You mentioned different stakeholders will have different views. Is there a place where the types of stakeholders are mentioned?

In the publication from earlier this year we do discuss types of stakeholders. I think it really depends on the project. As mentioned, we ran this for a project on mentoring for minority groups. We invited people who had received mentoring services, mentors, people who had coordinated mentor programs and people who were working in the directorate for immigration who were funding mentoring programs. They were all invited to the TRANSFER discussion and came up with different information. That specific example did teach us the importance of going through the conversation guide and making it lay person friendly, so getting rid of the research jargon, which sometimes I take for granted that other people are familiar with but, of course, they're not. So being really diligent about simplifying the questions as much as possible.

The other really important thing about inviting stakeholders, which I think Neil Haddaway and colleagues have done some work on, is really making them feel important and valued. I think it's easy to come to a meeting as a stakeholder with review authors and feel intimidated, as though you do not have much to add to a research project. By opening up and saying that the reason that you have a stakeholder here is because they have knowledge and expertise that you simply do not have. We find it has a twofold benefit. One is that they want to contribute and the second is that they feel there's a buy-in from stakeholders. If you have a stakeholder, a decision maker or anybody involved at the beginning of a systematic review process, you can stave off criticism at the end that you might not have taken a factor into account, or they're unhappy that the findings aren't relevant for their context. If you get those types of comments, you could say: yes, but we did involve a representative from your stakeholder group, or you know you are the stakeholder who was involved, and we did have this conversation. So, it protects against future criticism because you've done your very best to get everybody's input early on.

Could you say a bit more about applying this approach to qualitative reviews?

I would love to. So thus far we've only applied it to one user test with qualitative review authors and in one qualitative synthesis approach. Let's start at the beginning. There's obviously a debate about generalizability and transferability of qualitative review findings, but I think that if you first accepted that you're going to do a systematic review then you've accepted that there is some need to generalize those findings or that qualitative synthesis findings need to be generalized to other contexts.

What came up during user testing is the need to adapt the language for qualitative synthesis authors. The current conversation guidance is very much based on effectiveness reviews, so to get rid of issues such as compliance etc. A couple of other points came up and that was that by using TRANSFER early in a qualitative synthesis process, it can actually contribute to a number of things such as informing the sampling procedure later on, even the inclusion and exclusion criteria in the beginning, but also if you can imagine if you're in a guideline panel or you're trying to develop a set of review questions, then transfer might point out acceptability and feasibility issues that could be investigated by qualitative synthesis and so this actually leads me to a point which I was going to discuss. We very much focused on transferability and the development of this approach but what we see through user testing and through the very small sample of reviews that have used it is that it's actually just a really structured way of engaging with stakeholders to cover a wide variety of issues. So, during our conversations with stakeholders issues that are not relevant to transferability have come up which have also been able to inform the review process and they've been invaluable and, in my opinion, as I have no evidence to back this up, but they've saved time as well. Instead of the review team sitting for days at a time trying to investigate an issue by having multiple stakeholders in one room and perhaps even having a debate among them about different issues related to this intervention you can uncover issues that would be very difficult as an outsider to uncover otherwise.

Are there any situations where a transfer approach would be needed when writing a medical systematic review on a condition that affects people globally?

I think that this gets into the dangerous territory of the debate around complex and complicated interventions, but I think that there are probably numerous medical interventions that could have issues related to transferability. I hate to come up with something off the top of my head, but I imagine, for example, that different health systems have different ways of implementing maternal care, that might be based on context specific factors, for example, caesarean sections. I myself am not a medical doctor and I don't have a medical background. I would love to hear if you wanted to apply TRANSFER to that kind of approach.

Comment from co-author Simon Lewin from the audience: on reviews of clinical questions at the global level, when grading findings from these reviews it is still necessary to look at indirectness and the TRANSFER approach can be helpful with that aspect of a GRADE assessment.

How would you balance different views from different stakeholders, for example, the cost of an intervention likely to have a different view from patients versus administrative people?

I think that's a really interesting question. I don't think I can answer it directly, but I think that you get a debate when you invite multiple stakeholders to a meeting, and they might be able to sort this out amongst themselves. There's a lot of prioritizing and discussion in these kind of meetings and frankly at the end of the day the transferability factors that the stakeholders and the review team come up with during a meeting, they're a set of hypotheses, so in fact it could be a way to balance it out that way. So if you come up with three to five transferability factors within the group and that you think influence how the review findings will transfer to a specific context, you do a subgroup analysis and they don't transfer to that context, for example, or the context has no bearing on the specific review finding, that could be telling in itself. I think that the more variety of stakeholders you have, and different stakeholder groups you can invite and hold, the better the discussion will be and hopefully they can solve a lot of those ideas together.

I'm already collecting my review data without having used the TRANSFER approach. Should I go back and perform TRANSFER with my stakeholder, who would be my employer?

I think that it would be worth it if you could do some type of shortened version of TRANSFER if you have the time or the resources but of course it's understandable that you've already come quite far. If you wanted to do a mini-stakeholder consultation, just to be able to include some kind of subgroup analysis beforehand, it would probably be very valuable and it's much more difficult to do post hoc. I tried doing it in one review and it was going to require a lot of time.

Regarding GRADE, how will the level of evidence be downgraded if transferability is limited, in other words in addition to indirectness?

I don't think this should be in addition to indirectness. I merely think that when you make your indirectness assessment of not serious or very serious, this would merely support that, as I showed in the slides. If you make an assessment of, for example, not serious what is your footnote for that essentially? All too often in a review the footnote is missing, there it's just 'not serious', or its kind of ad hoc for each review finding. So, in this case we're saying that it's 'not serious' and we have three specific factors that we've identified and examined to support that assessment of 'not serious'.

Final comments

TRANSFER is about two things: one is making systematic review findings as relevant and useful to decision makers and stakeholders as possible. Through our experience we really believe that that is done by collaborating with them early on and being systematic and transparent in all collaboration. The second is really to support these GRADE assessments of indirectness and great circle of relevance. I wish we could do a small poll here as I would love to know how many people have filled out one of these assessments based on their gut feeling.

There's some work coming from Elie Akl, and it's called the SPARK tool. They've really focused on priority setting and working with stakeholders as well, and we are following their work closely and have talked to some of the co-authors.

TRANSFER is very much still a work in progress, and we are piloting different versions of the conversation guide. We are user testing and looking at how people perceive this, both the stakeholders and the review authors. Do stakeholders want to spend time on this? Do they find it valuable? So far, the indication is yes, this is a valuable use of time. Does the review team find it too onerous? So far, the conversation guide can be difficult to use and we're working on refining the language.

We are going to be setting up a TRANSFER project group so if any of you are especially interested in contributing to the development of it over the next one to many years, please send me an email.

We're really looking at how TRANSFER can be used within the context of GRADE/-CERQual assessments and more concretely, to support GRADE assessments. We still don't have any examples of that, this is just from our perspective, we think it would be helpful to support a GRADE and directness assessment.