

12 *Transformative leadership in resource-constrained schools in South Africa*

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Overview

Many students attending resource-scarce schools follow an almost predetermined pathway in which their lower socioeconomic status becomes intergenerationally entrenched due to poor achievement outcomes. This chapter argues that transformative leadership in disadvantaged schools can create transformative schools. School principals are the facilitators of learning, and must articulate a transformative vision to the school, and inspire teachers, parents, and students to achieve shared goals. In producing higher student outcomes than expected, these schools and their leadership are playing a transformative role in South African society. Using information from transformative resource-scarce schools that are performing above the national average, responses of primary school principals, teachers, and students are used to identify transformative leadership practices and outcomes. Transformative leadership in educational contexts is not abstract, nor is it a system of practice that requires a Herculean effort, but it can be attained by specific transformative leadership practices with achievable outcomes.

Introduction

The most prominent characteristic of the South African basic education system is the generally low quality of education that is delivered (Reddy et al., 2020). This is driven, in part, by the performance of poorer students in fee-free schools (called 'no-fee schools') that have consistently performed significantly worse than their fee-paying counterparts (Reddy et al., 2020). There are, however, some schools that, despite their resource-scarce contexts, produce good academic outcomes for students. In this chapter, the authors examine whether transformative leadership practices by principals are related to these better achievement outcomes.

The context for school leadership in South Africa has been strongly shaped by the promulgation of innovative legislation and policy, as well as by the shifting responsibilities required of school principals and school management, and the changing demography of students and teachers since 1994 (Bush & Heystek, 2006). Two major development needs that were identified were, first, the dismantling of Apartheid structures and widening of school governance and, second, the development of school leaders to enhance the quality of school management and improve educational outcomes (Bush & Heystek, 2006).

The traditional leadership approach of the principal has had to shift amidst the significant changes associated with education reforms, which require new and creative ways of thinking about the approaches used in educational leadership (Botha, 2018).

Despite policy reforms, South Africa continues to be characterised by a bifurcated education system where two distinct schooling systems exist. South African schools are categorised into socioeconomic groups based on schools' resources and the socioeconomic status of the area surrounding the schools. Schools in disadvantaged communities that are more resource constrained, and therefore allocated a higher state subsidy, are categorised as no-fee schools. Fee-paying schools are those that are situated in more affluent areas with greater access to resources, and therefore do not require the same level of state subsidisation. Generally, students from poorer backgrounds attend no-fee schools, while fee-paying schools are attended by students from more affluent backgrounds. Thus, there remain two distinct education systems with poor-quality, poor-performing schools on the one hand and high-quality, high-performing schools on the other (Soudien, Juan, Harvey, Zulu, & Hannan, 2017). Many of the disadvantaged no-fee schools are operating in contexts of multiple deprivation where they lack adequate resources and infrastructure, and face teacher shortages or have unqualified and under-qualified staff. In addition, they often operate in contexts with inadequate resources, poor service delivery, and limited access to social services – these compounded adverse conditions negatively impact on such schools' effectiveness. How can conditions in these schools be addressed so that their students' well-being and achievements improve despite the context?

Although a focus on achievement is important, there is also a need to promote changes in no-fee schools for the benefit of student well-being. If there is a focus on promoting characteristics of transformative leadership in disadvantaged schools, transformative schools can be created. Many students attending no-fee schools are set to follow an almost predetermined pathway through life in which their lower socioeconomic status becomes intergenerationally entrenched, but by promoting transformative leadership, through which schools and students are transformed, their well-being and opportunities for the future can be improved. Shields (2010, p. 558) argues that 'transformative leadership takes seriously Freire's contention that education is not the ultimate lever for social transformation, but without it, transformation cannot occur'. In Freire's (1998) now-famous article, conscientisation, developed through education, becomes the starting point for change.

The primary purpose of this chapter is to argue for the development of transformative leaders in no-fee schools in South Africa – schools which function in oppressive historical, social, and resource-constrained contexts. Transformative leadership is crucial if schools are to be successful in providing

good learning opportunities for students. The first part of this chapter presents a theory of transformative leadership and focuses on how the articulation of a common vision is operationalised. In the second part of the chapter, quantitative and qualitative data are used to identify specific transformative leadership practices and outcomes that are unique to transformative schools in South Africa.

Transformation through the articulation of a common vision

In Chapter 1, Swartz set up the key attributes of transformative leadership based on the work of Shields (2010). The processes of transformative leadership are concerned with a vision, influence, goals, being people-centred, and collaboration (Table 1.1 of Chapter 1). Drawing from this, the authors of this chapter argue that one core characteristic of transformative leadership in education is the ability to motivate others to work towards a particular vision and goal. The literature on leadership highlights that the development of a transformative vision is an important aspect of transformative leadership. This characteristic is further unpacked throughout this chapter. According to Van Oord (2013, p. 419), transformative leadership is a critical and collaborative process ‘in which school-based action research and situational knowledge creation contribute significantly to organizational decision-making’.

Within the school context, one can examine the practices employed by principals in developing a vision (Kose, 2011). The potential exists for principals to promote a transformative vision that can be leveraged for transformative hiring, curriculum development, professional learning, and school improvement (Kose, 2011). This future vision, which shows what is possible within the school and community, solidifies personal connections, forges an identity between an organisation and its members, and inspires personal commitment. It is this ability to inspire and create connections with others, and to articulate a compelling future vision, that allows effective leaders to aim for the betterment of society (Caldwell et al., 2012; Shields & Hesbol, 2020). A vision or mission that is collectively developed and shared by all school stakeholders is characteristic of effective schools (Glickman, Gordon, & Ross-Gordon, 2007), directs positive school change, helps foster inclusive and equitable schools (Kose, 2011; Scheurich & Skrla, 2003), and ideally guides quality professional development (Tallerico, 2005). The shared vision should therefore inform and guide the nature and trajectory of transformative school improvements (Mafora, 2013).

Transformative leadership ‘emphasises the need for educational organizations to articulate and attain purposes related to equity and *excellence*, public and private good, and *individual and collective advancement*’ (Shields, 2011, p. 6, emphasis added). From Shields’s description, two core characteristics of this vision emerge: the transformative vision must focus on excellence and must

be collaborative. The simplest way to measure transformation is through higher-than-expected student performance, which this chapter does measure. Apart from these academic outcomes, other non-cognitive and transformative leadership outcomes are also explored.

Methodology

To explore this form of leadership empirically, the authors used Trends in International Mathematics and Science Study (TIMSS) data collected from 297 South African nationally representative primary schools in 2019. The full sample consisted of 297 school principals, 294 mathematics educators, 11 903 Grade 5 students, and 11 720 parents/caregivers.¹ The study was approved by the Human Sciences Research Council's Research Ethics Committee and authorised and funded by the national Department of Basic Education. Informed consent was obtained from principals, teachers, and parents. Principals consented *in loco parentis* for student participation.

TIMSS collects achievement data, as well as contextual information from students, teachers, and school principals.² The authors extracted data for no-fee schools (a proxy indicator for resource scarcity) and then grouped the schools that scored above and below an average mathematics achievement score of 374 points (the national average). The better-performing schools have sometimes been referred to as resilient, but here it is argued that in producing higher student outcomes than expected, these schools, and their leadership, are playing a transformative role in South African society. Students from these schools will have greater access to further education and labour market opportunities. The authors then looked at the transformative leadership characteristics in each of the school groups.

Nineteen TIMSS items which were thematically linked to three themes – a focus on excellence, collaboration, and transformative outcomes – were extracted from the data. Frequency analysis was used to determine whether there were differences favouring the transformative schools. Next, t-tests were run to determine whether differences were significant at the 90 per cent confidence level. The nine remaining items appear in Table 12.1.

The limitation of using cross-sectional quantitative data to explore such complex phenomena is acknowledged. However, using data from such a large-scale study offers a window through which readers can glimpse the leadership styles of principals, management teams, and teachers in South African no-fee primary schools. Using this data, this chapter then builds conceptually by

¹ Unlike the Grade 9 TIMSS dataset, the inclusion of parent/caregiver data is unique to the Grade 5 dataset.

² For a comprehensive description of the TIMSS methodology, see Reddy et al., 2022.

drawing from smaller studies and theoretical literature on transformative leadership in South African schools.

Table 12.1 TIMSS items that measure transformative leadership characteristics where transformative schools differed significantly from low-performing schools

Transformative leadership characteristic	TIMSS item used to measure characteristic
Focus on excellence	<ul style="list-style-type: none"> • Principals' emphasis on academic success • Students' desire to perform well • Students' positive attitude to learning
Collaborative	<ul style="list-style-type: none"> • Parental involvement in school • Collaboration between school management and teachers • Student sense of belonging
Transformative outcomes	<ul style="list-style-type: none"> • Respect for classmates • Students never bullied • Parent satisfaction with schools

(Source: Authors)

Findings

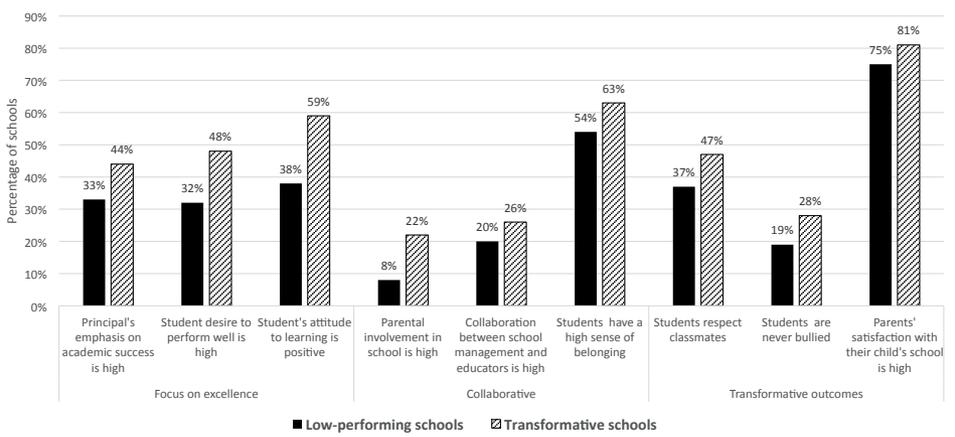
Seventeen per cent of the no-fee schools fell into the 'transformative school' group (scoring above the national average), indicating that there are schools that, despite their oppressive and resource-scarce contexts, are providing students with an above average education. Figure 12.1 sets out the differences in student exposure to transformative leadership practices, characteristics, and outcomes, between low-performing schools and transformative schools.

Each of the aspects identified in Figure 12.1 is not resource dependent, and therefore can be developed in any context. This is critical as they can be encouraged in no-fee schools which exist in resource-constrained environments. In the following sections, we discuss the three themes identified in relation to transformation through the articulation of a common vision: a focus on excellence and academic success, collaboration, and transformative outcomes.

A focus on excellence and academic success

From the reports of mathematics teachers and school principals regarding the emphasis placed on academic success, it is evident that, generally, the better-performing, transformative schools focused more on academic excellence. Significantly more emphasis was placed on academic success by principals, there was greater desire among students to perform well, and there were more positive student attitudes to learning.

Earlier studies found that effective South African principals are involved in the quality assurance of assessments and monitoring the progress of students

Figure 12.1 *Principal, teacher, and student reports of transformative leadership and outcomes*


Source: Authors' calculations based on Human Sciences Research Council, 2020

(Kanjee & Prinsloo, 2005; Taylor & Prinsloo, 2005). Principals therefore play a role in monitoring and addressing identified problems timeously, and in ensuring that teachers are adequately equipped for their roles and responsibilities by providing feedback and guidance so that they can instruct students effectively. Kamper (2008) found that leadership efforts of effective principals in South African schools in poor areas were focused on excellence in the classroom.

In terms of the school and classroom contexts, school leadership requires the principal not only to lead, but to be a supportive role-player and a facilitator of learning (Kamper, 2008; Kanjee & Prinsloo, 2005; Van der Berg & Gustafsson, 2019). In a qualitative study by Botha (2018), one principal from a well-functioning no-fee school stated:

I try to get them to pick a focal point. In the beginning of the year we establish goals and plan how we will reach them. We form committees, sharing and discussing ideas. I let them experiment with their ideas. They need to realize that this is a joint effort, a total quality effort to become a total quality school. Teachers are responsible for all learners. (Principal 'Hilda' in Botha, 2018, p. 10816)

This quote highlights how a clearly expressed and shared vision can provide clear direction to all stakeholders in the school community: educators, students, and parents. However, developing a clear and common focus requires a leader to serve as the medium through which a group's collective aspirations can be shaped and subsequently to provide direction to the relevant groups and individuals (Botha, 2018). Furthermore, the group needs to have shared goals and be clear about how to achieve these goals, in order to pursue a shared vision. The principal must

therefore be able to communicate realistic goals to the school's stakeholders. Finally, a principal must set high and consistent performance standards in order to improve achievement (Botha, 2018).

Students' attitudes towards learning a specific subject convey their emotional evaluation of that subject. Attitudes have a strong impact on behaviour through either facilitating or hindering the learning process. The commitment and motivation to learn a subject can be influenced by whether students enjoy the subject, attach value to it in terms of considering it useful to themselves and society, and by their self-efficacy or self-confidence in their ability to perform well in that subject (Juan, Hannan, and Namome, 2018). In and of itself, promoting positive attitudes towards learning is a desirable outcome; however, positive attitudes are also associated with better student performance. Research has shown that students who enjoy learning mathematics and science, and have higher self-efficacy or confidence in their ability to perform well in these subjects, achieve higher scores (Juan, Hannan, and Namome, 2018; Reddy et al., 2022). The relationship between attitude and achievement is bidirectional, with each mutually reinforcing the other. A transformative leader should encourage positive attitudes towards learning among students, and cultivate their desire to perform well, through working with teachers to implement strategies to achieve this.

Collaboration

The TIMSS results showed that the transformative no-fee schools had greater parental involvement, more collaboration between school management and educators to plan instruction, and a greater sense of belonging to their school among students.

In schools that are able to collaboratively define the core purpose of teaching and learning, and ensure that the entire school community is empowered to become involved, teaching and learning becomes transformative (Botha, 2018). This is a complex undertaking in South Africa, where schools operate in varying socioeconomic conditions, and principals and management teams in these resource-constrained contexts are faced with challenges and tasks that may require different leadership and management approaches. These challenges must be overcome while striving for quality educational outcomes – and this requires transformative leadership. In this transformative role, school leaders are the facilitators of learning. This encompasses how well school leaders can articulate a common transformative vision to everyone involved in the life of the school and inspire teachers, parents, and students to work towards shared goals.

The ability of leaders to inspire a shared vision for the future, create personal relationships, and distribute leadership to build capacity to stimulate positive change is key in transformative leadership. This future vision, that shows what

is possible within the school, within communities, and within stakeholders themselves, solidifies personal connections, forges an identity between an organisation and its members, and inspires personal commitment. It is this ability to inspire and create connections with others, and to articulate a compelling future vision, that allows effective leaders to aim for the betterment of society (Caldwell et al., 2012; Shields & Hesbol, 2020). Transformative leaders must infuse consultation and participation into organisational routines to achieve this (Mafora, 2013), cultivating an environment conducive to collaboration.

A prerequisite is the establishment of mutually respectful relationships with staff, students, and their families, and with the wider community. This should enable school leaders to focus on working with their staff to implement equitable and socially just instructional strategies. Collaboration is crucial in supporting and leading the entire school community to be responsive to the needs of students and provide them with high levels of support (Shields & Hesbol, 2020).

Shields (2010) argues that transformative leaders reject an individualist stance in which the challenges faced by schools are attributed to students and their families in South Africa. Collaboration between school stakeholders is required. Mafora (2013) highlights that transformative leadership with social justice at its core, and its potential to address inequalities, marginalisation, and inadequate material conditions that hinder effective learning and teaching, is highly applicable to both suburban and township schools. This transformative leadership is essential for improving the education system within the South African context.

School effectiveness and improvement depend on more than just who is responsible for decision-making; they depend rather on defining the core purpose of teaching and learning collaboratively and then ensuring that the entire school community is empowered to become involved (Botha, 2018). How well a school principal can articulate a common vision and inspire teachers, parents, students, and community members to work towards shared goals is critical (Hoadley, Christie, & Ward, 2009). A qualitative study by Botha (2018) found that in schools that had achieved this focus, teaching and learning became transformative. Leadership can therefore influence the culture of a school such that it has a transformative impact on all school stakeholders (Botha, 2018). One of the teachers in the study states:

The principal is bringing in new staff; high energy people who are willing to spend time, even their own money, on the schools. People want to do a good job for her. She is always around and available to us; on the school grounds or in the classrooms. She is positive about our teachers and the work we put in. ('Teacher' in Botha, 2018, p. 10817)

The responses from this teacher and other teachers in the study indicate that collaboration was a key factor in the success of these schools (Botha, 2018). They

spoke of how their principal endeavoured to make her school the best it could be and had a clear and unified focus. She developed a common cultural aim for her staff and constantly pushed them to do their best to improve the school. She found a way to collaboratively define the essential purpose of teaching and learning in the school and empowered the entire school community to become involved – she knew what was needed for the school to become successful and the staff embraced her ideas. ‘As a result, teaching and learning became transformative’ (Botha, 2018, p. 10817). The principal of this school showed that leadership has the potential to influence school culture so that it has a transformative impact on the whole school. The motivation and talent to achieve this is required from the principal, as well as from the teachers under the guidance of the principal (Botha, 2018).

Although a strong leader is important, transformative leadership also relies on support from multiple role-players both within the school (educators and students) and beyond (parents). Building relationships and working closely with teachers, students, parents, and communities is critical. Principals can encourage and foster these relationships by facilitating open communication between themselves and their stakeholders. They should also articulate a common vision of success for the school and inspire educators, students, and parents to work towards shared goals. Creating spaces and strategies that allow for the sharing of ideas, and cultivating a culture of collaboration where all stakeholders feel comfortable to provide input and feel heard, is essential. Collaboration may be enhanced through promoting a sense of belonging for all stakeholders.

Transformative outcomes: Creating an environment conducive to teaching and learning

Transformative principals implement equitable, socially just leadership as a means of creating inclusive schools in which all students feel welcomed, respected, and academically challenged (Shields & Hesbol, 2020). Schools should be places where students and teachers feel safe, which enables effective teaching and learning (Winnaar, Arends, & Beku, 2018). It is therefore critical that school leaders create such an environment (or ‘climate’), especially within no-fee schools.

A school’s climate is determined by a multidimensional range of intangible factors, such as the challenges teachers face, disciplinary problems, and the emphasis on academic success, that reflect the overall social atmosphere of the school (Mullis, Martin, Foy, & Arora, 2012; Winnaar et al., 2018). A positive or healthy school climate is associated with fewer challenges facing teachers, lower incidences of bullying and disciplinary issues, positive interactions between peers and teachers, and a higher emphasis on academic success. In addition, students feel that they belong to the school, are confident in their abilities, and are more

engaged in the classroom (Juan, Zuze, Hannan, Govender, & Reddy, 2018). Research has shown that students in schools that have a healthy school climate tend to perform better (Zuze, Reddy, Visser, Winnaar, & Govender, 2018).

The TIMSS reports from students, principals, and mathematics teachers present a clear pattern of difference between transformative and non-transformative schools. In comparison to other no-fee schools, in the transformative schools, students seem to attend class in more conducive learning environments and have greater respect for their classmates, while there is less bullying and higher levels of parent satisfaction with the schools.

Earlier research showed that the way principals encourage change and improvement, and promote a shared culture, has an impact on the success of schools (Botha, 2018). The leadership behaviours of 'innovative, equity-focused, transformative school leaders' (Shields & Hesbol, 2020, p. 16), who develop systemic school-wide strategies, focus on making learning more meaningful for their demographically changing student populations. Transformative leaders thus implement equitable, socially just leadership as a means of creating welcoming, inclusive schools (Shields & Hesbol, 2020). These principals endeavour to find ways to offer all students inclusive, excellent, and equitable education.

In the qualitative study by Botha (2018), Principal 'Laura' is praised for her interaction with and encouragement of staff, and she is adamant about the importance of their professional development, thus promoting an environment conducive to teaching and learning. One teacher notes:

She puts things on the board in the staff room such as: 'Mrs A has a great idea, go and see it'. She praises us just the way we praise our learners. She always notices if you spend a lot of time on something and will tell you that you have done a good job; and when I am praised, just like my learners, I want to do an even better job. ('Teacher', in Botha, 2018, p. 10817)

Principal 'Laura' states, 'I like to let people try out ideas and am willing to allow for failure' (Botha, 2018, p. 10819). This is corroborated by the school's teachers, one of whom comments, 'We open our big mouths all the time; there is no fear here about saying what's on your mind' (Botha, 2018, p. 10820), while another states that the principal is 'receptive to teachers' attitudes and philosophies, we are empowered. She communicates confidence in me; she repeatedly tells me "I want you to be the best teacher in the district"' (Botha, 2018, p. 10820).

School leaders play a key role in promoting inclusive and respectful learning environments (Shields & Hesbol, 2020). Principals must support teachers: encouraging them to share their opinions and implement innovative ideas, providing mentorship for new teachers, and maintaining communication to

ensure that issues are addressed timeously. Teacher training is crucial in terms of engaging with students positively, encouraging students, and instilling confidence in them. Providing extra support for struggling students is important, and implementing strategies to address poor discipline and bullying is vital. These elements can contribute to creating healthy school environments that are conducive to teaching and learning.

Conclusion

A student's access to particular school leadership and management environments largely depends on the type of school (no-fee versus fee-paying) that the student attends (Zuze & Juan, 2020). The quality of leadership matters for student outcomes, especially in failing schools (Bloom & Abel, 2015). In these circumstances, both transformational (changing schools) and transformative (changing students) leadership are required. These types of leadership styles are intertwined within the South African schooling context. Effective leadership is crucial in resource-constrained schools, perhaps even more so than in affluent schools.

Although various scholars have argued that principals should build a common lived and written vision to guide equitable school improvement efforts (for example, Capper, Theoharis, & Sebastian, 2006; Lindstrom & Speck, 2004; Scheurich & Skrla, 2003; Tallericco, 2005), there has been little empirical examination of principal practices that shape the development of a transformative collective vision. This chapter presents a first step in providing this evidence. The descriptive-analytical findings show that transformative leaders are associated with transformative schools, and through the disaggregation of findings the transformative leadership attributes present in better-performing, no-fee schools have been identified.

Transformative leadership does not in itself guarantee effective implementation of envisaged reforms. The implementation of reforms depends on the motivation and capacities of leadership for its success. There are also factors that operate independently of transformative leaders that may inhibit the implementation of reforms. It is important for principals as school leaders in South Africa to be informed about the context that might have an impact on the effectiveness of their schools, but which could also ensure that their schools remain relevant and able to contribute to the growth, change, and development of their communities. South African principals not only have to keep up with developments in the world, just as their counterparts in more developed parts of the world do, but they also have the additional task of taking into account both intra- and extra-institutional contextual developments that may be unique to their particular communities and situations (Botha, 2018).

Using empirical data and drawing from extant literature, this chapter has set out very specific practices and outcomes of transformative leadership that are not resource dependent and can be employed in all schooling contexts.

#TransformativeLeadershipInSchools

Transformative leadership in resource-poor schools is not an abstract notion, nor does it require Herculean effort. It can be attained by using specific practices, with system-changing outcomes.

Questions for discussion

1. Is it possible to speak about an institution (such as a school) as being transformative? What might be gained or lost by doing so?
2. What impact does the absence of resources have on transformative leadership?
3. Does this chapter go far enough in talking about how a transformative leader might engage with the policy context to bring about greater systemic change? What else could be done?

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