

Chapter 8. Selecting a method of synthesis and collecting relevant data

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Key points

- Choosing a synthesis method is important but challenging, as the many available methods differ in complexity and in how well developed and tested they are.
- The chapters in this handbook cover three extensively tested QES methods alongside methods for integrating QES findings with intervention effects research and further methods for combining qualitative and quantitative research.
- To support an informed choice when planning a review these synthesis methods are compared across seven dimensions. Protocols should flag a possible alternative approach in case the planned method proves a poor fit for the review's purpose or available data.
- Method selection goes hand in hand with synthesis-specific data extraction: data on context, methods, and findings are needed across all methods, and should be collected and managed systematically using appropriate extraction and storage tools.
- The use of Large Language Models remains controversial and lacks validation in QES so a cautious approach to their use for data extraction, coding and synthesis is recommended following the responsible AI use in evidence synthesis (RAISE) guidance.

8.1 Introduction

The purpose of this chapter is to help review authors plan for the synthesis stage of a qualitative evidence synthesis (QES) that will be a stand-alone review or part of a broader mixed-methods review. Planning a synthesis requires understanding the similarities and differences between synthesis methods to make an informed choice about which to use to synthesise the findings of included studies and how to extract the key data from included studies needed for synthesis.

Selecting an appropriate method of synthesis can be challenging. There are many methods to choose from, and some are not as well developed or have not been as extensively applied or tested as others. Moreover, there are many similarities across the methods which can sometimes make it difficult to discriminate between them. The guidance in this chapter is important as review authors commonly select a method of synthesis that they are familiar with, or a method that is commonly used, without also considering whether the method is the best choice for a specific context, type of available studies and data or purpose. Familiarity and experience with a method is still an important factor to consider but should not lead to selection of a method by default. This chapter guides review authors to take an informed approach to deciding which synthesis method to use so that it is fit for achieving the purpose of the review and suits the review teams' experience. It acknowledges that the method specified in the protocol may need to be revisited once studies are identified for the review if the original selected method turns out not to be a good fit for achieving the review purpose or the data available to be synthesised. Review authors can use this chapter to help them reflect on their experience and select another more appropriate method.

The chapter will also outline some general guidance for collecting data from included studies to use in the synthesis. This guidance is general as different methods of synthesis require data to be collected using method-specific steps and processes. Therefore, guidance on collecting data provided in this chapter should therefore be read in conjunction with the guidance on collecting data in subsequent chapters in the handbook detailing specific methods of synthesis.

The chapter ends with a discussion on engaging and involving people and groups with diverse perspectives (e.g. policymakers, the public) in the review; equity, diversity and inclusion; and reflexivity as they pertain to choice of synthesis method and collecting relevant data.

8.2 Overview of synthesis methods

This handbook details nine approaches to the synthesis of qualitative research and mixed-methods reviews that include qualitative research alongside other types of research. These approaches include recommended 'core' methods and those that are potentially valuable in a Cochrane and Campbell context but require further methodological development and testing.

The Cochrane Qualitative and Implementation Methods Group (CQIMG) (which includes representation from the Campbell Methods Group) currently recommends four synthesis methods as *core* methods as they have undergone a high degree of methodological development and there are many published examples including within the Cochrane and Campbell Libraries. Three of these are for the synthesis of qualitative research: Framework and Best-Fit Framework Synthesis (Chapter 9), Thematic Synthesis (Chapter 10), and Meta-ethnography (Chapter 11). When planning a Cochrane and Campbell review which requires synthesising qualitative research, either as a stand-alone review or as one component of a broader mixed-methods review, review teams should consider one of these three approaches. We discuss the similarities and differences between these three approaches further in section 8.3 and illustrate which might be best to use in which context in section 8.4. The CQIMG also recommends as one of its four core synthesis approaches, methods for integrating the findings of a qualitative evidence synthesis with an intervention effects review by connection or comparison (Chapter 14). These particularly suit situations where review teams are conducting a qualitative evidence synthesis and an intervention effects review in a mixed-methods review or are looking to integrate the findings of a QES with an existing review of intervention effects.

Four other synthesis approaches which can be used to integrate diverse types of qualitative and quantitative research are described in later chapters of this handbook: realist synthesis (chapter 16), qualitative comparative analysis (chapter 18), meta-narrative review (chapter 19) and critical interpretive synthesis (chapter 19). Meta-aggregation (chapter 19), which is applicable for stand-alone reviews aiming to synthesise qualitative research, is another approach described in chapter 19. All of these require new or additional exemplar reviews to demonstrate their value within Cochrane and Campbell before they are recommended as core methods. Table 8.1 provides an overview of all nine synthesis approaches presented in this handbook. (For more detail and key references relevant to each approach see the signposted chapters in the first column).

Table 8.1 Overview of synthesis approaches in this handbook

Synthesis method	Brief description
<i>Core recommended methods</i>	
Framework and best-fit framework synthesis (Chapter 9)	In framework and best-fit framework synthesis, a framework, model or theory is selected, adapted or created prior to the synthesis. The framework, model or theory is used to extract, organise, integrate and interpret the findings from included qualitative studies to address the review question ^a . Synthesis steps include familiarisation with the topic and background literature to select a suitable framework, model or theory, indexing/coding data within the framework, model or theory, charting to look at patterns across the data, and mapping and interpretation including extending and revising the framework, model or theory as necessary. Additional steps in best-fit framework synthesis include identifying and synthesising theories to form a framework, coding data that do not fit, and testing the robustness of the new framework.
Thematic synthesis (Chapter 10)	In thematic synthesis, themes are generated from the findings of included qualitative studies. Steps include coding of findings to describe and compare findings across studies, the generation of descriptive themes to identify patterns and meaning across studies, and the production of analytical themes to address the review question. Whilst descriptive themes provide a comprehensive overview or map of the concepts and ideas identified within the set of studies in their own terms, analytical themes further interpret descriptive themes in light of the review question and purpose.
Meta ethnography (Chapter 11)	In meta-ethnography new theory or conceptualisations are built from the findings of included qualitative studies. Synthesis steps in a meta-ethnography include determining how studies are related to each other (e.g. study aims, theoretical approach or setting); translating the studies into one another to identify and explain similarities and differences in findings (called reciprocal and refutational translations respectively); and synthesising the translations through further analysis and reinterpretation to produce new insights and understanding. These new translations are then linked in a 'line of argument'.
Integrating qualitative and quantitative evidence by comparison or connection (Chapter 14)	Integrating the findings of a qualitative evidence synthesis (QES) with the findings of a review of intervention effects allows review teams to explore the reasons for variation in intervention outcomes. Through comparison, the findings from each synthesis are juxtaposed (using a matrix, logic model or a line of argument) to illustrate where they are concordant or discordant. Through connection, the synthesis of one type of evidence is used to inform the focus and conduct of the synthesis of the other type (e.g. QES findings are used to structure a sub-group analysis or a qualitative comparative analysis of the effects data).
<i>Other methods which need further testing in a Cochrane and Campbell context</i>	
Realist synthesis (Chapter 16)	In a realist synthesis diverse sources of evidence - including qualitative and quantitative evidence and non-research sources such as policy documents - are brought together to explore how, why and in what contexts interventions work and for whom. Prior to synthesis an initial programme theory is developed to capture understanding of the relationship between interventions, their context and outcomes. Evidence is then synthesised according to this theory to test and refine it. Synthesis steps include coding evidence, exploring patterns in the evidence to confirm, refute or modify the theory, developing a narrative to explain the intervention and producing a final programme theory.
Qualitative Comparative Analysis (Chapter 18)	Qualitative Comparative Analysis (QCA) draws on information from diverse sources to develop explanations ('causal recipes') for intervention success (or failure). Prior to synthesis, important features of interventions and their context are identified from theory (e.g. from programme theories or a QES). These features are then analysed in relation to intervention effect studies (called cases) included in the review. Steps in QCA include coding which features are present or absent in each case; grouping cases

	with particular configurations of features and assessing the consistency of association between configurations and outcomes.
Meta-narrative (Chapter 19)	In a meta-narrative review different insights on a topic are brought together from studies across diverse disciplines and traditions in 'meta-narratives' or 'storylines' of research including philosophical assumptions, research questions and development over time. Synthesis stages include building individual meta-narratives in each discipline or tradition through mapping out how the topic has been researched (e.g. concepts, theories, methods), major findings and areas of disagreement. Meta-narratives are then compared and contrasted to highlight differences in approaches and findings. Differences in findings are further analysed to produce higher order insights.
Critical interpretive synthesis (Chapter 19)	In a critical interpretive synthesis, evidence from diverse qualitative and quantitative research is analysed to develop a synthesising argument in relation to the review question. This is a new theoretical framework consisting of a network of constructs and their relationships, linking constructs in the literature with synthetic constructs developed as a result of the synthesis. Processes in a critical interpretive synthesis include identifying reoccurring themes, identifying existing constructs and drafting new ones, evolving these through constant comparison with the evidence in relevant studies, and taking a critical approach to the literature to expose underlying assumptions and contextualise findings.
Meta-aggregation (Chapter 19)	In a meta-aggregation, findings from qualitative studies are analysed to generate recommendations for practice. Synthesis steps in a meta-aggregation involve: a) the identification, extraction and listing of findings in each study; b) organising similar findings across studies into categories; and c) developing categories into 'synthesised findings' that summarise the evidence and specify practical actions for policy-makers and practitioners. There is no intention to re-interpret study findings to create new insights or theory through the synthesis.

^a Framework synthesis has also been used to combine findings from a QES with synthesised results from trials (see chapter 14)

Table 8.1 describes some of the key features of the different approaches to synthesis focusing on what they aim to do and some of the steps and processes involved. Other overviews of synthesis methods for qualitative research and mixed methods reviews often highlight the philosophical assumptions about the nature of reality and the nature of knowledge associated with different approaches (i.e. ontology and epistemology). Whilst these are important they can make understanding similarities and differences between synthesis approaches difficult, so in this chapter epistemology is discussed separately first here. A useful discussion of epistemology in relation to QES is provided by Barnett-Page and Thomas (2009). They introduce a 'realist' to 'idealist' continuum:

- *Naïve realism*: research is able to uncover reality directly.
- *Scientific realism*: it is possible for knowledge to approximate closely an external reality.
- *Critical realism*: research can only ever provide a representation of reality research as reality is always mediated by our perceptions and beliefs.
- *Objective idealism*: there are collectively shared understandings of the world and research aims to explore these.
- *Subjective idealism*: research can only capture multiple alternative human constructions as there is no shared reality.

Whilst underlying ontology and epistemology are articulated as an integral feature for some synthesis approaches, for others they are not. For example, meta-ethnography is underpinned by objective idealism, meta-narrative review by subjective idealism and realist synthesis and qualitative comparative analysis by scientific realism. In contrast, thematic synthesis and framework synthesis are not usually described as being underpinned by any particular philosophical position, although in practice many review teams adopt positions towards the realist end of the continuum. Epistemology relates to the ‘Methodology or method’ dimension of the framework used in this chapter to support understanding of similarities and differences across synthesis approaches.

8.3. Understanding similarities and differences in synthesis methods

As noted above there are many similarities across synthesis methods. Differences are often quite subtle and nuanced. In this section, we discuss possible synthesis methods for use in a QES or a mixed-methods review across a number of dimensions (Table 8.2). These dimensions build on previous work on identifying similarities and differences between synthesis methods (e.g. Barnett-Page and Thomas, 2009; Booth et al., 2018; Gough et al., 2012, 2017). In particular they draw on Barnett-Page and Thomas’s mapping of synthesis methods and their varying epistemological underpinnings, and the RETREAT framework developed by Booth and colleagues and described in chapter 1 (Booth et al., 2018). The dimensions described in this chapter help to operationalise relevant elements of the RETREAT framework to support review teams to navigate through the various methods available, and consider which methods might best suit their review purpose and context, the type of studies and data to be included, and the experiences, preferences and expertise of the review team.

8.3.1. Model of research use

QESs and mixed methods reviews are often undertaken to inform policy and practice decisions and the way that their findings are expected or planned to inform decisions can help with choice of synthesis method. The ways in which research, whether from primary research or a systematic review, is used by decision-makers, such as policy-makers or commissioners, have been classified in many different ways (Gough et al., 2012). Here, we focus on two models of research use: ‘instrumental’ and ‘enlightenment’ (Weiss, 1979) and Table 8.2 indicates which synthesis methods are associated with each. A synthesis that aims to support the instrumental use of research may involve using the findings of the synthesis directly to inform a decision. For example, a QES to inform decisions about the appropriateness of different applications of the same treatment may reveal that patients across different contexts universally dislike a particular method of application of a treatment; therefore, a decision is made to discontinue that approach. For stand-alone QESs or for a QES undertaken as a separate component of a broader mixed-methods review, synthesis methods that tend to be chosen by review teams working within an instrumental model are meta-aggregation, thematic and framework synthesis. Where the QES is being used in the context of a mixed-methods review, thinking about its findings ‘instrumentally’ (i.e. how they can directly inform decisions) can be very helpful, as they can be used to directly guide how the qualitative findings are integrated with other types

of evidence (Chapter 14). Qualitative comparative analysis (QCA) and realist synthesis are also particularly suitable for supporting the instrumental use of research with their focus on developing and testing causal ‘recipes’ or programme theories.

The enlightenment model aims to inform the context within which a decision is made. For example, a QES that synthesises research exploring the social isolation associated with being overweight, may be used to illuminate the different contexts and pathways through which social isolation arises but may not point to a specific intervention as being the ‘right’ one to choose. Meta-ethnography, critical interpretive synthesis and meta-narrative reviews all support an enlightenment approach to evidence use. Emphasising theory development (meta-ethnography and critical interpretive synthesis) or higher order insights from looking across disciplinary boundaries (meta-narrative reviews), these synthesis methods are more likely to provide decision-makers with new ways of seeing a problem and its potential solutions (e.g. access to health care for vulnerable groups, spreading healthcare innovation, strengthening public accountability).

As highlighted in Table 8.2 some synthesis methods have been classified as useful in either instrumental or enlightenment models of research use. For example, many thematic syntheses have been undertaken for enlightenment purposes as well as instrumental as analytical themes support the development of new theory (see chapter 10).

8.3.2. Methodology or method

The difference between a synthesis methodology and a method is that a method can be understood as a sequence of stages, steps and processes to follow. A methodology may include a sequence of stages, steps and processes, but these lie within an overarching epistemological and ontological framework (i.e. theories about the nature of knowledge (epistemology) and the nature of the world (ontology) – see section 8.2). For example, thematic synthesis can be understood as a sequence of stages and processes that the review team can progress their synthesis through, but these are not necessarily tied to a specific epistemological or ontological position; i.e. thematic synthesis is a method rather than a methodology. When using thematic synthesis, a review team can choose any theoretical perspective as appropriate to achieve their purpose. The same applies to framework and best-fit framework synthesis (Chapter 9).

On the other hand, a realist synthesis involves a sequence of stages, steps and processes, but these must be carried out in line with a realist epistemology and ontology, i.e. realist synthesis is a methodology (e.g. Pawson et al., 2005). The synthesis approaches in this book cover both synthesis ‘methods’ and ‘methodologies’ (Table 8.2).

When review teams choose a synthesis approach classified as a ‘methodology’ they will need to engage with the specified philosophical underpinnings of those methodologies to apply them as they were intended. This does not mean that review teams employing ‘methods’ do not need to think about underpinning epistemology and ontology; as for primary research it is good practice to make these explicit. For example, as noted earlier, thematic synthesis and framework and best-fit framework synthesis have often been

applied with review teams adopting positions towards the realist end of the of realist-idealist continuum (even if this is not always made explicit).

8.3.3. Mode of reasoning

There are generally four modes of reasoning that are associated with doing research including systematic reviews: inductive; deductive, abductive and retroductive (Danermark et al., 2019). Different types of reasoning are associated with different types of synthesis approaches (Table 8.2). Deductive, or 'top down' types of synthesis start with a given set of categories or concepts, and aim to 'fit' the data into these pre-defined categories. This approach involves testing existing theories against data and is the primary mode of reasoning in framework synthesis. Because review teams start off with an existing framework, model or theory, it is often considered as an approach that can be applied more rapidly than other synthesis approaches which involve the development of theory (Chapter 15). And because the method starts off with a theory (although this can be refined and extended through the synthesis), it is often argued that framework synthesis is ideal for beginners (see section f below).

Inductive synthesis is more 'bottom-up'; synthesis starts with the data, compares across studies, and draws out commonalities and differences from them. With this approach, theory is generated. Inductive reasoning is the primary mode of reasoning in both thematic synthesis and meta-ethnography. The aim of meta-ethnography is to develop theory through an inductive approach. Thematic synthesis aims to ensure that the themes generated through it are grounded in the perspectives and experiences of study participants so foregrounds an inductive approach.

As indicated in Table 8.2, although framework synthesis is primarily deductive and thematic synthesis is primarily inductive, this is sometimes complemented with some inductive coding (framework and best-fit framework synthesis) or some elements of deductive coding (thematic synthesis) as necessary. In framework and best-fit framework synthesis, inductive coding and generation of themes is carried out on data that do not fit the framework, model or theory. In best-fit framework synthesis this inductive coding is an additional stage (chapter 9). In thematic synthesis, a review team may start off with an initial framework based on the review question(s) to classify findings into broad categories before coding inductively within each category (chapter 10).

Abductive approaches aim to generate plausible (most likely) explanations from the data and can involve identifying the hidden causes and mechanisms that explain observations. Retroductive in realist methods is a "backward-looking" mode of inference used to explain observed phenomena by uncovering the underlying causal mechanisms and context that produced them. As shown in Table 8.2, abductive and retroductive reasoning is typically used in those approaches to synthesis which include diverse types of research such as realist synthesis, critical interpretive synthesis, QCA, meta narrative review and the methods outlined in chapter 14. They are also often used in combination with inductive and deductive reasoning. This complexity means that abductive and

retroductive reasoning are considered unsuitable for review teams with no prior experience of these (see also section 8.3.7 below)

8.3.4. QES data requirements

The purpose of qualitative research is to provide theoretical interpretations and explanations for patterns identified in qualitative data which attend to the subjective meanings of actions and behaviour and context (Chapter 1). Qualitative research varies in how well it is designed, conducted and reported and this can affect the depth or richness of interpretation and explanation ('conceptual richness') and how well context is described ('contextual thickness') (Chapter 7). Conceptual richness captures the extent to which the analysis in a primary study interprets and explains patterns in the data (extending existing theory or developing new theory) as well as describing the patterns. Contextual thickness captures how thoroughly aspects of study context are described (e.g. participant characteristics, the health and care or other system under study and the actors within it, study setting, methods and procedures, characteristics of researchers). (These two concepts are described further in Chapter 6). Whilst all types of syntheses benefit from studies which display contextual thickness and conceptual richness, some synthesis methods are more dependent on studies with these properties as shown in Table 8.2. For example, a meta-ethnography requires contextually thick and conceptually rich findings in the included studies to be able to conduct the interpretive processes needed to produce higher order conceptual insights. This is why it is often advised that the synthesis approach specified in the protocol needs to be confirmed once studies have been identified and assessed in terms of conceptual richness and contextual thickness.

8.3.5. QES method developed within a mixed-methods review

If the plan is to use a QES method in a broader mixed methods review that will ultimately integrate the findings of a QES with an intervention effects synthesis, whether the QES method was originally developed within the context of a mixed-methods review becomes important. The guidance for QES methods developed in this context is more likely to enable the synthesis of the qualitative research in a way that can be then readily integrated with an intervention effects synthesis.

Of those QES methods which were developed to synthesise **just qualitative research** (framework synthesis, thematic synthesis, meta-ethnography, meta-aggregation), the development of thematic synthesis and some of the variants of framework synthesis originally took place as part of larger reviews which included both qualitative and quantitative research as shown in Table 8.2. The broader intention was to eventually integrate the findings of the QES with the other types of research evidence included. For example, in the generation of analytical themes (one of the key stages of thematic synthesis, see chapter 10) review teams who are working with an instrumental model of evidence use are encouraged to consider the implications of their data for intervention development. These implications can then be explored or tested within the intervention effects synthesis. In framework synthesis (see Chapter 9), the same framework can be used to compare and contrast findings from qualitative and quantitative studies on the

concepts within the framework (e.g. which interventions evaluated by trials address framework concepts identified as important in the qualitative studies?). This does not mean that a QES conducted using meta-ethnography and meta-aggregation could not be integrated with an intervention effects review, but review teams would need to conduct additional work to link the two syntheses together.

8.3.6. Synthesis of diverse types of research

Some of the synthesis methods outlined in this handbook were designed to look across different types of research such as studies from both qualitative and quantitative research traditions (Table 8.2). Chapter 14 describes methods that support review teams to integrate a QES with intervention effects research by comparison (e.g. systematically comparing the two types of syntheses) or by connection (e.g. the synthesis of one type of research is used to inform the focus or conduct of the other type). Chapter 14 covers the use of QCA to analyse intervention complexity (see also chapter 18) as one way to achieve connection (i.e. a QES can be used to inform the conduct of the QCA). Realist synthesis, critical interpretive synthesis and meta-narrative review are all designed to draw on and make sense of diverse types of quantitative and qualitative research. In contrast to the methods described in chapter 14, these methodologies do not require separate syntheses of each type of research before they are integrated. Whilst these approaches require further testing within Cochrane and Campbell reviews, the methods outlined in Chapter 14 are already in use in Cochrane and Campbell reviews.

8.3.7. Review team experience

Whilst the application of all synthesis approaches benefits from review teams with expertise and experience in the synthesis method being applied, some are more suitable than others for beginners. Table 8.2. shows that meta-aggregation, thematic and framework synthesis are the most suitable for beginners although someone with QES expertise still needs to be on hand for support. The guidance on these methods contains detailed specification on coding and theme building steps, which can support those undertaking a QES for the first time (see chapters 9, 10 and 19). Coding data into an already existing framework provides an additional level of support for beginners undertaking a framework synthesis. Meta-ethnography requires an experienced team because of the more unfamiliar analytical processes and terminology involved (e.g. the various translation processes) which can confuse review teams with no prior experience.

All synthesis methods which integrate qualitative and quantitative research need an experienced team with relevant expertise in the particular synthesis approach chosen to integrate. Ensuring that skills in both quantitative and qualitative research is represented in the team is also crucial.

Table 8.2: Similarities and differences in synthesis approaches for qualitative evidence synthesis (QES) or mixed methods reviews mapped across seven dimensions

	Model of evidence use <i>Will the synthesis approach support the instrumental (I) or enlightenment (E) model of research use by decision-makers?</i>	Methodology or method <i>Is it a method or is it a methodology?</i>	Mode of reasoning <i>What type of reasoning is used in the analysis – inductive (I), deductive (D), abductive (A), Retroductive(R)</i>	QES data requirements <i>Is it dependent on having contextually thick and conceptually rich data?</i>	QES approach developed within a mixed methods review <i>Was the QES method developed in the context of a broader mixed methods review?</i>	Integration of qualitative and quantitative research <i>Can different types of research (be combined within the synthesis?</i>	Review team experience <i>How much prior experience is advisable – suitable for beginners (B) or only for teams with advanced skills (A)?</i>
Core methods recommended for use in Cochrane and Cambell reviews							
Framework or best fit framework synthesis (Chapter 9)	I	Method	Mainly D, some I as required	No	Yes	No ^a	B/A
Thematic synthesis (Chapter 10)	I/E	Method	Mainly I, some D as required	No	Yes	No	B/A
Meta ethnography (Chapter 11)	E	Methodology	I	Yes	No	No	A
Integrating qualitative and quantitative evidence by comparison or connection (Chapter 14)	I	Method ^b	A	N/A	N/A	Yes	A
Methods that require further testing in Cochrane and Cambell reviews							
Realist synthesis (Chapter 16)	I/E	Methodology	I, D, A, R	N/A	N/A	Yes	A
Qualitative Comparative Analysis (Chapter 18)	I/E	Methodology	I, A	N/A	N/A	Yes	A
Meta-narrative (Chapter 19)	E	Methodology	I, A	N/A	N/A	Yes	A

Critical interpretive synthesis (Chapter 19)	E	Methodology	I, A	N/A	N/A	Yes	A
Meta-aggregation (Chapter 19)	I	Methodology	I	No	N/A	No	B/A

^a Framework synthesis has also been used within mixed-methods systematic reviews to combine findings from a QES with synthesised results from trials or trial sibling studies such as process evaluations (chapter 14) (Brunton 2017); ^b One of the ways to connect qualitative and quantitative evidence described in this chapter is qualitative comparative analysis; this is a methodology rather than a method.

8.4 Selecting a method of synthesis

The previous section mapped synthesis methods according to seven dimensions which highlighted their similarities and differences (Table 8.2). For each dimension, implications for choice of synthesis method were highlighted. There is no simple algorithm for selecting a method of synthesis. Review teams need to assess which method best suits their context and purpose, type of studies and data available and review team preferences, experiences and expertise. Before making a final selection, review teams should read the chapters describing each method in more detail to understand what is involved and ensure that it meets their situation and requirements.

We illustrate below how review teams might consider the dimensions to select between the three

core methods for conducting a QES, either as a stand-alone review or as one component of a broader mixed methods review. Meta-aggregation is another synthesis approach for QES, but this requires further testing in a Cochrane and Cambell context.

Framework and best-fit framework synthesis is often chosen when a review team seeks a structured approach than can also be later integrated with other types of research (if needed). It is likely to suit review teams in which most of the members have had little prior experience in conducting a QES as data are primarily deductively coded into an existing framework that provides a helpful level of structure. It can also be useful for review teams with a tighter timescale as this structured approach may facilitate a rapid review. Review teams opting for this method will not be highly reliant on finding sufficient studies with contextually thick and conceptually rich data to be successful. Because this methods supports an instrumental model of evidence use it will be suitable for teams who are conducting a review to at directly informing decisions or policy. This method is not strictly tied to a specific ontology or epistemology but because it supports an instrumental model of evidence use review teams choosing it are likely to adopt a realist position.

Thematic synthesis is often chosen when a review team seeks a flexible approach which will primarily build synthesis themes and theory from the included studies. Review teams also choose this method when they need to integrate their QES with intervention effects research. Like framework and best-fit framework synthesis review teams who are largely beginners can favour this method as synthesis steps and processes have a high level of specification. It is also chosen because it is a flexible approach as it: is not highly dependent on having contextually thick and conceptually rich data to be successful; can be applied in both instrumental and enlightenment contexts and; is not strictly tied to a specific ontology or philosophy.

Meta-ethnography is often chosen when the review team's primary purpose is to build new theory from the studies included. Theory development and an underlying objective idealist epistemology means that meta-ethnography relies on the advanced analytical skills of the review team. Use of this methodology is not usually selected by review teams with little prior experience. The success of meta-ethnography does depend on studies with contextually thick and conceptually rich data so review teams need a back-up plan if there are insufficient studies meeting these criteria. Because this synthesis approach is best suited to

an enlightenment model of evidence use (i.e. offering decision-makers new ways of seeing problems and solutions) thematic synthesis can be a useful back up plan.

The remaining synthesis approaches are for use in situations where review teams are looking to address questions that require the inclusion of both qualitative and quantitative types of research.

- **The ‘connection’ and ‘comparison’ methods outlined in Chapter 14** are often chosen when review teams are looking to integrate a qualitative evidence synthesis with an existing review of intervention effects or are looking to integrate the separately conducted qualitative and quantitative components of a mixed-methods review. Review teams whose aim is to directly inform policy and practice choose these methods as they support exploration of, for example, intervention complexity, appropriateness or implementation (for the latter, see also chapter 16). They are well suited to review teams who have expertise in both QES and intervention effects reviews and skills in integrating data from different types of research. Except for qualitative comparative analysis (see below), the methods are not tied to a specific philosophical position. Review teams are, however, likely to adopt a position at the realist end of the realist-idealist continuum because they are often used for instrumental purposes.

Realist synthesis, qualitative comparative analysis, critical interpretive synthesis and meta-narrative review are also chosen by review teams who have a review question and purpose that requires the inclusion of both qualitative and quantitative research. All require experienced teams who: have both quantitative and qualitative research skills; are familiar with the abductive or retroductive analytical skills required; and can work with the specific philosophical assumptions underpinning each methodology.

Realist synthesis and **qualitative comparative analysis** are both suitable for review teams working within an instrumental model of evidence use through their focus on exploring why and how interventions work. Review teams choosing realist synthesis develop, test and refine programme theories paying particular attention to intervention context, mechanisms and outcomes. Those choosing QCA develop explanations for intervention success or failure through the identification of critical features (related to, for example, intervention characteristics, context and implementation). QCA can be chosen as a way to connect a QES with intervention effects research. In contrast a review team choosing realist synthesis will not necessarily work with or undertake separate syntheses for different research types before bringing them together. Instead, they will use individual quantitative and qualitative studies in the development, testing and refinement of programme theories.

Meta-narrative reviews and **critical interpretive synthesis** are both suitable for review teams working within an enlightenment model of evidence use through their focus on making sense of diverse bodies research in relation to the phenomenon of interest. Because these approaches are underpinned by subjective idealism (i.e. assumes research can only capture multiple alternative human constructions), review teams will apply a critical lens to expose the underlying assumptions in how research from different traditions is produced. A review team using meta-narrative reviews will draw out insights on the review topic from different disciplines

and traditions into ‘meta-narratives’ or ‘storylines’ which are then further analysed to produce new insights. Those conducting a critical interpretive synthesis combine different insights into ‘synthesising arguments’ which can offer new ways to conceptualise the phenomenon of interest.

A few further considerations for synthesis selection can be found in sections 8.6 to 8.8.

8.5 Collecting data for synthesis

In preparation for synthesis, the data pertinent for the review question need to be collected. This section describes the data collection process (also known as data extraction) and how this can be managed in a way that is appropriate for the synthesis method being used. This section covers general principles that apply across all synthesis methods, but it is not a comprehensive guide; synthesis method-specific guidance can be found in subsequent chapters on the different synthesis methods. Collecting data in a systematic way from each study can help review teams get to know their included studies in detail and starts the process of ‘getting immersed in the data’. This section covers the different types of data that need to be collected and tools to support the data collection process. It also considers the role of AI, recommending caution in its use in a QES.

8.5.1 What types of data are collected in a qualitative evidence synthesis (QES)?

Typically, three types of data are used for understanding the primary studies and facilitating synthesis:

- Contextual information about the study
- Methodological information about the study
- The findings from the study

Review authors may decide to collect these different types of data together or in a staged process. Data collection is often iterative as review teams re-visit the studies and the data collected at different stages of the review. For example, methodological information may be collected when assessing methodological limitations (Chapter 7) and revisited again during synthesis and when assessing confidence in the review findings (Chapter 13).

8.5.2 Contextual and methodological data

Contextual and methodological data encompass all primary study information that is needed, other than the findings. The contextual data provides insight into the people, the setting and details of the phenomenon of interest (Chapter 6). Methodological data provide details on study design and methods (Chapter 7). Together, these data give us an understanding of the overall landscape of evidence, but also what is missing in terms of guiding future research. Table 8.3 provides a description of these two types of data.

Table 8.3: Contextual and methodological data for collection/extraction from studies included in a QES (Adapted from Noyes et al (2019) with permission of BMJ Publishing Group)

Data extraction field	Examples of information extracted
Contextual	Important elements of study context, relevant to addressing the review question and locating the context of the primary study; for example, the study setting, population characteristics, participants and participant characteristics, the intervention delivered (if appropriate) etc.
Methodological	Methodological design and approach taken by the study; methods for identifying the sample and recruitment; the specific data collection and analysis methods utilized; any theoretical models used to interpret or contextualize the findings etc.

Useful frameworks to use when considering contextual information are those with a focus on equity such as PROGRESS Plus (O'Neill et al., 2014), the PRO-EDI tool (Treweek et al., 2026) or guidance from the EPPI Centre on considering and reporting health equity issues in systematic reviews (Schemilt et al., 2024). The PROGRESS in PROGRESS plus refers to Place of residence, Race/ethnicity/culture/language, Occupation, Gender/sex, Religion, Education, Socioeconomic status, Social capital (O'Neill et al. 2014) (see Chapter 1). The 'Plus' refers to characteristics associated with discrimination (e.g. age, disability); particular features of relationships (e.g. young people who care for family member or children that are excluded from school); and relationships/characteristics that are temporary (e.g. pregnancy, leaving hospital). Schemilt et al. (2024) encourage more comprehensive consideration of all marginalised, at-risk, socially excluded and/or inclusion health group(s) including, for example, people in contact with the justice system, victims of modern slavery and language minority groups.

As well as being used in various stages of a QES, the data collected on context and methods are also used to prepare one or more tables describing the characteristics of included studies. These tables may vary depending on the review question and where the review is being published. Reviews published in the Cochrane and Campbell libraries require a detailed summary of every study, whereas a journal report may be more succinct with only essential information presented (Noyes et al. 2019). Regardless of reporting requirements, review authors need to have sufficient information on context and methods to critically appraise individual studies included in the synthesis and to assess confidence in the review findings using GRADE CERQual (Lewin et al. 2018) (Chapter 13). For example, if the included studies lack geographical spread or are exclusive of different income settings, the review team may downgrade the relevancy of the review findings, which in turn will determine recommendations for further research.

8.5.3 Data from findings of included studies

The third type of data are the study findings which will be synthesised. Findings in qualitative research are the outputs generated from the analysis and interpretation of qualitative data. These outputs can be in the form of themes and sub-themes, thematic maps, conceptual models or theory with a narrative illustrating the findings in relation to the phenomenon under study. Findings can generally be found in the section of study reports labelled 'findings' (or 'results'), but can also be found in the discussion, conclusions, summary statements and

additional online files. As well as a narrative, relevant findings might be found and extracted from tables, infographics or logic models in the main report and additional online files (Noyes et al. 2019).

Findings are often supported with verbatim extracts from the underlying qualitative data collected in the study such as quotes from participant interviews or researcher fieldnotes and interpretations. These extracts can illuminate meaning and context, bringing the findings to life. It is important that review teams do not mistake these verbatim extracts as the only data they need to collect on study findings. When reading a report of a qualitative study, review team members never have direct access to the underlying qualitative data: everything within the report – including quotations from participants – is mediated through the interpretive judgements of the primary study researchers.

It is important to note that sometimes the primary study may have a focus that is broader than the review question. There may be multiple populations or study settings that extend beyond the focus of the synthesis. In this instance, only data pertinent to the review question should be collected. To illustrate, if a review team wished to explore the views and experiences of nurses, but the primary study included healthcare professionals more broadly, only study findings that can be attributed to nurses should be extracted. If this is not possible, the study may need to be excluded.

8.5.4 Managing data collection

It is important to carefully manage data collection. Data collection and synthesis are not linear and sequential but rather iterative processes that require communication among the review team (Noyes et al. 2019). Ways to collect the contextual, methodological and findings data from primary studies depend on both the method of synthesis and the experience of the review team. Therefore, transparency and traceability of the data collection process is important and can be achieved through a) the development of a bespoke data collection form or b) using specialist review software. Both support systematic data collection across studies and members of the review team.

a) *Developing a bespoke data extraction form*

The form can be a Word document, Google forms, Excel sheet, or any format agreed by the review team set up to collect methodological and contextual data and data on findings in a consistent way across studies. Simple prompts can be used directing the review team to collect the required category of data (e.g. In which country(ies) was the study conducted in? Which theory(ies) were used to inform the study?). In terms of the study findings, the form can be designed to collect the data in one place for synthesis to be conducted.

b) *Using a software program*

This could be specialist qualitative analysis software such as QSR NVivo or specialist reviewing software such as EPPI Reviewer (Thomas et al. 2020). Like the bespoke data extraction form, software programs can be set up to support the systematic collection of methodological and contextual data and data on findings. Beyond data extraction, qualitative analysis software or systematic review software with qualitative analysis capabilities can support the synthesis of

findings. For example, in thematic synthesis, software can support coding of study findings and development of themes, and the software can help to clearly illustrate each stage of the synthesis (see Chapter 10). It is also possible to extract relevant data for a meta-ethnography into software for supporting transparency of the review team's concept development (France et al. 2019). Houghton and colleagues (2017) used QSR NVivo to support a QES using framework synthesis. They describe how they were able to extract data into the framework directly from the PDF of included studies. They were then able to further code inductively within the framework. Software programmes can also enable review teams to display findings by study characteristics. This can be useful for sub-group analyses (for example: exploring the perspectives of specific groups or specific contexts) and assessment of confidence in the review findings.

8.5.5 Using Artificial Intelligence (AI) and automation with human oversight

The use of Large Language Models (LLMs or generative AI (GenAI)) to help conduct primary qualitative research is controversial. For example, 419 researchers signed a position statement saying that “GenAI as simulated intelligence is incapable of meaning-making”, that qualitative research should remain a “*human practice*”, and that “GenAI” is harmful to the environment and to people in the Global South (Jowsey et al., 2025). While there is some evidence that LLMs can be helpful in the early stages of reviews, there is very little (or no) evidence about their use in QES. Given this, and the fact that the Cochrane and Campbell Collaborations expects the use of any tool to be justified based on the evidence it has been validated for use in that specific context (Flemyng et al., 2025), it is hard to see how the use of a GenAI tool in a QES can currently be justified (other than for the purpose of their evaluation).

Despite this, there has been a proliferation of AI tools for use in QES. This is a new and rapidly developing aspect of methods development and review conduct with as yet little methodological testing and evaluation. Review authors need to take a cautious approach: claims that AI tools can conduct the data extraction and synthesis should raise concerns as QES methods need human interpretation and appreciation of the evidence context.

Cochrane and Campbell in collaboration with the Joanna Briggs Institute and the Centre for Environmental Evidence host a joint Artificial Intelligence methods group that is involved in developing the responsible AI use in evidence synthesis recommendations and guidance (RAISE), which offers continually updated and tailored advice for a diverse range of roles in the evidence synthesis ecosystem. The RAISE guidance can be found at <http://www.raise-evidencesynthesis-ai.org/>. Review authors should keep abreast of the RAISE guidance and consider testing AI methods in their QES by undertaking a study within a review (SWAR) and publishing the findings. Any use of AI in review processes should be declared.

8.6 Engaging and involving diverse perspectives

Various people and groups such as practitioners, policy-makers, patients or members of the public may have important perspectives on the type of synthesis to be conducted and what kinds of data to collect. With the appropriate training and support, patient and public representatives can play a role in selecting a synthesis method that in their view would be the best fit for the question and specific context. An early discussion with a review commissioner or

policy-maker may highlight the model of evidence use that the findings of the QES will feed into and this can have implications for choice of synthesis method. Synthesis methodologies that are underpinned by a subjective idealist epistemology and are highly interpretive (e.g. meta narrative review, critical interpretive synthesis) may not suit those who want to learn more about the lived experience of a particular community, population, patient or professional group. In this scenario, ensuring that findings are sufficiently illustrated by quotes from the group of interest is likely to be important. Within the context of primary qualitative research Berry and Hayward (2011) describe how, in an earlier qualitative paper that “purports to concern “users’ and clinician views”, 74% of the quotes were taken from therapists’ accounts, and 26% from service users (i.e., when each verbatim quote equals 1 unit)”. Such imbalances may easily be perpetuated, both within the included studies and within the synthesis product.

Seeking a range of perspectives on the QES can sensitise the review team to the types of data to collect within the broad categories of methodological and contextual characteristics and on study findings. At this stage, decisions often need to be made as to what is important and not important data when addressing the review question. Policy-makers, practitioners and members of the public for example will often have crucial insights on what kinds of data to collect on study context that the review team may have overlooked. For example, Houghton and colleagues (2020) conducted a rapid QES at the onset of the COVID-19 pandemic. They wanted to explore the factors that create barriers and facilitators to healthcare workers’ adherence with infection prevention and control guidelines for respiratory infectious diseases. Including a team member with expertise in infectious diseases was important, as their perspective sensitised the review team to collect and interpret data relevant to respiratory infectious diseases, as well as to factors specific to the emergence and early stages of the pandemic.

8.7 Equity, diversity and inclusion

Many of the early published QESs played an important role in championing the viewpoints of those with less-frequently heard voices such as carers (e.g. Lins et al., 2014) or migrants (e.g. Aldin et al., 2024). This continues to be a driver for much qualitative research and should be considered within all syntheses. Framework synthesis, thematic synthesis and meta-ethnography can all support review teams to highlight the perspectives of those that are less heard as synthesis findings are built from primary qualitative research which should be grounded in the worldviews of its participants.

Data that is collected from primary studies can be biased if not selected in an open and transparent way. Important data may not be extracted if review authors do not perceive that it is important. Additional biases may be introduced if diversity and inclusion of specific groups and contexts are not considered whilst collecting data and important data may not be extracted. It is important that more than one person collects data to ensure that all relevant data that helps address equality, diversity and inclusion are extracted. The diversity (or lack of it) of the data collectors may also impact on this process.

When selecting data to include in a QES, and subsequently to present, the review team should be particularly alert for data that represents the views of minority communities or disenfranchised groups. Where such groups are the focus of the research question in a primary

qualitative study the review team is less likely to overlook their inclusion. However, where individuals are represented within a general population, relevant verbatim extracts should be clearly identified and coded. The review team will equally want to avoid imputing the views of the general population to those individuals (through an “averaging” effect) as well as avoiding attributing the views of a minority to the overall population. However, a review team should recognise that the use of verbatim extracts simply for credibility is contested and that these extracts serve other purposes such as illustrating the analysis and the findings (Eldh et al. 2020).

8.8 Reflexivity

Review authors will have specific biases towards named methods, and these should be made transparent in the decision-making process. The diversity within the review team may be an important consideration for some review questions. For example, a QES exploring the menopause experience of women may be conducted differently if undertaken by an all-male review team and this would need to be made transparent through a reflexive process. In such instances, a synthesis that sticks more closely to the findings of the included studies could be more appropriate.

Reflexivity is particularly important also for review teams who have conducted previous QES on similar topics. For example, Houghton et al. (2020) conducted a QES exploring the factors that impact on people’s decision to take part in a randomised trial. A subsequent review, by Meskell et al. (2023), explored the factors that impact on people’s decision to take part in vaccine trials in a pandemic or epidemic. Some of the review authors were involved in both reviews and so it was important to reflect on how the first QES may have influenced their approach to undertaking the second QES to ensure openness to new and differing synthesis findings.

8.9 Chapter information

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Declarations of Interest

Angela Harden, Catherine Houghton, Jane Noyes and Andrew Booth are convenors of the Cochrane Qualitative and Implementation Methods Group. James Thomas is a former convenor of the group, senior editor of the Cochrane Intervention handbook, a co-convenor of the Artificial Intelligence methods group and a member of the Campbell Collaboration Technical

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