National Lifelong Learning Strategies (NLLS) -Transversal programme

Key Activity 1: Policy Cooperation and Innovation

EFELSE - Evaluation Framework for the Evolution of LLL Strategies in Europe

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D5: EVALUATION FRAMEWORK

Deliverable

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SUMMARY

The EFELSE Evaluation Framework can serve as a tool for evaluating Lifelong Learning policy and its implementation. It is derived from the EFELSE project's discussions on methodological issues and defines methods, tasks, purposes and expected outcomes for performing the analytical evaluation tasks.

This deliverable first provides a background about reasons for evaluating lifelong learning. Then it introduces frameworks for implementation of evaluation activities, in particular the CIPP (Context - Input - Process - Product) and SWOT (Strength - Weakness - Opportunity - Threat) model. It describes the method of balanced scorecards (BSC) for indicator analysis, and it provides valuable indicators for the EU's 6 dimensions to analyse coherence and comprehensiveness of lifelong learning strategies. Furthermore, it provides an example for the application of the EFELSE tool.

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1. The need for evaluating Lifelong Learning

The area of education and training in Europe due to diversity –both from a cultural and philosophical point of view, as well as from an investment and planning capacity perspective at the Member States – is not as of yet as coherent as intended by policy orientations. The notion of LLL, currently governing policy orientation, where the aim is to consider learning provisions and their effects both on the system and individual levels and in relation to the triangulation of provisions-research-innovation, while well perceived as a notion for enhancing competitiveness, social justice and individual fulfilment is not "evenly penetrating" into the national systems of education and training across the EC. This discrepancy defines significant differences between the Member States in the way learning outcomes and performances on specific benchmarks are regarded. This has serious implications on the value placed on LLL both internally and externally to a country. The challenge for Member States is to develop and implement LLL strategies that combine the national character of the educational system and simultaneously converge to the principles of Education and Training 2010. While this is apparent at the level of intention in all Member States, the pace by which reforms are being introduced varies considerably as do the impacts that emerge from their introduction (qualifications frameworks, validation of learning etc). The Commission Communication on "Making a European area of lifelong learning a reality" clearly defines the axes on coherence and comprehensiveness of a national LLL strategy. Likewise the 2008 Joint Report of the Council and the Commission guides national systems of education towards the orientation of development of coherent and comprehensive strategies that are to facilitate learning for all and learning outcomes in our societies under the scope of enhancing competitiveness and the process of innovation of E&T systems across the sub-sectors, forms and levels.

Continuous evaluation is necessary for monitoring progress with respect to the development of a coherent and comprehensive LLL strategy. By this, initiatives for reaching the Commission's LLL goals are accompanied with quality management. Arzberger and Brehm (1994) distinguish between evaluation and quality assurance. They define evaluation rather broad in the meaning that someone evaluates something, with respect to a goal which was defined prior to the evaluation or with respect to effects and outcomes. In the context of the EFELSE evaluation framework, evaluation relates to a country's or an institution's LLL strategy and its implementation with respect to the parameters of coherence and comprehensiveness stated by the EU. This evaluation is not done per se; using the methods provided by this tool can help to ensure the quality of the applied LLL facilitation measures, to improve it, or to adjust it to changing requirements. Besides the concept of evaluation, Arzberger and Brehm distinguish quality assurance as goal and framework for the application of approaches and methods of evaluation research (Arzberger & Brehm, 1994, p. 64). They describe quality assurance as going beyond evaluation and define continuous quality assurance as the key to professionalism. This meaning also refers to one of the axes of coherence – quality control and indicators – defined by the Commission. With respect to the organisational aspect of LLL, the EFELSE tool can support policy makers as well as training providers

- to get insights into LLL policy and implementation and receive data necessary for decision making,
- to get control over LLL policy and implementation and be able to make refinements,
- to establish a dialogue between different stakeholders, e.g. policy institutions, training providers and the target group of learners, and
- to legitimise costs and sustainability of a program (see Stockmann, 2000).

2.   Aims of this Evaluation Framework

The Commission Communication "Making a European Area of Lifelong Learning a Reality" (European Commission, 2001) is one of the basic papers on the implementation Lifelong Learning (LLL) strategies in European countries. It contains a suggestion of six building blocks for comprehensive and coherent Lifelong Learning (LLL) strategies which focus on the following basic factors:

Coherence factors

- *Partnership working across the learning spectrum:* collaboration between all stakeholders

- *Creating a learning culture:* increasing learning opportunities and motivation

- *Striving for excellence/ quality control & indicators:* quality assurance measures

Comprehensiveness factors

- *Insight into demand for learning*: needs of the learner & learning needs of organisations, society and labour market

- *Adequate resourcing/ Investment:* financing and allocation of resources

- *Accessibility to learning opportunities:* anyone, anywhere, anytime

This framework allows studying and supporting the process of innovation in E&T from the perspective of "adult participation" and under the scope of coherent and comprehensive LLL frameworks. The principle elements for considering coherence and comprehensiveness of the LLL national strategies will be the Commission's factors for coherence (*partnership working*, *learning culture* features, *control and indicators*) and comprehensiveness (*demands for learning*, *investment in education*, *accessibility to learning opportunities*).

Basically, the framework aims at identifying divergence and compliance of the intended LLL strategies and the results of their implementation. Especially the diverging aspects will serve as basis for reflection and as starting point for policy and implementation adjustments. This implies analysing if some strategies are well developed and well implemented while others have gaps and certain shortcomings (i.e. on the issue of qualification recognition, monitoring procedures, recognition of informal and non-formal learning, support services to guide adult learning, etc.). Thereby, the framework will reveal results regarding coherence and comprehensiveness of intended strategies.

Users applying this evaluation framework will be able to

- analyse the effects of reforms in all sections of education and training on adult education. That will allow specifying what is included in the National Qualifications Framework, how the transfer of credits and recognition of learning outcomes is realised, and how people can get motivated to participate in lifelong learning, etc.

- discuss how a country has speeded up the process of assessing and recognizing non-formal and informal learning for the disadvantaged groups, including the recognition of non-visible skills, and social competencies. This discussion recognises the current context, in particular what investments were made, what partnerships were put in place, what type of innovations (administrative, learning, organizational, technological, etc) were considered and how these considerations (choices) facilitated or not the creation of a new culture on adult learning (this is in contrast to what existed before 2000), what quality control measures were considered and how these were measured (indicators), what guides the demand for adult learning and how accessible are educational services for adults of different categories including migrants and disadvantaged groups (competencies of migrant workers that attained skills and competencies outside Europe).

- discuss how a country has or has not improved the monitoring of adult learning by knowing what sources of information / data are available, who has "control" over this information and how such information / data is utilized.

This understanding will come from studies and reflection on:

- what partnerships have been put in place both internally to the country and externally, to re-structure / upgrade adult learning services in a country,
- if a "new learning culture" has been created in relation to adult learning (formal, non-formal and informal levels) and to what extend is this new learning culture founded / supported on new technologies (perhaps learning technologies is a better term).
- whether Quality Control issues have been discussed and integrated in the strategies (both at the intended and implemented levels), what standards are used to select staff, is there a guidance service available at some level, who manages adult education services (both at policy and implementation level), how are these "managers" selected? How are new programs initiated (top down versus bottom up approaches on what bases are programmes initiated) and how are these funded and monitored?
- what are the demands for learning, how accessible are the educational services for adults by the different target groups (those we have specified),
- what was spend on adult education (investment),
- how is accessibility guaranteed?

While the tool aims to develop understanding on the synergy between national practices and the process for effective integration of the elements of coherence and comprehensiveness into the national LLL strategy for all sectors, forms and types of educational and training provisions, particular focus will be given to *adult learning*. In this respect the models and frameworks to be derived from the tool concern the benchmark area of "lifelong learning". Yet, the structure of this tool allows picking special dimensions and parameters. Furthermore, the tool aims, as a consequence of EFELSE's European approach, on a wide generalisability and applicability in the context of many countries. As a consequence, indicators and benchmarks presented stay often on a general level and have to be adapted for a national context. Some more detailed analysis can be found in the national reports of Germany, Greece, Poland, Romania, Slovakia, and Spain, which can be downloaded from the EFELSE website, as well as in the special papers developed for each evaluation parameter which also can be found on the website. Exemplary country information for the EFELSE partner countries could be found in Annex A.

3. Evaluation Approach

The framework will define criteria for their consideration in the national context. By exploiting a decision-management-oriented-approach it derives a typology of the national dispositions for addressing the "Education and Training 2010 work programme". The empirical and analytical activities will follow the CIPP evaluation model (as it is conducive to the evaluation of parameters from a contextual perspective). The CIPP (Context, Input, Process, Product) model (see Stufflebeam, 1978, 2007) provides an explicit process aspect for the indicator analysis. "Corresponding to the letters in the acronym CIPP, this model's core parts are context, input, process, and product evaluation. In general, these four parts of an evaluation respectively ask, what needs to be done? How should it be done? Is it being done? Did it succeed?" (Stufflebeam, 2007) This means that it raises questions about how a particular policy affects the change of lifelong learning indicators. Thus the CIPP approach can serve as an effect control for changes in the E&T system and help to identify strengths and weaknesses of LLL strategies. The EFELSE evaluation tool realises the implementation of the CIPP model and the particular analysis of the indicators on the basis of a balanced scorecard method (BSC). Results of this analysis will support the identification and definition of strengths, weaknesses, opportunities and threats. Therefore, the EFELSE Evaluation framework provides two analysis layers for the evaluation:

1. The *indicator analysis* focuses on particular indicators for evaluating the state of LLL in a country. Indicators will be analyzed with a balanced scorecard method, in the context of objectives, benchmarks and policies related to these indicators. This method facilitates the definition of special objectives with respect to an evaluation dimension which can be measured by indicators. By contrasting these indicators with set benchmarks, balanced scorecards allow the identification of areas that meet the benchmarks and other areas which don't meet them. Furthermore, the balanced

scorecard (BSC) method facilitates the matching of objectives, policies and indicators which allows users of this tool to identify stringent implementations of policies and objectives.

2. The *SWOT analysis* reveals strengths, weaknesses, opportunities, and threats of lifelong learning strategies. It relies on the indicator analysis for finding out particular strengths and weaknesses of the formal and non-formal educational system. However, SWOT looks beyond the strengths and weaknesses and draws attention to the issues of opportunities and threats. Both categories look further than the current situation and try to identify potential developments and facilitators and obstacles for future policy implementation.

In the following, the two analysis layers will be described in more detail, and their interconnection is presented. A short visualized leaflet of the different stages can be found in Annex B.

4. Indicator Analysis using balanced scorecards (BSC)

A key tool to analyse policy impact is the balanced scorecard approach of Kaplan and Norton (1992; see also Cobbold & Lee, 2002). Originally, this approach was developed to facilitate the strategic management of a company. Yet, in the current context of this framework it can introduce educational policy makers into defining goals and correlate them with particular measures for getting evidence. One peculiarity of balanced scorecards is the multi-perceptivity of analysis. They include four perspectives: a perspective on finances, one on the customer, one on internal workflow and one on innovation and learning (see Kaplan & Norton, 1992). In a later version (Kaplan & Norton, 1996), they refine their approach for policy application with respect to goals and measures. In the refined approach, they use the categories of *objectives* (to define clear goals to reach), *targets/benchmarks* (a certain threshold that marks that the goal has been reached), *measures/indicators* (evidence for change and can be either in the style of statistical data or some action, e.g. some implementation of laws and regulations), and *initiatives/policy* (particular initiatives or policies to reach objectives and benchmarks; see Kaplan & Norton, 1996). Such procedure allows the use of indicators for evaluating progress with respect to lifelong learning in the context of objectives, benchmarks and policies.

If we try to mach the four perspectives of Kaplan and Norton (1996) with the six dimensions of the Commission's Communication "Making a European Area of Lifelong Learning a Reality" (European Commission, 2001) on the implementation Lifelong Learning (LLL) strategies in European countries, we can see that some perspectives comprise of two LLL dimensions:

Table 4.1: Matching the Kaplan and Norton (1992) perspectives and the six dimensions of the EU LLL program.

Perspective	Dimension
Finances	• *Adequate resourcing/ Investment:* financing and allocation of resources
Customer	• *Insight into demand for learning*: needs of the learner & learning needs of organisations, society and labour market • *Accessibility to learning opportunities*: anyone, anywhere, anytime
Internal workflow & processes	• *Partnership working across the learning spectrum:* collaboration between all stakeholders • *Striving for excellence/quality control & indicators*: quality assurance measures
Innovation & learning	• *Creating a learning culture:* increasing learning opportunities and motivation

Looking at table 4.1, one can also see one important aspect: the *Comprehensiveness factors* of investment, demand for learning, and accessibility relate mainly to the Finances and Customer perspective while the *coherence factors* of partnership working, striving for excellence, and learning culture relate to the internal process and the learning perspective. This distinction indicates that it is not enough to focus either on comprehensiveness or on coherence, but that it is necessary to consider both for implementing the vision of the EU's LLL strategy.

The following subsections give insights about how to apply the balanced scorecard approach for the contextual evaluation of LLL. The EFELSE consortium defined parameter aspects for each of the six evaluation dimensions to allow a more differentiate and m ore focused analysis[1]. Following this approach, each parameter aspect should be analysed with regard to its objectives, benchmarks, indicators and policies (see figure 4.1).
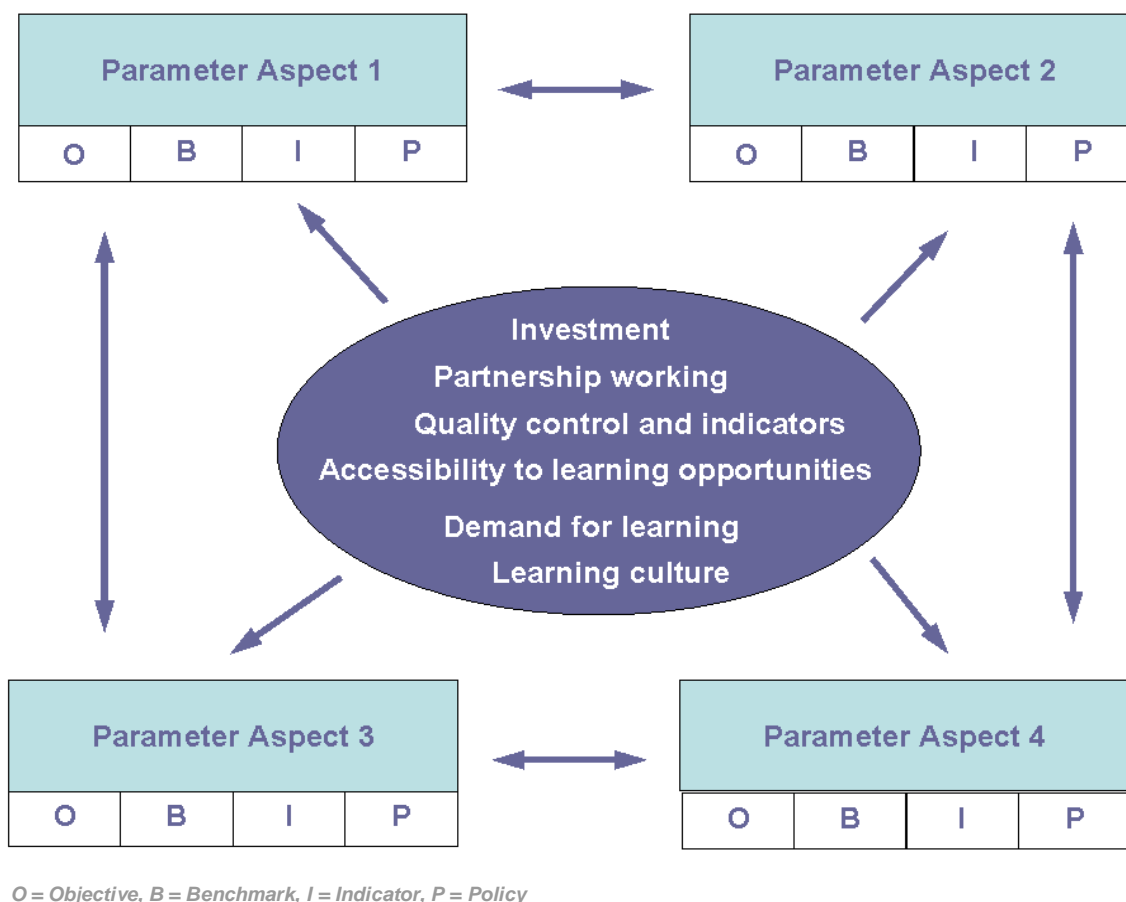

O = Objective, B = Benchmark, I = Indicator, P = Policy

Figure 4.1: Balanced score card approach for the analysis of the six LLL-strategy dimensions.

The following six sections provide a framework for the evaluation of each of the six dimensions. They are structured as following:

Figure: The figure aims at providing a short overview on the main aspects of a parameter. If following the EFELSE evaluation framework, the figure may be used to mark missing aspects, e.g. a parameter aspect

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[1] The report at hand provides an overview on indicators for the six EFELE evaluation parameters. The definition of parameters and related indicators was based on the methodological outline proposed in the EFELSE Analytical Framework. It was further developed in the six special papers for each dimension, each written by a partner from the EFELSE consortium, and updated continuously on the basis of the ongoing research and project activities. The information in this report is based on the documents available at April, 04, 2010. Both, the analytical framework and the reports on evaluation dimensions can be downloaded from http://efelse.iacm.forth.gr.

indicator, a missing policy or to mark excellence. In this style, the fields may be coloured like traffic lights to visualize the current state with respect to one dimension

List of indicators and data sources: The list of indicators and data sources provides users with hints where to look for data. The suggested data sources aim at covering the context of the European Union and are therefore rather general. Furthermore, the indicators for some dimensions are not yet developed or administered within the European Union (e.g. learning culture). In such cases, the consortium took the approach to rely on existing indicators that can be interpreted in the context of such dimensions. One example for this is the indicator of participation that can be interpreted in the context of demands for learning, as the size of demand for learning, but also in the context of learning culture regarding how far LLL participation has penetrated society.

Whenever necessary, the descriptions of the dimensions were further specified by additional information.

4.1   Partnership Working
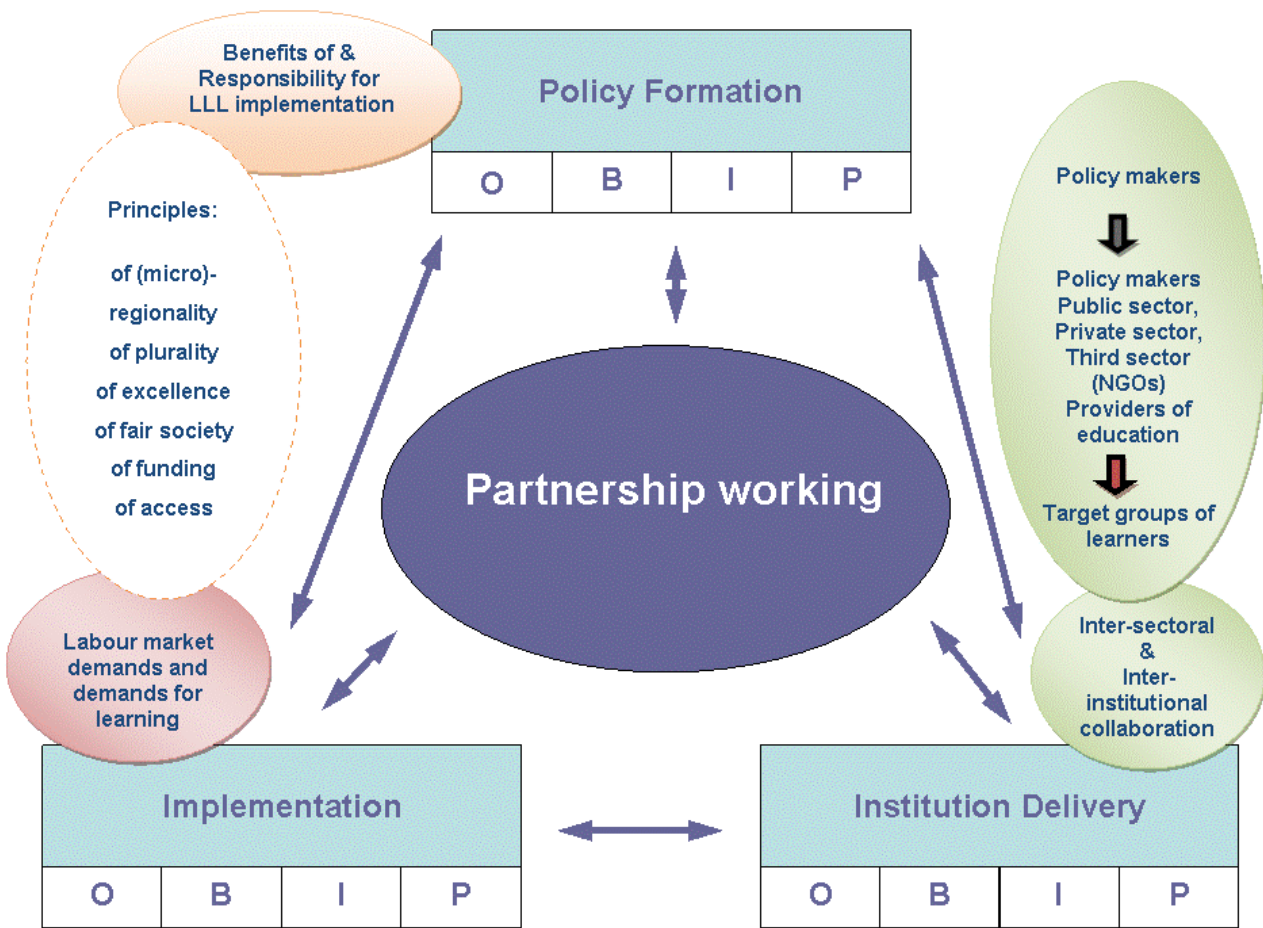
O = Objective, B = Benchmark, I = Indicator, P = Policy

Figure 4.2. Balanced score card for the analysis of partnership approach.

Suggested data sources:

- Buiskool, B.J. e.a. (2005). Developing local learning centres and learning partnerships as part of Member States' targets for reaching the Lisbon goals in the field of education and training; a study of the current situation. Leiden: Universiteit Leiden, Research voor Beleid. <http://ec.europa.eu/education/policies/2010/studies/locallearning.pdf>

- Adult Education Survey (AES), EUROSTAT, CEDEFOP, OECD

- Labour offices' reports, European Public Employment Services network, providers of education

Analysis of the balanced score-card approach for a working partnership on LLL

According to the available online sources, the notion of partnership in LLL includes a variety of sectoral and institutional inter-relations between various stakeholders that perform a range of activities in order to increase the scale of participation on LLL according to the needs of local/regional/national labour markets, whilst there is no precise definition that would imply every aspect of a working partnership yet, due to contextual factors inside multicultural EU Member States' backgrounds (policies, learning culture, funding, economic situation, etc.).

Policy formation on LLL partnership in context of this model should include efforts to increase the rate of participation as well as legislative framework that facilitate the creation of partnerships, forums and networking with regard to *inter-sectoral* and *inter-institutional collaboration legislative frameworks* for a partnerships' networking activities in EU which ought to be responsive to *social needs and* mainly to *needs of local labour markets*, aims of action plans and *guarantees* of *longer financial suppor*t from EU funds (after period of funding a partnership expires, etc.) and government. Indicators of participation in LLL according to sectors, institutions and regions and occurrence of new legislative frameworks for partnerships will then provide a scope of data to measure and evaluate it, or to access to policies which can encourage or discourage partnership working on a given regional level.

Education and training institutions play crucial role in delivering the LLL processes to the target groups. Objectives of these entities in relation to their prospective working partnership are to create, broaden and extent partnership's network of collaboration, maintain forums for the consultation process within a partnership and eventually support the idea of association (network of partnerships). A study of indicators such as the *diversity of partners* from the perspective of *sectors, geography,* , local – regional – national – European connection, *forms of collaboration,* their *accessibility* to public and *duration of membership in a partnership* can contribute to a better understanding working partnerships of LLL in regional policy implementation.

Implementation process covers two substantial objectives: to increase effectiveness of a partnership in LLL in the field of local labour market needs and requirements, the other is to raise the general degree of qualifications and in such way increase competitiveness of target groups. Indicators of employability, scope of new qualifications and success in the local labour market can measure efficiency of a working partnership.

Indicators for the analysis of the partnership approach

Policy formation	Suggestion of data sources
Legislative aims in national LLL strategies supporting building-up partnerships in LLL	National legislation on LLL European Lifelong Guidance Policy Networks Communications of the European Commission
Other existing national and European legislative frameworks for partnerships in LLL	
Does the implementation of partnership improve LLL participation rate towards 12,5% for 2010/ 15% for 2020.	
Inter-sectoral and inter-institutional collaboration legislative framework for networking activities in EU, responsive to social needs and demands of local labour markets, aims of action plans, guarantees of longer finance support from EU funds and governments, principles of micro-regionality, plurality, excellence, fair society, funding, access	
Legislative framework on public-private partnerships (PPP) and promotion of social partnerships	

Institution delivery	Suggestion of data sources
Existence of national association for education of adults	Internet portals of of associations (EAEA, FEDEE, ESREA, etc.)

Buiskool, B.J. e.a. (2005)

CEDEFOP

Annual reports of training institutions and associations |
Membership in European associations for education of adults *(e.g. EAEA, FEDEE, ESREA)*	
Indicators needed for diversity of partners from the perspective of sectors, geography, local/regional/national/European	
Collaborative network of institutional inter-relations within a region or Member States	

Implementation	Suggestion of data sources
Increase cooperation between LLL stakeholders	National reports on LLL

Learning region project websites

National online fora portals on LLL

Existing national information systems of LLL |
Quality control mechanisms to response to learning needs and demands in the labour market (e.g. information systems)	
Continuation of learning region projects	
Online fora on LLL	
Public-private partnerships (PPP)	

4.2 Learning Culture

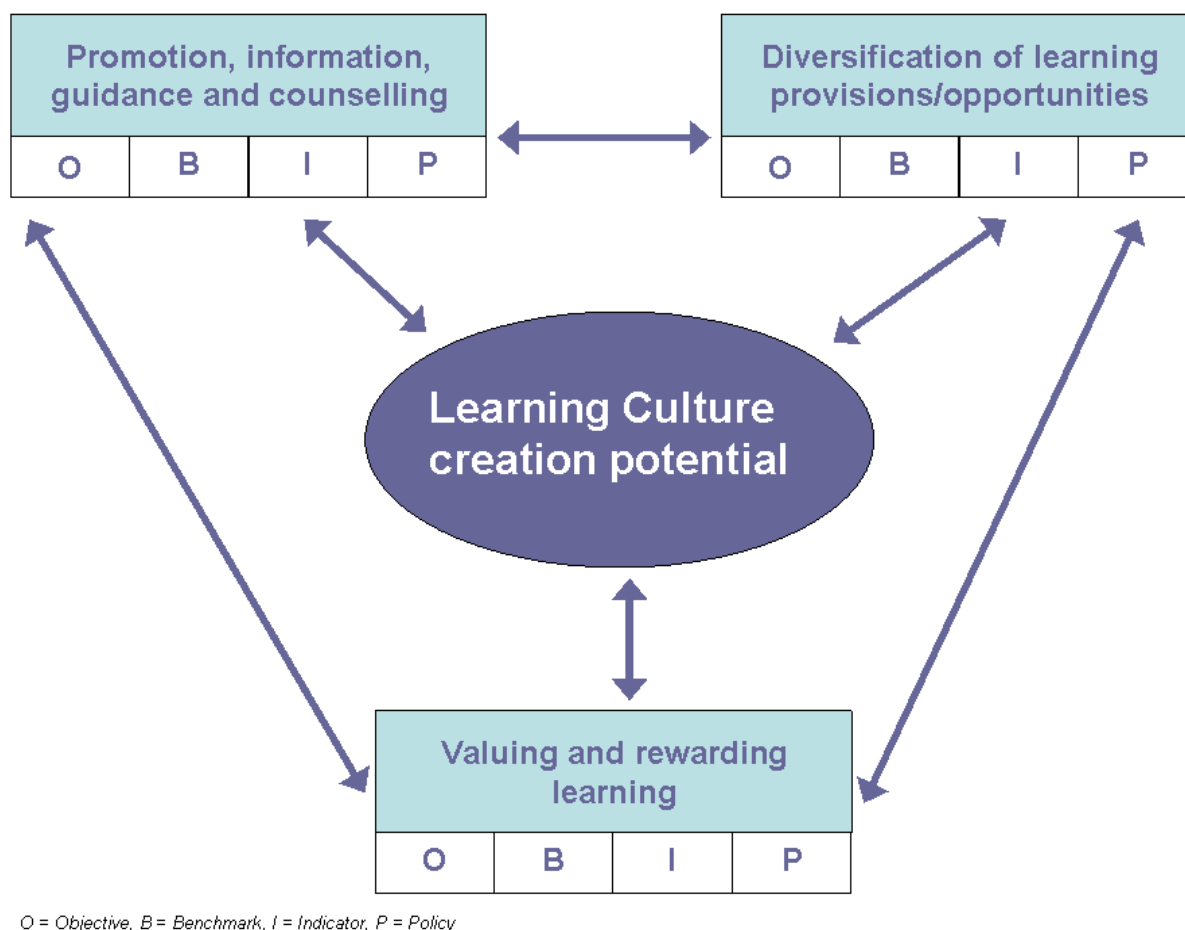O = Objective, B = Benchmark, I = Indicator, P = Policy

Figure 4.3. Balanced score card for the analysis of learning culture.

Indicators for the analysis of learning culture

Promotion, information, guidance and counselling	Suggestion of data sources
The percentage of the population aged 25-64 who did not participate in LLL activities but are willing to participate in the future	Adult Education Survey (AES)
The percentage of the population aged 25-64 reporting actively seeking for information about learning opportunities	
The percentage of those among the population aged 25-64 actively searching for available learning opportunities who have achieved in finding relevant information	
The percentage share of career guidance providers as compared to other sources of information on learning possibilities	

Diversification of learning provisions/opportunities		Suggestion of data sources
Percentage of education/training facilities which comply to relevant physical accessibility laws and regulations of the country		Adult Education Survey (AES)
Participation in formal and non-formal education and training	Participation rate of women aged 25-64 in formal and non formal education and training	
	Participation rate of people aged 55-64 in formal and non formal education and training	
	Participation rate of low skilled people (ISCED level 0-2) aged 25-64 in formal and non formal education and training	
	Participation rate of unemployed people aged 25-64 in formal and non formal education and training	
Share non formal education and training activities provided by NGO's and other non-commercial institutions such as libraries, museums, cultural societies		
Percentage of those reporting as obstacle that there was no training offered at a reachable distance among the population of non LLL participants willing to participate in the future.		

Valuing and rewarding learning	Suggestion of data sources
Number of established by law competence-based occupational standards2 as reference points for the validation of non-formal and informal learning	European Inventory "validation of non-formal and informal learning"
Number of certificates which can be earned through the use of officially approved validation methods of non-formal or informal learning	
Number of established validation centres	
Yearly number of certificates awarded to citizens through established validation procedures	

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2 Including the code and the name of occupation, level of difficulty of work, competence, and field of work, main tasks, knowledge and skills.

4.3   Quality control and indicators

Lifelong learning is a complex process covering all levels of education and training throughout the life of the individual, including formal, non-formal or informal learning, with the aim to improve individual's knowledge, skills and competences. Among the main objectives in Lifelong learning is to provide equal opportunities for access to quality learning throughout life to all people. In the recent years, the quality objective has been increasingly coming to the fore of all European education and training policies. Many of the European countries have done important efforts to implement the policies and converging to the European quality assurance. The process is strongly influenced by national legislation, existing institutions and even by culture.

EFELSE's approach to studying comprehensiveness and coherence of the Quality Assurance across Europe emphasizes on the following important aspects a) the Quality control, focusing on the existence of policies, mechanisms and tools, together with their level of coherence in respect to European Frameworks and also taking into account the level of awareness, consultation and sharing of good practice examples on EU, national and regional levels; b) the Target span, where the focus should be on evaluating the scope of the national policies, including ambitious targets in population participation (i.e. inclusion of all), broad provision of E&T (i.e. linked both to population interest and labour market needs). Special attention is devoted on the inclusion of innovative pedagogies and focus on teachers' education and training. Furthermore, indicators as retention and learning outcomes and responsiveness to the labour market needs are considered.

The evaluation of the quality control of lifelong learning within EFELSE should include study the existence of national and regional level policies for quality and identification of indicators to measure progress, together with the level of maturity in the implementation of quality control mechanisms, evaluation and monitoring on an ongoing basis.

The existence of quality control policies, mechanisms and tools is crucial for defining Europe's learning domain as area of excellence. Furthermore, collaboration between involved institutions and sharing of good practice is of high importance. Objectives of such collaboration will include the ensuring continuous improvements of the quality and the efficiency of Education and Training / Lifelong learning; the improvement of the access and efficiency in the formal and non-formal education system, allowing individual pathways and avoiding repetition of learning which has already been achieved; increasing accountability, transparency and credibility of institutions; increasing the coherence of quality assurance across Europe, and also across national/regional/local institutions; guaranteeing timely implementation of relevant and efficient quality assurance measurements, processes and tools; increasing the quality of the LLL providers through an accreditation process, including mechanisms for monitoring staff qualifications, facilities, learning resources and materials, etc.
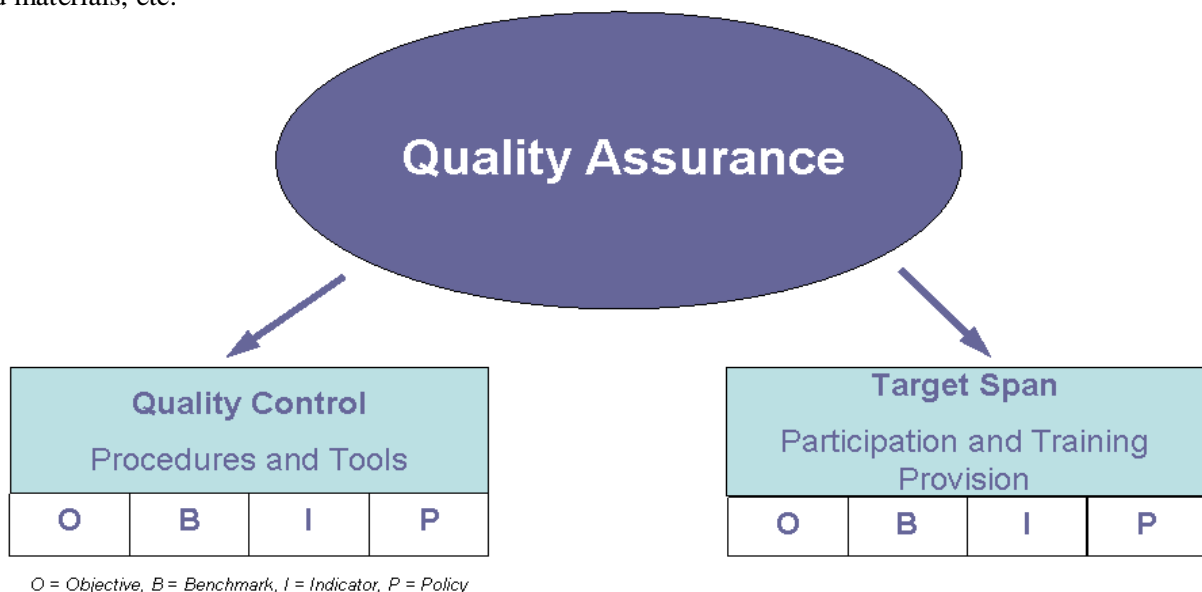

Figure 4.4. Balanced score card for the analysis of quality control and indicators

Indicators for the analysis of quality control and indicators

(Note: qualitative studies are also important with regard to quality assurance in LLL)

Quality Control – Procedures and Tools		Suggestion of data sources
Financial support dedicated on quality assurance		See list below
Number and size of institutions responsible for quality control		
E&T Providers	Share of E&T providers (e.g. VET providers) applying Quality Assurance systems	
	Share of E&T providers applying regular external quality review	
	Share of E&T providers providing formal qualifications and certification	
	Share of E&T providers providing public reports on quality evaluation of their institution	
Participation in the one or more of the of the following: European Network for Quality Assurance in Higher Education (ENQA), EUA, EURASHE, ESIB		
Accreditation indicators	quality of learning resources (including the digital ones), accredited teaching staff, adequate facilities, etc	

Target Span – Participation & Training Provision		Suggestion of data sources
Participation	Rate of participation to LLL / Access rate to LLL	See list below
	Retention rate in courses / drop out rate	
Outcomes	Successful completion of training in regular time / Rate if accreditation/certification	
	Learning outcomes / achievements, including but not limited to levels of literacy and numeracy, ICT and language skills)	
	Destination of trainees (Placement rates sixth month after training) / Employment rate of the trainees	
	Use of acquired skills in the workplace	
Rate of Learners' satisfaction / number of complaints		
Teacher competences	Number/rate of Teacher regularly participating in further development training	
	Investment in trainers and teachers	
Rate of institutions providing counselling and assistance		

Suggested data sources

- ENQA Current Trends in European Quality Assurance (26. May. 2009) - Info for Greece, Romania and Spain:, http://www.enqa.eu/files/ENQA_wr8_current_trends_final.pdf

- QA Models in Europe, data for Romania and Germany
  http://www.qualityfoundation.org/qualc/index.php?option=com_content&view=section&layout=blog&id=5&Itemid=8&lang=

- Info about Germany and Spain:
  Quality in Education and Training: Cases of Good Practice in Vocational Education and Training and Higher Education, Federal Ministry for Education, Science and Culture, Vienna, March 2006, available online at http://www.bmukk.gv.at/medienpool/18020/study_quality_in_education_a.pdf

- Info for Germany, Greece, Spain, Romania:
  Cedefop panorama series (2009) "The relationship between quality assurance and VET certification in EU Member States", ISBN 978-92-896-0615-8, available at
  http://www.cedefop.europa.eu/etv/Upload/Information_resources/Bookshop/555/5196_en.pdf

- Adult Education Survey (AES)
  http://epp.eurostat.ec.europa.eu/portal/page/portal/microdata/adult_education_survey
  e.g. for Spain available through INE
  http://www.ine.es/jaxi/menu.do?type=pcaxis&path=/t13/p459&file=inebase&L=1

- Statistical Data on Employment and Education and training UNESCO/OECD/Eurostat (UOE):
  www.oecd.org/education/database

- Continuous Vocational Training Survey (CVTS)

- Labour Force Survey (LFS) http://epp.eurostat.ec.europa.eu/portal/page/portal/microdata/lfs

- Eurostat /note: all data refering to individuals to be disaggregated according to gender/

- Higher Education Quality Assurance Agencies - Country Related to EFELSE

Country	Country	Scope	Main evaluation type
Germany	Akkreditierungsrat – **www.akkreditierungsrat.de**	National, university and nonuniversity sectors	Metaaccreditation
	Zentrale Evaluationsund Akkreditierungsagentur (ZevA) – **www.zeva.unihannover.de**	Regional, university and nonuniversity sectors	Programme accreditation
	Akkreditierungs-, Zertifizierungs- und Qualitätssicherungs- Institut (ACQUIN) - **www.acquin.org**	Regional, university and nonuniversity sectors	Programme accreditation
	Agentur für Qualitätssicherung durch Akkreditierung von Studiengängen (AQAS) – **www.aqas.de**	Regional, university and nonuniversity sectors	Programme accreditation
	Akkreditierungsagentur für Studiengänge der Ingenieurwissenschafte n, der Informatik, der Naturwissenschaften und der Mathematik (ASIIN) – **www.asiin.de**	Regional, university and nonuniversity sectors, subjectspecific	Programme accreditation
	Akkreditierungsagentur für Studiengänge im Bereich Heilpädagogik, Pflege, Gesundheit und Soziale Arbeit (AHPGS) – **www.ahpgs.de**	Regional, university and nonuniversity sectors, subjectspecific	Programme accreditation
	Stiftung Evaluationsagentur Baden-Württemberg (EVALAG) – **www.evalag.de**	Regional, university and nonuniversity sectors	Programme evaluation

	Foundation for International Business Administration Accreditation – **www.fibaa.de**	Regional, university and nonuniversity sectors, subjectspecific	Programme accreditation
Greece	National Accreditation Centre for Continuing Vocational Training (EKEPIS) http://www.ekepis.gr	Continuing Vocational Training Sector	Programme and Institutional evaluation & accreditation
	Organisation for Vocational Education and Training (OEEK) http://www.oeek.gr	Initial Vocational Training Sector	Validation and qualification system for vocational education and training
Poland	National General Accreditation Commission – **www.men.waw.pl**	National, university and nonuniversity sectors	Programme and institutional accreditation
	University Accreditation Commission – **http://main.amu.edu.pl/~ects/uka/uka.html**	National, university sector	Programme accreditation
	Association of Management Education Forum – **www.semforum.org.pl**	National, prívate university and nonuniversity sectors, subjectspecific	Programme evaluation and accreditation
Romania	National Council for Academic Assessment and Accreditation – **www.cneaa.ro**	National, university and nonuniversity sectors	Programme And institutional accreditation
Slovakia	Accreditation Commission – **www.akredkom.sk**	National, university and nonuniversity sectors	Programme and institutional accreditation
Spain	National Agency for Quality Assessment and Accreditation (ANECA) – **www.aneca.es**	National, university sector	Programme and institutional evaluation and accreditation
	Agency for Quality Assurance in the Catalan University System – **www.agenqua.org**	Regional, university sector	Programme and institutional evaluation

4.4

Demand for Learning

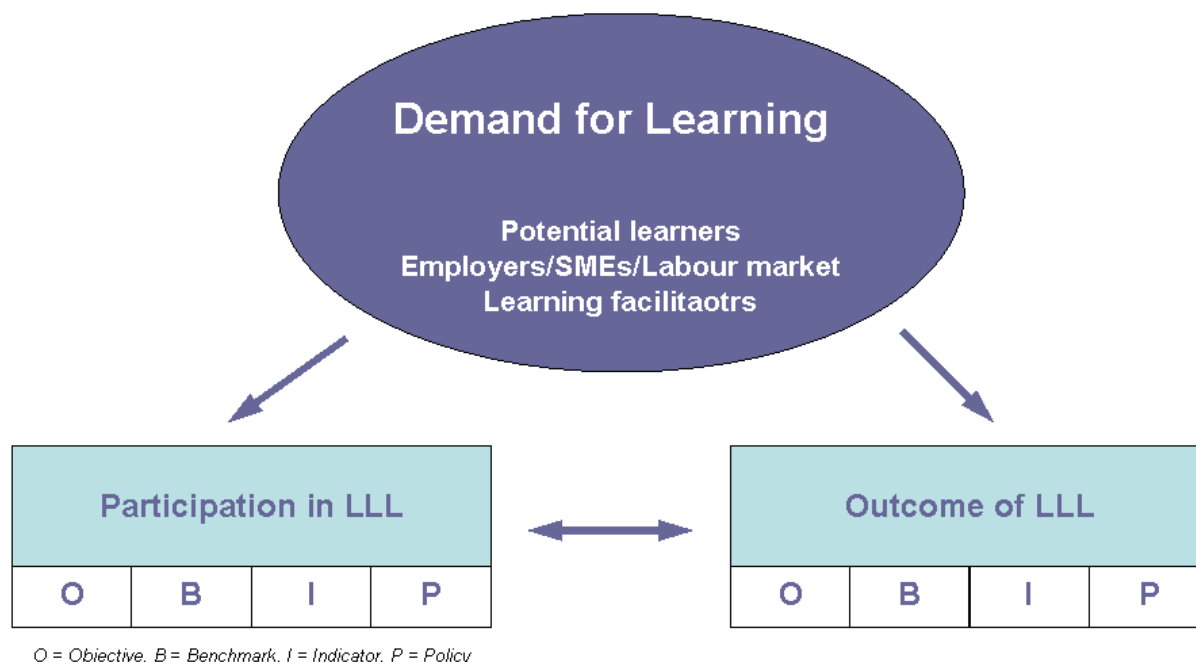*O = Objective, B = Benchmark, I = Indicator, P = Policy*

Figure 4.5: Balanced score card approach for the analysis of demand for learning.

Indicators for the analysis of demand for learning

LLL participation indicators		Suggestion of data sources
Participation of adult learners	Participation in LLL (formal, non-formal, informal education) of adult population (25-64), by certain groups (age, sex, migration background, occupational status, etc), during the last 12 months.	UNESCO/OECD/Eurostat (UOE)

Continuous Vocational Training Survey (CVTS)

Adult Education Survey (AES)

Labour Force Survey (LFS)

Survey on Income and Living Conditions (SILC)

Eurobarometer, eEurope benchmarking |
	Participating in job-related training and continuing education	
	Participation in post secondary/ further education (not job-related but liberal or hobby-related), general continuing education	
	Participation in continuing education of initially low qualified people	
	Average hours/percentage of working time spent on training	
	Participation in online education/ e-Learning/ distance education	
	Rate of working population trained on job related ICT skills	
Participation of companies	Participation in continuing education and training (non-formal, informal education), all enterprises, by	Continuous Vocational Training Survey (CVTS)

and employers	sector, by size, etc.	Labour Force Survey (LFS)
Professional development of teachers and trainers	Percentage of teachers having received training/ who follow continuous professional training	ESS initiatives for the aggregation of national data
	Progression in number of applicants for training programmes	OECD TALIS – Germany did not participate
	Continuous training of teachers in areas of emerging skills needs	Labour Force Survey (LFS) Eurobarometer, eEurope benchmarking

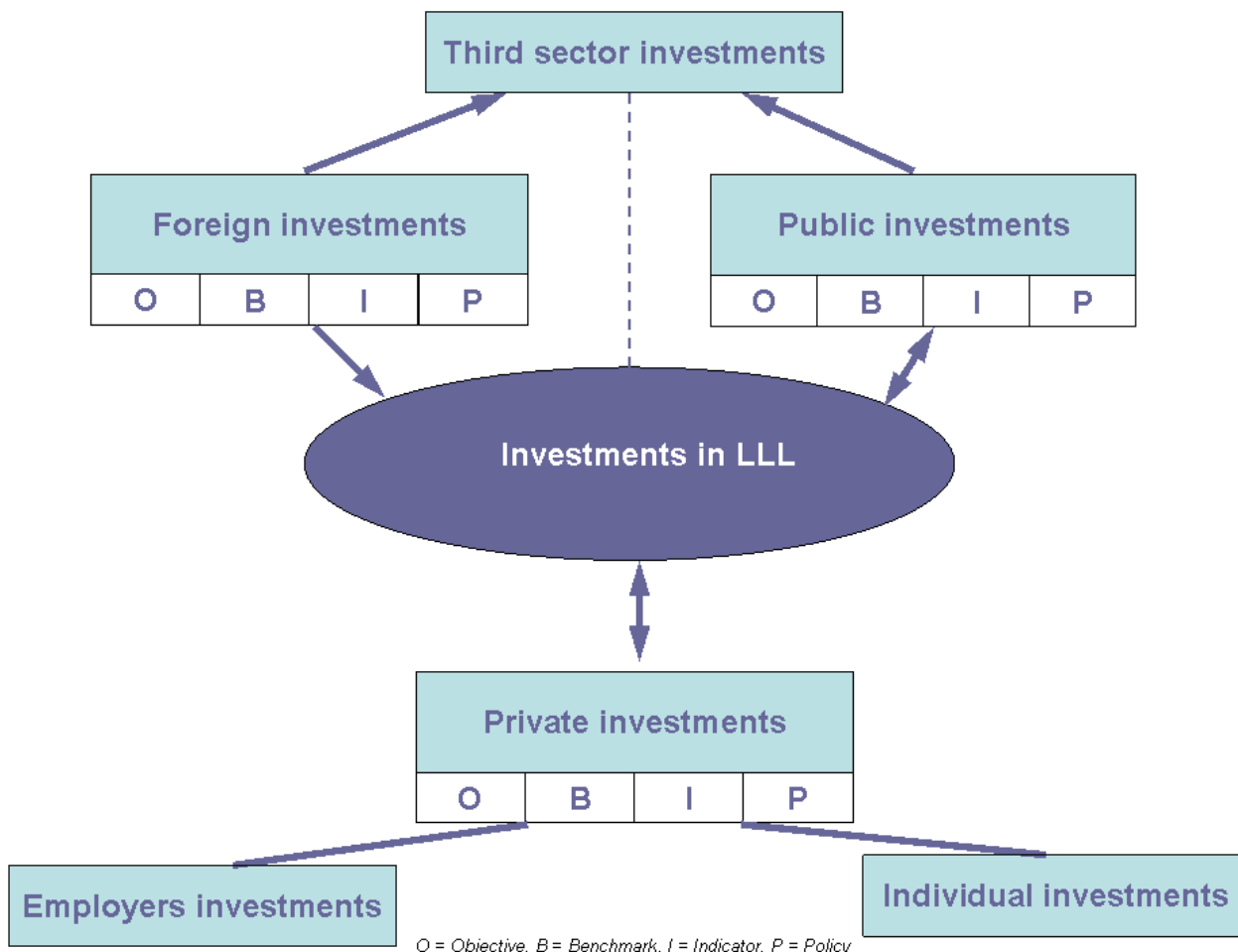| Outcomes of LLL		Suggestion of data sources
Adult learner competencies Formal, non-formal, informal learning	Educational attainment rate of adult population (attainment level)	Eurostat (UOE) Labour Force Survey (LFS) Survey on Income and Living Conditions (SILC) International Civics and Citizenship Education Study (ICCS, since 08/09) Programme for the International Assessment of Adult Competences (PIAAC), planned for 2009
	Literacy proficiency rate of adult population (reading, mathematics, science)	
	Participation and skills in education by field (language, ICT, learning to learn, civics)	
	Vocational competences	
	Entrepreneurial attitude and activity	
Labour market development	Impact of educational levels on employment and unemployment	UNESCO/OECD/Eurostat (UOE) Continuous Vocational Training Survey (CVTS) Adult Education Survey (AES) Labour Force Survey (LFS) Survey on Income and Living Conditions (SILC) Eurobarometer, eEurope benchmarking Eurostat-BASELINE
	Employment growth in high education sectors	
	High employment regions and skills needs	
	Share of the workforce using computers for work	
	Shortages in ICT occupations and sectors	
	Importance of various assets in finding a job (prior qualifications, language and computer skills etc)	
	Training needs to keep current job/to find a job (no further training needs, yes but cannot do training, yes and I will do training)	
Teacher/ trainer competencies	Shortage/surplus of qualified teachers and trainers on the labour market	ESS initiatives for the aggregation of national data OECD TALIS Labour Force Survey (LFS) Eurobarometer, eEurope benchmarking
	Share of teachers with IS (Information System) literacy (and other teacher/training skills)	

4.5   Investments in Adult Education

Figure 4.6. Balanced score card approach for the analysis of investment in adult education.

Indicators for the analysis of investment in LLL

Public investment indicators		Suggestion of data sources
Structure of costs of CVT courses	PPS per employee in all enterprises Table 4, p. 31	EUROSTAT (2002a; 2002b): CVTS2.
Costs of CVT courses as a percentage of total labour costs of all enterprises (%)	Table 5, p. 32	EUROSTAT (2002a; 2002b): CVTS2.
Share of sources of financing of continuing education and training (job-related) among employed adults Source of funding received for	a) self b) employer c) government Table 6, p. 34	Source: O'Connell (1999): IALS-data. Eurobarometer 71.2 Survey, May - June 2009

training (individual, government, EU, employer etc)		
Employee sponsored CVT courses by firm size	Annual volume (hours per employee); Table 7	CVTS2
Structure of the direct costs (types of costs) of training courses	a) fees/payments b) travel costs, daily allowances c) labour costs d) costs of rooms p. 41-42	CVTS2

Private investment indicators		Suggestion of data sources
Respondents' willingness to pay for education and training, by purpose, EU15	a) by learning purpose, EU15, % b) by country and learning purpose, % Figure 29	Eurobarometer 2003
Proportion of respondents not willing to contribute towards the cost of their education and training, by purpose and socio-economic group, EU15, %	a) by country and by aggregated learning purpose, % b) by selected age group and learning purpose, %	Eurobarometer 2003
Direct costs and personnel absence costs for training courses per hour of continuing training	a) the costs to the enterprises for each participation hour b) the total costs per participant, subdivided into direct costs and personnel absence costs c) the distribution of the direct costs to the individual costs levied d) the balance between contributions to public funds and public subsidies for the purposes of continuing training in enterprises e) the proportion of the costs for training courses in the labour costs.	CVTS2
Structure of the direct costs (types of costs) of training courses	a) fees/payments b) travel costs, daily allowances c) labour costs d) costs of rooms p. 41-42	CVTS2
Proportion of direct costs and	a) direct costs	CVTS2

personal absence costs in the total costs per participant %	b) personal absence costs Figure 5.4	
% of costs of training courses in total labour costs of all enterprises, according to type of cost	a) total costs b) direct costs c) personal absence costs d) employers' costs Figure 5.5	CVTS2
Participation hours per participant (total and by sex)	a) total b) by sex Figure 4.1 i 4.2	CVTS2

Foreign investment indicators		Suggestion of data sources
Structure of the direct costs (types of costs) of training courses	a) fees/payments b) travel costs, daily allowances c) labour costs d) costs of rooms p. 41-42	CVTS2

Third sector investment indicators		Suggestion of data sources
Structure of the direct costs (types of costs) of training courses	a) fees/payments b) travel costs, daily allowances c) labour costs d) costs of rooms p. 41-42	CVTS2

4.6 Accessibility of Learning Opportunities

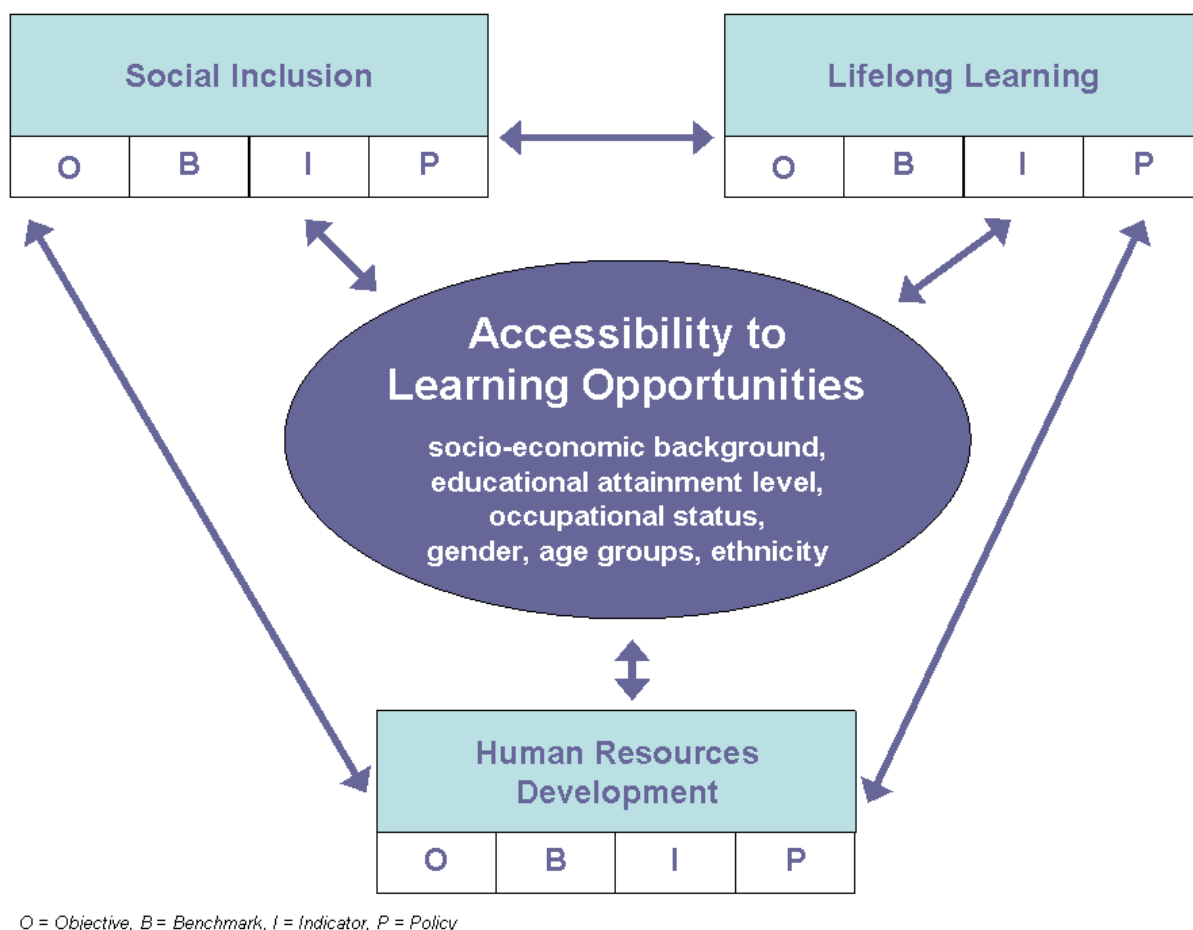*O = Objective, B = Benchmark, I = Indicator, P = Policy*

Figure 4.7. Balanced score card approach for the analysis of accessibility to learning opportunities.

Indicators for the analysis of the accessibility to learning opportunities

Social inclusion indicators (core indicators in bold typing)
Reducing educational and learning differences between males and females
Share of the female population aged 18 – 24 with only lower secondary education and not in education and training
The education-skills gap (difference) among immigrants, ethnic minorities compared to "native" or majority people
Obstacles in joining training (cost, family obligations, employer support, workload etc), e.g. Eurobarometer 71.2 Survey, May -June 2009

Lifelong learning indicators (core indicators in bold typing)
Non-formal AL activities to develop key competencies of adults
Balancing differences between different age groups focusing more on ageing people. Age and skills are inversely related in all countries
Adult learning provision to contribute to complete schooling (elementary, VET, upper secondary)
Adult learning provision to accumulate credits for entry into higher education

Human resources development indicators (core indicators in bold typing)
Outreach activities for excluded and low skilled adults in terms of learning as socialisation and integration
Unemployment rate and educational attainment for the unemployed
The educational attainment of the working age population (15-64 year olds)
Participation of the employers to learning programs
Number of training programs using ICT
Active teachers involved in training programs

5.   SWOT Analysis

The SWOT analysis can be used to derive, analyse, and focus the balanced scorecards results with other factors (e.g. socio-cultural factors, capacity building factors) that impede or facilitate the implementation of LLL strategies. It extends the analysis to an internal and an external perspective. The internal perspective takes up aspects that are within the control of an organization, like strengths that can be developed and weaknesses that can be worked on. The external perspective considers aspects that are out of an organization's control like opportunities that might appear or threats that may come up. Table 5.1 gives an overview on the perspectives and guiding questions for each dimension.

The identification of positive and challenging aspects of the lifelong learning strategy implementation can be developed on the basis of a SWOT analysis. In general, this approach aims at the identification of strengths, weaknesses, opportunities, and threats (SWOT) of a given field of interest. According to the German Federal Ministry of Internal Affairs, the SWOT analysis is a strategic management tool which allows the identification of strengths and weaknesses of an organisation (internal view) and the chances and threats of its environment (external view; see BMI, 2009; Lee & Ko, 2000; Lombriser & Abplanalp, 1998). The aim is the identification of solutions and strategies which are necessary for the achievement of the organisation's goals The SWOT analysis can also be used for the evaluation of specific organisational projects. In the context of the EFELSE project the SWOT approach can be applied for evaluating the strengths, weaknesses, opportunities and threats of implementing the lifelong learning strategy to get a more differentiated overview about the individual statements made by the interview partners with a focus on good practices and challenges in the process of lifelong learning strategy implementation.

Table 5.1. SWOT matrix with guiding questions according to BMI, 2007 (see http://www.orghandbuch.de, Chapter 6.3.4).

„Internal view" on country specific LLL policies	
STRENGTH	**WEAKNESSES**
• Reasons for success? • Synergies? *e.g. special programme for funding adult education*	• Weak points to consider? *e.g. current strategy excludes older age groups*
"External view" on factors that influence LLL	
OPPORTUNITIES	**THREATS**
• Future trends worth following? *e.g. companies become aware of chances related to education of older workforce*	• Situation of society? • Existing regulations? • Change in policy? *e.g. impact of financial crisis: workers might not want to stay away from work to long*

By its structure, the SWOT analysis can be feeded with data from the indicator analysis as well as by further data like e.g. interviews or further research. To use it on the policy level for evaluating LLL strategies, the BSC results mainly cover the areas of strengths and weaknesses while opportunities and treats can be derived from forecasts about future development.

Table 5.2. Combination of SWOT analysis and balanced score card for analysing LLL strategy parameters.

EVALUATION PARAMETER	**STRENGTHS**	**WEAKNESSES**	**OPPORTUNITIES**	**THREATS**
Demand for Learning: Participation in LLL	*Analysis of indicator data and policies*	*Analysis of indicator data and policies*	*Analysis of policies*	*Analysis of policies*

However, applying SWOT as small organisation like e.g. a training provider, the BSC result may also provide insights in threats and opportunities. If we take, for example the parameter "demands for learning", it can be a strengths or weakness of a training institution, provided the specific measures taken to meet the demands for learning. However, national policy may pass laws or regulations to control the demand for learning that may develop as a threat or opportunity for a training institution. Table 5.3 gives an example for a SWOT analysis of investment structures, derived from interviews with education policy makers in Germany.

Table 5.3. Example SWOT analysis on the policy level for the dimension of Investment.

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Specific funding regulations and strategies exist and work for several programmes, e.g. on federal level: Educational Savings Plan, BAMF integration courses; on Länder level: Bavarian Labour Market Fund,	Funding opportunities should be available for all income groups, e.g. the Educational Savings Plan has a focus on persons with lower income, but still people need to have the money that can be saved; offsetting against tax liability is mainly advantageous for people with higher income Expenses of training providers for high-quality distance teaching can only be covered with high enough participation rates.	LLL should be financed and realized with subsidies and public funds In theory, the qualifications needed by the economic system could be financed by the economic system. Institutionalisation and budget management are important tools for linking the formal education system and non-formal/informal lifelong learning.	Funds are generally quite small. Main cash-flow still follows the main sectors of the education system (e.g. school education, higher education). Existing funding procedures cannot be changed easily and adapted to new structures, and exceptions are not permitted. **Small training providers have serious problems due to reduced funds and financing**; long-term planning is impossible. As a consequence the employment conditions of staff are suboptimal/ uncertain..

SWOT analysis can be used for particular indicators (e.g. participation for LLL), for whole dimensions (e.g. demand for learning) or for the educational system as a whole. Applying the SWOT analysis on different levels can assist users of this tool to find out the crucial elements of the E&T System by a bottom-up process that starts from some particular indicators and develops to the coverage of the whole E&T system. Thereby, it is important to analyse and identify core elements that ascend one level in the bottom-up process and context elements that, although important, are not main priority and therefore stay on the current level.

6.   Further development

Applying the EFELSE Evaluation framework once, users can identify the current state and make statements about the evaluation of LLL strategies. Yet, for the evaluation of strategy implementation it is important to see the effects of a particular policy. Therefore, the CIPP evaluation approach aims to investigate how far context and input influence the process and product. The balanced scorecard method provides a good basis for process evaluation by applying it twice to see how an indicator made progress towards its benchmark, either by evaluating available data retrospectively or with an initial and a follow-up evaluation. The second mode of application may realize the potential of balanced scorecards as tool for strategic management see (Kaplan & Norton, 1996, p. 79). They propose a spiral model for applying the balanced scorecard with the stages of *translating a vision*, *communication and linking*, *Business planning*, and *Feedback and learning*. Like in a spiral, these stages follow one another until the stage of translating a vision is reached a second time and the spiral turns a second time with a refined vision. Besides, indicator-based analysis has to take up a multi-perspective view. The beneficial application of indicator analysis requires a model about how different indicators interact with each other by mutual influences (see Kaplan & Norton, 1996, p. 83). One example for this is the EU dimension *culture of learning*. In the context of educational policy making the importance of a good culture of learning may be common sense. However, particularly this dimension is rather weak in available indicators. Thus, one has to define which goals the culture of learning should serve. One may be that

a good culture of learning reflects a high motivation of people to engage in informal and formal learning activities which means that a good culture of learning is reflected by high participation rates in Lifelong learning. By such models, one can evaluate dimensions that are low in indicators by follow up indicators until more appropriate indicators are developed. Deiss (2009) reflects this by his figure about the use of indicators for policy making. He postulates an interaction between indicators that monitors policies and policies that monitor indicators (see figure 6.1). In concrete, he states that more open indicators help to develop new policies that, once the policies are settled can be monitored by at this time well defined indicators. To exemplify this by our dimension culture of learning one could say that the open indicator of participation rates helps to define new policies on facilitating learning culture. Once there is a particular policy for facilitating learning culture, one can analyze the progress towards its goals by well defined indicators.
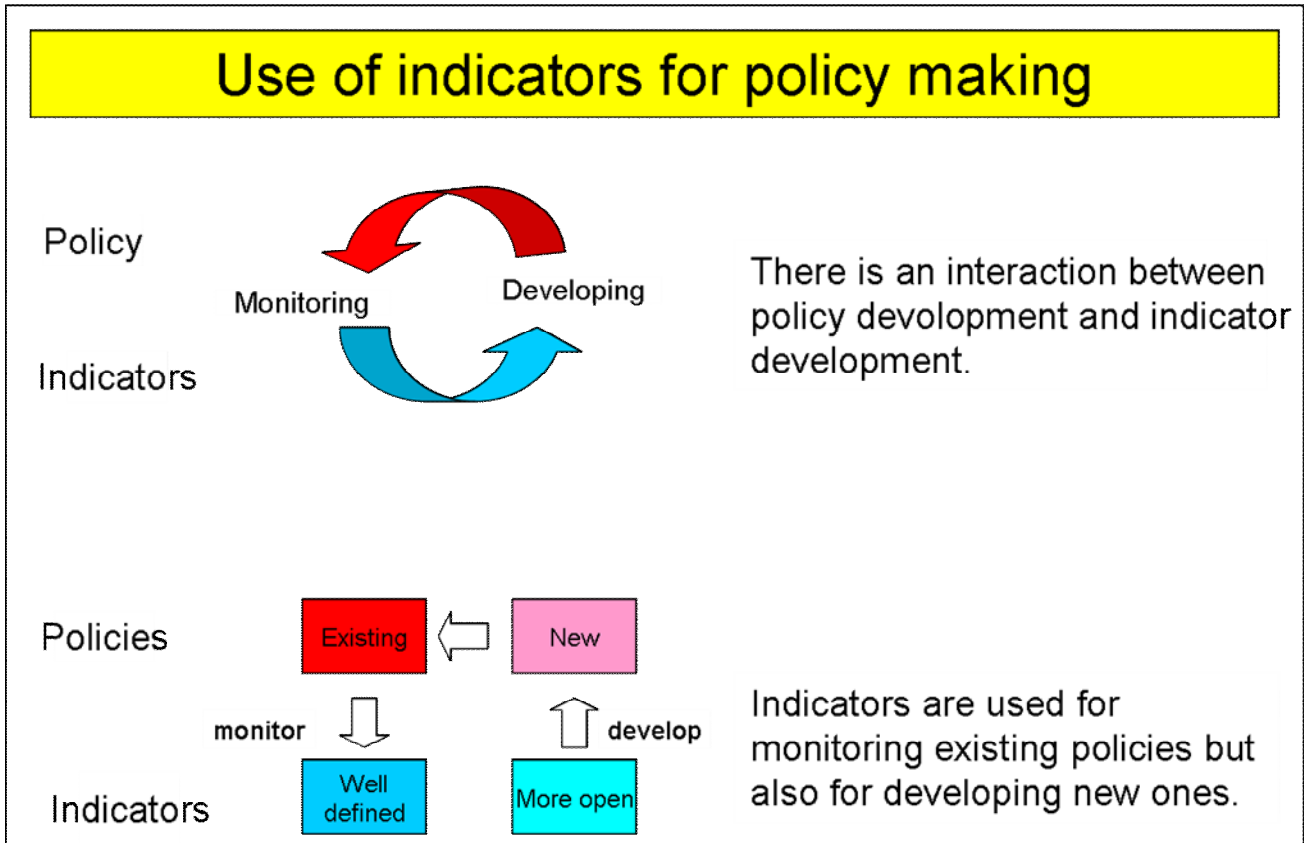
Figure 6.1: The Use of indicators for policy making according to Deiss (2009).

The current stage of the EU with respect to incoherence and incomprehensiveness of the member states' LLL strategies is therefore also reflected in the indicator situation: Missing or weakly developed strategies for facilitating one dimension also lead to a lack of indicators for evaluation these dimensions. Thus, particularly as the indicators aim at measuring progress towards a goal, it is crucial to firstly develop elaborate strategies and their goals before evaluating them.

7. Final remarks

Evaluation is an important aspect of any e-learning project. There are different issues, e.g. which style of evaluation to use, which evaluators to chose and which aspects to evaluate, depending of the goals of an evaluation. Taking a socio-cultural perspective, evaluation should also focus on participants' cultural background and inter-cultural differences in attitudes, values and stereotypes. Schaumburg (2008) emphasizes that evaluations can be substantially better, if they take place already in an early stage of development to prevent inefficient developments, if they ask questions which are oriented on the goals of development, if they

consider the particular context of a course and if they take different perspectives into account, e.g. deciders and developers, teachers and learners, and directly involved persons and external experts.

8.   References

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Annex A. Peculiarities of LLL Evaluation in the EFELSE Partnership Countries

This Annex exemplarily describes pecularities of evaluating lifelong learning strategies in the countries Germany and Slovakia. For further information of the other countries (Greece, Poland, Romania, Spain) see EFELSE project website (http://efelse.iacm.forth.gr).

Germany

Given the specific situation of Germany – with strengths in the comprehensiveness and weaknesses in the coherence of the lifelong learning strategy – we recommend focusing evaluation activities on the aspects of "creating a learning culture", "partnership working", and "quality control and indicators" (Of course, the comprehensiveness factors should not be neglected for the benefit of coherence factors). This is supported by the views of the EFELSE interview partners on evaluating the lifelong learning strategy implementation (see interview results and SWOT analysis above). They revealed a need for evaluation on all levels, but with a focus on challenges caused by the federal system and lacking quality assurance approaches. It was pointed out by the policy makers, that any development can only be evaluated, if the differences within states are taken into account. It would therefore be necessary to develop indicators such as differentiated and target group-specific participation rates, the exploitation of programs, and the development of lifelong learning networking structures. Related benchmarks need to set realistic objectives, and adaptation to the requirements on federal and state level is required. It is also important to focus not only on vocational continuing education, as is often done in Germany, but also on other aspects of general continuing education and adult education. An institute for quality assurance on national level and agreement on an overall approach would be needed for the implementation and monitoring of such evaluation processes. The responsibility for quality assurance is not only found on the policy level, but also on the very specific level of the providers. The representatives of training institutions stated that they aim at providing good quality training for different target groups of learners, and according to the demand on local labour markets. Two aspects were revealed as basis for training provision: good marketing to attract learners and raise their awareness for the need of lifelong learning, and reliable financial backing for training provision, often in cooperation with external partners and companies. In this respect, the need for quality assurance measures has to be embedded in the provider's self-conception. Currently, the approaches are inconsistent, and too often evaluation results do lead to consequences in training improvement.

Monitoring and measuring lifelong learning implementation requires a common understanding among all stakeholders, e.g. learners, training providers, the labour market and policy makers, on the general alignment of the lifelong learning strategy. The current discussion on the establishment of eight new lifelong learning indicators (see Council of the European Union, 2009; Deiss, 2009; BMBF/BIBB conference[3]) clearly shows that lifelong learning in Germany is part of an ongoing process on European level and is subject of constant change and development.

We therefore recommend formulating dynamic visions of areas which need to be improved, of areas with already good performance, and of new areas which might be identified in the course of time. The visions need to draw a specific future picture of lifelong learning in Germany, focusing on desirable developments as well as on aspects that should be avoided. The formulation of visions, and the adaptation of these visions according to new developments and requirements of lifelong learning in Germany and on European level, would allow the specification, adaptation and integration of new objectives, benchmarks and indicators. It is strongly recommended to evaluate the measures that will be initiated to let the visions become reality. The EFELSE Tool introduced above provides support for policy makers and training providers in this respect. The evaluation approach suggested by the EFELSE project is to be seen as tool which can only provide initial support and needs to be adapted and modified according to the actual developments and needs on the level of policy and training provision in Germany.

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[3] BMBF/BIBB. Fachtagung Neue Benchmarks in der EU-Bildungspolitik 2010 – 2020

Slovakia

National Strategy of Lifelong Learning (LLL) and Lifelong Guidance (LLG) approved in April, 2007, contains a systematic approach and solution for primary fields of LLL, in particular, from the point of adult education. The main aim of the strategy is to complete both sub-systems (education and guidance). In this respect conditions are being created for simplification of citizens' access for acquiring new qualifications also in non-formal education, with the use of adequate guidance services and access to education, which leads to personal growth of individuals. The available statistics and surveys on LLL show that among the groups of largest participants belong learners aged between 25 to 44 years, the economically-active population.

During the phase of the EFELSE project an ongoing processes of creating LLL culture in Slovakia has been seen through major legislations concerning LLL that were approved in 2009. The first legislation is concerned with the continuing education of teachers who are the main source of information for the learners. Secondly, the Act on LLL that was passed in December 2009 puts in place measures for better monitoring, forecasting and evaluation of learning needs. Funding, together with curricula reform and with the government's reform are the three major pillars for overall optimalization of the Slovak education. The main sources of funds are allocated in favour of LLL and LLG by the European Social Fund (ESF) through the Operational Program Education. Act on Employment Services established legislative framework for the National System of Professions, which came into effect in 2008 as a systemic framework for the creation of the National System of Qualifications. This is the first time the SR enacted legislation that established the concept of National System of Qualifications.

Our interview partners have revealed that priorities of LLL are focused on support of development of key competencies and introduction of innovation into educational process, creation of open system of LLL based on recognition of results of further education and informal learning, quality assurance of LLL, increase of investment into LLL, provision of accessible and quality information and guidance services for LLL and labour market, formation of conditions for the same and continuous access to LLL to all citizens with the aim to bring education as close as possible to citizens, support the principle of Learning regions regarding its specific needs. The strategy deals with LLL and LLG in complex as an effort for systematic access to both sub-systems that will lead to determination of concrete measures up to the year 2011.

As a weakness we see, that planning of the educational activities for adults on the central level is not ensured. About the content of programs of LLL most of all decide educational institutions, which is not often according to the labour market needs. The system of LLL is needed to be perceived as a relatively complex system, in which can be found large volumes of information, which is not often user oriented. Self-governmental regions or public authorities have a role to play especially in setting strategy, where they want to orient economic or social perspective of the region. Considering low rate of the tradition of LLL, adult education is not sufficiently considered as an integral part of lifelong adult education. As for the Learning Region projects, when the funding period was over, the regional partnerships ceased to exist. Interviewees pointed out those LLL stakeholders should discuss kinds of partnerships they want to see growing in their regions or between regions, within the country or over the borders. They should also attract public resources to motivate people for participation in education and companies or other bodies to multiply this funding. Innovation is not very visible objective of current policies, strategies or budgetary decisions and should be given more attention.

Among the main strengths within the implementation of the National LLL Strategy we see that the companies or entrepreneurs, whether from private or public sectors are interested in LLL as existing and functioning reality. Department of Information and Prognosis of Education controlled directly by the Ministry of Education of the SR is processing data on the essential characteristics of educational organizations, the process of providing staff training, funding sources and basic characteristics of various educational activities and the number of trainees. The data can be used for better monitoring and forecasting of educational, training and labour market needs. Each year since the year 2002, about 500 LLL institutions provided data and since the new law on LLL came into practice, all LLL institutions have to provide the data, otherwise they will be penalized. In year 2007, 1200 training institutions offered accredited courses of further education. New Act on LLL also emphasis forecasting of future labour market needs in three-year periods.

We therefore recommend improving the overall respect and value of education through sustainable growth towards the knowledge-based society, to see the access and quality of LLL as a dual objective, ensuring the

availability of quality services for young people, teachers, marginalized groups, as well as to the older generation. Focus deep efforts on higher investment in LLL not only from the EU part and national budget, but also from PPP in order to be more competitive economy within the EU. Define development priorities in the sector of education and R&D according to specific conditions of regions with the inclusion of local learning and research centres of excellence. As an Information System of LLL is being developed and tested, it will bring benefits to all LLL stakeholders and will make the whole system more visible and transparent. For the development of online learning culture there must be higher penetration of broadband and high-speed Internet, not only in large urban areas, but also in rural areas. Finally we highly recommend building strong and long-lasting partnerships in the whole context of LLL. It is too early to assess the efficiency of new legislation, but it is important that Slovakia is moving in the right direction and secondly it is important that we are moving not only within the Slovak framework, but also in an international one.

Annex B. Visualised Analysis Tool

For localized versions of the analysis tool see EFELSE project website (http://efelse.iacm.forth.gr).

National Lifelong Learning Strategies (NLLS) -Transversal programme

Key Activity 1: Policy Cooperation and Innovation

EFELSE - EVALUATION FRAMEWORK FOR THE EVOLUTION OF LLL STRATEGIES IN EUROPE

TOOL
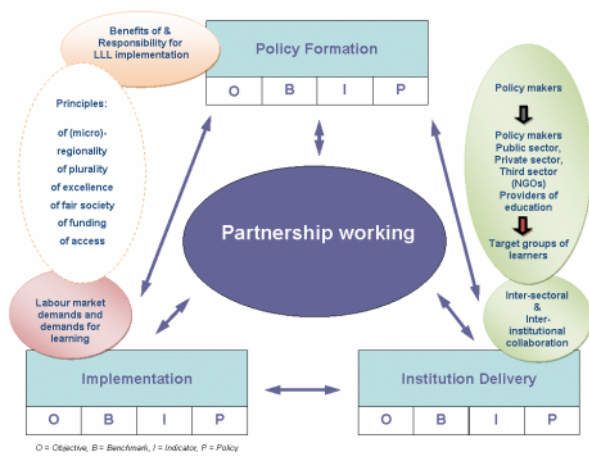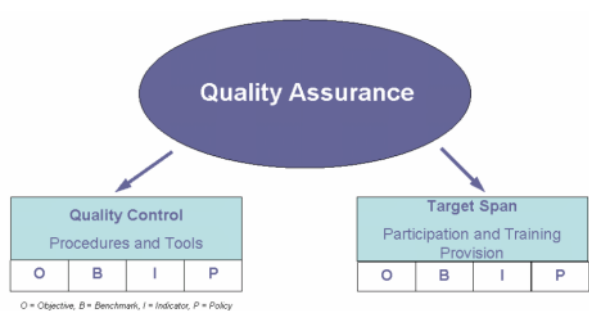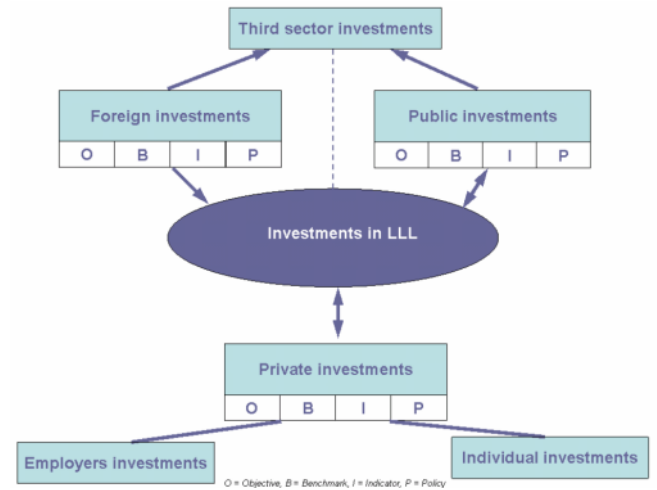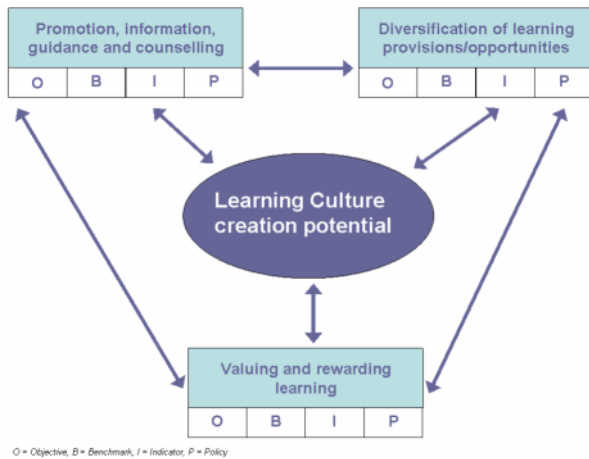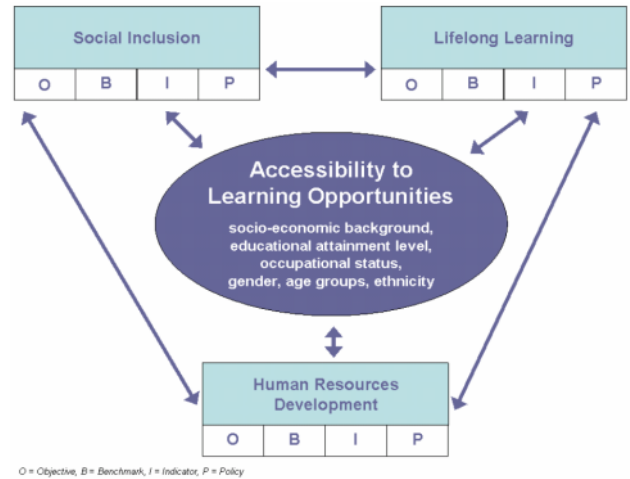
PROJECT NUMBER: 147760-LLP-2008-GR-KA1NLLS

STEP1

Analysing the *Coherence* and Comprehensiveness of Lifelong Learning Strategies using a

Balanced Score Card Approach

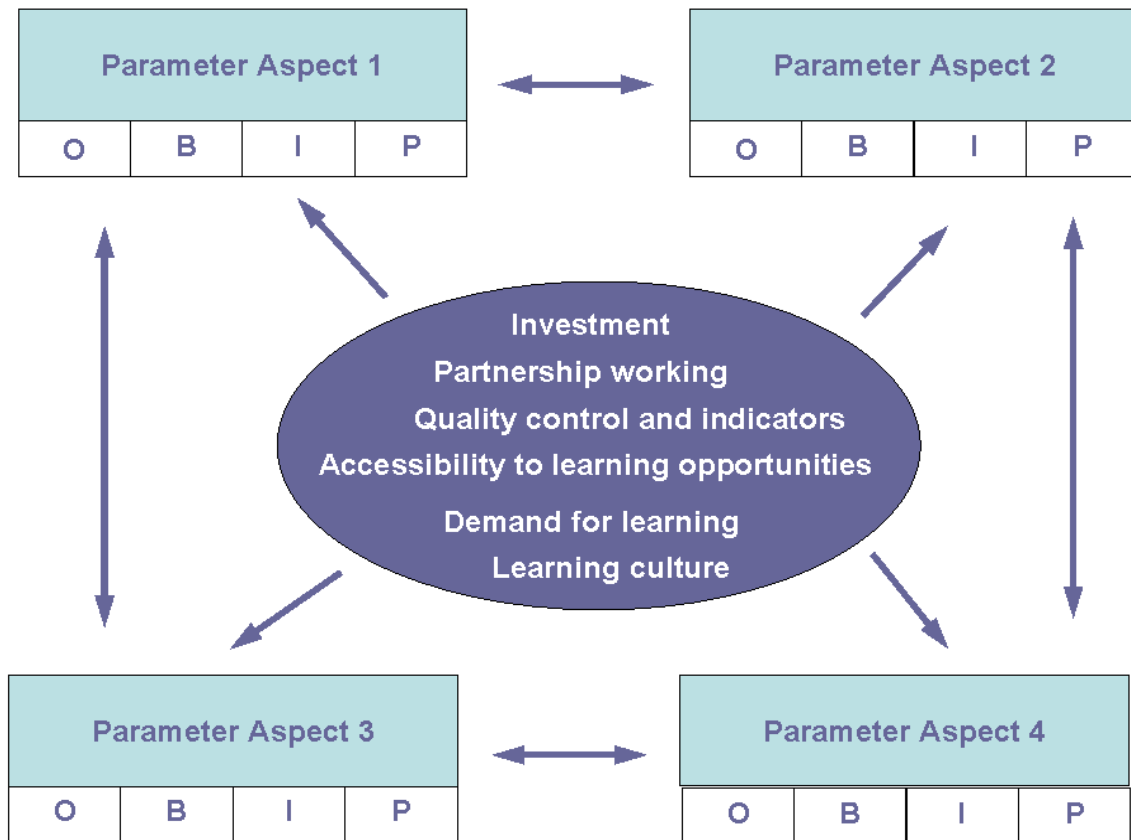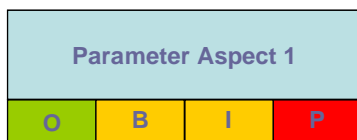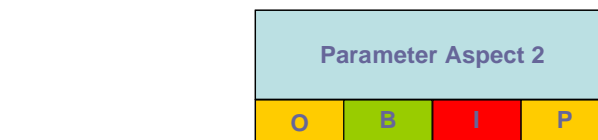| STEP1a	STEP1b
Coherence	*Comprehensiveness*
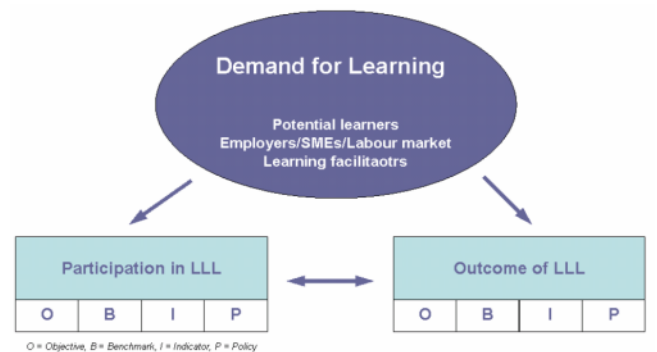
STEP 2

Identifying Performance Levels using a
"Traffic Light" Visualisation

Performance Level of Parameter Aspect in a specific country context (example)

Parameter Aspect 1		Parameter Aspect 2
well defined / goal met	Objectives	needs improvement
needs improvement	Benchmarks	well defined / goal met
needs improvement	Indicators	action required
action required	Policies	needs improvement

STEP 3

Refining the Analysis using a
SWOT Approach

SWOT matrix with guiding questions for analysing LLL strategy implementation

„Internal view" on country specific LLL policies	
STRENGTH	**WEAKNESSES**
Reasons for success? Synergies? *e.g. special programme for funding adult education*	Weak points to consider? *e.g. current strategy excludes older age groups*
"External view" on factors that influence LLL	
OPPORTUNITIES	**THREATS**
Future trends worth following? *e.g. companies become aware of chances related to education of the older workforce*	Situation of society? Existing regulations? Change in policy? *e.g. impact of financial crisis: workers might not want to stay away from work to long*

(see BMI, 2007; http://www.orghandbuch.de, Chapter 6.3.4)

Combination of SWOT analysis and balanced score card for analysing LLL strategy parameters.

EVALUATION PARAMETER	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
e.g. Demand for Learning: Participation in LLL Outcomes of LLL	*Analysis of indicator data and policies*	*Analysis of indicator data and policies*	*Analysis of policies*	*Analysis of policies*

This step can be combined with interviews with policy makers and representatives from training institutions in the field of lifelong learning.