



Intake-to-Placement: Basic Matchmaking Process Improvements

Guide developed as part of the Competitive Pet Placement Project

What is Pet Matchmaking?

Pet matchmaking aims to find positive outcomes for pets in care and comprehensively support community members interacting with your organization. To best match pets in care or expected to be in care soon with potential adopters and fosters, shelter personnel must be trained on best customer service and conversational interviewing practices and follow a consistent matchmaking protocol.

Matchmaking Protocol

A matchmaking protocol includes an organization's intake-to-placement process and lists which teams are responsible for certain tasks, such as the physical handoff of the pet, meet and greets, speaking with the public, updating files, and more. This protocol should reflect a [case management approach](#) and [training](#) to ensure every person who calls, emails, completes a form, or walks in the door of your shelter is treated as a unique case. This protocol should also integrate a [conversational interviewing](#) focus and [scripts and sample language](#) for common terms used in matchmaking discussions such as blurbs related to behavior or medical needs, especially if your organization has public-facing labels on pet profiles. When developing a protocol, consider the types of adoption or foster counseling flow processes that will work best for the organization's current setup. Here's a sample:

- Before greeting a potential adopter or foster, review the submitted [interest form](#) for details on the type of pet they are looking for, characteristics, and basic home setup.
- Identify 3-5 pets that may fit their interests and begin the appointment. Be sure to consider recommendations from your long LOS population.
- Give a high-level overview of the top 3 pets that may fit their preferences and how they align with their interest form. At this time, verify any gray areas on their form or clarify any notes they may have entered. For example, if they are interested in a dog-friendly dog, ask if they are interested in a dog that specifically can live with other dogs or a dog that can mingle in public spaces where other dogs may be present. These clarifications can help further narrow down potential matches.
- If the pet has specific medical or behavior considerations, highlight the basics, monetary considerations, long-term care, or other high-level items that may impact placement, and explain that you will give comprehensive details a little bit later in the process. Ask if they have a preference for one or two in particular.
- Complete a meeting with the pet(s), highlighting throughout any specific qualities or considerations mentioned in the pre-meeting overview.
- If a pet is selected, give a more in-depth description of the previously mentioned





considerations and complete relevant paperwork.

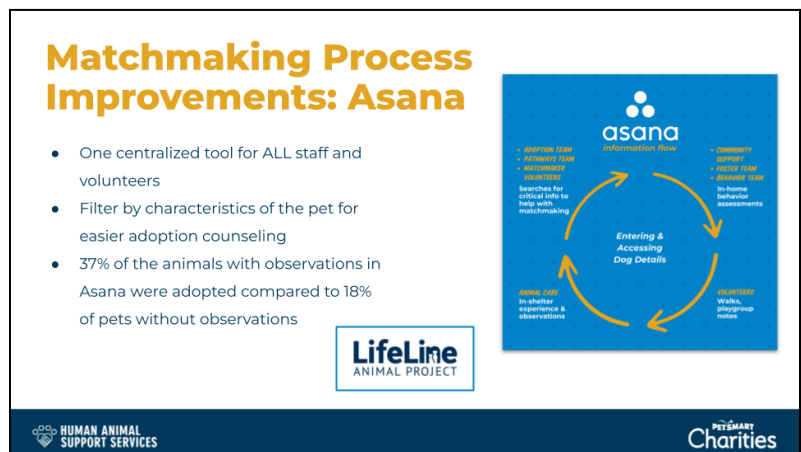
- If a pet is not selected, offer an overview of the 2 remaining backup options. Proceed as normal. If a pet is not selected from any of the top 5 options, ensure they are aware that new pets join the organization often, how to keep an eye out for specifications they may have, and direct them towards any local rehoming sites as applicable.

Entering and Filtering Pet Information

To have a comprehensive matchmaking conversation matchmakers need to be able to easily reference pet characteristics in addition to basic pet details for multiple pets at one time. This might include personality traits, whether they can live with other pets, behavior or medical considerations, or other attributes that may impact placement options. Where to enter and find this information varies widely by shelter software and most commonly can be found in a pet's written biography or a general "memo" area. Memos can be lengthy and sometimes conflicting, so adding attributes or labels to a pet file can be a time-saving effort that leads to more positive outcomes. When available, create separate memo categories to sort information such as "medical memo," "positive observations," and "playgroup notes."

External programs such as [Asana](#) and [Trello](#) can collect and sort pet information to support matchmaking if the organization's existing software cannot easily accommodate highlighting pet personality information. This may also be ideal for organizations that have volunteers regularly interacting with pets but cannot be granted permissions to directly enter details into shelter software. These programs are easily accessible and can be a valuable tool when integrating volunteer notes into the matchmaking process. Benefits include:

- Creating an individual file for each pet, allowing multiple parties to enter notes, add photos or videos, add behavioral attributes, and more. This creates a multi-tiered approach to completing a pet's profile from different perspectives.
- Filtering information such as attributes, characteristics, setup information, historical information, and more to easily see pets that may fit a specific preference.
- Integration with (some) shelter software. While **not all shelter software offers this capability**, some can integrate into programs like Asana to automatically fill in basic

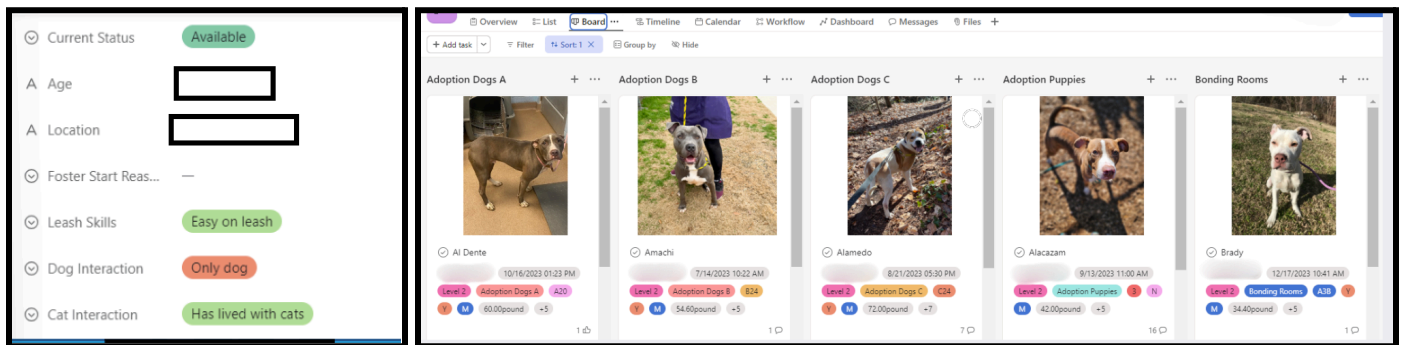




details such as age, sex, ID, weight, DOB, etc. This allows individuals utilizing these platforms to focus on areas that can help build this pet's personality profile.

- Sorting pets into specific status categories such as “available,” “on hold,” “adopted,” “urgent,” and “in foster” to support prioritization.
- Inclusion of highlighted dates. This may be particularly helpful for fosters looking to transfer to another foster by a specific date, or for a pet that will be available for adoption at an upcoming time. (You can view these in a calendar view on most platforms!)
- Viewing pets in “card” or list format for flexibility in different processing styles.

Sample Cards and Basic Details:



Bonus: Consider collecting [pet report cards](#) for pets returned to the shelter from foster or other programs to improve existing notes, biographies, and pet matchmaking opportunities.

Matchmaking Process Improvements

GETTING STARTED

- Identify a **centralized place** for pet attributes/observations
 - Staff & volunteer **access** to record and view
 - Focus on **common requests** (dog/cat/kid interactions)
- Use record-keeping system during every matchmaking opportunity (adopters & fosters)
 - Goal: to be able to **recommend a pet** based on an individual's lifestyle or request
- **Lead with the positive** during the matchmaking conversation
- Dedicated staff and volunteer **training** on the matchmaking process (consider creating videos!)

Sample Script and Blurb Exercise

A matchmaking protocol should also integrate scripts and sample language for common questions and common matchmaking terms. This includes topics related to behavior or medical needs, especially if your organization has public-facing labels on pet profiles that may be



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confusing or worrisome to the public.

Complete the following exercise to brainstorm sample language to describe common questions during the matchmaking process. You may integrate scripts in both in-person and virtual communications. [Review this short list of recommendations to help get you started.](#)

TOPIC (<i>Commonly asked questions</i>)	BLURB (<i>Common response to topic</i>)
Sample: What is Heartworm Positive+ ?	This pet will receive heartworm treatment for free through our shelter after adoption. This process may vary by pet but often requires a few visits to our shelter for injections and lots of rest. Heartworm treatment typically has a high right of success!
Sample: What is a “ flight risk? ” / What does “ scared ” mean?	<p>Option #1: This pet has shown nervous, shy, or fearful behaviors while in our care and we recommend taking introductions slowly and taking extra care in new environments to let them adjust as they may try to run or hide. [Include additional details such as “They are very sweet and cuddly once they get comfortable with a person” or “Toys really help them come out of their shell”] We will be happy to provide additional resources and support to make the transition home as easy as possible.</p> <p>Option #2: This pet is considered a flight risk due to fear-based flighty behaviors and has a history of escaping if the opportunity presented itself, but was safely caught with little or no difficulty. While pets are transitioning into a new environment, there is a higher likelihood of seeing escape attempts as a result of transitional stress, lack of relationship with the people in the home, and/or learning the boundaries of their new home. We can support you with (supplies/ instructions) to best help this pet transition into your home.</p>
Sample: Do you have any dog/cat-friendly pets? / Do you have any cats/dogs that like other cats/dogs?	<p>Option #1 - DOG SPECIFIC - Playgroup Notes Available: Let me tell you about a few of our dogs that have done well in our playgroups! While we do not have notes on how these pups do in a home environment with other dogs, they have had positive interactions with many other dogs in a group setting. [If looking at a specific dog, highlight any particularly great playgroup notes]</p> <p>Option #2 - CAT SPECIFIC - Cat Group Room Notes Available: Let me tell you about a few of our cats that have done well in our group housing rooms with up to [X] number</p>



	<p>of other cats. While we do not have notes on how these kitties do in a home environment with other cats, they have had positive interactions with many other cats in a group setting. [If looking at a specific cat, highlight any particularly great cat interaction notes]</p> <p>Option #3 - Previous Home Notes Available: While we have not introduced this dog/cat to any other dogs /cats while here at the shelter, they have previous notes of being good with [small and large] dogs/cats in their previous home. [If you have specifics, for example: <i>Notes say that they were very respectful of other dogs' boundaries if they didn't want to play anymore as well!</i> or <i>Notes say this cat loved playing and cuddling with other cats in the home</i>]</p>
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Once you have created a list of potential script responses to common medical, behavior, or other attributes for pets in care, ensure the list is approved by department leadership, distribute the list to all team members that complete matchmaking efforts, and ensure the scripts are listed in all team protocols to ensure consistency.

Bonus: Connecting shelter software attributes or labels for pets with sample blurbs, as outlined above, can increase matchmaking efficiency. These blurbs may be added as a “comment” or “memo” when an attribute is added, or be a standalone note in the pet’s file. Ensuring a pet’s file is up to date with attributes and matchmaking notes can significantly increase both consistency and ease in the matchmaking process.

Public-Facing Photos and Biographies

Consider what information is already shared with potential fosters and adopters before they contact your organization. The photos, biographies, and overall pet profiles on your organization’s website or social media pages are the first step in ensuring language is consistent and welcoming. Align the type of language in your scripts and blurbs with the public-facing information you provide about available pets to ensure consistency in messaging and improve customer interactions. [See our best practices for pet photos and bios here.](#)

Volunteer Matchmaking Roles

Volunteers can play a critical role in helping more pets find positive outcomes. Integrating volunteers into the matchmaking process is easy! Consider the following volunteer matchmaker role overview and recruitment rollout samples as a starting point for finding opportunities that work for your organizational structure.



- [Volunteer Matchmaker Role Overview SAMPLE](#)
 - [Instructions tip sheet TEMPLATE](#)
- [Recruitment for Volunteer Matchmakers Emails - SAMPLE](#)

Visibility of Matchmakers

In addition to ensuring internal protocols for matchmaking are consistent, consider creating signage or [badges](#) for on-site matchmakers that community members can easily locate to enhance customer service flow.

- [Adoption matchmaker badges - TEMPLATE](#)

Supporting Resources

Matchmaking Support

- [Conversational Interviewing](#) - HASS
- [Foster Program Overview](#) - HASS
- [Increasing the Odds of a Successful Adoption | ASPCA](#)
- [To find adopters and fosters for pets who are more difficult to place, start with your language](#) - Maddie's® University
- [Getting to Yes! Making Great Matches Between Pets and People](#) - AmPA!
- [Dog Matchmaker Job Description Sample - APA!](#)
- [Meet Your Match® Survey and Guides to Download | ASPCApro](#)
- [Matchmaking - Working with Adopters and Pets to Increase Adoptions](#) - Maddie's® University
- [Communicating Objectively About Behavior](#) - PACC
- [Dog-Dog Intros](#) - Austin Pets Alive!
- [Dog Foster MatchMaking Guidelines](#)
 - <https://aspcameetyourmatch.org/>

Marketing Resources

- [Ethical Standards for Marketing Shelter Pets](#)
- [Marketing FUNDamentals](#) - Maddie's® University
- [Bio Writing, Photography, + Marketing Resources](#) - HeARTs Speak
- [Shelter Pet Marketing is Not Adoption Counseling](#) - Maddie's Fund®
- [Refresh Your Marketing for Long-Term Shelter Animals](#) - ASPCApro