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A qualitative systematic review protocol for a synthesis of teachers' and learners' experiences with the Teaching and Learning Toolkit

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The best available evidence on educational strategies should inform the decision-making of teachers, policy-makers, and other stakeholders in the field of education. The Teaching and Learning Toolkit created by the UK-based Education Endowment Foundation (EEF Toolkit) is recognized as one of the most important tools providing information on effectiveness, costs, and certainty of evidence for 30 education strategies. However, the latest version of the EEF Toolkit from 2021 does not provide information on users' experience with the strategies. Therefore, we selected the 10 most effective strategies and designed a protocol for a qualitative systematic review to summarize the experiences of teachers/learners (aged 3–18 years) with these selected strategies in the context of schooling. All stages of this systematic review will be conducted and reported in line with JBI methodology and PRISMA 2020 statement. The search will be carried out in following information sources: APA PsycINFO (EBSCOhost), PubMed (NLM), ERIC (EBSCOhost), SocINDEX with Full Text (EBSCOhost), Academic Search Ultimate (EBSCOhost), Web of Science Core Collection (Clarivate Analytics), Scopus (Elsevier), ProQuest Central (ProQuest), OpenDissertations (EBSCOhost), ProQuest & Dissertation Theses (Clarivate Analytics), and Google Scholar (Google). The selection of relevant studies, critical appraisal, data extraction and synthesis will be conducted by two independent reviewers. The ConQual approach will be used to assess the certainty of evidence of all synthesized findings.

KEYWORDS

Education Endowment Fund, Teaching and Learning Toolkit, qualitative evidence synthesis, systematic review of qualitative studies, evidence-based education

1 Introduction

The education of all learners across different ages and phases of schooling should be based on the best available scientific evidence. This is required by various definitions of evidence-based education (Georgiou et al., 2023; Spencer et al., 2012; Kantor et al., 2022) as well as by educational legislation in many countries throughout the world. U.S. legislation adopted evidence-based educational strategies in the early 1990s which influenced both the *No Child Left Behind Act* (2002) and the *Individuals with Disabilities Education Improvement Act* U.S. Department of Education (2004) to require teachers to use educational practices based on research evidence to ensure that students received the highest quality instruction. In Europe, the requirement for evidence-based education was clearly manifested in the development of UK educational policy, and later influenced educational policy across Europe (Marttila, 2020). Identification of the best available evidence on different educational methods is enabled by the use of evidence synthesis methodology rather than the use of the results of primary studies (Kantor et al., 2023). Therefore, teachers and other users may find answers related to teaching and learning practices in numerous systematic reviews. While these research studies are not always easy to find, read and interpret for many practitioners and other users, various overviews and summaries of evidence related to educational methods (Allen et al., 2021; Mitchell, 2019; Petty, 2018) have been used to inform educational practice and policy. One of the best examples is the metanalytic study, *Visible Learning* (Hattie, 2010), that provides a synthesis of over 800 meta-analyses related to achievement in school-aged students.

In the field of education, information on the effectiveness of educational methods has also begun to be disseminated in the form of toolkits, e.g., *Great Teaching Toolkit* (Coe et al., 2020). Currently, the most well-known and internationally used toolkit is the *Teaching and Learning Toolkit* created by the UK-based Education Endowment Foundation (EEF) (referred to as the EEF Toolkit in this text). The EEF is a research organization aiming to improve educational outcomes by providing evidence-based resources to teachers and school leaders (Education Endowment Foundation, 2025). One of these resources is the EEF Toolkit which is a widely accessed evidence portal that summarizes the global evidence for 30 different educational strategies and communicates them in an accessible format to teachers, school leaders, and policymakers. For each of the strategies, information is presented about its average impact on attainment for pupils, the strength of the evidence supporting the findings, and the average costs of implementation.

The original version of the EEF Toolkit was based on a database of meta-analyses of intervention findings in education compiled by Higgins between 2008 and 2011 and subsequently published as a *Toolkit of Strategies to Improve Learning: Summary for Schools Spending the Pupil Premium* under the heading of Sutton Trust in May 2011 (Higgins et al., 2011). The original aim of this initiative was to help schools decide how to allocate any additional funding to support the achievement of pupils from disadvantaged backgrounds and to use evidence on educational strategies to inform policy spending. This original version of the EEF Toolkit included 21 summaries of research presented in

terms of potential gain (effect sizes converted into the months of pupils' progress), costs, applicability of the approach toward different subjects, evidence estimate (extent and robustness of the evidence) and overall cost-benefit (ratio of costs and potential impact). Future development of the Toolkit was influenced by the establishment of the EEF in early 2011 and by close ties between the EEF Toolkit and development of subsequent educational policy. Following the publication of the Toolkit in 2011, in 2012 the UK government announced that schools should report how they spent their pupil premium allocation (Gorard, 2020). Thus, the EEF Toolkit became a widely used resource by teachers, school-leaders, parents, and policy-makers. The EEF Toolkit has been translated into six languages and modified for national education systems in Australia, Cameroon, Chile, Jordan, and Spain as of 2022 (Higgins et al., 2022). These adaptations have helped to spread the influence of the Toolkit outside of the United Kingdom and it has been used by policymakers and practitioners in many countries, including the Czechia. Moreover, the EEF Toolkit is regularly updated. The last update was launched in 2021 utilizing the GRADE (The Grading of Recommendations Assessment, Development and Evaluation) methodology to assess the certainty of evidence (Guyatt et al., 2008) and this update has been championed as the first large-scale project applying this methodology to assess the certainty of evidence in educational research.

Despite the thoroughness of the updated EEF Toolkit, it lacks some information that may be useful to inform decision-making in policy and practice. Specifically, qualitative evidence of the experiences of learners and teachers with the included educational strategies belongs to this category. Experiences are understood here as deep subjective and personal descriptions of participants' beliefs, attitudes and perspectives (Alhazmi and Kaufmann, 2022). Because the phenomenon of experience is typically explored by qualitative studies, results of qualitative systematic reviews are needed to fill this knowledge gap. However, there are limited numbers of high-quality systematic reviews from qualitative evidence in education as this methodology is relatively nascent and, generally, not widespread in educational research (Maeda et al., 2021; Major and Savin-Baden, 2011).

Due to the growing collaboration between the EEF and JBI Center of Evidence-based Education and Arts Therapies at Palacký University Olomouc in the Czechia, we aim to address this knowledge gap through conducting a collaborative study that will enable including information on learner/teacher experiences with the most effective evidence-based educational strategies into the EEF Toolkit. This manuscript provides a prospectively published protocol for conducting this qualitative systematic review. For these purposes, the 10 most effective methods were selected from EEF Toolkit. First we identified:

- Collaborative learning approaches involving pupils working together on activities or learning tasks in groups. The groups need to be small enough (2–6 students) for everyone to participate on a collective task. Pupils in the group may work on separate tasks contributing to a common overall outcome or work together on a shared task.
- Feedback is information given to the learner or teacher about the learner's performance relative to learning goals

or outcomes. It should aim toward improvement in students' learning. Feedback can be about the output of the activity, the process of the activity, the student's management of their learning or self-regulation, or them as individuals (which tends to be the least effective). This feedback can be verbal or written or can be given through tests or via digital technology. It can come from a teacher or someone taking a teaching role, or from peers.

- Homework refers to tasks given to pupils by their teachers to be completed outside of usual lessons. Typical examples of homework activities in primary schools tend to be reading or practicing spelling and number facts, in secondary education these include completing tasks assigned in lessons, preparing for tasks in future lessons, routine coursework, and revision for tests and examinations. The definition of homework also includes activities such as "homework clubs" where pupils have the opportunity to complete homework in school but outside normal school hours, and "flipped learning" models, where pupils prepare for classroom discussions and complete application tasks at home
- Metacognition and self-regulation approaches aim to help pupils think about their own learning more explicitly, often by teaching them specific strategies for planning, monitoring, and evaluating their learning. Interventions are usually designed to give pupils a repertoire of strategies to choose from and the skills to select the most suitable strategy for a given learning task. Self-regulated learning can be broken into three essential components: 1. cognition – the mental process involved in knowing, understanding, and learning; 2. metacognition – often defined as "learning to learn"; and 3. motivation – willingness to engage our metacognitive and cognitive skills.
- Mastery learning varies the time needed for pupils to become proficient or competent at learning objectives. Mastery learning breaks subject matter and learning content into units with clearly specified objectives which are pursued until they are achieved. Learners work through each block of content in a series of sequential steps and must demonstrate a high level of success on tests, typically about 80%, before progressing to the next unit. Those who do not reach the required level are provided with additional tuition, peer support, small group discussions, or homework, so that they can reach the expected level.
- One-to-one tuition involves a teacher, teaching assistant or other adult giving a pupil intensive individual support. It may happen outside of normal lessons as additional teaching – for example, as part of extending school time or a summer school – or as a replacement for other lessons.
- Oral language interventions emphasize the importance of spoken language and verbal interaction in the classroom. They aim to support learners' articulation of ideas and spoken expression and include targeted reading aloud and book discussion with young children; explicitly extending pupils' spoken vocabulary; the use of structured questioning to develop reading comprehension; and

the use of purposeful, curriculum-focused, dialogue, and interaction.

- Reading comprehension strategies focus on the learners' understanding of written text. Pupils are taught a range of techniques which enable them to comprehend the meaning of what they read such as inferring meaning from context; summarizing or identifying key points; using graphic or semantic organizers; developing questioning strategies; and monitoring their own comprehension and identifying difficulties themselves.
- Phonics is an approach to teaching reading, and some aspects of writing, by developing learners' phonemic awareness. This involves the skills of hearing, identifying, and using phonemes or sound patterns in English. The aim is to systematically teach learners the relationship between these sounds and the written spelling patterns, or graphemes, which represent them. Phonics emphasizes the skills of decoding new words by sounding them out and combining or "blending" the sound-spelling patterns.
- Peer tutoring includes a range of approaches in which learners work in pairs or small groups to provide each other with explicit teaching support, such as cross-age tutoring, peer-assisted learning, and reciprocal peer tutoring, in which learners alternate between the role of tutor and tutee. The common characteristic is that learners take on responsibility for aspects of teaching and for evaluating their success. Peer assessment involves the peer tutor providing feedback to the tutee relating to their performance and can take different forms, such as reinforcing learning or correcting misunderstandings.

A preliminary search was carried out in Epistemonikos, Cochrane Library, PROSPERO, and no published or ongoing qualitative systematic reviews on the topic were identified. Therefore, this protocol for a qualitative systematic review is prospectively submitted for publication with the aim to synthesize understandings of the experiences of learners and their teachers with the chosen educational methods.

Review questions:

- What are the experiences of learners (aged 3–18 years) with the selected strategies of the EEF Teaching and Learning Toolkit in the context of school education?
- What are the experiences of teachers of learners (aged 3–18 years) with the selected strategies of the EEF Teaching and Learning Toolkit in the context of school education?

The selected strategies of the EEF Toolkit involve the following approaches: collaborative learning approach, feedback, homework, metacognition and self-regulation approaches, mastery learning, one-to-one tuition, oral language interventions, reading comprehension strategies, phonics, and peer tutoring. For each strategy, a separate search, screening, extraction of data, critical appraisal, data extraction/synthesis, and certainty of evidence assessment will be conducted. This will be driven by the same methodology described in following section.

2 Methods and analysis

This qualitative systematic review will be conducted according to the JBI methodology of systematic reviews of qualitative evidence (Lockwood et al., 2024) and will be reported in line with the Preferred Reporting Items for Systematic Reviews and Meta-Analyses (PRISMA) checklist (Page et al., 2021). The protocol was also conceptualized in line with the principles that were followed in the updated version of the EEF Toolkit in 2021. The qualitative systematic review has not yet been undertaken by our team, only preliminary searches have been conducted.

2.1 Inclusion criteria

Population: We will include learners in preschool education, elementary, and secondary schools (expected age 3–18 years), only college/university education will be excluded. Eligibility will include different types of schools and grades, all genders, languages, nationalities, disabilities, socioeconomic, cultural, and religious status. During the synthesis, we will consider the division of learners into separate sub-groups (preschool, elementary, and secondary school).

Teachers of such learners will be included as a separate subgroup for data analysis in this review. Studies on teachers' assistants and other professionals will also be considered for inclusion, however only pedagogical staff will be eligible for this review. If the sample is only partially eligible (e.g., mixture of students in secondary and tertiary education), we will consider data related to eligible participants.

Phenomena of interest: This review will consider studies that explore experiences of learners and their teachers with the following educational strategies (according to the above mentioned EEF Toolkit strand definitions): collaborative learning approach, feedback, homework, metacognition and self-regulation approaches, mastery learning, one-to-one tuition, oral language interventions, reading comprehension strategies, phonics, and peer tutoring (the definition of all included strategies were provided in the Introduction section). The experience may be short or long-term but must include the deep subjective perception of the individual. Studies including only superficial statements and comments on participants' experience will be excluded. Also, the above-mentioned approaches combined with other educational strategies may be considered for inclusion.

Context: This review is focused on school education conducted in any educational environment, however education in inclusive environments will be handled separately from education in special schools/classes during data synthesis.

Type of studies: All types of qualitative studies and paradigms such as phenomenology, grounded theory, ethnography, action research, feminist research, and/or studies with qualitative description, e.g., questionnaires with open-ended items will be considered for inclusion. Also, mixed design studies will be eligible but only qualitative data will be included. Any form of publication will be eligible, including peer-reviewed journals, books, chapters, conference proceedings, dissertations, etc.

2.2 Search strategy

A three-step search strategy will be applied. An initial search of APA PsycINFO and ERIC was undertaken with the aim of identifying typical studies eligible for this review. The words of titles/abstracts of these studies and the index terms used to describe them were used to develop a full search strategy in English for PsycINFO (see [Supplementary Appendix I](#)). The search strategy, including all identified keywords and index terms, will be adapted for the following databases and other information sources:

APA PsycINFO (EBSCOhost), PubMed (NLM), ERIC (EBSCOhost), SocINDEX with Full Text (EBSCOhost), Academic Search Ultimate (EBSCOhost), Web of Science Core Collection (Clarivate Analytics), Scopus (Elsevier), ProQuest Central (ProQuest), OpenDissertations (EBSCOhost), ProQuest & Dissertation Theses (Clarivate Analytics), and Google Scholar (Google).

The reference lists of all eligible studies will be screened for additional studies. There will be no limitation in the publication period. Only studies in English, Czech, Slovak, German, Spanish, and Chinese languages will be included.

2.3 Study selection

All eligible citations will be collated and uploaded into Zotero 7, and duplicates will be removed. After a pilot test, the eligibility of titles and abstracts against the inclusion criteria will be screened by two independent reviewers. Following the first stage of screening, full texts of all potentially relevant studies will be retrieved in full and assessed again by two independent reviewers. Reasons for exclusion of any full texts will be justified and referenced in the final publication of this study. Any disagreements at any stage of the study selection process will be resolved by discussion or by the input of a third reviewer. The search procedure and its results will be reported in full in the final publication of this study and presented in a PRISMA flow diagram.

2.4 Assessment of methodological quality

Two independent reviewers will critically appraise eligible studies for methodological quality using the standard JBI critical appraisal checklist for qualitative research (Lockwood et al., 2015). Authors of studies will be contacted in case any important information is missing. Any disagreements at any stage of the procedure will be resolved by discussion or by the input of a third reviewer. All the studies that pass through the assessment of methodological quality will be included in the systematic review and results of their critical assessment will be reported in narrative as well as tabular form.

2.5 Data extraction

Two independent reviewers will carry out the data extraction. We will extract data about:

Details of the study: First author, year of publication, and full reference.

Methodological background: Stated philosophical perspective, research methodology, research question, data collection methods, data analysis methods, statement locating the researcher culturally or theoretically, statement describing the influence of the researcher on the research, and vice-versa, ethical approval of the study.

Population: For learners, their age/grade, gender, nationality, language, subject, and socioeconomic background will be extracted. For teachers and other pedagogical staff, the type of the school, subject, experiences of learners/educational staff.

Phenomenon of interest: Findings related to the participants' experience.

Context: Country, socio-cultural factors that might influence the findings, type of school or other school facility, information about the educational strategy, and length of the pedagogical intervention. Given the diversity of educational settings, teaching practices, and socio-cultural factors, a comparison of possible inconsistencies will be conducted across all the studies and only findings from studies with similar contextual factors will be submitted to data synthesis. Any disagreements at any stage of the procedure will be resolved by discussion or by the input of a third reviewer. All studies (or essential parts of studies) in other language than English, will be translated to English or the extraction will be done by native speakers. In line with the assessment of the methodological quality, authors of studies will be contacted in case any important information for data synthesis is missing. In such cases, authors of studies will be contacted twice and given at least a 2-week period to provide a response. Failure to reply will be reported in the final systematic review.

2.6 Data synthesis assessing confidence in the findings

Wherever possible, the findings of studies will be collated by the meta-aggregative methods using JBI SUMARI software. The authors' analytical interpretation of the data will be extracted verbatim. Each finding included will be accompanied by a direct quotation as a supporting illustration. In the synthesis, only unequivocal and credible findings will be included to develop categories for findings with meanings that are sufficiently similar. Where textual collation is not possible, the findings will be presented in a narrative format. These findings will then be categorized based on their similarity in meaning prior to being further synthesized to produce a comprehensive set of synthesized findings that can be used to inform policymakers and practitioners in the field about the main study results.

Each synthesized finding will then be assessed using the ConQual approach (Munn et al., 2014), developed by JBI to rate the confidence in the outputs of qualitative evidence synthesis. ConQual evaluates two core components: dependability, reflecting the methodological quality of the included studies the JBI Critical Appraisal Checklist for Qualitative Research, and credibility, relating to the congruence between the author's interpretation and the supporting data (Lockwood et al., 2024). Dependability is assessed using the following items from the JBI Critical Appraisal Checklist for Qualitative Research (Lockwood et al., 2015):

- Is there congruity between the research methodology and the research question or objectives?
- Is there congruity between the research methodology and the methods used to collect data?
- Is there congruity between the research methodology and the representation and analysis of data?
- Is there a statement locating the researcher culturally or theoretically?
- Is the influence of the researcher on the research, and vice-versa, addressed?

According to current recommendations how to assess dependability in JBI systematic reviews of qualitative (Lockwood et al., 2024), for 4–5 “yes” responses the findings remain unchanged, for 2–3 “yes” responses the score is downgraded by one level, and for 0–1 “yes” responses the score is downgraded by two levels.

Credibility is assessed as:

- Unequivocal – Findings are accompanied by an illustration that is beyond reasonable doubt.
- Credible – Findings are accompanied by an illustration lacking clear association with it.
- Unsupported – Findings are not supported by the data.

The ranking system for credibility follows several rules (Lockwood et al., 2024):

- No change (the synthesized findings contains only unequivocal findings).
- Downgrade one level (mix of unequivocal/credible findings).
- Downgrade two levels (all credible findings).
- Downgrade three levels (mix of credible/unsupported findings)
- Downgrade four levels (unsupported findings).

Each synthesized finding starts with a high confidence rating that may be downgraded depending on these two domains (as an impact of methodologically weaker studies on ConQual score). The resulting ConQual score (high, moderate, low, or very low) will be reported in a Summary of Findings table, including individual ratings for dependability and credibility. This structured and transparent assessment supports the applicability of results for educational decision-making and practice.

3 Discussion

Results of this systematic review are necessary to better understand learners/teachers' experiences with educational methods. These understandings may refine the decision-making of experts in educational practice and strengthen their awareness of learners' unique preferences, choices, experiences, and needs in the process of education. This is in line with the core principles of evidence-based education that should integrate the best available evidence with the perspective of experts and various groups of learners (Kantor et al., 2022). Also, the information about users' experience is necessary for assessing the appropriateness of various

interventions – this criterion is part of the evidence to decision framework in the creation of the evidence-based recommendations using the GRADE methodology (Schünemann et al., 2013). Incorporating the main results of this systematic review with the content of the EEF Toolkit will provide information needed for evidence-based decision-making. This review aims to extend existing evidence on Toolkit strategies by providing qualitative data on acceptability, meaningfulness, and contextual fit from the perspective of practitioners and learners. These dimensions are essential to understanding implementation in real-world settings, complementing the Toolkit's current emphasis on effectiveness and cost. The main results will be expressed by data synthesized statements – a specific feature of the JBI methodology for qualitative systematic reviews that provides a tool for informing practitioners and policy-makers in an easily understandable way.

The transparency of this systematic review will be ensured by the prospective publication of the protocol, adherence to standardized procedures given by the JBI methodology for systematic reviews from qualitative studies and by adherence to the reporting guidelines PRISMA 2020. Also, all procedures will be conducted by two independent reviewers and/or by the team of the authors and a reflective approach will be applied whenever possible to address interpretive subjectivity and other potential sources of biases. The richness of the data will be reflected by the number of findings included into each data synthesized finding and by the number of data synthesized findings themselves. Based on the study results we will make recommendations for future research and will identify potential knowledge gaps.

4 Ethics and dissemination

This systematic review will involve the analysis of secondary data from published primary studies, which do not require formal ethical approval. The data extracted will be publicly available, and no new primary data collection will take place. The dissemination of the study results will be provided mainly by the EEF Toolkit – EEF will consider including the main results in the body of its texts (in separate sections). It is not currently planned for the qualitative findings to be integrated with quantitative findings presented in the EEF Toolkit. Also, the main results will be submitted for publication in peer-reviewed educational journals and disseminated at national and international conferences. We plan to report the findings to the leading international organizations focused on evidence synthesis (such as Campbell Collaboration or JBI) and the relevant experts in policy-making in the Czechia and United Kingdom.

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Author contributions

JKa: Conceptualization, Funding acquisition, Methodology, Project administration, Writing – original draft, Writing – review & editing. AS: Conceptualization, Methodology, Project administration, Writing – original draft. MZ: Conceptualization, Methodology, Writing – original draft. LB: Writing – review & editing. JR: Writing – original draft, Writing – review & editing. ZS: Conceptualization, Methodology, Resources, Writing – original draft, Writing – review & editing. DS: Writing – review & editing. JKL: Supervision, Writing – review & editing.

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Conflict of interest

The authors declare that the research was conducted in the absence of any commercial or financial relationships that could be construed as a potential conflict of interest.

Generative AI statement

The author(s) declare that no Generative AI was used in the creation of this manuscript.

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Supplementary material

The Supplementary Material for this article can be found online at: <https://www.frontiersin.org/articles/10.3389/feduc.2025.1563052/full#supplementary-material>

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