

## **FUNDRAISING IN SECTION 21, QUINTILE 1 - 2 NO-FEE SCHOOLS IN THE FREE STATE PROVINCE, SOUTH AFRICA**

Gawie SCHLEBUSCH<sup>1</sup>, Tlale MPOLOKENG<sup>2</sup>

<sup>1,2</sup> Central University of Technology, Free State, South Africa

### **Abstract**

The purpose of this study is to explore how state-provided funds, together with money raised through fundraising, are managed in Section 21, quintile 1 - 2 no-fee secondary schools in the Free State province of South Africa to enhance the quality of teaching and learning. Fundraising is crucial in supplementing the limited financial support received from the state. The study adopts a phenomenological design, which allows the researchers to explore individuals' lived experiences, behaviours, and the ways in which they understand and carry out their roles. A qualitative approach was used, with open-ended questionnaires administered to a single group of participants – school principals. The sample included 15 principals from Section 21, quintile 1 - 2 no-fee secondary schools situated in three Free State education districts. Data was thematically analysed and reported as such. The findings indicate that many schools still face challenges with fundraising due to limited knowledge, expertise, and skills. Effective and efficient financial and fundraising management is essential to prevent fraud and misappropriation and to promote transparency, openness, and accountability. It also helps to build trust among schools, donors, sponsors, parents, and communities.

*Keywords: Financial management, Fundraising in no-fee schools, Section 21 quintile 1-2 schools, Quality of teaching and learning*

### **1. Introduction**

Certain aspects require clarification within the context of this paper. The South African Schools Act (Act 84 of 1996) (SASA) stipulates that schools are categorised as either Section 20 or Section 21 schools, with Section 21 schools granted full decentralised financial and administrative autonomy to manage their own finances. Furthermore, schools are classified into five quintiles, with quintile 1-3 schools receiving greater state funding than quintile 4 and 5 schools, as they are located in socio-economically disadvantaged areas.

In South Africa, quintile 1-2 schools are designated as 'no-fee' schools, which, according to the National Poverty Distribution Table (Department of Basic Education [DBE], 2025) account for 60% of public-school learners nationally in 2025. This cohort of schools is legally prohibited from charging school fees and is expected to rely primarily on government funding (Mestry, 2020). However, all schools in South Africa are allowed to carry out fundraising activities to supplement the funding provided by the state. Despite increased state funding for quintile 1 - 2 no-fee secondary schools in South Africa, many of these Section 21 schools continue to experience persistent resource constraints that undermine the quality of teaching and learning. This led to the following research questions:

- How are state and fundraising funds managed in Section 21, quintile 1-2 no-fee secondary schools in the Free State province?
- What roles do principals and School Governing Bodies play in fundraising in Section 21, quintile 1 - 2 no-fee secondary schools?
- How does fundraising contribute to the quality of teaching and learning in Section 21, quintile 1 - 2 no-fee secondary schools?

### **2. Literature Review**

#### **The Role of the Principal as Financial Manager**

Although the School Governing Body (SGB) holds final accountability for the school's financial management, it is common for the SGB to assign routine, day-to-day financial tasks to the principal, who is also a member of the SGB (Dlomo et al., 2022). The level of the principal's involvement in financial matters generally varies according to the size and complexity of the school. Nevertheless, the school remains accountable for ensuring that the SGB governs school finances in accordance with the SASA and consistently acts in the best interests of the learners (Republic of South Africa, 1996). In this regard, the principal must make sure that all staff understand the financial

policies and procedures established by the SGB and that these are followed carefully. Furthermore, the principal acts as a key liaison between the provincial education department and the SGB.

Studies on financial devolution consistently demonstrate that the role of the principal is significantly broadened, with principals occupying a central position in the oversight and management of school finances, including the coordination of supplementary income-generating activities such as fundraising (Schlebusch & Mokhampanyane, 2024). This broadened mandate increases accountability and requires close, transparent collaboration between principals and their SGBs, particularly in decisions concerning the mobilisation and utilisation of both state-allocated and self-generated funds. However, research indicates that many principals and elected SGB members lack sufficient financial knowledge or training to discharge these responsibilities effectively (Mogorosi, 2022).

Routine financial activities, including in some cases the management of fundraising income, are often delegated to individuals with greater financial expertise, such as accounting teachers, administrative staff, or other suitably qualified personnel, particularly when principals and SGBs lack confidence in their own financial capabilities (Zwane & Mestry, 2025). While this practice may improve operational efficiency, research suggests that limited collaboration between school management teams (SMTs) and SGBs can weaken effective oversight and intensify accountability gaps in school financial governance (Basson & Mestry, 2019). Without adequate capacity-building and clearly articulated governance structures, such delegation may increase the risk of weak financial control and regulatory non-compliance, especially in the management of fundraising income, where responsibilities become fragmented and insufficiently monitored. Within this framework of financial accountability and statutory compliance, schools often need to explore supplementary income-generating strategies to support educational activities and address resource constraints (Nchaga, 2025).

### **Fundraising**

Principals and SGBs play a key role in fundraising and are responsible for making sure that additional funds are allocated fairly so that all learners benefit. This task is particularly challenging in Section 21, quintile 1 and 2 no-fee schools, where persistent issues such as poverty, unemployment, child-headed households, and low adult literacy limit the financial support that communities can provide (Mpolokeng, 2017). Furthermore, research shows that many no-fee schools struggle to secure sufficient funding due to a lack of skills and stakeholder involvement, exacerbated by community poverty and limited participation in fundraising initiatives (Sebidi, 2025).

Within this context, SGBs carry statutory responsibilities for school finances and related oversight, including budget processes and the governance of fundraising, with recent legislative updates reinforcing expectations for transparent financial management and finance-committee leadership (Mataboge & Rapeta, 2025). Yet many governing bodies report limited financial expertise, which places intense pressure on principals and SGBs to raise, manage and monitor funds effectively (Garcer et al., 2024). Despite sustained efforts, numerous schools continue to struggle to generate supplementary revenue at the scale needed to offset state shortfalls and to strengthen teaching and learning (Sebidi, 2025). This challenge is compounded when any financial initiatives are perceived as coercive or when parental contributions are unlawfully enforced, which undermines trust and can harm community engagement (Ngceba, 2026).

The logistical burden of organising fundraising activities often falls on teachers and administrative staff who are already overstretched, reducing the effectiveness of such efforts (Schoolwall, 2025). There is also evidence that inequities in fundraising outcomes mirror broader socioeconomic inequalities, such that schools in the poorest areas are least able to benefit from community contributions (Naim, 2025). Without focused capacity-building and supportive policymaking, SGBs may struggle to adapt innovative fundraising methods that could broaden participation and enhance educational resources for all learners.

### **Theoretical Framework**

School-Based Management (SBM) theory offers a useful framework for analysing the decentralisation of financial and administrative authorisation to Section 21 schools under the SASA. Caldwell and Spinks (1992) describe the self-managing school as one in which decision-making powers are transferred to the local level to strengthen responsiveness, accountability and organisational effectiveness. Their model highlights the connection between autonomy, participatory governance and improved institutional performance, suggesting that schools are better equipped to respond to contextual demands when granted control over resources and operations.

In the South African context, Bush (2008) and Naidoo (2005) examined how financial devolution operates within historically unequal and resource-constrained environments. Their work points to the gap between formal autonomy and actual capacity, particularly where principals and SGBs lack sufficient financial expertise. Together, these perspectives provide a coherent lens for examining governance, accountability and resource management in quintile 1-2 no-fee schools.

### **3. Method**

#### **Research Design and Approach**

Given the qualitative nature of this study, phenomenological research design was employed. Phenomenology aims to uncover the core of a phenomenon by exploring it through the lived experiences of individuals who have directly encountered it (Bouzioti, 2023). Its purpose is to understand not only the content of human experiences but also how these experiences are perceived (Tavakol & Sanders, 2024). This design is particularly appropriate for exploring fundraising in Section 21, quintile 1-2 no-fee schools, as it enables the study to capture how participants experience, interpret and respond to the realities of fundraising within financially constrained contexts.

A qualitative research approach was used in this study to investigate participants' perspectives on the management of state funding, together with those generated through fundraising activities, are administered in Section 21, quintile 1-2 no-fee secondary schools to enhance the quality of teaching and learning. According to Busetto et al. (2020), qualitative research seeks to understand and interpret the meanings that individuals or groups ascribe to social and human experiences. This approach enables researchers to explore issues from the perspectives of participants and to understand the meanings they assign to behaviours, actions, and intentions (Tenny et al., 2024). This approach was essential for gaining in-depth insight into participants' perceptions and experiences.

#### **Sampling**

According to Stratton (2024), qualitative researchers generally select participants in a way that allows for a deeper exploration of the phenomenon under investigation. Purposive sampling, as outlined by Nyimbili and Nyimbili (2024), entails the intentional selection of participants with particular attributes, as they are best positioned to provide rich and relevant data for the study. For this study, purposive sampling was employed to identify fifteen principals from Section 21 quintile 1 and 2 no-fee secondary schools, with five principals drawn from each of three education districts in the Free State province.

These principals were selected because they possess direct experience of financial management and fundraising within Section 21 quintile 1 and 2 no-fee secondary schools, thereby providing rich, contextually relevant insights into the phenomenon under investigation.

#### **Data Collection and Analysis**

This study used open-ended questionnaires to allow participants to share their thoughts and opinions without restriction. Tombs and Strange (2024) note that such questionnaires often contain questions that ask participants to explain the reasons behind their answers. Such questions do not impose restrictions on how participants answer, instead, they allow individuals to respond in their own words. The responses to open-ended questions are not predetermined, as they must be recorded and subsequently analysed or coded to identify and interpret the underlying meanings. Open-ended questionnaires were delivered personally by one author to the 15 participants.

In thematic analysis, key aspects are identified and drawn from the data. These emerging patterns are then developed into the categories that guide the analysis. Beyond recognising and arranging patterns within the dataset, thematic analysis involves critically examining the connections between themes and their alignment with the research question(s), thereby strengthening interpretive clarity (Goyanes et al., 2025). The process is cyclical rather than linear, requiring ongoing revision and refinement of codes and thematic structures to deepen analytical insight and reinforce credibility. Saunders et al (2023) further emphasise the importance of maintaining clear audit trails and providing explicit justification for analytic choices, as such transparency underpins the dependability and integrity of qualitative findings derived through thematic analysis. The process for this study included initial engagement with the data, systematic coding, the identification of themes and the reporting of findings. Drawing on Braun and Clarke (2024), reflexivity remained important throughout, as the authors were aware that their own assumptions may influence coding and interpretation. When carried out with care, thematic analysis offers rich insights that illuminate participants' experiences in meaningful ways. The themes were presented narratively, backed by verbatim quotes from participants.

#### **Ethical considerations**

Permission to conduct the study in schools was granted by the Faculty Research and Innovation Committee, as well as the Department of Basic Education. Approval was also sought from school principals, who provided consent for the research to take place on their premises.

Informed consent was obtained from all participants once they had been fully briefed on the study's purpose, the nature of their involvement, and their right to withdraw at any time without penalty. They were also guaranteed anonymity, with assurances that no personal details would be revealed in any reports or publications.

All data collected were treated confidentially, ensuring that responses could not be traced back to individual participants or schools.

#### **4. Findings**

The findings are organised under three key themes identified from the principals' responses. The analysis draws on data collected from questionnaires completed by principals of Section 21, quintile 1 and 2 no-fee secondary schools. Pseudonyms are used to refer to participants, i.e., Principal 1, Principal 2, etc.

##### **Theme 1: The Significance of Effective Financial Management in Schools**

Principals emphasised the need for transparency, accountability and openness in the financial management of schools. Principal 3: *"The good financial management helps to ensure that financial activities of the school are being conducted in a transparent and open manner that is in line with all policy requirements"*. They noted that all stakeholders should be given the opportunity to contribute when the annual budget is drafted. Such participation fosters trust in both the budget and the school's financial processes. This trust is further reinforced through the careful implementation of the budget, including the procurement of quotations where required and the proper recording and retention of all payment receipts. Principal 11: *"When we write up the budget, we all must sit together...that is the teachers and parents on the SGB so everyone can say what is really needed. If people are part of this budget planning and we keep all quotes and slips safe, they all can see the funds is used the right way; that will make them trust the school."*

The principals emphasised that sound financial management is crucial for a school to fulfil its mission and achieve its vision. They highlighted that the quality of teaching and learning relies heavily on the careful handling of financial resources. Principal 8: *"Without sound financial management the school cannot achieve its mission and vision. There will be no effective teaching and learning."* To support this, funds must be managed efficiently and used in ways that directly enhance classroom provision. In this regard, principals stressed that SGBs should exercise their authority to generate extra funds through fundraising initiatives to support the school in addition to the resources provided by the state. Principal 2: *"We do not receive enough funding from the Department, so we must use the small amount we get from them very carefully. If we want all the relevant resources and functional classrooms for our learners, the SGB must also organise fundraising to bring in additional money."* These funds should be directed towards procuring additional materials and resources that strengthen the quality of teaching and learning and contribute to improved learner outcomes. The principals explained that sound financial management is essential in schools, as it supports the overall administration of teaching and learning resources, office operations, transport and other expenses. Principal 6: *"If we do not manage our money properly, it becomes hard to run the school. Money is needed for books, classroom resources, office work, transport, and other things, so we as the SGB must plan and spend carefully."*

They also stressed that all financial actions should follow the school's financial policy and any other related financial instructions. Principal 14: *"We need a management system that follows the policy and other financial rules, includes everyone involved, and is done openly."* The principals indicated that the DBE ought to provide ongoing training in financial management for principals, SMTs and newly elected SGB members, equipping them with the knowledge and skills required to manage school finances effectively, efficiently and with accountability. They noted that such training should be facilitated by district officials, including circuit managers and finance deputy directors, and that teachers should be included where appropriate. They further indicated that the provincial DBE allocates a dedicated budget for these workshops and ensures that comprehensive training manuals are made available across all education districts. Principal 1: *"It is so important so that regular workshops are required for principals and teachers"*. The principals noted that financial management is a vital aspect of school governance, as the careful and purposeful use of funds directly enhances the quality of teaching and learning. Improved educational quality, in turn, contributes to stronger academic performance among learners. They also stressed the importance of maintaining regular financial controls to ensure that expenditure remains within the limits of available income and that only authorised spending is undertaken. Principal 10: *"We always watch the money we spend every month with the finance committee and make sure we do not spend more than we have budgeted. So, we only pay for things that are in the budget, so that the school stays out of problems."*

##### **Theme 2: Fundraising Roles in Schools**

Principals described their fundraising role as starting with determining the school's needs to support teaching, learning, and academic achievement. They also noted the importance of encouraging parents and the broader school community to take an active part in school events, including fundraising efforts. They acknowledged the need to make deliberate efforts to increase parent and community involvement. Principal 7: *"I need to make sure that we have good communication channels to the parents and the community, otherwise we will never really get*

them involved.” One approach to achieving this is through improving communication channels to ensure that clear and timely information about fundraising activities is shared. Principal 15: *“We know what our needs are to be better with our teaching and to get higher results, so we need to motivate everyone to participate when we organise fundraising events. The money from these events can help us better our results”*.

The principals indicated that fundraising is a shared responsibility between themselves and the SGB. They stated that, as SGB members, they are automatically included in all decisions concerning fundraising. They saw their main role as motivating others, making sure that those on the fundraising committee stay dedicated to their responsibilities. In essence, they saw themselves as providing leadership rather than undertaking day-to-day management of fundraising activities. Principal 9: *“I share fundraising with the SGB, as I am a member of the SGB. I am part of the decisions taken there.”* Principal 6: *“We have people directly involved in fundraising, I need to motivate them, so I am more a fundraising leader than a fundraising manager.”*

The participants also highlighted that teachers and learners are vital to the success of any fundraising activity, often serving as the main channels for sharing information about the event with the wider community. A participant remarked that these two groups serve as the glue that can either ensure the success of a fundraising activity or lead to its failure. Principal 10: *“We should never forget also the teachers and learners. They play a big role in fundraising. I say they are the glue that will hold it together or it will fail.”*

An aspect mentioned by principals is that elected parent members of the SGB do not always have the financial literacy capacity to make informed financial decisions. This leads to such parent SGB members to delegate some aspects to the principal and fundraising committee to make decisions on. Principal 7: *“Some parent members in the SGB do not really understand money matters, so they let me or the fundraising team decide how to spend the money raised by fundraising. They trust us to make the right choices.”* In addition, a principal stated that in some instances, the SGB co-opt a person with expertise to assist with a fundraising project. Principal 3: *“Sometimes the SGB asks someone who knows about money or fundraising to help with a project. This way, we can raise more money and do things properly.”*

### **Theme 3: Supporting Effective Teaching and Learning Through Fundraising**

Participants concurred that ineffective fundraising in Section 21, quintile 1 and 2 no-fee schools negatively affect the quality of teaching and learning. They noted that their schools frequently face difficulties in securing the extra resources required to support the educational process. Although they recognise the importance of fundraising, many still face difficulties in organising successful events that would meaningfully increase the school’s funds. Principal 5: *“We want to get more resources for better teaching, but we still struggle to get good amounts with our fundraising.”*

Participants highlighted that teachers sometimes cannot travel to cluster workshops or meetings because of limited funding. These workshops, organised by subject advisors, focus on teaching methods, addressing challenges, assessment, and sharing effective practices. Attending such sessions is important for teachers’ professional growth and for improving classroom learning. They suggested that money raised from fundraising could help cover travel expenses, allowing teachers to participate and develop their skills further. Principal 15: *“Fundraising will give us the funds to send all our teachers to all their cluster meetings as we will have extra funds for that. They learn a lot there and this benefit our learners.”*

One participant noted that added funds could be used to employ teachers for scarce subjects or in situations where a replacement cannot be appointed immediately after a teacher retires. In such cases, the SGB would need to cover the salary of the temporary teacher if departmental funding is not available during the transition period. The key point stressed was that a teacher must be present in the classroom, and every possible measure should be taken to ensure continuity of teaching. Principal 12: *“Schools will be able to buy educational resources and be able to employ relevant and qualified people after a teacher retires or is sick for a while. Sometimes it takes time for the new teacher to be appointed, and we can pay someone in the meantime to make sure learning and teaching can go on.”*

Participants believed that extra funds generated could assist with the overall running of the school and help create a better learning environment by enhancing the grounds and facilities. They also pointed out that schools in underprivileged areas face major difficulties, as many local community members lack the financial capacity to make contributions. Principal 4 stated: *“The main problem with schools in the poor community is that the chances to raise enough funds is more limited and this is negative for our school to provide quality education.”*

## **5. Discussion**

The principals’ responses highlight the fundamental importance of transparency, accountability, honesty and openness in the financial management of schools. Only when these principles are upheld can a school hope to

realise its mission and vision, as financial practices must support the strategic intentions expressed in its mission statements. This aligns with Dibete and Potokri (2021), who argue that schools require adequate resources to achieve their goals and that such resources must be properly planned for within the school budget.

Considering the importance of sound financial management for the smooth running of schools, it is vital that principals, SGB members, SMTs, finance and fundraising committees, and other stakeholders handling school funds receive regular training in financial procedures. Both principals and teachers need to have the appropriate skills and understanding to manage finances effectively. Faku and Mulaudzi (2024) highlight that, in South Africa, many parent members of SGBs have limited literacy and experience in financial management, making continuous training and development essential to uphold proper standards. While SGB members may initially lack certain financial competencies, appropriate training can enable them to carry out these responsibilities confidently.

Although SGBs are legally accountable for all school monies, many lack the expertise to manage finances independently. Participants therefore emphasised the need for SGBs to delegate day-to-day financial duties to principals and finance committees, while retaining overall oversight. SGBs may also co-opt community members with financial expertise to strengthen governance. To uphold integrity in financial management, finance committees must provide regular and accurate financial reports to the SGB at scheduled meetings. Rangongo et al. (2016) support this view, stating that institutions handling public funds must account for them in a prescribed and transparent manner. The finance committee should therefore present clear reports on income and expenditure during each planned SGB meeting.

Fundraising emerged as a shared responsibility among principals, teachers, learners, parents and the wider community. Although each contributes to the overall success of an event, its effective management relies strongly on the SGB, including the principal, who must ensure that human and financial resources are well coordinated through the appropriate committees (Sebidi, 2025). Successful events also require strong marketing, as communities need regular reminders to sustain interest and involvement. Clear and consistent communication is therefore crucial to maintaining awareness and encouraging participation.

School finances are shaped by stakeholders beyond the school itself, as most funding is sourced externally. It is therefore essential for the SGB to maintain complete transparency in relation to all income and expenditure. Following correct financial procedures promotes accountability and fosters trust, with proper documentation providing clear evidence of responsible financial management. Ultimately, accountability lies with the SGB, the principal and any staff member involved in handling money or stock (Faku & Mulaudzi, 2024). Although parents are sometimes excluded from financial discussions because of the perception that they may find financial statements difficult to interpret, this should not prevent their involvement, as they remain key partners in supporting financial integrity.

## **6. Conclusions**

In summary, sound financial governance in Section 21 quintile 1 and 2 no-fee secondary schools require more than compliance with statutory provisions; it demands sustained ethical leadership, shared accountability and strengthened institutional capacity. When financial management is transparent and aligned with the strategic objectives of the school, it supports the advancement of teaching and learning. At the same time, decentralised authority places significant responsibility on principals and School Governing Bodies, particularly in socio-economically disadvantaged contexts where financial expertise may be limited. Fundraising, while essential in supplementing state allocations, introduces additional governance demands and requires careful coordination, transparency and community trust to be effective. Capacity-building, inclusive stakeholder participation and clear oversight structures are therefore vital. Ultimately, the continued effectiveness and sustainability of no-fee schools depend on governance arrangements that integrate prudent financial stewardship with responsible and equitable approaches to supplementary income generation.

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