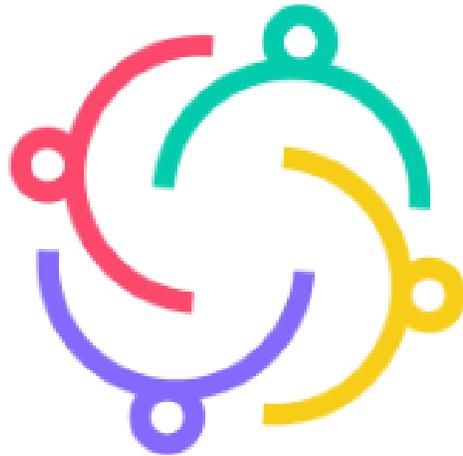


ADVIS Advancing Independent Schools

Behind Every Great School:
2026 Administrative Professionals Retreat

February 19, 2026



A RESILIENT ASSISTANT
SUCCESS PLANNER

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Please print and bring this workbook to the 2026 Administrative Professionals Retreat.

A RESILIENT ASSISTANT

Behind Every Great School: 2026 Administrative Professionals Retreat

ADVIS *Advancing Independent Schools*

with **Shelagh Donnelly**, founder and publisher of **Exceptional EA**

REFLECT. PLAN. IMPLEMENT.

Thank you for turning to me for your professional development.

Your participation in this retreat is an investment in professional growth. Reflecting, communicating, planning and acting on what you learn are among your next steps in creating returns on investments (ROI) in yourself and your career.

I've developed this workbook to help you succeed and thrive as you follow up on our time together. In the pages ahead, you'll find opportunities for self-assessment and planning. Make the time for discussion of this professional development, your goals and your progress with the colleague(s) to whom you report.

ABOUT THIS COURSE

You and your school went through a lot during the first half of this century's "Roaring Twenties". Not long after making it through a pandemic, we saw the emergence of generative artificial intelligence (GenAI). Whether GenAI is seen as a threat, a resource, or a combination of the two, both GenAI and agentic AI continue to charge forward. As we embark on the second half of this decade, it's anticipated the pace of change will continue to escalate, even for those working in traditional environments. With that in mind, we'll examine different degrees of change and how you and your leaders can best prepare for them.

While assistants are often known for adaptability, living through the latest industrial revolution – as we make our way from IR4.0 to Industry 5.0, also known as Society 5.0 – can lead to stress. Then again, some of us create self-imposed stress or head down a path to burnout through the pursuit of perfection.

The good news: We can effectively navigate changes and challenges, just as our predecessors in this career made it through groundbreaking changes during previous industrial revolutions. We can counter stress and burnout through something Shelagh calls informed optimism, and Shelagh will equip you with practical strategies to nurture your resilience. These are wins for all involved, as your personal resilience supports your school's resilience.

WHAT YOU'LL GAIN

- Understanding resilience, and its importance in times of change and challenge
- How to choose informed optimism
- Intentional resilience, strategies to nurture yours, and a challenge

NOTICE

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There are different degrees of change, and our attitude toward change can impact outcomes. What are some characteristics of each of these types of change?

Developmental

Transitional

Transformational

Navigating changes

group exercise

Make your way to a quadrant of the room reflecting a change you've experienced.

LEADERSHIP CHANGE(S)



AI/TECH CHANGE(S)



POLICY CHANGE(S)



TRANSFORMATIONAL CHANGE

Connect with one other person in the group, ideally someone you don't know. While maintaining confidentiality, discuss what/who helped you navigate the change ... and what, if anything, you might do differently in a future situation.

How will I navigate this type of change in the future? Will I take the same approach, or is there anything I might do differently?

In listening to how others have navigated change, did I gain insights I can apply to navigating change? If so, what do I want to remember?

We've navigated substantial changes before

Post-retreat exercise: Reflect on the year 2020. ***ID one developmental, transitional or transformational workplace change that took place that year.***

The change:

- A. What initial reaction(s) did I have to this change? In hindsight, was this a reasonable reaction?
- B. Was the change developmental, transitional or transformational in nature?
- C. What resources were available as I/we adapted to this change? Did I tap in to such resources, and what/who was particularly helpful? ... *Was I a resource person for others within our school?*
- D. What challenges did I/we overcome? What helped me adapt to this change? Did I become more intentional in nurturing my resilience?
- E. What do I find satisfying about the way I/we/our school community adapted to this change?
- F. What ideas do I have on how I can approach adapting to a comparable type of change in the future?
- G. In hindsight: What, if any, opportunities did this change offer?
- H. What new skills, insights, connections or other benefits did I gain as a result of this change?
- I. If I grew professionally as a result of this change, did I document such development for discussion at a subsequent performance review, and discuss it with my leader(s)? If not, what held me back?

Complete the same exercise reflecting a subsequent change.

Post-retreat exercise: Reflect on the last 24 months. ***ID one developmental, transitional or transformational workplace change that took place that year.***

The change:

- A. What initial reaction(s) did I have to this change? In hindsight, was this a reasonable reaction?
- B. Was the change developmental, transitional or transformational in nature?
- C. What resources were available as I/we adapted to this change? Did I tap in to such resources, and what/who was particularly helpful? ... *Was I a resource person for others within our school?*
- D. What challenges did I/we overcome? What helped me adapt to this change? Did I become more intentional in nurturing my resilience?
- E. What do I find satisfying about the way I/we/our school community adapted to this change?
- F. What ideas do I have on how I can approach adapting to a comparable type of change in the future?
- G. In hindsight: What, if any, opportunities did this change offer?
- H. What new skills, insights, connections or other benefits did I gain as a result of this change?
- I. If I grew professionally as a result of this change, did I document such development for discussion at a subsequent performance review, and discuss it with my leader(s)? If not, what held me back?

Learn from the past, and prepare for the future

Post-retreat exercise

What changes do I anticipate may occur within our school and the workplace within the next few years?

What have I learned, over the course of my career, that can help me prepare for and adapt to future changes?

Where have I focused my professional development in the last couple of years? What type of training and development will I pursue in the next two years? What's my professional development focus for the balance of 2026?



Informed optimism

Shelagh described informed optimism as something we cultivate and gain through curiosity, ongoing learning and a positive attitude. This is not naive optimism; it's grounded in reality, and a pragmatic outlook.

The more we know, the better we can prepare and position ourselves to navigate changes and challenges ... and be of value at work. As we broaden our perspective, we can align our professional development to adapt to changing circumstances.

What can I do?

Pay attention to school, private school sector, education, business and geopolitical matters.

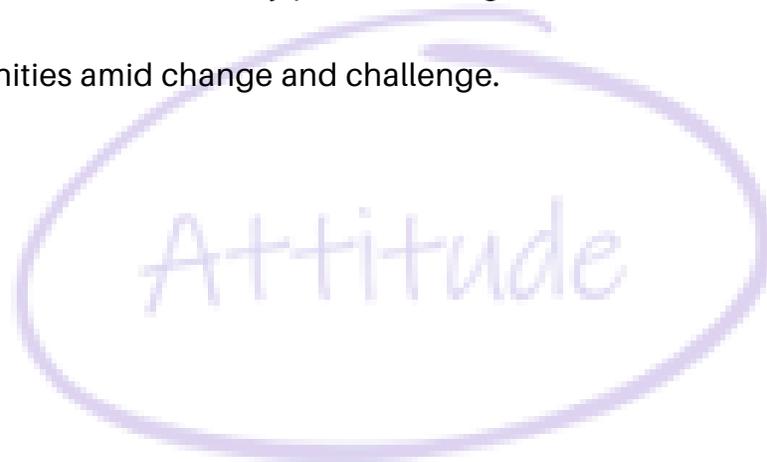
Watch for emerging risks, constraints and opportunities. This elevates our capacity to navigate whatever may come our way, and to be of value to the school and its leaders.

Read beyond the scope of my role.

Ask informed questions.

Be discerning and focused about my professional growth.

Look for opportunities amid change and challenge.



Rethinking the merits of perfectionism

Many assistants are perfectionists. It can be easy to conflate/connect high performance with perfectionism, yet we're better off aiming for excellence. The absence of perfection does *not* imply delivery of sub-par work, failing to proofread or failing to pursue accuracy and quality.

Shedding perfectionist tendencies *can* support effectiveness and efficiencies, yielding better outcomes for you, your colleagues and the school. It can also support better life-work balance. Join Shelagh in becoming a recovering perfectionist.

If I'm a perfectionist, or have perfectionist tendencies, consider these questions.

Do my Head of School/leader(s) and other colleagues expect perfection of me, or is this a self-imposed pressure I place upon myself?

Do I use personal time to pursue perfection, or unnecessarily rework quality deliverables? If so, are colleagues aware of the extra efforts I'm making? Would they want me to do this?

Is perfectionism either **(a)** a good use of my time and compensation, or **(b)** a luxury at the potential expenses of time, frustration, delayed outcomes and missed opportunities?

Do I expect perfection of the leader(s) I support?

Have I missed out on opportunities because I wouldn't try something, speak up, or put myself forward until I had all my ducks in a row?

Has perfectionism been impacting any of my **(a)** time management, **(b)** resilience, **(c)** separation of my personal life from work, or **(d)** relationships/connections?

Has my approach at times adversely impacted others by virtue of delays/me taking excess time to polish deliverables even when they're already accurate and professionally and appropriately presented? If so, who (ID by roles, groups) am I impacting?

While I of course want to perform at a high level, can I expend time and energy in a manner that may be better for my colleagues *and* for me?

If I'm ready to rein in perfectionist tendencies, what intentional changes can/*will* I make in order to perform at a high level *without* aspiring to perfection?

Be self-aware, and intentional in building resilience

Be aware of what depletes your energy (battery) and your resilience. Many things in life are beyond our control, yet we *can* control how we choose to navigate such matters.

Consider what helps you recharge your battery and nurture your resilience, and of what you're doing when you're feeling resilient. Be intentional in maintaining, reinforcing positive practices.



What do I do to charge/recharge when facing challenges, or when I'm feeling less than resilient?



What routines or practices are part of my life when I'm feeling charged and resilient? Have I been intentional about such practices?

How much of a priority is resilience to me? What will I do about it?

Shelagh discussed 18 different ways we can nurture resilience. Which of these strategies are already part of my life? What steps can I also incorporate?

Feel free to take photos of Shelagh's slides highlighting these ideas.



Remember

Here are some other tips or concepts I want to remember.



Interested in more of Shelagh's thoughts? Follow her on LinkedIn.