

Ensuring Transferability in Evidence Synthesis: Conceptual and Theoretical Engagement, Boundary Clarity, and Stakeholder Relevance

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Ensuring Transferability in Evidence Synthesis: Conceptual and Theoretical Engagement, Boundary Clarity, and Stakeholder Relevance

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Abstract

Evidence syntheses can shape understanding and practice in health professions education, but their value depends on more than methodological credibility. Synthesis transforms findings from multiple studies and contexts into synthesized knowledge claims, creating a transferability challenge distinct from that of primary research. Review-level transferability concerns whether these claims can meaningfully inform understanding or action beyond the contexts represented in the evidence base, and what readers need to judge that fit. In this commentary, we propose three interrelated dimensions that can support transferability: conceptual and theoretical engagement, boundary clarity, and stakeholder relevance. We illustrate how deliberate attention to these dimensions throughout the review process can clarify what knowledge has been constructed, make visible the conditions and limits of its claims, and provide the contextual information users need to judge relevance. Designing for transferability can help synthesized knowledge travel across contexts without assuming universal applicability.

Keywords: Knowledge synthesis; Health professions education; Knowledge translation; Transferability

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Evidence synthesis has become central to knowledge translation in health professions education (HPE).[1] They can be used effectively to consolidate what is known, highlight what is uncertain, and inform health professions education practices. Yet evidence syntheses do more than accumulate findings from primary studies; they construct synthesized knowledge claims from studies conducted across different contexts. This creates a distinct transferability challenge. Rather than asking whether findings from one setting apply elsewhere, review-level transferability concerns whether synthesized claims can meaningfully inform understanding or action in contexts beyond those represented in the evidence base. A responsibility then of the review team is to synthesize the literature and convey knowledge claims in a manner that supports the readers' judgement regarding the fit of those claims to their context; in short, to support transferability. In this commentary, we describe transferability in evidence synthesis and highlight three dimensions that, when engaged deliberately throughout the review process, can support the meaningful and judicious travel of synthesized knowledge across contexts.

Credibility as Foundation, Transferability as Reach

In a previous paper, we proposed alignment, rigor, and transparency as methodological principles for establishing the credibility of HPE evidence syntheses.[2] Credibility addresses whether a synthesis has been designed and conducted in ways that make its claims trustworthy. Transferability addresses a different question: what is the reach of those claims beyond the evidence base from which they were constructed?

The distinction parallels, but is not equivalent to, the familiar distinction between internal and external validity in clinical research.[3] A synthesis may be methodologically credible yet provide insufficient basis for readers to judge whether its claims are relevant to another setting, population, system, or purpose. Transferability therefore depends not simply on the trustworthiness of a synthesis, but on whether it provides sufficient conceptual and contextual information for readers to judge the reach, conditions, and limits of its claims.

This commentary builds on our earlier work by shifting attention from the credibility of evidence synthesis to its reach. Some practices, particularly transparency, contribute to both. Their function, however, differs: credibility supports confidence in the synthesis, whereas transferability supports reasoned judgments about whether and how its claims may inform understanding or action elsewhere.

Discussions of Transferability

Transferability has been described in the context of qualitative research, educational innovation, and, to a lesser extent, evidence syntheses. While these accounts provide a useful starting point, they remain incomplete for the particular demands of evidence synthesis.

Prior health profession education has conceptualized transferability as encompassing applicability, resonance, and theoretical engagement.[4,5] Applicability involves providing sufficient contextual detail for readers to judge similarity to their own settings. Resonance refers to presenting findings in ways that are meaningful to readers, often through thick description, evocative language or literary devices (e.g., poetry or metaphor). Theoretical engagement emphasizes connections to theory or theory generation. By situating a study within a theoretical

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framework and describing how the findings confirm, modify, or extend existing theory, authors support the transferability of their insights.

Transferability in evidence synthesis is more complex than in primary research because synthesis introduces an additional inferential transformation. Each included study already represents findings produced within particular theoretical, methodological, and contextual conditions. Reviewers then select, compare, interpret, and combine those findings to construct a synthesis claim. Transferability concerns the subsequent question: whether that constructed claim can meaningfully inform another context, and what information readers need to judge what might fit in another context. Accordingly, review-level transferability requires more than descriptions of individual study contexts. It requires deliberate attention to how synthesized claims are constructed, bounded, and made interpretable to potential users.

Existing approaches to transferability in reviews have largely emphasized transparency: clear descriptions of the population, intervention, control group, outcomes, and methodological decisions.[6] Some approaches address context more directly. The relevance component of GRADE-CERQual assesses how well the contexts of underlying studies match the review question[7], and realist syntheses theorize how context shapes outcomes through context–mechanism–outcome configurations.[8] However, CERQual judges relevance to the review's own question rather than to a reader's context, and realist synthesis is one review type among many. While valuable, such approaches do not fully address the additional interpretive challenge created when evidence from multiple studies and contexts is combined into synthesized claims. We therefore argue for a broader conceptualization of transferability that is relevant across review types, although its expression will vary according to the purpose and knowledge product of the synthesis.

Dimensions of Review Transferability

Building on prior work on transferability in HPE,[4,5] we propose three interrelated dimensions particularly relevant to evidence synthesis: conceptual and theoretical engagement, boundary clarity, and stakeholder relevance (Table 1). These dimensions are not intended to be exhaustive or prescriptive. Rather, they identify three complementary questions that shape whether synthesized knowledge can travel: What conceptual meaning has been constructed? What are the boundaries of that claim? And what enables intended users to judge its relevance in context? Their relative importance and expression will vary with the purpose and form of the synthesis.

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Dimension	Planning	Data Extraction & Synthesis	Presentation of Findings	Discussion / Reflection
Conceptual & theoretical engagement	Specify the concepts, assumptions, or theoretical frame that orient the synthesis	Examine how findings support, extend, contradict, or reshape that conceptual framing	Present synthesized patterns, concepts, relationships, explanations, or models appropriate to the review purpose	State the level of abstraction achieved and where conceptual claims remain uncertain
Boundary clarity	Make explicit what will count as relevant evidence and what the synthesis is intended to speak to	Examine consequential variation across contexts and forms of evidence	Show which contexts, perspectives, and forms of evidence are represented, underrepresented, or absent	Clarify where claims are likely to hold, require adaptation, or lack evidentiary support
Stakeholder relevance	Identify the questions and contextual distinctions consequential to intended users, with stakeholder input where appropriate	Attend to evidence relevant to how different users may interpret or use the synthesis	Organize findings so users can recognize and compare conditions relevant to their own contexts	Enable users to judge fit—including adoption, adaptation, or non-transfer

Table 1: Three Dimensions of Transferability: This table illustrates how each dimension manifests across the stages of the review process. The table is illustrative rather than prescriptive; its purpose is to make transferability visible as a design stance rather than a reporting checklist. Additionally, although the dimensions are shown applied sequentially across review phases of planning, data extraction and synthesis, presentation of findings, and discussion/reflection, we do not suggest a linear process but rather an iterative one that allows for refinement as insights emerge.

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Conceptual and Theoretical Engagement

Conceptual and theoretical engagement helps establish what a synthesis means beyond the accumulation of individual findings. It may serve two related functions. Engagement with conceptual and theoretical frameworks early in the review process can guide what the review attends to and how evidence is organized. For example, a scoping review might use an existing framework to categorize interventions, outcomes, or contextual factors. Generative engagement uses the synthesis to refine, challenge, connect, or develop concepts and explanations. For example, a realist review may generate or refine a program theory that explains how and why outcomes are produced across contexts. The balance between these functions varies by review purpose; not every synthesis aims to generate theory.

By locating findings within a conceptual structure, reviewers make explicit the level of abstraction at which the synthesis speaks. This enables synthesized knowledge to travel conceptually without implying that it applies universally. Across the review process, teams can make their conceptual commitments explicit, use them to guide decisions in the review process, and show how the resulting synthesis confirms, extends, qualifies, or challenges existing understanding (Table 1).

Boundary Clarity

Boundaries define the interpretive reach of a synthesis: what its claims speak to, under what conditions, and where their relevance becomes uncertain. Some boundaries are established by reviewers through choices about questions, inclusion criteria, forms of evidence, and conceptual framing. Others emerge from the evidence base itself, such as limited contextual, cultural, professional, or geographic representation.

Boundary clarity therefore extends beyond reporting inclusion and exclusion criteria. It requires reflexivity about what was treated as legitimate evidence, which perspectives and contexts are represented or absent, and how methodological and epistemological choices shaped the resulting claims. Making these boundaries visible enables readers to judge where synthesized knowledge may reasonably inform another context, where adaptation may be required, and where the evidence offers little basis for transfer.

Stakeholder Relevance

Transferability is ultimately judged in relation to a context of use. Stakeholder relevance therefore concerns whether the synthesis attends to the questions, contextual features, and forms of knowledge that potential users need to judge fit. Stakeholder perspectives can shape the review question, identify contextual distinctions that reviewers might otherwise overlook, and influence how findings are organized and interpreted.

Relevance should not be equated with simple usability or uptake. Its role in transferability is to help ensure that intended users can recognize which aspects of the synthesis are consequential to their questions and circumstances, including contextual distinctions that may shape how the findings are interpreted

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Conclusions

Evidence syntheses increasingly shape understanding and decisions in HPE. Their value depends not only on whether their claims are credible, but on whether readers can judge how those claims relate to contexts beyond the evidence base from which they were constructed. Transferability should therefore be treated as an intentional design consideration rather than an assumed consequence of methodological rigor.

We propose three interrelated dimensions that support such judgments. Conceptual and theoretical engagement clarifies what knowledge has been constructed and at what level of abstraction. Boundary clarity makes visible the conditions and limits of those claims. Stakeholder relevance ensures attention to the contextual distinctions users need to judge fit. Together, they shift transferability from an end-stage question, "Can these findings apply elsewhere?", to a reflexive concern throughout synthesis: "What have we constructed, where might it hold, and what would another context need to judge its relevance?"

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