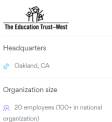


The Education Trust–West improves office operations and hiring with Asana



Asana impact

- Reduced email usage within the organization
- Faster hiring and onboarding with project templates and smoother handoffs
- Clarity on office-wide schedule and speaking proposals for proactive planning

The Education Trust–West is the California based office of the nationally recognized and U.S.-based nonprofit, The Education Trust. They work for the high academic achievement of all students at all levels—pre-kindergarten through college—to expose opportunity and achievement gaps that separate students of color and low-income students from other youth. They then identify and advocate for strategies that will forever close those gaps, and work alongside parents, educators, policymakers, and community and business leaders across the state in transforming K-12 public schools and postsecondary systems into institutions that serve all students well.

But for The Education Trust–West to be able to champion students, they also need a champion for their work. Enter Elizabeth Calmeyer, Manager of Operations and Talent at Ed Trust–West. Elizabeth manages their recruiting operations and software deployments, as well as their branch's needs from moving office locations to staff meetings. It's a lot for anyone to tackle, especially without a unified system to keep it all together.

From challenges to change

According to the [Anatomy of Work Index](#), nearly half of workers across the U.S. struggle to understand how their work contributes to the mission. Mission-driven nonprofits like The Education Trust–West especially need to have clear goals, strategies, and tactics not only to achieve those missions, but to help their team see how they're part of the solution. Before Asana, The Education Trust–West was struggling with:

- Collaboration between teams. Messy handoffs meant leads had to supervise an entire process from start to finish and lowered trust.
- Unrecorded or unwieldy processes. Work got duplicated or outdated, with too much time spent on repeating menial tasks.
- An unintuitive work management tool. The dull interface and steep learning curve left many employees' project management needs unmet.
- Unclear schedules. Employee schedules and key org-wide dates weren't visible to everyone, causing hiccups and poor planning.

Though the Education Trust–West team had a work management tool in place, it just wasn't working. They needed a better solution.

Better collaboration without conforming

When Elizabeth started with The Education Trust–West, the organization had just selected a work management tool, to which she helped onboard the team. Despite some of the initial gains to help get everyone on the same page, they couldn't outweigh the growing day-to-day pains.

"I didn't want to switch tools, especially because I had just onboarded my team. Yet I kept finding myself giving complicated explanations to people about how to do things and thinking it shouldn't have to be this way," says Elizabeth. Then she joined an internal pilot group to find a better work management solution for the organization.

"We tried several tools, but the group kept saying no. Either they weren't intuitive, or didn't match our mental models. With Asana, we could shape it to our work, versus the other way around."

As the team trialed Asana, several things stood out to them, including:

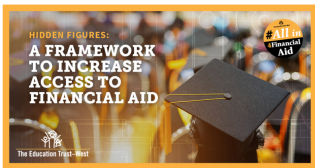
- It was easy to get started with a trial
- They could shape Asana to their work style, versus having to conform to a rigid system
- A reduction in email thanks to clear tasks and easier conversations in context
- It was visually appealing, making it more exciting to get in there and start collaborating

Getting the team on board

Once The Education Trust pilot team made their decision to use Asana, Elizabeth led the rollout for the Ed Trust–West office. In looking for resources to help her do so, she came across an [Asana Together training](#) in San Francisco, which she attended.

"I paid close attention to how the Asana team trained us at the event, which gave me a template for how to train our staff." Then it was time to pass on her learnings in front of her team. "I created an event project and had everyone in the room create tasks and add sections. They could see how plans would come together and how their pieces fit."

Elizabeth started using Asana to run meetings, pulling up projects for everyone to see the agenda and track follow-up work during the meeting. To continue to improve the learning path, The Education Trust also worked with an Asana [Customer Success Manager](#) (CSM) who helped them build out more projects, design processes, and discover best practices.



Building the best playbooks

With help from a CSM and a team that's onboarded, The Education Trust now relies on Asana to manage tons of projects and processes:

- **Work requests:** Instead of responding to whatever comes in via email or conversations, Elizabeth's team relies on request tasks and sets recurring tasks for work that they do regularly around the office.
- **Meeting agendas:** Sharing the agenda beforehand and pulling it up during a meeting makes conversations more purposeful. Elizabeth can better capture follow-up work and ideas that come up.
- **Speaking opportunity submissions:** As soon as someone becomes aware of a speaking opportunity, they can fill out a form and provide all the information Elizabeth needs to action it. No more back and forth on last minute ideas.
- **Recruiting:** With [project templates](#), Elizabeth can kick off new roles in a few clicks and make everybody's responsibilities clear so candidates have a seamless experience.
- **New hire onboarding:** With a new hire onboarding project template, new employees can make an impact faster and managers are assured they have the most up-to-date information.

A+ at work and in the communities they serve

Since moving to Asana, The Education Trust–West has left all their old tools, daunting multi-page docs, and extensive spreadsheets behind.

"We got rid of our eight-page onboarding document. Employees start off happier, with the updated information they need."

Asana has also helped "build more trust and transparency," Elizabeth explains. "We now embody the principle of making sure that there's a clear owner for every task, so the work actually gets done."

The Education Trust–West has also upleveled its strategic work. This year, they were able to plan, track, and execute their college affordability initiatives with comprehensive timelines and a streamlined way to communicate updates, while reducing email and meetings. One of these accomplishments was utilizing Asana to manage the planning of the California College Affordability Summit. This event brought together nearly 600 practitioners and educators to identify opportunities to increase financial aid access for California's student and proved The Education Trust–West team is ready to take on more events.

While all of this is great for The Education Trust–West, the real winners are the students and families they serve, who can now expect more resources and improved advocacy. Ultimately that means students and education advocates are equipped with the advocacy tools needed to ensure California schools and districts work to meet the needs of our students of color, low-income, and English learner students.