



International
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► Toolkit for lifelong learning policy assessment

Part 2



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1. Introduction

In Part 1 of this handbook, we explain the different aspects of a lifelong learning policy framework. The explanation takes in the different reasons for implementing lifelong learning policies, the potential activities that may be involved, the lifelong learning models that help us understand these policies, and the factors that influence design of a lifelong learning policy framework.

The primary purpose of Part 1 is to provide a comprehensive foundation for understanding lifelong learning policy formulation. However, we also remind the reader that real-world application rarely results in a one-to-one match between models and actual policy implementation. As a result, the task for policymakers is to work out what is needed in their own context, rather than simply selecting an existing model.

Here in part 2 of the handbook, we incorporate a toolkit for policy assessment. The toolkit produces two outputs: 1) a lifelong learning policy profile in line with the ILO skills pillars; and, 2) an assessment of policy adequacy along with identification of any gaps that may affect future policy actions. While both the framework and toolkit can provide a type of benchmarking, neither is intended as a form of such to be applied across countries or set against what are deemed common standards. This reticence owes, firstly, to each country having its own policy goals and trajectory as well as unique challenges in terms of resources and opportunities. Secondly, to downplay benchmarking is prudent owing to the inherent difficulty of finding meaningful common standards as baselines.

What is less difficult, is using the profile assessment to establish the extent to which a particular lifelong learning policy is meeting its own goals, and how much progress the policy is making towards the proposed ILO skills pillars.

2. Methodology

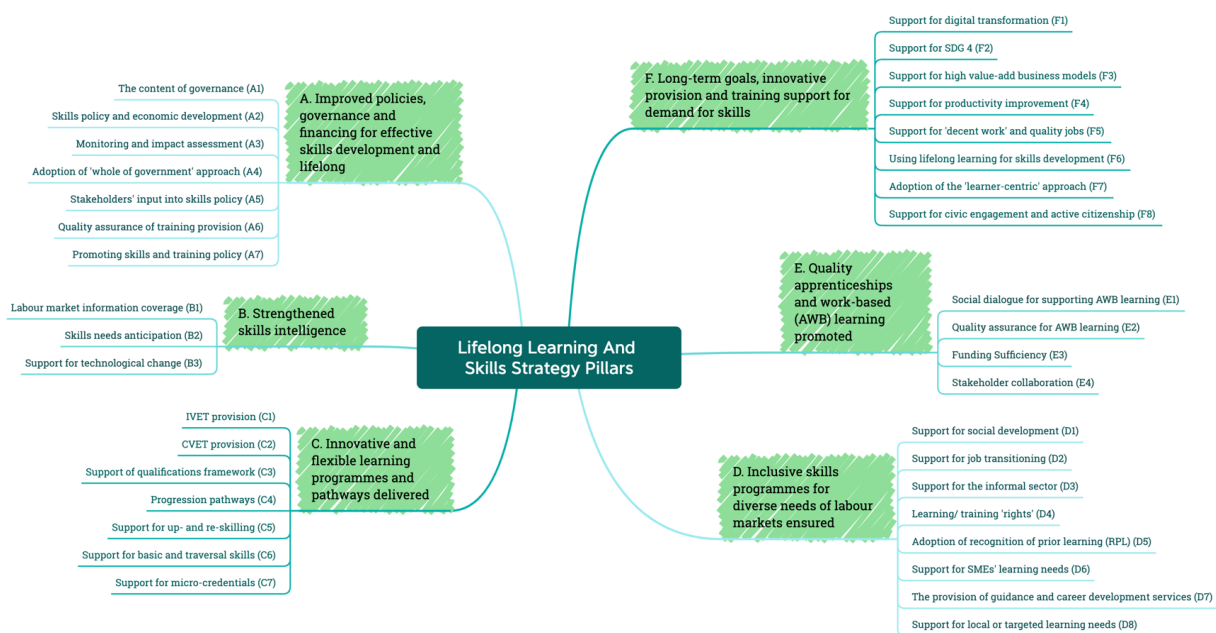
2.1. The assessment approach to policy profiling

Insofar as the objective of the exercise is to enable policymakers to understand its own progress in terms of providing lifelong learning, the main methodology of the toolkit entails a self-assessment of the current system and provision. This assessment is set against a country's skills policy and goals as well as its policy infrastructure and corresponding performance adequacy.

The toolkit contains six broad categories of assessment covering various topics as discussed in Part 1 (the policy framework handbook). The first five of the six assessment categories are organized in line with the five skills of the ILO skills strategy. This arrangement yields assessment results that can inform policymakers of any difference between the country's current provision and the recommended provision under the ILO skills strategy.

There are a few other policy tools, and they are often discussed in the relevant literature, yet for purposes here they may fall outside the five pillars. We assign these policy tools to the last category of policy assessment. Diagram 1 illustrates the six categories and their sub-questions. In total, there are 32 questions/tools.

► **Diagram 1. Lifelong learning policy assessment dimensions.**



Source: authors

After posing each policy question, we then probe the extent to which a particular tool has been adopted and to what degree it is delivering the intended result. Note that should a policy be absent, the assessor has opportunity to state that this particular policy should or will be considered in the future period. As such, the assessment places focus on policy relevance and adequacy, and in turn should reveal policy gaps as well as a policy profile that can be compared with the ILO skills pillars. The resulting information provides a basis for future policy actions.

2.2. The assessment process

Each reply to an assessment question requires documentary evidence. This is not meant to be taken as a stern request for evidence. It is, rather, a way to ensure that the assessment process is not unduly affected by contingencies such as policy desirability, personal impressions or guesswork.

As to who can competently provide assessment, the methodology requires assessors be knowledgeable about the existing skills system as well as the broader context within which the skills policy resides. This often means appointing senior or experienced staff members within the relevant government departments or ministries. Furthermore, we suggest using two or more assessors working separately in order to avoid the “single source” problem. When assessments differ, the assessors must reconcile the differences among themselves. Should external assessors be used, the same requirements apply.

In addition, the following good practices conducing to actionable assessments should be considered:

1. Policymakers and assessment staff should be familiar with the issues discussed in Part 1 before attempting to utilize the assessment toolkit. This will help ensure common understanding regarding the background factors and process requirements pertaining to the policy assessment exercise. At completion of an assessment, those involved should conduct a thorough discussion (or series of discussions) to establish findings and determine recommended actions.
2. Sufficient time should be allowed to carry out the assessment. We suggest at least one to two months, if assessors have no other duties; otherwise three to five months may be required. Regardless of specific duration, the period will include a post-assessment discussion and policy recommendation phase involving policymakers and assessors.
3. In addition to producing documentation, quantification and other forms of data, assessors should consult stakeholders for they can provide insights on particular tools (for example, on the performance of a policy tool provision).
4. An assessment process should include one or two independent external checks, for instance by a knowledgeable researcher outside government, to validate results.

3. How to use the toolkit

3.1. Assessment steps

As shown further below in diagram 2, assessors address themselves to each question starting from the left and moving to the right. Table 1 directly below explains the steps and what activities are expected along the eight positions (circled numbers in red) depicted in diagram 2:

1. This is the beginning of the assessment of a particular policy tool under the statement column. These questions are organized as described in table 1.

► **Table 1: Scope of questions in the policy assessment toolkit**

Category	Content	Number of questions
A	Improved policies, governance and financing	7
B	Strengthened skills intelligence	3
C	Innovative and flexible learning programmes and pathways	7
D	Inclusive skills programmes for diverse needs	8
E	Quality apprenticeships and work-based learning promotion	4
F	Long-term goals, innovative provision	8

The first five categories (A–E) are derived from the ILO skills pillars. The last category (F) contains additional questions as discussed in Section 2.1.

2. Column (a) in diagram 2 contains questions meant to ascertain whether a particular policy tool is operating within the skills system. In the case of question A1, it is one of two multi-response questions in the toolkit, the other being question B1. In these two questions, more than one answer may be selected excluding the last option.
3. The last option in every question tends to be reserved for non-use circumstance of that policy tool. Plainly, selecting that last option will mean that all previous options do not apply. In most cases, after option selection the flow is directed to the last column (e). However, even if a particular policy tool is not used, the assessor ought to provide a description here to state whether this policy tool is likely to be adopted in the future. See also further information in point 8 below.

► Diagram 2. Workflow of the policy assessment toolkit

Toolkit for Assessing the Current Skills System for Lifelong Learning

	Statement	Policy Relevance		Policy Adequacy		Policy Actions Required
		(a)	(b) Name the document that supports (a)	(c) How is (a) working so far?	(d) Name the document that supports the assessment in (c)	(e) Describe actions relevant to (c) or (a) where the question seems irrelevant
A	Improved policies, governance and financing for effective skills development and lifelong					
A1	Which of the following elements are covered by the governance of the skills policy? (Tick if it is applicable)	☐ Mission ☐ Vision ☐ Stakeholders ☐ Role and responsibilities ☐ Priorities ☐ Financing ☐ There is no formal skills policy / a framework of governance does not exist (go to col. 'e')	< Documentary source > →	☐ The governance is broadly working well → ☐ It needs improvements → ☐ It is working poorly →	< Documentary source > →	< Describe planned actions > ↓
A3	To what extent is the impact of your skills policy monitored and assessed? (Impact may go beyond 'goals')	☐ An official report is required on a regular interval (e.g., yearly) → ☐ Report on an <i>ad hoc</i> basis → ☐ No official requirement / seldom reported (go to col. 'e')	< Documentary source > →	☐ We are satisfied with this arrangement → ☐ It needs improvement → ☐ The current arrangement is not working at all →	< Documentary source > →	< Describe planned actions > ↓
A4	Is your skills policy supported by a 'whole of government' approach?	☐ Yes, it is → ☐ No, it is not (go to col. 'e')	< Documentary source > →	☐ We are satisfied with this approach → ☐ It needs improvement → ☐ This approach is not working at all →	< Documentary source > →	< Describe planned actions > ↓

- This shows the normal format of policy tool assessment for nearly all questions on usage or adoption that allow for selection of only one of the three options. Notice that after option selection, the flow is directed to the right, either to column (b) or to column (e).
- Column (b) contains supporting evidence options relating to what the assessor has selected in column (a). If the supporting evidence is a document (for instance a report on policy or legislation), please cite the document title. If the source is non-documentary, please indicate. The aim here is to ensure the assessor is not relying on impressions or guesswork. The question posed seeks to determine if the answer given in column (a) is fully relevant and accurate.
- Column (c) seeks to ascertain the extent to which the policy is working towards the expected outcome. Again, only one option is allowed in this column. Notice that in most cases, excluding the first option, the remaining responses imply actions that may be required.
- Column (d) functions similarly to column (b) as it seeks to ensure the performance assessment of a policy is appropriate. It is understood that not all policies receive regular appraisals. Hence, this is one aspect of the assessment tool that may rely on qualitative assessments, particularly when no hard data whatsoever is available. The important thing to bear in mind is the importance of due diligence in support of an assessment. For example, assessors may need to consult a range of officials and stakeholders to gather diverse feedback before gauging a tool's impact.

8. In column (e), comments to guide future plans are provided. The following are some examples:
 - a. If in column (a) it is indicated a particular tool has not been adopted or been only partially implemented, please provide explanatory comments in column (e) on the likelihood of future adoption including an indication no action is expected if that is the case. In every case, explain the what/why/when.
 - b. Column (c) provides indications on the performance or progress of the policy tool. Irrespective of the assessment, please comment on what is expected to happen with this tool – would it be improved, reformed or replaced? Again, in every case explain what/why/when.
 - c. In some questions – precisely which not ascertainable beforehand as the contexts of countries can differ substantially – the comments following from columns (a) and (c) may overlap. In that case, simply make explicit that the comments in column (e) cover both implementation and performance of the tool.

3.2. Analysing the results

Assuming an assessment has been reliably produced, we can expect the following outcomes suitable for use in supporting further policy development for lifelong learning.

1. The compiling of a lifelong learning policy profile, taking into account:
 - a. **The country's own policy profile** – by adding up the first options of the 32 questions, we will get a sense of how extensive the skills system is. For questions A1 and B1, the multiple-response nature of the question means we ought to have the majority of sub-questions answered positively in order to equate that with the first option in other questions.
 - b. **The ILO skills pillars** – when we compare this profile alongside the ILO skills pillars, we further come to know where policy implementation stands in relation to the five skills pillars.
 - c. **Where a lifelong learning model skills system is located** – we must recall that the usage of policy tools alone may not serve to distinguish different lifelong learning policy models because most policy tools can be used for different models. Hence, this typology exercise is notable for its overlapping edges as spoken of in the framework document. For example, if a country's policy focuses mostly on employment entry support rather than other in-employment upskilling or reskilling areas, on employability and on a range of enabling tools such as career advice and community learning, this is likely to be a core model.

On the other hand, the expansive model of lifelong learning has certain distinctive features in terms of policy intent. Examples include the explicit adoption of lifelong learning as the principle for organizing skills provision and support (question F6), with this supported by a range of enabling policies such as the adoption of learning rights (question D4); adoption of a learner-centric approach to skills development (question F7); adoption of long-term, skill-enabled goals such as decent work (question F5); SDG 4 (question F2); the learning city (question F10); and active citizenship/empowerment (question 8).

When a system is adopting these policies and enabling elements, we argue that the system is moving beyond the policy focus of employment provision (whether pre- or post-entry), to a wider range of lifelong learning goals, consistent with the definition that we provided in the framework document. Thus, we may consider the system is either is or is on its way to being an expansive model of lifelong learning.

All other profiles that do not fit into the core or expansive models most likely belong to the augmented model.

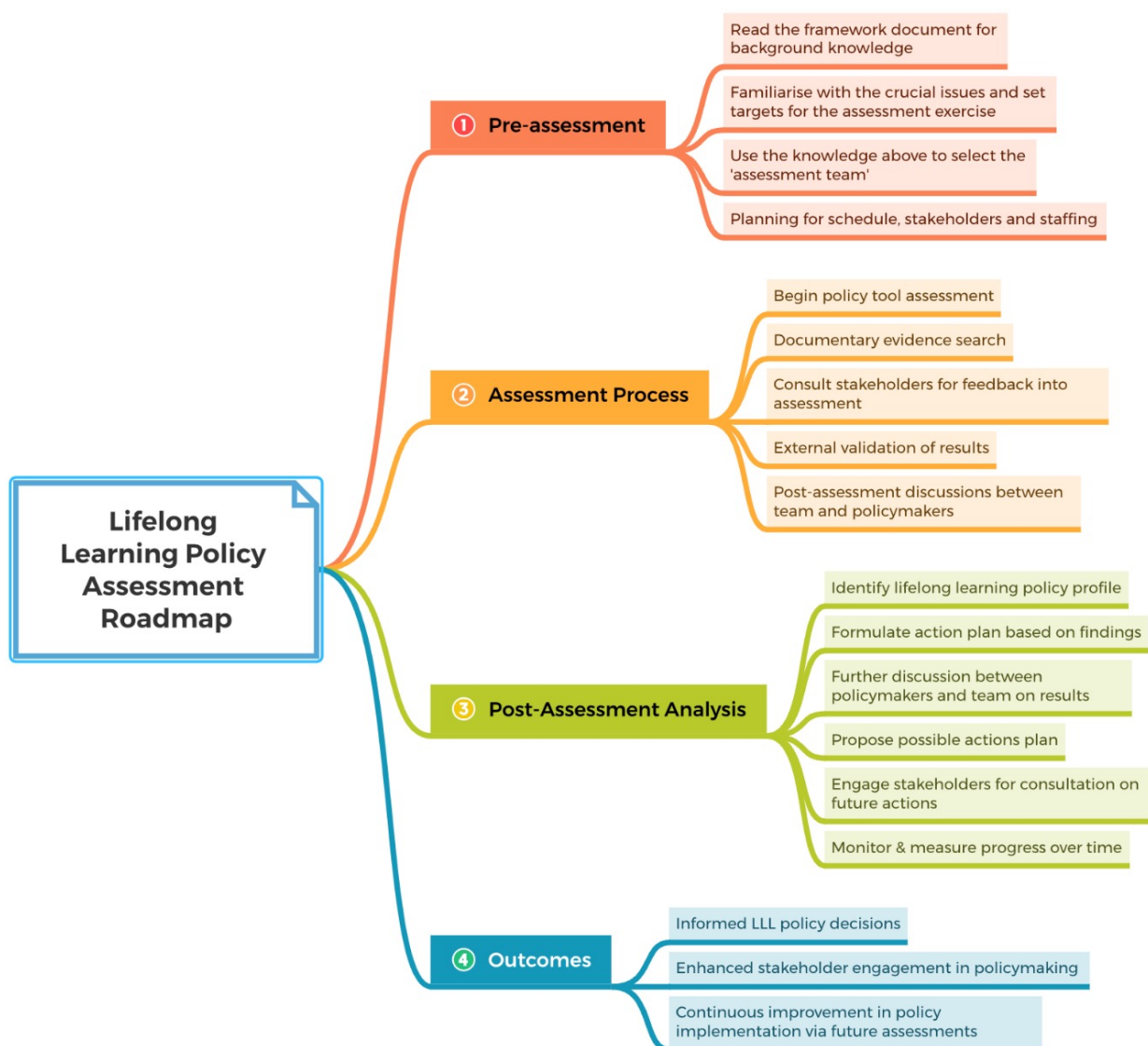
2. The identification of an action plan: By collating the information in column (e), we will see emerge a set of suggestions for future and possible policy action, as the information in column (e) pertains to underperforming tools or a lack of provision. However, whether the list contains proposals for action or otherwise, list content will vary from case to case given that policy intent, ambition and influencing factors vary from case to case. Either way, we have a current position to build upon, and a list of ideas for consideration.

3. A base document for policy input: The profile information and the action plans can form the basis for further consultation among stakeholders. This may enhance engagement, participation and effectiveness of future skills policies.
4. The creation of progress benchmarking: We mentioned that benchmarking across countries is not a realistic or meaningful exercise whenever contextual factors are difficult to control. However, information collected via the toolkit, if repeated over time, will support the measuring and monitoring of change. Moreover, with systematic use of the assessment tool provided here we can identify what works, what does not work and what may work.

4. The roadmap

A substantial amount of information has been related so far. In this section, we summarize the assessment process in the form of a roadmap, with a view to helping policymakers and assessment staff obtain a clear picture of the steps involved.

► **Diagram 3. The roadmap of lifelong learning policy assessment**



5. Concluding remarks

There are three key concluding remarks to consider.

Firstly, assessment quality relies most importantly on diligent execution of the assessment work. As in any assessment and evaluation, accuracy is key.

Secondly, the information gleaned can support other policy activities not discussed here, for example, establishing priorities, ensuring funding and identifying additional stakeholders and policy partners.

Thirdly, if the unit of analysis is located at the region level in the same country, comparisons can be made, making policy and provision more targeted for local needs.



► **An analytical framework and toolkit for the review of national lifelong learning systems**

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