中的問題，教師宜提供相關訊息，以建構他們的心智模式和形成操弄問題空間的假設。當設計CLEs時，教師宜決定學習者解決問題時所需要的訊息。豐富的訊息資源乃是CLEs中非常重要的一部分，CLEs宜及時地提供學習者可選擇的（learner-selectable）訊息。因此，相關的訊息銀行（information banks）與訊息倉庫（information repositories）宜連結到CLEs中。上述之訊息銀行宜包含適當的文字檔案、圖片、聲音資源、影像及動畫等，以幫助學習者了解問題及其原理。

（四）認知（知識建構）的工具

在CLEs中，教師宜提供認知的工具，鷹架式輔助學習者執行任務的能力，以解決複雜、創新及真實的任務。認知工具係指一般的電腦工具，其在支持和促進特別種類的認知處理過程。此智慧型設備（認知工具），係用來視覺化或表徵、組織、使自動化或取代思考技巧。舉例而言，資料庫、概念構圖（concept mapping）、試算表、專家系統（expert systems）及超媒體都是認知(知識建構)的工具。

（五）對話及合作的工具

Scardamalia等學者（1994）指出，「科技支援學習環境（technology-supported learning environments）之概念，係指使用各式不同的電腦中介溝通（computer-mediated communications），以支持學習者在社群之間的合作」（引自Jonassen, 1999, p.228）。CLEs宜提供學習者共享式訊息（shared information）及共享式建構知識工具（shared knowledge-building tools），以幫助學習者合作式地建構知識。這些對話及合作的工具，可支持社群中的學習者去協議與做決定，以達成共同目標。透過各式型態的電腦會議，例如網路郵遞論壇（listservs）、電子郵件、電子佈告欄及網路新聞服務（NetNews services）等工具的使用，電腦網路科技支持了各式主題的論述社群（discourse communities）。

（六）社會的或情境化的支持

回顧教學設計和科技使用的歷史，許多教學計畫的失敗，常是因為草率的品質所致。例如，影片播放的失敗，常是因為物理環境的黑暗不足或適合儀器的取得不易。因此，在設計及實施CLEs時，調整情境化的因素，是成功實施CLEs的重要關鍵。此外，教師必須熟悉教學平台的設計，學生也應熟悉教學的介面設計。因此，對教師與相關人員實施在職訓練以支持學生的學習活動，有其必要性。教師也可以在網路上提供一些問題，經過同學討論反映意見之後，再提供說明或澄清意見，這些都是社會的或情境化的支持。質言之，提供教師與學習者社會的或情境化的支持，是成功執行CLEs所不可或缺的。

二、支持執行CLEs之三個教學策略（Jonassen, 1999, p.230）

在CLEs中，教學策略宜適當的支持學習活動與目標。示範、指導以及鷹架式輔助等三個教學策略的應用，可支持CLEs的執行。茲就上述教學策略分述如次：

（一）示範

在CLEs中，示範是最容易實施的教學策略。示範可分為行為的示範（behavioral modeling）與認知的示範（cognitive modeling）。前者係指示範（demonstrate）如何執行在活動結構（activity structure）中的活動；後者乃指清楚表達學習者從事於活動中，所應使用之推理（reasoning）。在CLEs中，當學習者需要協助時，他們可按類似「展現給我」（show me）或「我要如何做這個」（How do I do this）的按鈕，示範將提供學習者一個所欲表現（desired performance）的範例。此外，問題解決之示範，應在此過程中清楚說明每一個步驟的推理與決定。換言之，專家應示範內顯（covert）與外顯表現（overt performance）的步驟。

（二）指導

在示範過程中的每一步驟中，經由指導之後，學習者的表現將顯著進步。而一個好的指導教練（coach），能引起學習者的動機、分析學習者的表現及提供回饋、反思與建議。在CLEs中，當尋求協助時，學習者可按類似「我現在做的如何」（How am I doing ?）的按鈕，來尋求指導策略。而指導教練最重要的角色，是監督、分析及調整學習者的發展技巧。換言之，指導可以是提供暗示與幫助、促進適當的思考類型、促進合作活動的利用、促進相關案例的考慮、促進明確認知工具的使用及提供回饋。

（三）鷹架式輔助

如前所述，示範策略著重在專家的表現，指導策略著重在學習者的表現，而鷹架式輔助策略，則是一個支持學習者的系統性取向。鷹架式輔助著重在任務、環境、教師及學習者，並支援學習者能力外之暫時性架構。在CLEs中，學習者要尋求鷹架式輔助時，可按類似「協助我做這個」（Help me do this）的按鈕。許多情況之下，當學習者在執行任務時會遭遇

到困難，常是因為先備知識的不足。在此情況之下，教師可採取三種鷹架式輔助學習取向：（1）調整作業的困難度，以遷就學習者的能力；（2）重組任務，以取代先備知識之不足；以及（3）提供另類評量（alternative assessment）。

在Jonassen之「設計建構式學習環境之模式」（1999）的中心部分，是一個讓學生試圖去解決的問題。此問題包含對問題發生情境之描述、一個有趣的並支持學習者去表徵問題（representation of the problem），以及一個學習者可主動並影響學習環境的問題操弄空間（problem manipulation space）。上述所提及的模式與教學策略適宜作為評量網路化建構式學習環境之指標。

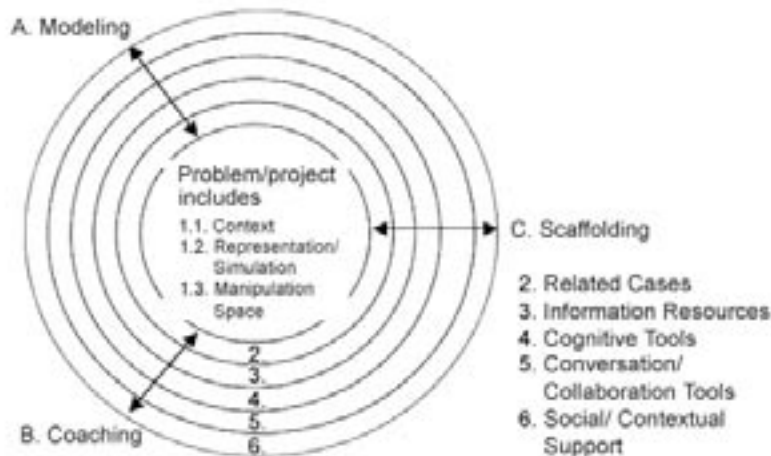


圖1 設計建構式學習環境之模式 (摘自 Jonassen, 1999, p.218)

七、網路大學教學平台之設計

目前美國網路大學所使用的教學平台，主要是利用課程軟體公司（例如Blackboard、WebCT）所生產的工具。在國內，網路教學平台的開發，有些是結合各校本身特色，由各校自行開發設計的，有些是直接使用商用平台，如前所述，中山網路大學使用旭聯科技公司的「智慧大師」。茲就國外及國內的網路教學平台，介紹其平台功能及介面設計如下：

（一）國外網路教學平台：

陳文誌及游萬來（2002）依據C2T2 的評比項目，對國外較著名的5個教學平台所做的比較。其中主要針對各教學平台所提供的學習工具與輔助工具進行評估，Blackboard教學平台的得分最高，而在同步溝通方面，Blackboard也是得分最高之一。以下介紹Blackboard的平台設計及功能。

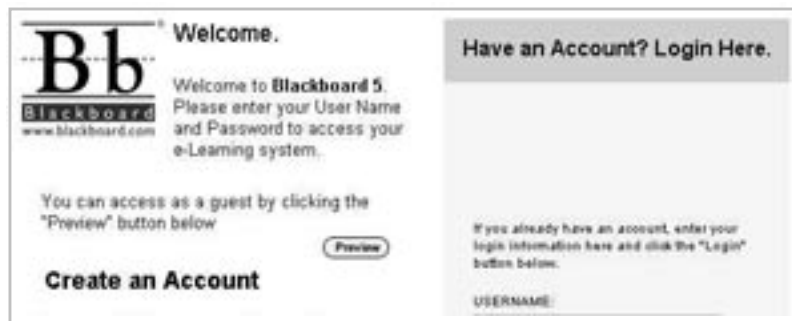


圖2 Blackboard網路教學平台首頁之介面

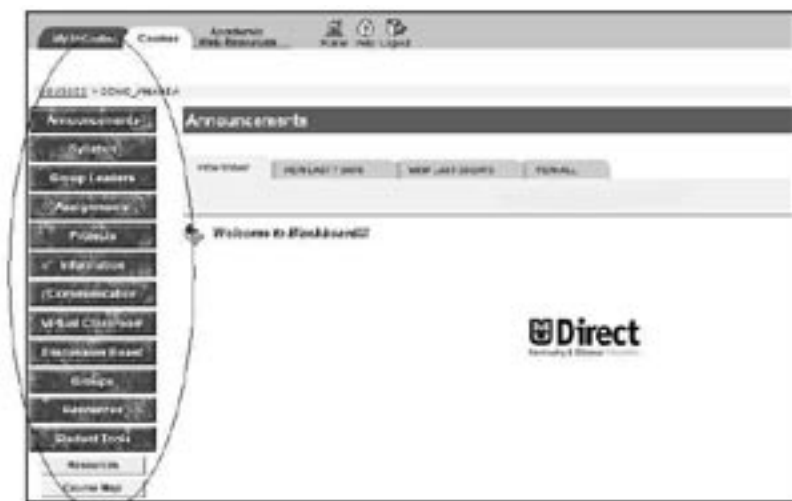


圖3 Blackboard之功能列選單

Blackboard 首頁的介面設計如圖2所示，圖3左側呈現的是平台的功能。左側選單的設計中，公佈事項（Announcements）可以讓使用者（即學生）知道教師公佈的最新消息，以讓學生掌握住該門課的動態；課程講義（Syllabus）內容可以讓使用者（學生）知道整個學期的作業、考試日期以及教師所選擇的資料；若該門課有專案計畫，則計畫領導者（Group Leaders）會列出各領導者以及各團體成員之姓名；指定作業（Assignments）列出該門課現在的作業；專案計畫（Projects）包含個別或是團體專案作業；資訊（Information）部分提供該門課之相關重要資訊；溝通（Communication）可以讓使用者寄送 E-mail 給班上同學或老師，或使用交談工具（Chat tools）與同學溝通合作，達成良好的互動；若網路課程有使用虛擬教室（Virtual Classroom），使用者（學生）可以進入教室中；討論版（Discussion Board）可以讓使用者（學生）根據課程主題，提出各式不同的訊息讓全班閱讀；組別（Groups）則列出所有組別成員；資源（Resources）可以讓使用者看到黑板資源中心（Blackboard Center），並回答各式不同的問題；學生工具（Student Tools）則讓使用者檢查個人成績、列出個人工作事項、檢查課程進度以及繳交作業。

另外，麻省理工學院 Open CourseWare（MIT OCW）是一個免費、開放的豐富教育資源，目前已上線的七百門課程中，內容包括了三十三門學科以及麻省理工學院的五個學院資源；全世界各地的教師、學生、相關人士和自學者都可以善加運用這一個無價的知識寶藏（中山網大北聯會，個人溝通，2004年5月8日）。茲以「媒體、教育、市場」課程為例，介紹其介面設計及平台功能。麻省理工學院 Open CourseWare 之首頁如圖4所示，當使用者進入該課程的首頁後，即可看見左側選單呈現搜尋（Search）功能、教學大綱（Syllabus）、行事曆（Calendar）、閱讀文獻（Readings）以及課程錄影資料（Video Lectures）（MIT OpenCourse Ware, 2004）等，能夠提供學習者進行各種知識加值與創新的討論，其學習頁面設計如圖5所示。



圖4 麻省理工學院 Open CourseWare 之首頁



圖5 「媒體、教育、市場」課程之學習平台首頁

相對於MIT OCW，台灣目前也有一個分享交流與公開討論的地方，這一個學習社群是「中山大學資訊管理學系」支持成立的開放學習社群，並由陳年興教授指導，可以約集一些朋友在學習社群內交流分享知識與進行學習活動（開放式學習社群，個人溝通，2004年5月13日）。

（二）國內網路教學平台

在台灣的網路大學，以中山網路大學為例（如圖6），所使用的網路教學平台為「智慧大師Wisdom Master 2.1」。以目前開設的「VCD 製作」課程為例，其平台功能之介面設計如圖7所示。



圖6 中山網路大學之介面



圖7 中山網路大學「VCD製作」課程之教學平台設計



圖8 系統區

在圖7的介面中，使用者透過該教學平台介面之設計，可以了解到課程內容、課程資訊、課程互動、個人區、系統區等。而在該教學平台中，使用者亦可使用其他功能（圖8），例如系統建議、線上字典、計算機、校務/問卷、會議廳等。除此之外，教學平台右側之溫度計，係為個人的「學習統計資訊」，點選該溫度計之後，使用者可以知道自己在該門課的登入次數、上課次數、張貼篇數、討論次數、閱讀時間和閱讀頁數等。透過一般功能的介面設計，學習者可以在教師的引導下進行學習；而學習統計資訊的平台設計，可以讓使用者自我監控，以達到自我評鑑與自我學習的目的。

參、研究設計與實施

一、研究方法

本研究採用內容分析法（content analysis），研究者客觀與系統的分析教學平台的設計與功能，就其設計和功能部分，與建構式學習環境模式相互比較，以發現教學平台中推論的、蘊含的及潛在的意義。關於內容分析法，其定義與特性分述如下：

（一）定義：

美國學者Berelson（1952）將內容分析法定義為：「是針對傳播的明顯內容，做客觀、系統、定量的描述之一種研究法」（引自王文科，2003）。歐用生（1991，pp.229-254）指出，內容分析法係透過量化的技巧以及質化

的分析，以客觀和系統的態度，對文件內容進行研究與分析，藉以推論產生該項文件內容的環境背景及其意義的一種研究方法。張邵勳（2004，p.428）認為，內容分析是「對相關理論的訊息作系統性及客觀性的推理」之一種研究法，強調內容分析最好和其它研究法一樣：應用假設檢定、能推論與理論有關之事件的意義。透過「定量」的技巧及「定性」的分析，以客觀和系統的態度，對文件內容進行研究分析，藉以推論該文件內容的環境背景及意義。早期內容分析只是研究傳播內容「說的是什麼」，現今的內容分析已經擴展至「潛在內容」的分析，即「構成文件材料中推論的、蘊含的及潛在的意義」之定性研究，舉凡信件、日記、報章雜誌、實況新聞報導、會議記錄、影片、網站及電視/廣播節目等，都是內容分析的素材後來再擴及非語言的傳播。

（二）特性

內容分析具有以下四種特性（吳明清，1991；吳紹群，2002；施美玲，1997；魯賓，2000）：（1）客觀化（objectivity）：是指對資料詮釋、編碼的時候並不是全憑研究者的解釋，而是要先制定一致的、系統的規則，如此才能確保在不同時間、由不同人員做出的結果是一致的；（2）系統化（systematic）：與客觀化是一體兩面的，因為有了系統化的編碼規則，才能確保研究的信度；（3）數量化（quantitative）：內容分析法的特色就是可將質化資料轉變為量化的形式，資料需要具有統計上的推論性；（4）明顯化（manifestly）：可能藉由使用些符號或藉著字眼的寓意來暗指內容性；當記錄與解釋資料後，有時可發現不只顯明的事物，也會發現隱藏及先前不顯明的事物。

二、研究對象

本文的研究對象為國內外大學的網路學習平台，主要是以美國密蘇里大學歌倫比亞校區所使用的Blackboard、國內的中山網路大學教學平台為主，輔以麻省理工學院的Open CourseWare學習平台，並從建構式學習模式，針對Blackboard教學平台設計和中山網大的「智慧大師Wisdom Master 2.1」教學平台設計加以分析。

肆、研究結果與討論

一、國內外網路大學發展現況

根據前述之網路化學習之源起及國外（美、英、中國大陸）網路大學之發展現況的文獻內容，可以瞭解網路大學的發展自1970起在美國揭開序幕，從此以後在世界上展開遠距教學的新頁，在國外，不論是美國，歐洲的英國或對岸的中國，網路大學如雨後春筍般的成立。在台灣，受到世界潮流的影響，也有風起雲湧之勢。網路大學的興起與發展，除了說明科技的創新發展，更代表學習型態產生了新革命及高等教育學習新典範的來臨。無論是網路大學或是遠距教學，這種兼顧學習者的方便和需求的終身學習的方式，都說明了網路式學習的興起，已蔚為學習的新主流，並在世界各地逐漸深化之中，不但讓傳統面對面教學不再是唯一的方式，也成為學習的新趨勢。

二、網路教學（學習）平台之支援軟體

網路教學平台需藉由軟體的支援才得以實施課程，從前述之平台介面及功能設計可以看出，不論是國外的Blackboard公司、Open CourseWare或國內的中山網路大學系統（使用旭聯科技公司研發的智慧大師平台）等，都以能讓使用者輕易使用網路學習資源，並透過平台進行教學或測驗為策略。目前台灣各網路大學所使用的教學平台，不論是結合各校特色，由學校自行開發的教學平台，或直接使用軟體公司所研發的教學平台（例如旭聯、肯心、億網、艾康科技公司等），這些網路教學平台支援軟體最重要的意義，在於能否結合網路特性與教學理論，讓使用者能夠使用便利和善加發揮系統的價值，以促進有意義的學習環境為最大目標。

三、網路教學平台的設計

如前所述，設計建構式學習環境的條件有：（1）以問題或計畫為核心，

學習者需詮釋、解決此問題或完成計畫；（2）提供相關案例與訊息資源，支持學習者了解問題與提供可能性的解決方式；（3）提供認知工具，幫助學習者去詮釋與操弄問題；（4）提供對話及合作的工具，能使社群中的學習者去協商與建構問題的意義；（5）提供社會的或情境化的支持系統，以幫助學習者執行建構式學習環境。此外，學習環境宜提供示範、指導及鷹架式輔助等教學策略以支持教學活動。

本研究根據以上建構式學習模式，作為評量網路化建構式學習環境之指標。綜觀 Blackboard 與中山網大之教學平台設計，都具有課程介紹、訊息資源、互動討論、作業繳交、線上支援、學生工具等功能。「課程介紹」提供授課大綱及教師對課程的規劃；「訊息資源」提供課程教材以及相關的網路資源；「互動討論」提供師生之間可針對課程相關議題進行討論；「作業繳交」紀錄各項作業之要求及學生繳交狀況；「線上支援」讓學生能從資料庫中獲得線上常遇到問題的解決方法或向系統管理者求援；「學生工具」則提供學生的學習輔助工具，例如線上字典、計算機、筆記本等，中山網大還提供學生學習記錄，讓學生從自己登錄狀況瞭解自己使用網路學習功能的情形，這些設計都符合了建構式學習環境設計的精神。亦即有意義的學習環境應以案例或問題為中心，提供多元觀點、訊息資源、對話及合作的工具及認知的（知識建構）工具，並時時給予示範、指導及鷹架式輔助。

然而，對於此二平台之功能設計，研究者亦提出二項建議：（1）在學習（輔助）工具方面，此二教學平台均有些缺乏；即使中山網大提供了線上字典、計算機、行事曆等學習輔助工具，卻未能針對各課程而設計，例如「VCD製作」課程，以上工具尚有改進的空間；（2）此二教學平台均未提供相關案例，如前所述，生手最欠缺的就是經驗，而相關案例的設計，能夠提供生手一些參考經驗。因此，一個優良的教學平台，應提供相關案例，不但能有助於學生學習，也能創造相關的附加價值。以下將Blackboard及中山網大之教學平台設計中，符合建構式理論之特色如表2所示：

表2 教學平台功能符合建構式理論之特色

建構式學習模式	Blackboard	中山網大
1.案例或問題	(1) Announcement (2) Syllabus	(1) 課程介紹。 (2) 課程資訊（最新消息、課程公告）。
2.相關案例	無	無
3.訊息資源	(1) Information (2) Resources	(1) 課程內容 (2) 教材目錄
4.認知的（知識建構）工具	(1) Archives (2) Instructor Q & A (expert system) (3) Multimedia (4) Hypertext (5) Assessment / Assignment	(1) 老師上課影音檔 (2) 教材內容資料庫 (3) 多媒體內容 (4) 超連結 (5) 作業/報告，測驗/考試，成績資訊。
5.對話及合作的工具	(1) Discussion Board (2) Virtual Classroom (3) Group	(1) 課程互動（課程討論、線上討論、議題討論、會議廳） (2) 同學資訊
6.社會的或情境化的支持	擔任平台教學的老師具有專業的素養。	擔任平台教學的老師具有專業的素養。
7.示範、指及鷹架式輔助（線上支援）	(1) Help (2) Communicator	(1) 郵寄助教 (2) 常見問題

伍、結論與啟示

前述網路大學的發展現況說明了學習型態的改變，亦即網路大學成為高等教育學習的新型態，該學習型態不僅讓更多人口加入終身學習的行列，更促使學習的管道更加通暢無阻。無論是在美、英、中國大陸或是台灣，網路大學的營運數量不斷的增加，更清楚說明終身學習的重要性。統計顯示，至2001年底台灣網際網路使用人口達782萬人、網路普及率為三成五、透過學術網路上網的用戶數有291萬戶、透過電話撥接上網用戶達525萬戶、新興寬頻用戶達113萬戶，與2000年底作比較，成長率高達四倍（大紀元，2002）。近十年來，國內大學校院由於政策上引導數量擴充，學校數及學生人數都有快速增長的現象。顯然，國內大學教育數量大幅擴增，是從1981（民國七十）年

代中期開始，到2004（九十二年度）年已達一百五十二所（含軍警校院七所及空中大學二所），學校數成長了三·七五倍，學生人數也增加了二·五二倍。這種數量的擴增，促使高等教育機會普及，更多人得以接受大學教育，除了可以避免教育機會不均，也可以避免人才浪費的現象（教育部，2004c）。綜合以上上網人口與高等教育數量的資料可知，利用大學為主體發展而成的網路大學，將有助於終身學習的推展與資源的整合利用，這對處於知識經濟的全民而言，將是向上提昇最好的方式。

近年來備受重視的大學校院區域整合發展計畫，無論是採用校際模式、策略聯盟或是學校整併，除可落實學術資源共享之外，藉由競爭且合作的機制，提昇大學在國內外的競爭力（張奕華，2002）。以此理念觀之以及參考國外的實例（例如英國的UKeU、美國的西部州長大學），國內的網路大學可採行區域整合模式（例如南台灣網路大學、北台灣網路大學），並與國外的網路大學合作；如此一來，不僅可以發揮台灣科技島的優勢，更可以與國際接軌，達成網路學習無國界的目標。

建構式學習主張學習是主動的，知識是由學習者結合新、舊知識經驗建構成的，絕非僅由老師傳授或從教科書中背誦而來。亦即，建構式學習強調教與學皆是以學生為中心，並重視學生的個別差異。誠如陳文誌與游萬來（2001）所言，要設計規劃一個良好的線上設計課程與學習環境，必須考慮設計教育、教學理論與方法、學習理論與方法以及資訊科技的發展等項目。因此，唯有具備理論基礎的設計，才能夠致力學生於有意義的學習；並透過有意義的學習，以增進學習效能。本研究使用內容分析法，透過建構式學習模式作為教學設計者在設計網路教學平台的參考及評估的標準，並檢視平台的設計是否具備理論基礎之依據。本研究未來可進一步蒐集師生在網路學習環境的實際學習歷程及使用意見，並進行實證分析，將更能印證理論與實務間的關係。將建構式學習模式與網路化學習平台相結合，不但能支持學生從事於有意義的學習，更能應用新興科技之進步性，以突破傳統教學模式的限制，為教學帶來更多的創新與效能。

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審稿辦法

● 壹、審稿流程

本刊之審查包括預審、初審、複審。

一、預審

主編就來稿之性質、格式、體例及嚴謹程度進行審查。

二、初審

1.通過預審之文章由編輯委員會聘請兩位審查人進行匿名審查。

2.初審意見分為五類：

- (1) 極力推薦採用（90分以上）、(2) 推薦採用（80-89分）、
- (3) 修正後不必再送原審者審查（75-79分）、(4) 修正後再送原審者審查（70-74分）、(5) 不予採用（69分以下）。

分數達75分以上者，原則上予以刊登。

3.若兩位審查人分數相差過大時，且其中一位分數達75分以上者，應送第三位審查人審查，本刊將依據第三位審查人之意見決定是否刊登。

三、複審

若審查人建議為「修正後不必再送原審查者審查」及「修正後再送原審查者審查」之文章，本刊將請作者修改，作者須於二周內寄回，並隨文附上「修改、答辯相關說明」，本刊將把修改之稿件及此說明文件交由主編或原審查人進行複審。本刊將根據複審意見及稿件數量決定是否採用。

● 貳、稿件刊登

經審查為「極力推薦採用」、「推薦採用」、「修正後不必再送原審查者審查」及複審通過之稿件，將提請編輯委

員會進行刊登確認，通過後本刊將寄發「接受刊登證明」及「出版同意授權書」，以利文章刊登出版。

● 參、審稿作業原則

- 一、編輯委員會依稿件主題，推薦國內外該領域之專家進行審查，並考量投稿者之論文指導教授、同系所同事等利害關係，迴避不適合之審稿人。
- 二、本刊之編輯委員及編務相關人員如投稿本期刊，不得參與所投稿件之任何討論，亦不得經手處理或保管與個人稿件相關之任何資料。
- 三、編輯委員會及編務相關人員對於投稿者與審稿者之資料應負保密之責，稿件審查並採雙向匿名作業。

● 肆、撤稿作業原則

- 一、投稿者應以書面掛號方式，提出撤稿申請。
- 二、對凡已進入初審階段之稿件，若投稿者提出撤稿申請，本刊一年內不接受投稿。

徵稿啟事

《教育研究與發展》（ Journal of Educational Research and Development ）為國立教育研究院籌備處發行之教育學術刊物，著重在教育領域內之研究與發展（ R&D ）方面相關議題，並推廣國內外教育學術研究與交流。所有稿件之徵、審稿辦法比照國科會人文處「臺灣社會科學引文索引」資料庫（ TSSCI ）之相關規定辦理，歡迎踴躍賜稿。

● 徵稿事項

1. 本刊為季刊，全年徵稿，徵稿主題如下：

徵稿主題	出刊日期	截稿日期
課程與教學	6 月 30 日	3 月 31 日
教育政策與制度 （含教育行政、學校行政等）	9 月 30 日	6 月 30 日
測驗與評量	12 月 31 日	9 月 30 日
師資培育	3 月 31 日	1 月 31 日

2. 所有稿件皆隨到隨審，編輯部於收到稿件五個月後通知採用與否。

● 投稿原則

1. 請以電腦打字，中英文不拘，中文撰稿文長以 15000 字為原則，至多為 20000 字（含中英文摘要、註釋、參考書目、附錄、圖表等）。中文摘要請勿超過 500 字，英文摘要不超過 500 字，並列出中英文關鍵字至少各 3~5 個。如以英文撰稿，請勿超過 12000 字。
2. 來稿正文與中英文摘要為一式三份，請以 A4 紙印出，並將檔案存於 3.5 吋磁片或光碟中（以 Word 檔貯存），連同「投稿者基本資料表」一併寄至本刊編輯部，本刊不接受電子郵件之投稿。
3. 投稿正文及中英文摘要中，請勿出現任何個人資料。

4. 來稿文件之註釋（採當頁註方式）及參考書目，請用 APA 格式第五版。
5. 未依本刊所要求之格式來稿，本刊將逕予退稿。
6. 來稿如未獲採用，本刊將致函作者審查結果，但不寄還稿件，請投稿者自留原稿。
7. 本刊因編輯需要，保有必要之文字刪修權。

● 著作財產權事宜

1. 為維學術倫理，請勿一稿多投，如有抄襲，改寫等侵犯他人著作權之情況者，由作者自負相關法律責任。
2. 來稿一經刊登，著作財產權即屬本刊所有，並通知簽署著作財產權授權書乙份，本刊將敬贈作者當期刊物 6 冊，不另支稿酬。

● 稿件審查

1. 本刊所有稿件採雙向匿名內外審查制度，由本刊編輯委員聘請相關領域學者專家二人審查之。經審查委員要求修改之文章，於作者修改之後再由編輯委員決定是否刊登。
2. 凡本刊接受刊登之稿件，得視編輯需要，經編輯委員會同意後，擇期刊登。

● 稿件交寄

來稿請以掛號郵寄「(237) 台北縣三峽鎮三樹路 2 號 國立教育研究院籌備處轉資料中心《教育研究與發展》編輯部收」。

Call for Papers

Journal of Educational Research and Development (JERD) is the official periodical of National Academy for Educational Research, the national level for educational research institute in Taiwan . JERD invites submission to provides a forum to discuss the issues regarding in perspectives on of educational research and development (R&D) to present convey a brand new worldwide vision.

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Subjects	Date of publication	Deadline of submission
Curriculum and Instruction	30, June	31, March
Educational Policy and Institution	30, September	30, June
Testing and Assessment	31, December	30, September
Teacher Education	31, March	31, January

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1. Manuscripts must be typed word processed with and double spaced on A4 (210 x 297 mm) size paper with margins at least 1 inch on all sides. on A4 (210 x 297 mm) size paper.
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3. The manuscript should be saved in MS Word file format, submitted on with a compact disk suitable for IBM PC.
4. All contribution submissions should follow standard the APA style (5 th Edition).
5. The manuscript should be original, and has not been not published before previously . Do not submit material that is currently being considered by another journal.

6. Author s of the papers articles being accepted will be are required to sign the Transfer of Copyright Agreement form.
7. Author of the manuscript should fill a submission form.
8. Author will receive 6 copies of the JERD in which their paper appears the issue of the journal containing their article .

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3. All paper will be submitted for anonymous peer review by domain experts in this area .
4. Acceptance, revision , or rejection letter will be sent mailed within 5 months after the manuscript is receiv ed ing the manuscript .

Author should Enclose submit three copies of the manuscript, the diskette (or compact disk) of the text files and the submission form to the following address by registered mail: . Please send all manuscripts, the compact disk of the text files and the submission form to the following address by registered mail :

Editorial Board, Journal of Educational Research and Development National Academy for Educational Research 2, San Shu Rd. , Sanhsia, Taipei County , 23703 Taiwan , R.O.C.

《教育研究與發展》投稿者基本資料表

Journal of Educational Research and Development Submission Form

姓名 Author(s)	中文： 英文：	投稿日期 Submission date	
投稿篇名 Title	中文： 英文：		
擬投稿之主題 Category of submission	<input type="checkbox"/> 課程與教(Curriculum and Instruction) <input type="checkbox"/> 教育政策制度(Educational Policy and Institution) <input type="checkbox"/> 測驗與評(Testing and Assessment) <input type="checkbox"/> 師資培育(Teacher Education) <input type="checkbox"/> 其他(Others)_____		
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國立教育研究院籌備處

National Academy for Educational Research *Preparatory Office*

● 簡介

教育部為配合提高「國民教育師資素質方案」，乃於民國四十五年五月十日在台北縣板橋市正式設立「臺灣省國民學校教師研習會」，聘教育家高梓女士為首任主任、民國五十四年，為加強教育研究工作，奉准增設研究室，置研究人員。同年，奉令兼辦國民小學校長、主任儲訓訓練，至今已儲訓九十三期。民國六十一年，受教育部委託從事「國民小學課程研究發展」工作，發展至今，成為眾所週知「板橋模式」。民國六十九年「國科會」同意將本會列為「學術研究機構」。為發展需要，於民國八十八年四月遷至三峽鎮新會區。七月改隸教育部，更名為「教育部臺灣省國民學校教師研習會」。為配合教育改革，本會將併入「國家教育研究院」，為我國教育發展提供另一階段貢獻。

● 沿革

◆ 民國88年12月

行政院核定本處暫行組織規程及編制表

◆ 民國89年5月

於三峽正式成立，並派吳清基先生為首任籌備處主任

◆ 民國90年7月

教育部派吳常務次長鐵雄兼籌備處主任

◆ 民國90年9月

教育部派何福田先生為籌備處主任

● HISTORY

◆ December 1999

The Executive Yuan approved the provisional regulations and organizational chart of a preparatory office for the National Academy for Educational Research.

◆ May 2000

Formal establishment of preparatory office for the National Academy for Educational Research in Sanhsia, headed by Dr. Ching-ju Wu

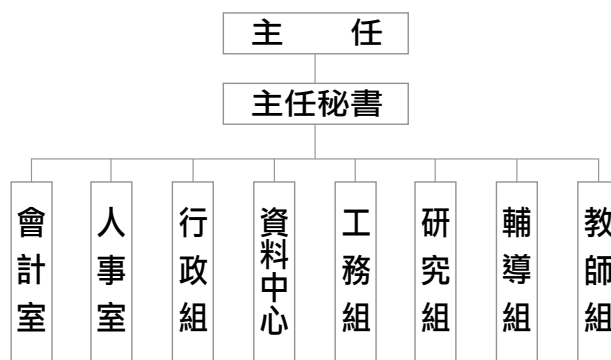
◆ July 2001

Dr. Tieh-Hsiung Wu was appointed Acting Director of the Preparatory Office

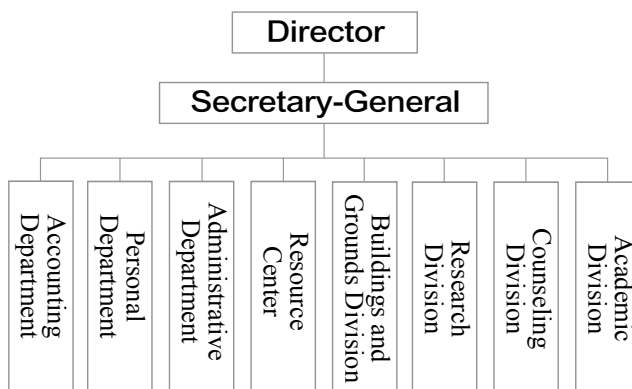
◆ September 2001

Dr. Fwu-Tyan Ho was appointed Director of the Preparatory Office

● 組織圖



- Organizational Chart



- 現有員額

- 一、研究人員23人
- 二、行政人員30人
- 三、服務人員23人（技工17名，工友6名）

- Current Staff

- 1. Research Staff 23
- 2. Administrative Staff 30
- 3. Service Personal 23
(17 technicians& 6 janitors)

- 本處掌理事項

- 一、國立教育研究院發展計劃之擬定事項。
- 二、國立教育研究院經費預算之擬擬及組織法規之研擬事項。
- 三、國立教育研究院建院用地、建築設備之規劃及興辦事項。
- 四、各級教師及行政人員之研習訓練事項。
- 五、各級學校課程及教學研究發展事項。
- 六、其他有關國立教育研究院籌備事項。

- Functions

- 1.Draft development plans for National Academy for Educational Research
- 2.Development of budget, organizational chart, and regulations for the operation of the National Academy for Educational Research
- 3.Development of construction plans and acquisition of equipment for the National Academy for Educational Research
- 4.Conduct in-service workshops for teachers and administrators
- 5.Research on curriculum and teaching
- 6.Other related function

● 成果

- ◆ 九年一貫課程綱要研究發展
- ◆ 九年一貫課程教師、僑校教師研習
- ◆ 進行教材教法實驗
- ◆ 國小校長、主任儲訓
- ◆ 國小各科教學媒體之設計製作及推廣
- ◆ 出版國教學報、研習資訊

● Achievements

- ◎ Research and development of the Nine Year Integrated Curriculum
- ◎ Workshops for teachers of Nine Year Integrated Curriculum and for overseas teachers
- ◎ Research and development of instructional materials and pedagogy
- ◎ Pre-service workshops for school principals and administrators
- ◎ Development and production of instructional media for elementary schools
- ◎ Publication of the Elementary Education Journal and the Institutional newsletter

● 願景

- ◆ 成為國家教育研究院

● Vision

- ◎ Establish the National Academy for Educational Research

Memo...

Memo...

Memo...

教育研究與發展

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