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Measuring School Principals' Well-Being: Validation of an Instrument

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Abstract

The article reports on the development and validation of an instrument to measure the well-being of public-school principals in Gauteng, South Africa, based on a specific theoretical framework. Adopting a quantitative, post-positivist paradigm, data were gathered from 207 principals selected by means of a census sample from various school types and socioeconomic backgrounds. The instrument included structured questions that evaluated job demands, job resources, and aspects of personal well-being. Exploratory factor analysis confirmed strong construct validity, revealing four contextual factors: support from the school community, support from the department, resource availability, and support from students and parents. Additionally, four dimensions of personal well-being were identified, namely professional, emotional, physical, and work-related well-being. Reliability analysis showed internal consistency across all scales. The findings indicated that principals' well-being is influenced by the interplay between workplace demands and available resources, aligning with the theoretical principles of the JD–R theory. This study thus offers a reliable, contextually relevant measurement instrument that can be employed for further research, policy development, and leadership support initiatives. By providing an empirically validated instrument tailored to the South African context, it lays a practical foundation for monitoring principal well-being and guiding targeted interventions aimed at enhancing leadership sustainability, organizational effectiveness, and educational improvement.

Keywords: well-being; job demands; job demands–resources theory; occupational stressors; school principals; instrument

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1. Introduction

The South African education system continues to contend with structural inequalities rooted in its historical past. Despite post-apartheid reforms aimed at improving equity and access, substantial gaps in school funding, resource distribution, and leadership capacity persist (Sincuba & Ncanywa, 2024). Principals of schools in disadvantaged areas often contend with systemic issues such as overcrowded classrooms, poor infrastructure, a lack of teaching materials, and high levels of violence (Mestry, 2017; Spaull, 2012). In these challenging environments, principals are expected to manage teaching, discipline, budgeting, community relations, and policy implementation, often with minimal support from the Department of Basic Education (DBE) or School Governing Bodies (SGBs). This not only increases their workload but also poses significant risks to their physical, emotional, and professional well-being. Research indicates that principals' well-being directly affects teacher morale, student outcomes, and the overall stability of schools (Leithwood et al.,

2019; Riley, 2021), and can lead to absenteeism, reduced motivation, and higher staff turnover rates. This is particularly concerning in South Africa, where there is a national shortage of experienced school leaders, and many teachers are reluctant to assume principal roles due to high stress and insufficient support (Maforah & Schulze, 2012; Wills, 2015; Mbokazi & Gugu, 2025).

Wills (2016) observes that principal turnover for reasons other than retirement exceeds retirement rates, highlighting a troubling trend of early departures from the profession. Between 2008 and 2012, principal turnover reached 28.7%, reflecting a significant "brain drain" in school leadership (Wills, 2015). Such instability disrupts leadership continuity, affects teacher morale, and ultimately impacts student performance. Despite these pressing issues, research on the well-being of South African school principals remains limited, and a validated local instrument to measure their well-being is currently lacking.

In developed countries, governments and education authorities are increasingly implementing frameworks and policies to support the well-being of school leaders. In Australia, for example, the annual Principal Health and Well-being Survey employed various existing instruments such as the Assessment of Quality of Life—8D (AQoL-8D) and the Copenhagen Psychosocial Questionnaire-II (COPSOQ-II) (Riley, 2021). The findings provide critical insights into principals' health risks, burnout levels, and coping strategies, which inform targeted interventions. Conversely, in low- and middle-income countries such as South Africa, the well-being of school principals remains largely overlooked in education policy.

While international studies provide useful perspectives, they often fail to account for South Africa's unique socio-economic and cultural context, including challenges such as crime, poverty, community instability, and unequal resource distribution. These factors exacerbate occupational stress and complicate the implementation of national education policies (Mestry & Singh, 2007; Kwatubana, 2024). Consequently, it can be argued that context-specific research is essential to identify local factors and to develop relevant support interventions for principals' well-being. The purpose of this study was to measure the levels of well-being of school principals. However, this article reports on the development and validation of the instrument used to measure the well-being of school principals in public schools in Gauteng Province. Grounded in a theoretical-conceptual framework, the study examined the instrument's validity and relevance to ensure that it effectively measures key aspects such as occupational stress, burnout, and work engagement. In doing so, it provides a scientifically sound instrument that can guide research, inform policy, and support targeted interventions aimed at enhancing leadership sustainability and effectiveness.

2. Theoretical-Conceptual Framework

2.1. Conceptualisation of Principals Roles

The role of school principals has undergone a profound transformation in contemporary education systems, evolving from a primarily administrative function into a multidimensional leadership position. This role now integrates instructional leadership, organizational management, emotional support, policy mediation, and community involvement. This evolution mirrors global reforms that emphasize accountability, school effectiveness, and shared leadership, which have raised expectations for principals (Fullan, 2014; Hallinger, 2018; Leithwood et al., 2020). Consequently, research has increasingly focused on the well-being of principals as a key factor influencing leadership effectiveness, school stability, teacher commitment, and learner success (Day & Gu, 2014; Leithwood et al., 2019; Riley, 2021; Walker & Qian, 2022). Current studies consistently indicate that the quality of leadership is closely linked to the well-being of leaders. The psychological and emotional states of principals affect their decision-making, trust in relationships, instructional

practices, and the overall climate of the organization (Grissom et al., 2021; Kraft et al., 2020). Therefore, principal well-being is increasingly conceptualized not merely as a private concern, but as a systemic issue influenced by working conditions, policy demands, and socio-economic factors (Hsieh et al., 2025; Riley, 2021). This conceptualization is particularly significant in contexts marked by structural inequality, where school leaders must manage complex demands with limited support from their institutions. Many education systems face resource gaps, and leaders contend with issues such as poor infrastructure, staff shortages, and socio-economic challenges that impact learners and their communities (Mestry, 2017; Spaull, 2019; Bush & Glover, 2014). These contextual challenges increase the complexity of leadership and intensify the risk of stress and burnout. Therefore, studying the well-being of principals should be approached through a broader socio-ecological lens that acknowledges how large-scale policies, organizational conditions, and personal interactions collectively shape leadership experiences (Bronfenbrenner, 1994; Collie et al., 2012). To develop meaningful theoretical and practical insights, it is crucial to view principals as individuals embedded in their contexts rather than as isolated figures. From this perspective, the role of a principal is relational, dynamic, and contextually shaped. Principals act as a bridge between policy and practice, translating national reforms into actionable strategies at the school level while addressing the needs of the local community. This intermediary role exposes them to multiple, sometimes conflicting expectations, including accountability requirements, staff management, parental involvement, and responsibilities for student welfare (Hallinger, 2018; Leithwood et al., 2020). The complexity of this role is often associated with increased job stress, especially when demands exceed available resources or when policy expectations do not align with on-the-ground realities (Grissom et al., 2021). In schools facing significant challenges such as poverty, violence, and family instability, principals frequently assume additional pastoral and social responsibilities, further adding to their workload and emotional strain (Mestry, 2017; Bush & Glover, 2014).

2.2. Well-Being

The central construct informing this framework is the concept of principal well-being, which contemporary research broadly defines as a multifaceted phenomenon. It encompasses aspects such as psychological health, emotional stability, job satisfaction, and social connections in the workplace (Riley, 2021; Collie et al., 2023). This comprehensive perspective aligns with positive psychology, which views well-being as more than merely the absence of stress, emphasizing the importance of flourishing, finding meaning, and achieving professional fulfillment (Seligman, 2011; Kern et al., 2014).

Importantly, research indicates that well-being is not a fixed state but a dynamic one, fluctuating in response to varying workplace conditions, organizational cultures, and leadership challenges (Grant et al., 2007). Consequently, principals may feel highly motivated while simultaneously experiencing significant pressure, suggesting that well-being exists on a continuum rather than as a binary condition. Understanding this complexity allows researchers to examine how different workplace factors can both support and hinder effective leadership.

2.3. Job Demands–Resources (JD–R) Theory

The theoretical lens for this study is the Job Demands–Resources (JD–R) theory, a well-established framework in occupational psychology that explains how various workplace factors influence employee motivation, health, and performance (Bakker & Demerouti, 2007; Bakker & Demerouti, 2017; Schaufeli, 2017). According to the JD–R theory, each job comprises a unique combination of demands and resources, and the interaction of these elements determines whether individuals feel engaged or overwhelmed.

This framework has become increasingly important in educational leadership research due to its adaptability, explanatory power, and relevance across diverse professional and cultural contexts (Hakanen et al., 2016; Skaalvik & Skaalvik, 2011). Its significance for school leadership lies in its ability to capture the complexities of principals' work environments, which often involve high expectations, multiple stakeholders, and varying levels of institutional support. Recent studies have also highlighted the JD–R model's relevance for understanding teacher and school leader well-being. A comprehensive meta-analysis revealed strong evidence that job resources are positively associated with well-being, whereas job demands generally have a negative impact (Li et al., 2025).

Within this theory, job demands are defined as aspects of work that require ongoing physical, cognitive, or emotional effort, potentially leading to physiological or psychological costs (Bakker & Demerouti, 2017). For school principals, these demands typically include heavy administrative duties, time constraints, accountability pressures, policy compliance, staff oversight, and crisis management (Leithwood et al., 2019; Riley, 2021; Grissom et al., 2021). These demands rarely occur in isolation; rather, they accumulate and interact, resulting in cumulative stress.

In schools with limited resources, the demands extend beyond standard leadership responsibilities to encompass learner welfare, community crises, infrastructure challenges, and social inequalities that affect school functioning (Mestry, 2017; Spaull, 2019). These additional responsibilities increase emotional labor and complicate decision-making, making principals more vulnerable to stress and burnout.

Job resources are defined as elements of work that facilitate goal achievement, reduce demands, and promote professional learning and development (Bakker & Demerouti, 2017). For school principals, these resources may include supportive professional relationships, mentoring opportunities, leadership autonomy, collaborative networks, and effective support from educational authorities (Day & Gu, 2014; Grissom et al., 2021).

These resources serve both motivational and protective functions: they enhance engagement while buffering the negative effects of job demands. Research consistently shows that principals who experience strong organizational support report higher job satisfaction, greater commitment, and improved psychological well-being (Riley, 2021; Collie et al., 2012).

A significant conceptual contribution of the JD–R theory is its framing of workplace pressures as structural features rather than indicators of personal failure. This distinction is important because leadership discourse often emphasizes individual resilience without adequately considering broader systemic factors. By situating stress within the organizational context, the framework challenges narratives that attribute leadership challenges solely to personal shortcomings. Instead, it highlights how institutional structures, policy contexts, and the distribution of resources shape well-being outcomes (Bakker & Demerouti, 2017; Schaufeli, 2017).

The JD–R theory proposes that well-being outcomes arise through two distinct pathways. In the health impairment process, excessive workplace demands contribute to burnout (Demerouti & Bakker, 2011). Conversely, in the motivational process, adequate resources foster work engagement (Demerouti & Bakker, 2011). This perspective aligns with critical educational leadership research, which advocates examining leadership challenges through a structural lens rather than an individual one (Hallinger, 2018; Bush & Glover, 2014).

A key practical application of the JD–R framework in educational research is illustrated by the GEW Frühjahrsreport 2025, which surveyed 6216 participants in North Rhine-Westphalia (Reintjes et al., 2025). The analysis showed that factors such as personal resilience, collegial support, and leadership culture were significantly associated with both

emotional exhaustion and work engagement, two central outcomes in the JD–R model (Reintjes et al., 2025).

2.4. Job Demands and Job Resources

Crucially, the JD–R theory emphasizes that job demands are not inherently detrimental. When accompanied by adequate job resources, these demands can function as motivating challenges that foster growth and achievement.

In many underprivileged educational contexts, job resources are often unevenly distributed or poorly aligned with local needs. School principals may face challenges such as limited access to professional development, inconsistent administrative support, and weak governance structures, all of which hinder their ability to effectively manage demands (Mestry, 2017; Bush & Glover, 2014). According to the JD–R theory, these resource shortages amplify the effects of demands, increasing susceptibility to stress and burnout. This underscores the systemic nature of leadership well-being and highlights the importance of organizational interventions rather than relying solely on individual coping strategies.

Another important element of the framework is work engagement, defined as a positive and fulfilling state characterized by vigor, dedication, and absorption in work (Schaufeli, 2017). Engagement represents the motivational pathway in the JD–R theory, illustrating how supportive environments can foster enthusiasm and persistence even in demanding roles. Engaged principals often demonstrate proactive leadership, creative problem-solving, and a strong commitment to school improvement (Grissom et al., 2021). Empirical evidence indicates that job resources such as trust, autonomy, and collegial support are closely associated with higher engagement and lower turnover intentions (Hakanen et al., 2018; Collie et al., 2012). This suggests that enhancing engagement requires not only reducing demands but also strengthening organizational support systems.

Furthermore, job resources are categorized into organizational and personal resources (Demerouti et al., 2001). Personal resources are defined as positive self-assessments related to resilience, self-efficacy, optimism, and perceived control (Xanthopoulou et al., 2007). For principals, individual attitudes and judgments—such as maintaining a positive outlook—can lead to increased work commitment (Mayerl et al., 2016). These personal resources shape how individuals perceive and respond to workplace situations, influencing whether challenges are seen as manageable or as overwhelming threats.

Research indicates that principals with strong personal resources tend to remain motivated, leverage available support, and sustain commitment even in the face of adversity (Beltman et al., 2011; Collie et al., 2012). However, scholars caution against overemphasizing personal resilience as a substitute for systemic change, arguing that focusing too heavily on individual coping strategies can obscure structural inequalities and shift responsibility away from institutions (Riley, 2021; Bush & Glover, 2014).

2.5. Job Demands-Resources and Principals Well-Being

One of the key strengths of the JD–R theory is its adaptability to different contexts. Unlike rigid stress models that assume uniform working conditions, the JD–R framework allows researchers to identify the specific demands and resources relevant to particular professions or regions (Bakker & Demerouti, 2017). This adaptability is especially important in environments affected by socio-economic disparities, where leadership experiences can differ markedly from those in wealthier contexts (Spaull, 2019).

By emphasizing the unique characteristics of each context, the framework supports the development of assessment tools and interventions tailored to local conditions, rather than relying on broad generalizations. This approach is particularly relevant for understanding school leadership, where principals navigate a wide range of circumstances that

influence both their stress levels and the resources available to cope. Research consistently demonstrates that increased job demands—such as heavy workloads, unclear roles, and accountability pressures—are strongly associated with burnout and lower well-being among principals (Marsh et al., 2023).

The theory highlights the important connections between the well-being of school principals and the outcomes of their organizations. When principals experience high well-being, they are more likely to foster a positive school climate, support teacher development, and sustain improvements in instructional practices, which in turn contributes to a healthier organization (Day & Gu, 2014; Leithwood et al., 2019). Conversely, when principals experience low well-being, it can result in poor decision-making, reduced leadership effectiveness, and higher turnover intentions—outcomes that are particularly detrimental in schools already facing significant challenges, where stable leadership is crucial (Grissom et al., 2021). From the Job Demands–Resources (JD–R) perspective, the decision to leave a leadership position is often not simply a personal choice but a predictable consequence of prolonged exposure to unsustainable work conditions.

In summary, this theoretical framework integrates essential concepts—principals, their well-being, job stress, burnout, work engagement, job demands, job resources, and personal resources—into a coherent model grounded in JD–R theory. It conceptualizes well-being as a dynamic outcome of the interactions among these factors within specific contexts. By emphasizing systemic influences while recognizing individual agency, the framework provides a comprehensive perspective on sustaining effective leadership. Such an integrated approach offers a robust foundation for research, policymaking, and practice aimed at strengthening school leadership, promoting equity in education, and enhancing the well-being of those who lead schools.

3. Data and Methods

3.1. Research Design

This study was designed with the explicit aim of developing and validating an instrument to assess the well-being of public school principals in Gauteng, South Africa. It was conducted within a post-positivist framework, which acknowledges that contextual factors and researchers' perspectives may influence outcomes, thereby underscoring the need for systematic measurement and critical reflection to enhance objectivity.

Guided by the Job Demands–Resources (JD–R) theoretical model, the study sought to develop a contextually relevant instrument capable of identifying key job demands, job resources, and personal factors affecting principals' well-being. A quantitative survey design was selected for its capacity to measure relationships between variables accurately and to support statistical analyses required for instrument validation.

3.2. Participants and Data Collection

The study targeted all public-school principals in Gauteng Province. To ensure a representative mix of school types, primary, secondary, and combined schools were included, along with a range of socioeconomic contexts such as urban, township, and rural areas. A census sampling method, aimed at including the entire population, was employed. This approach was intended to capture variations in resource availability and community dynamics.

In total, 450 principals were targeted, aligning with methodological guidelines that recommend a minimum sample size of 100–200 participants for solid statistical analysis in correlational studies. This strategy enabled the instrument to be tested across diverse leadership contexts, thereby enhancing its relevance and reliability.

However, only 207 usable responses were obtained. This response rate limits the representativeness of the sample, as it does not fully reflect all public schools in Gauteng Province. Consequently, this is acknowledged as a limitation of the study, as the validity and reliability of the instrument apply primarily to the study sample rather than to the entire population.

The questionnaire developed for this study consisted of three structured sections aligned with the primary objective of developing and validating the instrument. Section A collected demographic and professional background information. Section B focused on measuring job demands and job resources, drawing on established literature on principal well-being (Leithwood & Beatty, 2008; Riley, 2021). Section C assessed dimensions of personal well-being based on personal resources as outlined in the guiding theoretical framework (Xanthopoulou et al., 2007).

The questionnaire comprised 58 closed-ended items rated on a four-point Likert scale. Response options ranged from "to no extent" (1) to "to a large extent" (4) in Section B, and from "never" (1) to "always" (4) in Section C, depending on the item. Data collection was conducted electronically via a secure online platform to improve accessibility and reduce logistical challenges for participants. Ethical approval was obtained from the EduREC of the NWU (Ethics number: NWU-00296-24-A2), and formal permission was granted by the Gauteng Department of Basic Education (DBE). Participation was voluntary, and informed consent was facilitated by an independent party to prevent any perceived pressure. Confidentiality and anonymity were strictly maintained, with participants assured that their responses would be used solely for research purposes and stored securely in accordance with data protection standards. Participants were also informed of their right to withdraw from the study at any stage prior to data analysis without any repercussions. These ethical measures strengthened the integrity of the research process and enhanced the credibility of the instrument validation.

3.3. Data Analysis

Construct validity was assessed using exploratory factor analysis (EFA), while reliability was established using Cronbach's alpha coefficients. Together, these analytical methods were employed to achieve the main aim of the study: to develop a sound, contextually relevant instrument capable of reliably measuring the well-being of school principals. This self-compiled instrument was not intended to function as a standardized tool across different contexts. The instrument is only valid and reliable for this study population. Should the instrument be used in a different context, validity and reliability need to be determined again for that specific context.

4. Validity and Reliability

To ensure the instrument is both reliable and valid, we evaluated various forms of validity. We assessed construct validity using exploratory factor analysis (EFA), which helped us determine if the questionnaire items accurately reflected the intended theoretical dimensions (Taherdoost, 2016). We established face validity by having experts review the items to confirm they were appropriate and relevant for measuring the intended constructs (Holden, 2010). Content validity was confirmed through a comprehensive literature review on the Job Demands–Resources (JD–R) framework and school leadership well-being, followed by an evaluation from an expert panel to ensure alignment with the theoretical constructs (Gates et al., 2018; Yusoff, 2019).

We performed exploratory factor analysis on all items from Sections B and C of the questionnaire to uncover underlying constructs and see if the items grouped as theoretically expected (Tavakol & Wetzel, 2020). EFA was chosen as the most suitable analytical

approach because the study aimed to explore the dimensionality of a newly developed instrument in a specific context, rather than test an established measurement model. Within this exploratory analysis, Oblimin rotation was applied to clarify and simplify the factor structure. We selected Oblimin rotation because we expected the underlying constructs to be correlated, which is common in social science research. EFA was deemed appropriate at this early stage of instrument development due to its efficiency in data reduction and its ability to identify latent patterns within a large set of variables. The Kaiser–Meyer–Olkin (KMO) measure of sampling adequacy and Bartlett's test of sphericity were employed to ensure that the data was appropriate for factor analysis. Initially, we based our decision on factor retention on the eigenvalue-greater-than-one (Kaiser) criterion. However, we acknowledged the well-known limitations of this approach—especially its tendency to either overextract or underextract factors in psychological and educational research. To enhance our decision-making, we incorporated several complementary criteria. These included examining the scree plot to find the point of inflection in eigenvalues, ensuring the interpretability and conceptual coherence of the factor solution, assessing the magnitude and pattern of factor loadings ($\geq$0.40), and evaluating how well the emerging structure aligned with the JD–R theoretical framework. While more advanced techniques such as parallel analysis and Velicer's Minimum Average Partial (MAP) test are frequently recommended for determining factor retention, our research utilized a combination of statistical indicators and theoretical interpretability. This approach was chosen due to the exploratory and context-specific nature of developing the instrument (J. F. Hair et al., 2019; Tabachnick & Fidell, 2013). Importantly, the retained solution demonstrated a clear, stable, and conceptually meaningful factor structure with minimal cross-loadings. By using eigen values and inspecting the outcomes, the factor retention was satisfactory as more than 50% of the variance were explained for section B and C. The alignment between statistical evidence and theoretical expectations provided a strong rationale for retaining the final factor solution. The findings suggest that the structures identified are based on empirical data and reflect deeper underlying concepts, rather than being fixed latent factors. The exploratory factor analysis supported the theoretical expectations of the JD–R framework by clearly differentiating between job demands—like workload, administrative tasks, and emotional stress—and job resources, which include autonomy, support from colleagues, and opportunities for professional growth.

Furthermore, aspects of personal well-being, such as emotional resilience and job satisfaction, were supported by empirical evidence, reinforcing the connection between the statistical results and the theoretical model (Bakker & Demerouti, 2018). Items that showed strong correlations ($\geq$0.40) were grouped together to maintain conceptual clarity. To evaluate reliability, we used Cronbach's alpha coefficients, which assess the internal consistency of each subscale (Tavakol & Dennick, 2011). An alpha value above 0.60 was deemed acceptable for exploratory research, indicating that there was sufficient internal consistency among the items measuring job demands, job resources, and well-being constructs (Sullivan, 2011; Mohajan, 2017). A limitation of the reliability results is related to the work-related well-being subscale, which only includes three items. While this factor achieved a Cronbach's alpha of 0.60, it is crucial to understand that alpha values can be affected by the number of items in a scale, and shorter scales often produce lower and less stable reliability estimates. Therefore, we should interpret the internal consistency of this subscale with caution. Additionally, constructs with just three items may not adequately reflect the complexity of multidimensional psychological phenomena, which can lead to limited content coverage and decreased measurement stability across various samples. For these reasons, the work-related well-being construct should be seen as a preliminary and simplified representation of the domain. In this study, we did not conduct Confirmatory

Factor Analysis (CFA) because our main goal was to explore the underlying structure of a newly developed instrument rather than to validate a pre-defined model. CFA is typically recommended for later stages of instrument development once the factor structure has been established. Future research should utilize CFA with independent samples to evaluate model fit, stability, and generalizability of the factor structure, thereby enhancing the evidence for construct validity. Since reliability is a characteristic of data (Eason, 1991), researchers must also take into account how participants and context can influence reliability estimates. The same holds true for validity; thus, both the reliability and validity of this instrument are dependent on context. If the instrument is used in different populations or settings, it will be necessary to revalidate its psychometric properties.

5. Results

Construct Validity of the Instrument

The results of the factor analysis for Section B of the questionnaire, presented in Table 1, examined factors influencing principals' well-being and demonstrated strong sampling adequacy. The Kaiser–Meyer–Olkin (KMO) value was 0.93, indicating that the data were highly suitable for reliable factor analysis (J. Hair et al., 2006). Based on the eigenvalue criterion, four significant factors emerged, collectively explaining 70.48% of the total variance. In cases where cross-loadings occurred, the item was assigned to the factor with the highest loading. For example, item B23 (availability of funds) was placed under construct F3 (Table 1). These results indicate that the extracted factors accounted for a substantial proportion of the variance in responses, thereby reinforcing the construct validity of the instrument.

Table 1. Rotated Factor loading matrix for section B of the questionnaire.

Item	Description	F1	F2	F3	F4
B14	Relationship with teachers	0.83181			
B11	Communication between SGB and me	0.83144			
B20	Relationship with learners	0.82646			
B15	Support from staff	0.80906			
B12	Assistance from SMT during school-based appraisals	0.79521			
B13	Assistance from the SMT to carry out daily tasks	0.78645			
B10	Support from SGB in professional management	0.69537			
B9	Relationship between myself and the SGB	0.68343			
B16	Competence of my staff	0.68262			
B17	Relationship with parents and community	0.63484			
B7	Training from DBE to implement policies and legislation		0.81467		
B6	Frequency of training from the DBE		0.79638		
B2	Relationship with the DBE		0.78643		
B3	The DBE'S management of learner admissions (waiting lists, registrations, sorting applications)		0.76874		
B5	Support from the DBE		0.76313		
B8	Assistance from DBE during school-based appraisals		0.72560		
B4	Filling of staff vacancies		0.66461		
B26	Availability of infrastructure and their condition			0.84638	
B25	Availability of basic amenities			0.82393	
B24	Availability of resources			0.74468	
B27	Availability of human resources			0.68131	
B23	Availability of funds		0.39588	0.67207	
B28	School administration system		0.35945	0.50269	
B1	The school environment			0.50020	
B19	Parent support regarding student				0.63530
B18	The community and/or parents' involvement				0.61779
B21	Learners' discipline			0.41826	0.47262
B22	Learners' performance			0.34699	0.43198

The four constructs identified in the EFA of Section B of the instrument reflect different forms of support (Table 2). Relational school-based support emphasizes strong interpersonal relationships, effective communication, and collaboration among staff and stakeholders. Support from the Department of Basic Education (DBE) provides essential guidance, services, and collaboration to schools. Availability of resources encompasses physical infrastructure, financial support, and administrative systems that are crucial for efficient school operations. Learner–parental support highlights the important role of parents and the wider community in reinforcing learner behavior, academic success, and overall development. Collectively, these constructs underscore the key factors that influence the well-being of school principals.

Table 2. Constructs of factors influencing the well-being of principals.

Factor	Construct Label	Item Number	Item Description
1	Relational school-based support	B14	Relationship with teachers
		B11	Communication between SGB and me
		B20	Relationship with learners
		B15	Support from staff
		B12	Assistance from SMT during school-based appraisals
		B13	Assistance from the SMT to carry out daily tasks
		B10	Support from SGB in professional management
		B9	Relationship between myself and the SGB
		B16	Competence of my staff
		B17	Relationship with parents and community
2	DBE support	B7	Training from DBE to implement policies and legislation
		B6	Frequency of training from the DBE
		B2	Relationship with the DBE
		B3	DBE's management of learner admissions
		B5	Support from the DBE
		B8	Assistance from DBE during school-based appraisals
		B4	Filling of staff vacancies
3	Availability of resources	B26	Availability of infrastructure and their condition
		B25	Availability of basic amenities
		B24	Availability of resources
		B27	Availability of human resources
		B23	Availability of funds
		B28	School administration system
		B1	The school environment
4	Learner-parental support	B19	Parent support regarding student progress and conduct
		B18	The community and/or parents' involvement
		B21	Learners' discipline
		B22	Learners' performance

The factor analysis conducted for Section C (Table 3), which examined the personal well-being of school principals, yielded a Kaiser–Meyer–Olkin (KMO) measure of sampling adequacy of 0.93, indicating that the data were highly suitable for reliable analysis (J. Hair et al., 2006). Based on the eigenvalues, four factors were retained, collectively accounting for 66.32% of the total variance.

These results produced four distinct constructs, detailed in Table 3. As in Section B, when cross-loadings occurred, items were assigned to the factor with the highest correlation coefficient. However, for item C3 (experiencing role overload), the correlation coefficients were identical for constructs F3 and F4. In this case, the item was assigned to F4, as it theoretically aligned best with the construct of work-related well-being.

Table 3. Rotated Factor loading matrix for section C of the questionnaire.

Item	Description	F1	F2	F3	F4
C18	Not feeling in charge of the work situation	0.87439			
C22	Not learning, changing and growing at work	0.83900			
C17	Feeling negatively about myself	0.81919			
C20	Not satisfied with the involvement I have in decisions that affect my work	0.77864			
C21	Not having a sense of direction and purpose in life	0.77224			
C19	Not experiencing warm and trusting relationships at work	0.66831			
C16	Not satisfied with my life	0.63712			
C14	Not satisfied with my job	0.62668			
C4	Feeling isolated and lonely	0.47139			
C8	Experiencing muscle tension		0.90578		
C6	Sleeping badly and/or restlessly		0.89278		
C5	Experiencing fatigue		0.80613		
C10	Hard to recover my energy		0.77701		
C9	Feeling sad, depressed, anxious and/or hopeless		0.66833		
C7	Am irritable		0.62640		
C15	Not satisfied with my wage		0.54747		
C12	My general health is poor			0.68849	
C11	Experiencing physical illness and/or injury			0.61917	
C13	Taking sick leave frequently			0.59141	
C2	Uncertain of the SGB and my job roles				0.88878
C1	Working overtime				0.56405
C3	Experiencing role overload			0.47371	0.47327

The four constructs identified in the EFA of Section C of the instrument reflect different dimensions of well-being (Table 4). Professional well-being reflects a sense of control, purpose, and fulfillment in the workplace, supported by positive relationships, active participation in decision-making, and a healthy work–life balance. Emotional well-being is characterized by calmness, resilience, and the ability to recover from stress, with minimal anxiety or irritability, alongside feelings of security and support. Physical well-being relates to good overall health, enabling the principal to perform daily tasks without limitations or frequent illness. Work-related well-being emphasizes clear role expectations and supportive leadership from the SGB and staff, allowing the principal to manage responsibilities effectively without experiencing overload. Together, these constructs serve as key indicators of the overall well-being experienced by school principals.

Table 4. Constructs describing principals' personal well-being.

Factor	Construct Label	Item Number	Item Description
1	Professional well-being	C18	Not feeling charge of the work situation
		C22	Not learning, changing and growing at work
		C17	Feeling negatively about myself
		C20	Not satisfied with involvement in decisions that affect my work
		C21	Not having a sense of direction and purpose in life
		C19	Not experiencing warm and trusting relationships at work
		C16	Not satisfied with my life
		C14	Not satisfied with my job
		C4	Feeling isolated and lonely
2	Emotional well-being	C8	Experiencing muscle tension
		C6	Sleeping badly and/or restlessly
		C5	Experiencing fatigue
		C10	Hard to recover my energy
		C9	Feeling sad, depressed, anxious and/or hopeless
		C7	Am irritable
		C15	Not satisfied with my wage

Table 4. *Cont.*

Factor	Construct Label	Item Number	Item Description
3	Physical well-being	C12	My general health is poor
		C11	Experiencing physical illness and/or injury
		C13	Taking sick leave frequently
4	Work-related well-being	C2	Uncertain of the SGB and my job roles
		C1	Working overtime
		C3	Experiencing role overload

Tables 5 and 6 present the Cronbach's alpha coefficients for Sections B and C of the questionnaire. All constructs in these sections demonstrated alpha values exceeding 0.60, indicating a satisfactory level of internal consistency. This suggests that the questionnaire is a reliable tool for assessing the well-being of school principals. The implications of these reliability findings are discussed in the following section.

Table 5. Cronbach's alpha coefficient values for factors influencing well-being (Section B).

Factor	Cronbach's Alpha Coefficient Values
Relational school-based support	0.95
DBE support	0.91
Availability of resources	0.90
Learner-parental support	0.90

Table 6. Cronbach's alpha coefficient values for personal well-being (Section C).

Factor	Cronbach's Alpha Coefficient Values
Professional well-being	0.92
Emotional well-being	0.91
Physical well-being	0.83
Work-related well-being	0.60

6. Discussion

6.1. Key Findings

The purpose of this study was to develop and validate a contextually relevant instrument for measuring the well-being of public-school principals in Gauteng. The findings provided strong evidence of both reliability and construct validity. The identification of four coherent job-related factors and four personal well-being factors aligns closely with the expectations of the Job Demands–Resources (JD–R) framework, which posits that occupational well-being results from the interplay between workplace demands and available resources (Bakker & Demerouti, 2017). The clear grouping of items into meaningful dimensions thus offers robust support for the instrument's construct validity and theoretical foundation. The job-related constructs identified—support from school relationships, Department of Basic Education support, availability of resources, and support from learners and parents—reflect contextual factors widely recognized in the literature as critical to principal well-being. Research consistently shows that supportive professional relationships, collaborative school cultures, and effective institutional support enhance leadership effectiveness and psychological resilience (Leithwood et al., 2019; Collie et al., 2023). The strong factor loadings for relational variables suggest that interpersonal dynamics within schools have a significant impact on principals' experiences, reinforcing the notion that leadership is fundamentally relational and that social support serves as a protective buffer against occupational stress (Day & Gu, 2014).

The emergence of Departmental support as a key construct underscores the influence of systemic and policy-level structures on the well-being of school leaders. Research shows that bureaucratic pressures, poor communication, and limited administrative support can exacerbate stress for principals (Grissom et al., 2021). Identifying this construct indicates that principals differentiate between resources available at the school level and those provided at the system level, consistent with the JD–R model, which posits that resources operate across multiple organizational layers (Bakker & Demerouti, 2017). Furthermore, the recognition of resource availability as a distinct construct aligns with existing theories, as access to infrastructure, funding, and staff has been consistently linked to lower stress levels and higher job satisfaction among principals (Mestry, 2017; Bush & Glover, 2014).

The fourth contextual construct—support from learners and parents—highlights the influence of community conditions on leadership well-being. In diverse socio-economic contexts, principals often face challenges that extend beyond instructional leadership, including discipline issues, poverty-related pressures, and community instability (Spaull, 2019). Its inclusion in the factor structure suggests that well-being should be understood not only in organizational terms but also within broader social environments, consistent with socio-ecological perspectives on leadership (Collie et al., 2023).

The structure of personal well-being dimensions also demonstrates strong theoretical alignment. The identified constructs—professional, emotional, physical, and work-related well-being—emerged empirically and correspond with models that conceptualize well-being as a combination of psychological health, job satisfaction, physical capacity, and a sense of purpose (Kern, 2022; Riley, 2021). This distinction indicates that principals perceive well-being as a multi-layered concept rather than a single, vague state. Professional and work-related satisfaction serve as critical resources for work engagement, while depletion in emotional and physical domains contributes to burnout. Viewed through an occupational lens, this research reinforces the notion that well-being is dynamic, shaped by both personal experiences and environmental factors (Grant et al., 2007). The authors acknowledge a three-item subscale as limitation that was evident after the EFA was done, When the questionnaire is further developed, it is therefore suggested that more items should be added to address physical well-being and work-related wellbeing.

The reliability analysis further supports the effectiveness of the instrument. According to Field (2024), Cronbach's alpha values above 0.6 indicate that constructs are reliable. In this study, all Cronbach's alpha values exceeded the accepted threshold for internal consistency, demonstrating that the items within each subscale measure the same underlying construct (Tavakol & Dennick, 2011). The particularly high reliability scores for relational support and professional well-being suggest that these concepts are well-defined and stable. High internal consistency is especially important for newly developed instruments, as it indicates that the measurements are precise and results can be replicated in similar studies (Mohajan, 2017). Consequently, these findings confirm that the instrument is robust and suitable for both research and practical applications. For the work-related well-being construct, which had a Cronbach's alpha of 0.6, a closer examination was conducted to determine whether any items were lowering the coefficient. The analysis confirmed that all items were appropriate, and no revisions were necessary. The findings importantly reinforce key assumptions of the JD-R model, demonstrating that a principal's well-being is shaped by the balance between job demands and resources, rather than by demands alone. Evidence indicates that high demands do not necessarily result in burnout when sufficient resources are available to mitigate their impact (Hakanen et al., 2018). Conversely, a lack of resources—commonly observed in underfunded schools—significantly increases the risk of stress and exhaustion (Skaalvik & Skaalvik, 2011). The instrument's ability to measure

both demands and resources reflects strong theoretical alignment with the JD-R framework and enhances its explanatory power.

6.2. Implications

These findings have several important implications. First, they highlight the necessity and practicality of developing measurement tools that are grounded in local contexts rather than relying solely on instruments created in different socio-economic environments. Context-specific instruments are essential because leadership experiences can vary widely, and externally developed measures may overlook locally relevant stressors or supports (Bush & Glover, 2014). Second, the findings underscore the need for systemic interventions to enhance principal well-being, particularly through strengthening institutional support and promoting equitable resource distribution. Research shows that sustainable leadership depends not only on individual resilience but also on supportive working conditions (Riley, 2021).

6.3. Limitations

However, this study has several limitations. The sample was confined to a single province, which restricts the generalizability of the findings to other contexts. Additionally, the response rate limits the applicability of the results—including the validity and reliability of the instrument—to the study population. Future research should seek to replicate the validation process in diverse contexts and educational systems to confirm the stability of the factor structure. Longitudinal studies would also be valuable for examining how principals' well-being evolves over time and for assessing the instrument's sensitivity to such changes. Despite these limitations, the instrument developed in this study demonstrates strong validity, reliability, and theoretical coherence. It effectively captures key aspects of job demands, resources, and personal well-being, making it a robust and contextually relevant tool for evaluating principal well-being. This provides a solid foundation for future research, policy development, and targeted leadership support initiatives.

7. Conclusions

As part of a larger study, this study aimed to develop and validate a contextually relevant instrument for measuring the well-being of public-school principals in Gauteng province. The findings indicate that the instrument is both reliable and theoretically sound, demonstrating strong construct validity and internal consistency across all measured dimensions. Factor analyses produced clear and interpretable structures that align with established conceptualizations of occupational well-being, suggesting that the instrument effectively captures the multifaceted nature of principals' experiences. The identification of four job-related factors—support from colleagues, support from the Department, availability of resources, and support from learners and parents—together with four personal well-being dimensions—professional, emotional, physical, and work-related—provides compelling evidence that principals' well-being is shaped by the interaction between contextual demands and available resources. Importantly, the findings reinforce the central tenet of the JD–R framework: well-being is determined not solely by workload or stressors but by the balance between demands and supportive conditions. The prominence of relational and systemic support as significant factors underscores that leadership well-being is deeply embedded in social and organizational contexts. This highlights the necessity of viewing principal well-being as a systemic and contextual issue rather than a purely individual trait. Consequently, this study not only presents a validated measurement instrument but also provides empirical evidence supporting a comprehensive understanding of school leadership well-being in complex educational environments.

The validated instrument holds substantial value for both practical applications and academic research. For researchers, it provides a reliable and context-sensitive measure to assess leadership well-being in similar educational contexts. For policy-makers and education leaders, it offers an evidence-based tool that can identify specific areas where support systems and resource allocation require improvement. Such insights are essential for designing targeted interventions that promote sustainable leadership, enhance school functioning, and ultimately improve educational outcomes. Nevertheless, the study has limitations, primarily due to its focus on a single province, which restricts the broader applicability of the findings. Future research should aim to test the instrument across diverse geographical and socio-economic contexts and employ longitudinal designs to track changes in well-being over time. Overall, this study demonstrates that a rigorously developed, contextually relevant instrument can effectively measure principal well-being. By providing both a validated measurement tool and empirically grounded insights, it establishes a strong foundation for future research, evidence-informed policy-making, and strategic initiatives aimed at fostering sustainable and effective school leadership.

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Abbreviations

The following abbreviations are used in this manuscript:

KMO	Kaiser–Meyer–Olkin
JD–R	Job demands-job resources
DBE	Department of Basic education
SGB	School governing body
EFA	Exploratory factor analysis

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