



Ensuring Sustainability



*Organizational and Financial Health Assessment and Support
for Contra Costa School of Performing Arts*

Prepared for
Brandy Byers, Executive Director
and
Heather Vega, Board President
Contra Costa School of Performing Arts

Prepared By
Nicole Assisi, Ed.D.
Co-Founder and CEO
Thrive

Letter of Introduction



Dear Dr. Byers,

Thrive, in partnership with Delta Financial Associates, is happy to present the following proposal to support **Contra Costa School of Performing Arts (CoCoSPA)** with assessment of their organizational and financial health. Over the past three years, alongside the challenges of a global pandemic, CoCoSPA experienced significant leadership transitions, including a new Executive Director and shifts in board leadership. Additionally, financial errors made by back office providers and shifts in enrollment have threatened the longevity of the school. Despite changes in leadership and financial challenges, CoCoSPA remains focused on providing exceptional pre-professional performing arts education in a college and career preparatory environment. With its recent change in leadership, CoCoSPA has a unique opportunity to examine organizational successes and areas for change in order to embrace its next phase of success.

Thrive is an educational nonprofit specializing in creating vibrant places where children and adults thrive. In partnership with Delta Financial Associates, we will leverage our experience leading and managing financials for charter schools. Sabrina Ayala of Delta Financial Associates brings several decades in the financial sector including 12 years as Chief Financial Officer of a successful charter management organization. Dr. Nicole Assisi has seven years of experience as a charter school Executive Director and success in supporting school leaders in identifying priorities and charting the path forward. Together we will support the Executive Director, Leadership Team, and Board of Directors to ensure that school operations and finances are sound, allowing for the long term vision and core values of rigor, relevance, resilience, and relationships to flourish.

As a team, we are responsive, adaptive, and collaborative. We envision working together dynamically as we:

1. **Identify organizational needs and priorities:** work collaboratively with leadership and governance teams to support your school's longevity
2. **Financial Assessment:** understand financial challenges and opportunities to mitigate risks
3. **Path forward:** link arms and forge a path forward so your school thrives

We look forward to working together to create an outstanding future for CoCoSPA that strengthens the commitment to excellent education for all students. We look forward to talking through this proposal and collaborating to create an outstanding future for CoCoSPA that strengthens the commitment to excellent education for all students.

Regards,

Nicole Assisi Ed.D.

Founder & CEO

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Scope of Work



1

Part 1: Identify Organizational Needs & Priorities

Objective: To understand the current context of CoCoSPA (including existing constraints, demands, established practices, engagement, communication, and community needs). To provide insight, clarity, and focus in the process of identifying priorities and next steps for the Executive Director and Board.

Methods:

- Review existing plans for sustainability and long term success
- Interview Board of Directors, leadership team and key stakeholders to understand the existing context of CoCoSPA
- Provide insight and leadership coaching to the Executive Director to support the prioritization of organizational next steps.

Timeframe: April-May 2023 - Not to exceed 25 hrs

Deliverables:

- Road map with a clear vision and next steps
- Site leadership coaching and strategy support

2

Part #2 Financial Health Assessment

Objective: To provide insight to CoCoSPA leadership on their path to building a secure financial future, including day to day operations, and facilities

Methods:

- Review of current and historical financial documents, actuals, enrollment trends, facilities documents, and audits
- Analyze CoCoSpa's financials in comparison to other similar schools to identify efficiencies and areas of concern and offer suggestions to "right size" the budget
- Evaluate the current facilities financing model and suggest a path forward to support the renegotiation of the current bond as well as offer other facilities options if applicable.

Timeframe: April-May 2023 - Not to exceed 25 hrs

Deliverables:

- Recommendations on how CoCoSPA can build a secure financial future, including day-to-day operations, and facilities

Costs for Scope of Work



Part 1: Identify Organizational Needs & Priorities	Deliverables	Cost
<p>Goal: To understand the current context of CoCoSPA (including existing constraints, demands, established practices, engagement, communication, and community needs). To provide insight, clarity, and focus in the process of identifying priorities and next steps for the Executive Director and Board.</p> <p>Timeframe and touchpoints:</p> <ul style="list-style-type: none"> - April 2023 - April 2023 - Approx 14 meetings - Not to exceed 25 hrs 	<ul style="list-style-type: none"> -Road map with a clear vision and next steps -Site leadership coaching and strategy support 	<p>\$185/hr (not to exceed 25 hours)</p>
Part 2: Financial Health Assessment	Deliverables	Cost
<p>Goal: To provide insight to CoCoSPA leadership on their path to building a secure financial future, including day to day operations, and facilities</p> <p>Timeframe and touchpoints:</p> <ul style="list-style-type: none"> - April 2023 - April 2023 - Approx 3 meetings - 25 hrs 	<p>Recommendations for building a secure financial future, including day-to-day operations, and facilities.</p>	<p>\$220/hr (not to exceed 25 hours)</p>

Terms

Scope Flexibility and Expansion

The scope of work is flexible and can be updated, changed, or expanded throughout the project by mutual agreement of Thrive and the Project Lead representing the client. Additional work will be scoped, priced, and invoiced separately. No additional work will be performed without your written permission.

Payment Schedule

Payment is due in two (2) installments upon completion of each project part as scoped out in the two parts above. Thrive is always committed to being responsive to our clients' needs. If a different payment schedule is needed, please let us know. Any work provided outside of the scope of work will be charged at an hourly rate that Thrive will provide through a separately negotiated Scope of Work.

Travel Expenses

Travel expenses, if/when pre-approved by the client, will be billed separately and at reasonable cost. At this point, we do not anticipate any travel.

Assumptions

To increase the likelihood of project success we ask that the client provides:

- A primary point of contact to help coordinate, monitor, and encourage the execution of tasks assigned to client's staff.
- An executive sponsor to set internal strategic direction and vision, and remove any obstacles that impede project progress.
- Timely access to staff, data, and documents to allow for efficient information gathering.
- This proposal assumes that the client will assign an individual to lead and a team to support that Project Lead in facilitating meetings (including necessary logistics).
- This proposal assumes that all meetings (beyond those held during an onsite visit) can be conducted virtually via Zoom, Microsoft Teams, or any other preferred virtual team meeting platform.

Selected Project Team



Dr. Nicole Assisi
Chief Executive Officer, Thrive

Dr. Nicole Assisi is an experienced superintendent, principal, teacher and entrepreneur. San Diego Business Journal recognized her as a “40 under 40” leader and a finalist for CEO of the Year. Her schools were named among the most innovative in the nation and received a CA Senate Commendation. None of this would have been possible without a great team of educators, which is why Nicole now dedicates her career to supporting school teams to reach new heights. She believes that given the right conditions, any leader can become a transformational leader and any team can thrive. As a coach and consultant, she supports hundreds of leaders and their organizations in increasing their capacity. As a professor, Dr. Assisi has worked at the University of Cambridge, University of California Los Angeles, California State University in Dominguez Hills and the University of San Diego. In addition to a multitude of teaching and leadership credentials, Nicole holds a doctorate in educational leadership from the University of Southern California, two master’s degrees from the University of San Diego and Point Loma Nazarene University, is a certified Professional Certified Behavioral Analyst and holds an International Coaching Federation coaching certificate. [LinkedIn](#) / [Resume](#)



Sabrina Ayala
Chief Financial Officer

Sabrina Ayala runs Delta Financial Associates where she supports charter and private schools with their finances. She also served as the Chief Financial Officer of Green Dot Public Schools where she was responsible for managing all financial aspects, including financial strategy, budgets, cash management, accounts receivables, accounts payable, facility financing and purchasing. Prior to joining Green Dot in 2006, Sabrina was an Institutional Equity Trader on Wall Street with Merrill Lynch, a Valuation and Compensation Consultant with Stern Stewart & Co. and an Investment Banker with Kidder, Peabody & Co. Sabrina, an Eli Lilly Scholar, received her MBA from the Kellogg School of Management in 2002 with majors in Finance and Entrepreneurship. Her Bachelor of Science degree in Finance, with minors in Accounting and Sports Management, is from Northern Illinois University, where she graduated with honors, cum laude and Outstanding Woman Graduate of the Year. [LinkedIn](#)



Shelli Kurth

Chief Innovation Officer

Shelli has deep school-site leadership expertise and brings a broad range of experience as a nonprofit founder, grassroots organizer, school leader, and coach. Shelli’s passion for the people she serves has made her a sought-after coach, trainer, and consultant. Shelli co-hosts an award-winning statewide parent education show on UCTV and is driven by a deep belief in equity, access, and opportunity for all through the empowerment of individuals. She is also a national speaker and writer. As a consultant, Shelli brings intuition and joy to her work and is skilled at working through thorny relationships, creating consensus, and moving teams toward greater collaborative outcomes. [Resume](#) / [LinkedIn](#)



Mary Morris

Project Manager

Mary has over a decade of experience teaching and leading teams in elementary and middle grades. Her experience spans public, private and charter schools in the US and in Mexico. She has led workshops for teachers on design thinking, social emotional skill building, content instruction in both literacy and math, in addition to guiding teams in vertical alignment. She has a Master’s of Education with an emphasis in Curriculum and Instruction from the University of the Pacific and her BA from UC San Diego. Mary is realistic about the constraints of classroom teaching and likes to bring humor and a teacher’s perspective to her work. [LinkedIn](#)

About Thrive

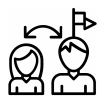
At Thrive, we believe just-in-time coaching, strategic planning, and program evaluation are essential in supporting leaders to accelerate learning and create lasting change in schools and education systems. Our team specializes in:



Co-Designing Solutions: We co-develop clear visions and strategies for innovative change. We bring new perspectives and leverage our clients' internal wisdom to develop strategic plans, mapping paths to new opportunities and greater impact.



Gathering Insights: We help leaders go from insight to impact. We bring a fresh perspective and expertise to leaders, providing clear strategies, practices, and evidence-based interventions.



Building Capacity: We stand shoulder to shoulder with leaders to help you run your strategy. We provide training, coaching, and workshops to ensure your team is ready for the work. Together, we build momentum and avoid stagnation.



Developing Tools: We build tools so your educators can do the important work of supporting students. Whether updating rubrics, creating new courses, or designing statewide playbooks, our team of experts is ready to roll up their sleeves and get the job done.

We are an educational nonprofit comprised of celebrated innovators, trusted partners, and thoughtful solution designers who are dedicated to improving teaching, learning, and leading in K-12 schools and beyond. Our team has supported a diverse range of organizations, from large universities like Arizona State University and districts like Los Angeles Unified, to single-site charter organizations. So you may better get to know us, we reference some of our clients in this document. They all have one thing in common: they know *investing in their people is the smartest thing they can do to shift outcomes for students.*

When your staff and students are thoughtfully and intentionally supported to be their best, good things happen: student achievement rises, staff retention increases, and capabilities grow. And your organization shines.



Why Thrive



Experience: We are seasoned leaders and superintendents who grasp your key challenges and have led through them. In addition to the clients featured on the following pages, we've aided numerous leaders worldwide in achieving a learning revolution.



Training: We are certified coaches and educators with expertise in facilitating positive change, drawing on both the art and science of the field. Our team has received extensive training in areas such as the neuroscience of change, leadership development, change management, team dynamics, and behavioral sciences, with some of our members even teaching courses on these subjects. With this knowledge, we equip leaders with effective tools to promote lasting and positive transformation



Impact: We received numerous accolades for innovation and excellence in education including

- California State Senate Proclamation for our innovative approach to education,
- Telly Award in partnership with UCTV & UCSD for supporting families during the pandemic,
- Acknowledgment as one of the top 100 most innovative programs by Getting Smart,
- Recognition as one of 50 model programs for social-emotional education.

382,874

STUDENTS REACHED

Thrive's work has impacted students across the nation by strengthening engaging learning communities and multi-tiered systems to support young people's success.

626

SCHOOLS REIMAGINED

We have supported districts, charters, and educational organizations to purposefully plan for systemic school excellence.

47

LEADERS SUPPORTED

We have coached 47 leaders, standing shoulder to shoulder as they catalyzed transformation of themselves, their teams, and their organizations.

36

TOOLS CREATED

Organizations and schools come to us to create impactful tools simplifying the work of educators. We are thrilled that many of these tools are now free to all.

Most importantly, our clients keep coming back to us because they can count on us to be masterful facilitators and solution designers who get the job done.

Some of Our Clients & Partners

School (re)Design & Strategic Planning



Needs Assessments & Program Evaluation



Implementation Support & Leadership Coaching



For more information and more sample projects, please see our [portfolio](#).



SAMPLE ENGAGEMENTS:

SCHOOL (re)DESIGN & STRATEGIC PLANNING

Does your organization have a plan to put your mission and vision into action?

Whether your school or organization is in its incubation phase or you want to fine-tune or recreate programs, we will help you dig deep and create an actionable plan to drive results for your students. Our experience brings innovative educational practices together with realistic implementation support.



Districtwide Blueprint

Lynwood Unified School District sought out our expertise to design a clear roadmap for its 19 schools. In partnership with Copernicus, we uplifted community voices to create a strategic plan to guide leaders in fostering student achievement.



Redesigning High School

We worked with Oroville High School (CA) leadership to innovate and implement a new high school model, meeting the needs of students in their particular context.



Roadmap to Success

Thrive supported Achieve Charter School (CA) in its strategic planning process. We engaged all stakeholders to identify core outcomes in the areas of programs, community, and people, and developed a roadmap to meet those goals.



CASE STUDY Middle School Reimagined

In 2021, Hamilton County Department of Education developed a competitive grant opportunity to reimagine and improve the middle schooler's experience through bold innovations. Thrive was brought into this work as a technical assistance partner based on our expertise in school redesign and team coaching. Over the course of six months we supported both the district's middle school and innovation teams, as well as the five grant recipient schools. We worked remotely and in-person to provide teams with thought partnership, training, and feedback as they developed plans to lead significant, meaningful change in their communities.





SAMPLE ENGAGEMENTS:

NEEDS ASSESSMENTS & PROGRAM EVALUATION

Are your programs and practices moving your organization toward success?

When you need a new perspective, we're here to help. We'll assess your programs, processes, and tools to ensure they're delivering results for your students. Our approach involves gathering insights from education partners, conducting in-depth program analysis, reviewing data to identify trends, and finding assets to build towards success.



Systems for Success

Arizona State University's Learning Enterprise sought Thrive's expertise to address a critical issue: supporting and bolstering the academic success of students of color. We built systems to increase student success through course reviews and by developing guides for teachers to easily engage students in mastering their online coursework.



Addressing Absenteeism

We worked with California Collaborative for Educational Excellence to examine causes for chronic absenteeism across the state of California and consolidate best practices in [a brief](#) addressing this key issue that affects outcomes for all students.



Systemwide Evaluation

Thrive supported [Da Vinci Schools](#), one of the nation's most innovative school programs, in developing a strategic plan that clearly supported their schools' mission and vision.

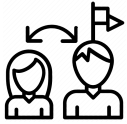


New Tech Network

CASE STUDY: Assessing for Equity

The New Tech Network is a national nonprofit design partner for comprehensive school change. NTN engaged Thrive to rethink leadership training for its 115 districts and 5,000 teachers. Our deep collaboration process uncovered opportunities for them to embody the NTN model at every stage. As a result, we developed deliverables, including content area student rubrics with a focus on equity. We also redesigned look-fors and competencies to align with NTN's [school success rubric](#). This work shifted NTN's internal culture and furthered progress on leadership and change initiatives. Our collaboration helped their team build stronger alignment between organizational priorities and NTN's onboarding, training and operating processes.





SAMPLE ENGAGEMENTS:

IMPLEMENTATION SUPPORT & LEADERSHIP COACHING

How will you onboard and maximize team capacity as you roll out new initiatives?

Thrive has the experience and expertise necessary to support and reinvigorate your administrators, leaders, and teachers, ensuring successful programs and experiences for your students.



Middle School Reimagined

Thrive worked with innovation grant recipients in Hamilton County to support district teams by providing thought partnership, training, and feedback.



JCS FAMILY

20 YEARS OF EMPOWERING LEARNERS

Transition & Growth Planning

Together with senior leadership, Thrive worked closely on the school sites and at the cabinet level to support succession planning and organizational growth at all levels of leadership.



District Management Group

Iteration Cycles

We coached LAUSD teachers through change iteration cycles around early literacy goals in partnership with DM Group. This work led to exceptional, measurable growth across school sites.



CASE STUDY MTSS Coaching

In collaboration with the Orange County Office of Education, Thrive supported 22 schools across California to implement an equity-based MTSS framework to address academic and social-emotional needs. Each school received a grant to support its MTSS work. We worked individually with school leaders to understand their context and starting point and develop a meaningful, effective path to implementation. We developed staff capacity to meet the needs of all students in a community-centered way through ongoing coaching, support, and training that impacted thousands of students across California.



Client Testimonials

Without our Thrive coach leading the way, we would never have increased our reading scores by 30%. She really helped my teachers dig into the data and fine-tune their instruction.

*Dustin Merritt
Principal, Los Angeles Unified School District*



One could not ask for better creative thought partners than Thrive in charting a forward course in dynamic educational environments. Thrive rose to the challenge, with a sense of urgency only exceeded by demonstrated grit and integrity.

*Morgan Appel
Assistant Dean, Education and Community Outreach, UC San Diego Extension*

Thrive delivers on its promise to personalize learning for all students so that all students can fulfill their human potential.

*Michael B. Horn
Speaker, author, education thought leader*



Thank you for exemplifying and simplifying the purpose of personalization and helping me to realign my lens and the vision for our school with what is going to be the best for our students even if it is a little scary.

*Megan K. Hennessey
Principal, Denver Public Schools*

We look forward to supporting your next project!



Dr. Nicole Assisi

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