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Generation X Global City Leaders: An emerging process for examining leadership experience in multi-national, multi-layer comparative perspective

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Advisory Groups and Multi-national, Multi-layered Research Design: Strategies for Studying Generation X School Leaders in London, New York City and Toronto
Groupes consultatifs et Conception de Recherche Multi-Nationale et Multi-Couche: Stratégies visant à étudier la Génération X des Leaders Scolaires à Londres, New York et Toronto

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Abstract
The merits of international comparative studies of educational leadership have been well established. However, academic reflection on the pragmatics of conducting management research across different jurisdictions remains sparse. Addressing the growing demand for explicit discussions of the practice and methods of comparative educational leadership research, this paper adopts Teagarden's (2007) international management research model to organize a detailed discussion of the opportunities and challenges of conducting comparative research into school leaders' experience and aspirations in urban setting. More specifically, the paper provides a detailed reflection on how the research has addressed the first two elements of Teagarden's model: forming research consortia and designing the research. The paper draws on an on-going study of Generation X, under 40-year-old, school leaders in London, New York City and Toronto to examine strategies for establishing and working with Advisory Groups and designing contextually reflective research strategies.

Résumé
Les mérites des études internationales et comparatives sur le leadership éducatif ont été bien établis. Cependant, la réflexion académique sur les aspects pragmatiques d'entreprendre des recherches de gestion à travers différentes juridictions demeure rare. Répondant à la demande croissante pour des débats explicites sur la pratique et les méthodes de recherche comparative en leadership éducationnel, ce document adopte le modèle de recherche en gestion internationale, conçu par Teagarden (2007), afin d'organiser une discussion détaillée sur les opportunités et les défis d'entreprendre des recherches comparatives sur l'expérience et les aspirations des leaders scolaires en milieu urbain. Plus précisément, ce papier fournit une réflexion détaillée sur la manière dont l'étude a abordé les deux premiers éléments du modèle de Teagarden : former un consortium de recherche et concevoir la recherche. Ce document s'appuie sur une étude en cours sur la Génération X de leaders scolaires de moins de 40 ans, à Londres, New York et Toronto, afin d'examiner les stratégies en vue d'établir et de travailler avec des Groupes Consultatifs, et de concevoir des stratégies de recherche contextuelles et réflexives.

Keywords: international; comparative; methods; Generation X; educational leadership; advisory groups
Mots-clés: international; comparative; méthodes; génération X; leadership éducatif; groups consultatifs

Governments appear to be increasingly intrigued and in some cases driven by the student achievement results generated by comparative international testing programmes including TIMMS[1], PISA[2] and PIRLS[3]. Bray (2005) explains the motivation behind these comparisons,

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[1] The Trends in International Mathematics and Science Study (TIMSS) explored mathematics and science achievement of fourth- and eighth-grade students in 1995, 1999, 2003, 2007 and 2011. (Source: http://nces.ed.gov/timss/index.asp. Accessed 15 September 2013).

suggesting "policy makers in individual countries examine education systems in other countries in order to discern ways to achieve political, social and economic objectives" (p. 239). This solution-seeking approach (Crossley & Broadfoot, 1992) often involves the identification and analysis of the "similarities and differences between the structures, processes and outcomes of education systems" (Dimmock & Walker, 1998, p. 384b) in support of policy, practice or theory-related developments.

Building on this growing collective passion for comparison and an ever-developing interest in the most "successful" education systems, McKinsey fuelled the fires of global educational comparison with an examination of the top-ranked school systems via a set of high-profile studies exploring the factors and conditions supporting outstanding student learning and attainment. Identified factors include jurisdictional structures and strategies prioritizing the recruitment and training of high-potential professional staff; the centrality of quality instruction; the creation of relevant curricula to enhance and improve learning (Barber & Mourshed, 2007); school leadership (Barber, Whelan, & Clark, 2010); and ongoing system enhancements (Mourshed, Chijioke, & Barber, 2010).

Within the wider context of these school- and system-level comparison trends, a surge of academic research has been examining the role and influence of school leaders on student learning and attainment (Day et al., 2009; Leithwood, Day, Sammons, Harris, & Hopkins, 2006; Leithwood & Jantzi, 2008; Robinson, Hohepa, & Lloyd, 2009). These studies have established leaders as second only to teachers in their influence on student outcomes and have sparked a renewed interest in school leadership-focused research that explores effective leadership practices (Day et al., 2009); leadership development and training (Barber, Whelan, & Clark, 2010; Darling-Hammond, Meyerson, LaPointe, Orr, 2009; Robinson, Hohepa, & Lloyd, 2009; Schleicher, 2012); recruitment and retention (MacBeath et al., 2009); and, leadership work in the context of national and state-level policy reforms (OECD, 2008; Roach, Smith, & Boutin, 2011) within accountability systems (Møller, 2009; Perry & McWilliam, 2009). Importantly, many of these studies explore leadership practice and policy in geographical isolation without the explicit application of comparative international perspectives. As a result, the work of digesting and interpreting findings and striving to contrast and compare leadership work and experience across different jurisdictions is left to the readers and users of the research.

Issues in Comparative General Management and Educational Leadership Research
Scholarly and policy interest in the importance and power of comparative and international research continues to gain momentum in general management and leadership literature (Dickson, 2003; Dickson, Aditya, & Chhokar, 2000; House, Javidan, Hanges, & Dorfman, 2002; Kwantes & Boglarsky, 2007; Pillai, Scandura, & Williams, 2013; Scandura & Dorfman, 2004; Tung, 2008; Tsui, 2004; Vaara, Sarala, Stahl, & Björkman, 2012; Van Emmerik, Euwema, & Wendt, 2008). However, the comparative educational leadership literature (Johnson, Møller, Jacobson, & Wong, 2008; Walker & Dimmock, 2000) remains sparsely populated, with relatively few studies focusing on training and development (Brundrett, 2001; Brundrett, Fitzgerald, & Sommefeldt, 2006; Bush & Jackson, 2002; Thody, Papanaoum, Johansson, & Pashiaridis 2007). There are also only a few studies that deal with successful principals in various contexts (Bolman

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[2] PISA is an international study that was launched by the OECD in 1997. It evaluates education systems worldwide every three years by assessing 15-year-olds' competencies in reading, mathematics and science. To date, over 70 countries and economies have participated in PISA. (Source: http://www.oecd.org/pisa/aboutpisa/. Accessed 13 September 2013).
[3] The Progress in International Reading Grade Literacy Study (PIRLS) has been testing reading comprehension in Grade 4 since 2001 in five-year intervals. (Source: http://timss.bc.edu/home/pdf/TP_About.pdf. Accessed 15 September 2013).

& Deal, 1992; Johnson et al., 2008 Ylimaki, Jacobson, & Drysdale, 2007). While these studies demonstrate the merit of comparison in support of theoretical and methodological development, there remain calls for the development of more rigorous and systematic strategies for gathering comparative leadership research.

The merit of comparative leadership research is clearly articulated within both educational and general management/leadership research communities. As these discussions have informed our own multi-jurisdiction research and underpin the rationale for this paper, we summarize emerging and important themes from the comparative management research. First, Ardichvili and Kuchinke (2002) echo wider sentiments that "comparative, cross-national research is needed to keep pace with the rapidly developing international and multi-cultural organizational environments (for example, Hansen & Brooks, 1994; Peterson, 1997)" (p. 100). Similarly, Tsui (2007) reinforces the need for "creating the much needed global management knowledge" (p. 1353) and reiterates how international comparative research serves the important promise of developing a more robust contextual understanding of management phenomena.

Second, the "homogenizing tendency" (March, 2005) is present in leadership research that prioritizes and celebrates North American, and particularly American-focused, leadership models (Dimmock & Walker, 1998a; Tsui, 2007; Walker & Dimmock, 2000; Walumbwa, Avolio, Gardner, Wernsing, & Peterson, 2008). This concentrated focus creates tensions and challenges for policy, practice and research resulting in leadership knowledge and models that may not reflect "different cultural, national and geographical realities of the education system" (Dimmock & Walker, 1998b, p. 385).

Third, within the leadership and management research community there is concern related to an overarching lack of big and novel ideas (Tsui, 2007) and a narrowing of research topics under investigation. This can lead to the recycling of "well-accepted constructs, theories, and methods and further analysis of well-analysed research issues" (Tsui, 2007, p. 1356).

Fourth, within the comparative education research community there have been calls to redress the methodological and content-based insularity of many educational research studies. Bray and Thomas (1995) and Walker and Dimmock (2000) have proposed that comparative and international research strategies should create opportunities away from introspection towards more cross-pollination of ideas and methods. Finally, there has been a well-articulated need for more robust and explicit discussions of the methods, tools and processes of international comparative research (Bray, 1999; Easterby-Smith & Malina, 1999; Fitzpatrick et al., 2009; Teagarden et al., 1995; Walker & Dimmock, 2000).

This Paper
Nested within these calls for increasingly innovative, rigorous and deeply contextualized (Tsui, 2007) comparative studies, this paper addresses three of the aforementioned themes in current international and comparative research discussions. We include the need for new and big leadership research ideas (Tsui, 2007); multi-national and multi-level studies (Bray & Thomas, 1995; Pettigrew, Woodman, & Cameron, 2001); and opportunities to deconstruct and examine the processes and methods of international comparative research (Dimmock & Walker, 2000).

This paper draws on our own comparative study of a new educational leadership topic to address the call for more explicit discussions of the pragmatics, opportunities and challenges of conducting multi-level, multi-jurisdictional educational leadership research. Our Global City Leaders (GCL) project examines the experience, aspirations and leadership of Generation X (GenX – under-40-year-old) school principals and vice-principals leaders working in three

Global Cities: London, New York City and Toronto. In the paper, we borrow from Teagarden and colleagues' (1995) framework of international comparative management research to organize the presentation of and reflection on our own comparative research.

Teagarden et al. (1995) set out four essential stages for comparative international studies: forming research consortia; generating design; data collection; and analysis. In this paper, we focus on the first two elements of the framework to explore our use of advisory groups (AGs) in building local connections and knowledge of our multi-strand policy and practice-led research design in developing a deep contextual understanding of school leader work in each city. More specifically, we highlight our processes for 1) mapping educational policy trajectories that have affected educational leaders over the last decade; 2) analysing leadership certifications, requirements and hiring practices; and 3) examining the roles, responsibilities and accountabilities of school leaders within and across each city.

To contextualize the overall research study and the paper, we provide a brief summary of our interest in generational theory, Generation X and Global Cities. In turn, an overview of our GCL project precedes a more detailed discussion of Teagarden's framework. In the proceeding sections, we present our GCL project approach to building and working with AGs and designing comparative international research. We reflect on our experience and provide recommendations for those interested in developing and refining their own comparative educational leadership research strategies. In conclusion, we consider the complexity of the challenges and opportunities associated with international comparative research and articulate our interpretation of the analytic power resulting from nesting the study in an international and multi-level national/state/provincial education policy and practice context. Via these discussions, we hope to contribute to the ongoing development of comparative educational leadership literature through our study's unique and timely multi-level and multi-national approach to the study of a new cohort of leaders.

Generational Theory and our Focus on Generation X
Generations are traditionally defined by temporal boundaries (Edmunds & Turner, 2005) or shared social experiences (Pilcher, 1994). In turn, generations have been assigned specific monikers that are used in both academic and popular discussions. At the moment, in most schools, there are three generations working within the ranks of leaders and teachers: baby boomers (born between 1946 and 1965), GenX (born between 1966 and 1980), and Generation Y (born between 1981 and 2003).

Our recent review of the empirical research exploring generational differences in the workplace (Edge, 2013) outlines the tensions and gaps within the research and the definitions and details of the different generational groups. It also identifies ways in which generational members may approach work. These include motivation; the work ethic; trust and relationships; the importance of social interaction; the need for autonomy; work hours and work/life balance; and issues related to work conditions, salary and status. While we do not examine these in detail in this paper, the aforementioned categories demonstrate variations in how different generations approach their work and careers.

School leaders approaching and taking retirement are almost exclusively from the baby boom generation. In cities, where the age of school leaders appears to be getting lower, new entrants to the post are mostly members of GenX, who grew up in the 1970s and 80s. They are often described as self-sufficient and fiercely independent (Berl, 2006); resistant to authority; network-savvy; comfortable with diversity; collaboration-driven; hungry for work/life balance;

and globally minded (Zemke, Raines, & Filipczak, 2000). These characteristics juxtapose GenX members against baby boomers, who are described as prioritizing work over family; desiring team-based work; and wanting title-based recognition (Zemke et al., 2000). This truncated summary of differences between the generations serves to highlight the potential differences in how the new generation of school leaders may approach the task of leading schools and constructing their careers.

Global Cities

Sassen (1991) coined the term Global Cities to reflect the growing international relevance of certain cities in an increasingly globalized infrastructure. Subsequently, *Foreign Affairs* magazine has produced an annual ranking of Global Cities in several categories including economics, entertainment and infrastructure. Often, as sites of innovation and influence, cities and their public policies develop strategies for coping with challenges and develop opportunities that take hold in jurisdictions far beyond their own. While there has yet to be a global ranking of educationally important cities, there are undoubtedly cities that have made their mark on the global educational landscape.

In 2009, during our funding application process, we personally noted the emergence of a younger generation of principals and vice-principals leading schools in each city. In conjunction with the abovementioned factors, we selected three of the top ten Global Cities (*Foreign Policy*, 2009) as sites of our exploration of the emerging generation of school leaders: London, New York and Toronto.

Each city was English-speaking, the largest city in its country and recognized for its diverse population. The education system of each was nested within a unique educational governance and policy arrangements which created very different structures and supports for the identification, certification, recruitment, training and retention of school leaders in London (Armstrong, Edge, Descours, & Batlle, 2013a), New York (Mejias, Edge, Armstrong, & Batlle, 2013) and Toronto (Edge, Armstrong, & Batlle, 2013). Similarly, the day-to-day role of school leaders and the accountability mechanisms in place to monitor this role were also radically different in each city (Armstrong, Edge, Descours & Batlle, 2013b).

While there have been changes in the rankings since the inception of the study, all three cities remain nodes of interest and influence on the global educational stage. As such, the cities offer a unique opportunity for observing the beginning of a new and emerging educational trend. While we acknowledge that these three cities do not represent all Global Cities or urban jurisdictions, as we are embarking on a new area of educational research, we are simply attempting to create a multi-layered, multi-jurisdictional first look at a new generation of leaders.

Our Global City Leaders Project

In 2008, we began to notice an upswing in the number of younger school leaders taking the helm in state-funded elementary and secondary schools in London. As most of these new leaders were under 40 years of age, they represented a new leadership generation in the education system: GenX. Our own, rather serendipitous, research and consulting work enabled us to spot similar patterns in other large urban centres, namely New York City (USA) and Toronto (Canada).

Based on our knowledge of generational theory (Edmunds & Turner, 2005; Manheim, 1952; Pilcher, 1994), it occurred to us that this new generation of leaders might have a different approach to leadership and different career expectations and aspirations for their lives to leaders of previous generations. More importantly, we noted that almost all of the leadership research

and evidence on which policy and practice are predicated has been based on successful experienced leaders – whom we assume fall almost exclusively into the baby boomer category. This led us to ask what we believed was an important question: what if the current educational leadership evidence base was derived primarily from the examination of the knowledge, skills, attitudes and outcomes of baby boomer leaders? If so, we wondered, would the empirical evidence-base that so often shapes recruitment, development and retention strategies accurately reflect the practice, needs and aspirations of this new generation? Or, similarly, would GenX leaders have a different set of priorities related to their careers, work lives and aspirations that could challenge current policy and practice on school improvement and student outcomes? These questions inspired our current study.

As these young leaders are, for the most part, just embarking on their leadership journeys, their early experiences will be central to their individual and collective future career decisions. As they represent a new generation of leaders, as per the generational literature, they may have a unique approach or set of expectations about their leadership careers which may have knock-on influences for policy and practice leaders working to recruit, develop and retain them.

From the outset, we knew that we needed to explore the influence of this shifting generational pattern of leaders from a small but globally relevant international and comparative frame of reference as explorations conducted "across a variety of cultural and national contexts would greatly enrich the current research base in educational leadership" (Johnson et al., 2008 p. 419). Similarly, we wanted to create a very specific jurisdictional comparison between cities and locate our comparison and analysis within national, state/province and city contexts to reflect concerns expressed by Bray and Thomas (1995), who believe such broad comparisons "yield incomplete and unbalanced perspectives". Therefore, our GCL study, funded by the Economic and Social Research Council (ESRC) in the UK, addresses a gap in the academic and policy knowledge about GenX school leaders in three global cities from a multi-national/city, multi-strand and multi-layer perspective.

Over the three years of the study, we will be conducting individual annual interviews with cohorts of 20–30 young leaders in each city to explore careers, professional identity, work/life balance, future aspirations, school improvement and talent-spotting. However, in order to understand the overall landscape within which our participating GenX leaders work and live, we first needed to create strategies to gain access to the participants and knowledge about the respective jurisdictions. To accomplish this goal, we set out to develop robust advisory groups and policy and practice context studies to be better able to apply comparative analyses on the overall datasets. We detail our preliminary approach to this task in the remainder of the paper.

The following four questions frame our study: (1) How have the young leaders' careers developed and what emerging patterns can be identified? (2) What opportunities and challenges do young leaders face in leading their schools? (3) What are young leaders' own perceptions of intersections between their age, experience, gender, ethnicity and nationality and their school leadership work? (4) How are young leaders leading their schools? The annual individual interviews have explored the first three research questions. School-level studies which include interviews with young leaders, administrators and up to eight teachers are providing the evidence for final question.

The interviews and school studies provide a lens through which we can view a small sample of young leaders in each city and preliminary evidence upon which we may explore emerging patterns and generate future research questions. However, to truly be able to

understand the actual experiences of our participants, we needed to develop a more robust understanding of the political, policy and practice landscape within which school leaders work.

While we had a working knowledge of and experience in each of the three cities, we were not insiders in the policy and practice communities. Further, the parameters of our funding did not allow us to hire research partners in each jurisdiction. Faced with these challenges, we focused our energies on two key strategies to develop the relational and contextual framework that would support our data collection and analysis. Adhering to the first two elements of Teagarden's (1995) framework, we concentrated on building local connections and support via AGs. We then focused our attention on the design stages of the project to ensure that we would be able to adequately capture the local policy and practice landscape in support of understanding the factors and conditions influencing young leaders' work and careers.

Teagarden's Framework as an Organizer
In 1995, Teagarden and colleagues published an insightful article proffering a theoretical conceptualization of comparative management research based on their reflections on their ongoing study of best human resources practice across a wide range of countries. The authors began their article with a bold and quite accurate statement: "cross-cultural research is not for the fainthearted" (p. 1262) and highlighted the oft identified challenges with multi-jurisdictional management research including "complexity, cost, time commitment, and methodological challenges" (p. 1262). Teagarden et al. also refer to Alder's (1984) work that outlined key challenges to cross-cultural management research. These include identifying whether observed phenomena are specific to a particular culture or universal; addressing researcher cultural bias; and the interpretative challenges between culture and research foci. Teagarden and colleagues set out to address the gap in explicit discussion of the content issues related to international cross-cultural research.

Teagarden and colleagues continue to problematize the need for research teams with members from multinational, multicultural and interdisciplinary backgrounds to reinforce earlier research (Roberts & Boyacigiller, 1984) and address the issue that an individual is unlikely, if unable, to be an insider in multiple jurisdictions (Alder, 1984). Teagarden and colleagues' (1995) reflections extend beyond the simple structures to the process-oriented and pragmatic nature of the process of building research teams: identifying potential research collaborators; creating the motivation to engage; and developing "an extraordinarily amount of personal, intellectual and research skill" (p. 1264 in reference to Goodman, 1985). Teagarden and colleagues expand on Cummings' (1984) stages of comparative management research and outline four specific stages of the development of cross cultural management research including: "1) forming the consortium; 2) generating the research questions and constructing the survey; 3) doing the research; and 4) making sense of the findings" (p. 1269). The strength of Teagarden's reflections on the framework rests on the inclusion of both relational and content issues. For this paper, we focus on our Generation X Global City Leaders project and highlight our own strategies, reflections and lessons from our three-city study.

Comparative Research: Striving for Deep Contextual Connections and Knowledge
Teagarden and colleagues explore both multicultural and collaborative elements of this research, but as we do not have research colleagues in each city, we consider only the cross-cultural

elements of the model. We strongly believe in working with local scholars and stakeholders to enhance the development of both local and wider knowledge about school leadership. With this in mind, we set out to establish city-based AGs to inform, inspire and reflect on the research design and findings both within their own cities and across our research sites. Similarly, reflecting Easterby-Smith and Malina's (1999) discussion of the role of local collaborators' abilities in "harnessing networks" (p. 77), we acknowledge the intensified importance of relationships within the context of comparative management research.

We organize and frame our reflections on our GCL project strategies and methods using two phases of the Teagarden et al. (1995) model of international comparative management research: forming research consortia and generating design. As we are still in the data collection and analysis phases of our study, we leave these reflections for a later time. Within each strand of the Teagarden et al. (1995) model, we highlight the core elements of our own actions and strategies to work across cities, countries and an ocean to support the best possible research design and outcomes.

Teagarden Stage 1: Forming Research Consortia or Building Advisory Groups
Teagarden and colleagues (1995) established local research consortia across their research sites to collaboratively gather, analyze and contextualize the locally observed practices. While their research collaborations marked a more formal approach to securing local support and contextual knowledge, phase one of their framework, "forming research consortium", proffers a helpful organizer to frame the rationale, membership and strategy for our city-based AGs.

As our GCL project did not have the budgetary support for local research colleagues, we were intent on ensuring that we developed within-city connections to address the need for a deep knowledge of the context of the experience and aspiration of our participating young leaders. To achieve this goal, we needed to establish a network of policy and practice contacts. We also wanted to ensure that our research reflected local contexts, examined emerging issues, and generated evidence that was theoretically important and also relevant for the local policy and practice work of leaders in each city. Our solution was to recruit and establish Advisory Groups in each city consisting of policy and practice leaders with responsibility for school leadership recruitment, development, retention and advocacy as well as academics and practitioners with an interest in or responsibility for cognate areas of work.

Our GCL experience with AGs may offer three contributions to the discussion of comparative educational leadership research methods. We present our reflections on: 1) the rationale for AGs; 2) the identification and recruitment of AG members; and 3) AG working practices. As the project is still in progress, these reflections are also in process. The information and discussion presented here and throughout the paper, are based on our collective reflections of our progress and practice in the GCL project to date.

Rationale for AGs
To expand the depth and reach of the research we aimed to invite up to 10 high-level policy and practice leaders and academics to join each city's AG. Each AG would meet annually and were designed to serve a three-fold function. First, AG members would provide vital insight into current local leadership policy and practice. Second, AG members would inform research design and co-interpret and contextualize findings. Third, AG members would support the research team in disseminating the findings.

Identification and recruitment of AG Members

In support of AG member recruitment, we had confirmed pre-proposal support from several leading organizations and leaders in each city. Once we had received the grant funding, we conducted a web-based desk review of publically available information on individuals and organizations engaged in the recruitment, development and support of school leaders in each city. In each city, we prioritized the list of possible AG members representing a range of governmental and non-governmental organizations, university academics and practice leaders with a vested interest in the current and future leadership of schools.

We extended initial invitations to our shortlist of potential members by personal phone calls and emails to discuss the overall project, our belief in the project's policy and practice implications and the possibility of AG membership. We were surprised that every individual and/or organisation we personally contacted agreed to join the Advisory Group. Our primary struggle to recruit members occurred in New York City where members of the research team did not have close personal ties at the start of the study. At the end of our second year, recruitment occurred primarily through professional networking opportunities assisted by the original AG members but also via our own work with educational leadership stakeholders. Consequently, there are currently 18 AG members in London, 11 in New York City and 17 in Toronto. During the second year of the project, we have also sought to increase the number of current and former young leader AG representatives.

AG meetings and engagement

Influenced by our desire to ensure an even playing field amongst our participants and ensure that little preparation was required for the meeting, we hosted our first AG meetings in each city during the second term of the first year of the project. At each meeting, we worked with AG members to develop the agenda for the meeting. We also asked attendees to work in pairs to answer two questions: 1) What questions do you hope this research will answer? 2) What are your personal/organizational aspirations for the research and your participation on the AG? After a five-minute discussion period, each pair introduced themselves to the group and shared their feedback, which was noted on flipcharts around the room. Based on the feedback, we co-developed the agenda for the meeting and discussed the shared questions and aspirations.

At the first AG meetings, we discussed the rationale and intended process of the research as well as the possibilities for AG members to engage in the research in the context of our own academic responsibilities to the funder and our participants. At each meeting, to protect the interests and participation of all members, each individual signed a consent form acknowledging their need to maintain confidentiality of items shared within the meeting and also their agreement to have the meeting audiotaped. All meetings have been recorded and notes from each have been used to generate a short summary document, which is shared with AG members and used to support the ongoing development of the project and to ensure that we are reflecting the experience and needs of the represented stakeholders. In the second year of the project, upon completion of the preliminary analysis of young leader interviews, AG members have had the opportunity to explore the initial analysis of emerging trends within and between cities and identify points of agreement and divergence from their own experience and understanding.

AG members have also provided our research team with valuable insights about and access to the leadership context and networks in each city. By forwarding our recruitment email to their own organizational members and personal/professional contacts, AG members assisted in the recruitment of our young leader participants. Via discussions at meetings AGs have

contributed to research design, assisted with the interpretation of findings and provided feedback on our website design and outreach activities. Members have also actively provided feedback on the format of AG meetings. We have also held subsequent annual and unscheduled interim meetings in each city as well as individual meetings as requested by AG members to discuss emerging findings and/or issues.

Reflections on AGs as a strategy for building local ties and connections
During the first two years of our research project, we have experienced several key points of reflection related to the role and practice of our Advisory Groups that have assisted us in refining our practice and perhaps some deeper insight into international comparative research design. First, AG membership recruitment has relied heavily on professional and personal networks previously established by the research team. Even connections, once removed, proved helpful. This echoes Easterby-Smith and Malina's (1999) reflections related to the powerful role that local professionals can play as gatekeepers to both participants and local knowledge. Second, as the research explores relatively new terrain with a high degree of policy/practice relevance, the topic of the study has provided a compelling reason for Ag members to collaborate on the study. To build on the potential of our AG member collaborations, we have actively engaged in discussions both individually and collectively related to how best to engage with and share findings within participating organizations and beyond.

Third, AG members have been exceptionally helpful in assisting us in sharing our recruitment information for participants. In short, the AG members have been active gatekeepers in some cases and their collaboration has served a valuable if not essential role in recruiting participants. Fourth, we have experienced some concern about confidentiality for AG members and their confidence in sharing their own views and potentially those of their organizations. To protect individual AG members and support their participation, all members are asked to sign a confidentiality form and meetings, with agreement of all members, are audiotaped. Fifth, while we have attempted to maintain consistency in the overall membership profiles in each city, this has not been possible as the differing governance and structural contexts in each jurisdiction require different representation. This has also been true in relation to the expertise and contributions of the academic members in each city, where individuals have been called upon for both their city-based and content-specific expertise across the entire project.

Finally, given the busy nature of our AG members and the pressure-filled context in which they work, we often struggle to find times when all members can come together. In the third and final year of the study, we will be experimenting with alternative methods to engage AG members in addition to our traditional annual meeting. These will include: optional online conference meetings; opportunities to engage with data and evidence analysis, presentation, and writing; and one-to-one visits to discuss emerging findings and their application within their organizations.

Advisory Groups have made a viable and important contribution to our study. AGs have served to mediate the challenges of not being able to have local research colleagues and have truly created, in most cases, new networks of colleagues and relationships within and beyond the research.

Teagarden Stage 2: Generating the Research Design
Teagarden and colleagues' (1995) second stage of comparative management framework refers to the general process of research design involving, in their particular study, "generating research

questions and constructing the survey" (p. 1275). To frame our own reflections on our own research design process, we have adopted the abovementioned term, "generating the research design". We seek to examine how our own design efforts have attempted to highlight the deeper "political, social and professional contexts" (Bush & Jackson, 2002, p. 425) within which the GenX leaders in our cities of interest are working. In short, we agree wholeheartedly with Tsui (2007), who suggests that "taking the context seriously, either within a single nation or across multiple nations, is simply practicing good science" (p. 1358).

There have been consistent calls within the educational leadership research community and beyond for a "more robust conceptual, methodological and analytical approach to comparative and international educational management" (Dimmock & Walker, 2000, p. 144). We contribute to the discussion related to comparative educational leadership research design by focusing on our rationale and process for establishing a contextually robust examination of each city's policy and practice landscape. More specifically, we were inspired by Tsui's (2007) suggestion that "deep contextualization is necessary for both theory development and for the meaningful application of existing theory to novel contexts" (p. 1357).

Our design also reflects additional calls (Bray & Thomas, 1995; Dimmock & Walker, 1998a) for studies that move from single-level, often national-level studies which often provide "unbalanced and incomplete perspectives" (Bray & Thomas, 1995, p. 472) toward more complex multi-level studies of educational leadership. We agree and believe that the explanatory function of studies that are geographically and systematically located in their own wider local, state/provincial and national context will have greater analytical power and influence. To develop a rich contextual understanding of the educational and leadership context in each city, we have spent considerable time and energy designing a multi-strand, multi-level strategy for gathering and analysing policy and programme evidence in each jurisdiction.

The work to build the contextual scaffolding for our research has occurred in four distinct but highly related phases. Phase 1 involved gathering and systematically analysing content and patterns within leadership-related policy documents with an eye to creating 15-year education and leadership-related policy trajectories in London (Armstrong, Edge, Descours, & Batlle, 2013b), New York City (Mejias, Edge, Armstrong, & Batlle, 2013) and Toronto (Edge, Armstrong, & Batlle, 2013). In Phase 2, we designed and implemented the strategy for analysing the content, aims, funding and outcomes of national/local leadership certification programmes including fast-track leadership development programmes and a more thorough and systematic review of the content of each of the certification programmes for leaders in each jurisdiction (Armstrong, Edge, Descours, & Batlle, 2013a). Phase 3 involved reviewing policy and accountability documents from each city to establish a picture of the current school leader roles and responsibilities (Armstrong, Edge, Descours, & Batlle, 2013a). Phase 4, designed to validate and inform our contextual knowledge of each city, engaged between 10 and 15 key policy/programme leaders per city in 60-minute semi-structured individual interviews either in person or via Skype.

While the process-related strands of work are detailed in the reports referenced above, we believe the most important contribution to the discussion of comparative methods rests in the multi-strand and multi-level approach to developing a rich contextual understanding of each jurisdiction. To highlight the detailed approach taken within our research, we provide a snapshot of our work from Phase 2, leadership certification pathways and programmes, followed by our reflections on the creating of contextually rich scaffolding for comparative research.

Leadership development and certification programme city-based profiles
Our initial aim was to define the leadership certification programme landscape in each city by identifying the process of becoming a certified school leader in London, New York and Toronto. We were specifically interested in the qualifications, professional experience, training and mandatory certification requirements. Having identified the statutory, or standard, leadership accreditation programme for school leaders in each city, we reviewed the websites of the primary organizations responsible for designing, administering and operating the required certification programmes. As this represented our preliminary analysis, we focused exclusively on publically available content. Partnership organizations involved in the administration and delivery of these leadership programmes were also consulted to identify any additional public documentation related to the certification programme and process.

Our overall approach to analysing the evidence focused on four key areas of each certification programme, using them as a guide to develop a picture of the programmes in each city: content; format; structure; and funding. Our intent was to identify, gather and review certification programme curricula, course prospectuses, and leadership frameworks guiding the programme structure and content. We also sought material related to other relevant information including partnership organizations, costs to applicants and frequently asked questions. After creating vignettes of each programme based on the above criteria, we examined key similarities and differences between the certification requirements according to the following categories: mandatory requirements for school leadership positions; candidate pre-requisites to begin the qualification process; research-informed content; programme content, structure, process, provider(s) and cost(s); and renewal-of-qualification requirements. Finally, within our reporting on this strand of evidence collection and analysis, we discuss the major points of convergence and divergence between the leadership certification programme in each city.

Reflections on research design to build contextual scaffolding
We acknowledge the importance of developing deep contextual knowledge about each site in a comparative educational leadership study. This is especially important in our study of GenX leaders in three different cities as the contexts within which they work, the certification they are required to obtain and their day-to-day responsibilities vary so widely. These contextual conditions have a significant influence on how leaders consider, enact and aspire to leadership positions. As we are considering a generational cohort of leaders, ensuring our robust and accurate understanding of the context became even more important. However, the process within and across the strands was not without complication or challenge.

For example, the need for comparative studies is articulated from different viewpoints including the current diversity of national/state level design of leadership programmes as set out by Bush and Jackson (2002) that "despite globalization, the striking feature is that nations and states have developed very different models to address their common need for high quality leadership in schools" (p. 425). Our own process of collecting and analysing information on leadership certification programmes has facilitated the development of a preliminary knowledge base of the certification process in each city. However, a number of challenges were encountered during the data gathering process. For example, it proved difficult to locate detailed information regarding the specifics of the course content for the leadership programme in London, compared with New York and Toronto where this information was more freely available. As such, comparing such a wealth of information from two cities with a relative paucity from the third proved to be a challenge. Furthermore, the complexity of the route to school leadership in New

York proved challenging due to the wide range of different stakeholders and organizations involved in the identification, training and certification of school leaders. This made information-gathering more complex compared to in London and Toronto where, despite having a range of providers offering their school leadership-training programmes, the overall certification process appears to be more clear-cut. While these issues have created challenges, in the end they all provide interesting insights into the public nature of school leaders, the level of accountability within which leaders work and the multiple layers of beyond-school organization involved in the development, certification and support of school leaders.

Conclusions

Our multi-city, multi-layer examination of the work, lives and aspirations of GenX school leaders presents a timely and important contribution to both domestic and international educational leadership research. Beyond theory generation, the recognition and understanding of contextual influence is important as "policy-makers and practitioners are increasingly adopting policy blueprints, management structures, leadership practices and professional development programmes fashioned in different cultural settings while giving little consideration to their cultural fit" (Dimmock & Walker, 2000, p. 147). We hope that the different strands of our overall research programme provide a rich contextual picture of the landscapes within which this new generation of young leaders work. Our own research design efforts and reflections confirm, in the context of our research and beyond, that multi-strand efforts to develop a rich contextual understanding of the city-based leadership experiences are important in order "to understand why some leadership practices appear to be workable in some contexts but not others" (Dimmock & Walker, 2000, p. 147).

As policymakers and academics continue to explore comparative educational leadership, there is merit in breaking down the processes and approaches associated with comparative leadership research. Teagarden et al. (1995) offer a useful organizer to begin to deconstruct particular approaches to addressing collective calls for rigorous and explicit approaches to gathering and interpreting evidence across different jurisdictions.

Similarly, within our research, even within the gathering of policy and certification-related documents and information, we agree wholly with Easterby-Smith and Malina (1999) about "the importance of managing relationships within cross-cultural research teams and the need to adapt methods for different national and cultural circumstances in ways that cannot be predicted in advance" (p.77). There has been ongoing value generated by our efforts to create and collaborate with AGs to build local connections, establish gatekeepers as allies and facilitate local reflection on international evidence. We strongly believe in working with local scholars and stakeholders to enhance the development of both local and deep knowledge about school leadership. Easterby-Smith and Malina (1999) discuss the merit of local collaborators and describe the process "harnessing networks" (p. 77). This is potentially a very viable option for international comparative leadership research and will be explored more fully as we continue our project.

As the project, and our reflections and learning from our own comparative educational leadership research evolve, we are aware that we need to consider additional issues related to deepening our understanding and reflection on the contexts within which we are working as "national cultures or other national contexts are by definition cross-level" Tsui (2007, p. 1358). The influence of national culture and organization or system-level culture as well as individual

approaches to leadership will be disentangled as we proceed with our research and remains a viable and relatively unexplored area of research.

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