



Implementing Case Management

Why Case Management?

Animal services personnel take a holistic, person-centered, and compassionate approach to meet the needs of human-animal families, also referred to as ‘interspecies families,’ by being trained as case managers.

Trained case managers help people keep their pets, provide resources and support to struggling pet owners, assist owners who need to rehome their pets, and help people find missing or lost pets. Case management means every person and animal is treated as an individual and asked questions so animal services can help find the best possible solution.

What problem does Case Management in Animal Services Solve?

Historically, shelters manage ‘intake’ departments that treat all animals and people the same and use intake as the primary or only way to provide service. In this traditional approach, people who need help with their pets, find a lost pet, or seek pet support services, are offered two options: to surrender their pet or handle the issue with little to no support from the animal services department.

What are the potential benefits of implementing Case Management?

- Improve customer satisfaction
- Improve quality of life of pets and people in your community
- Build community engagement
- Grow volunteer support
- Keep more people and animals together
- Reduce the number of animals housed in the shelter
- Treat everyone as an individual
- Reduce intake
- Increase the number of animals returned home
- Promote responsible pet ownership
- Increase public safety
- Promote diversity, equity and inclusion
- Support human health and wellness

Things to do:

1. Gather and organize human and animal resources that are available in your community.
 - a. Use the [Ideal Animal Welfare Ecosystem](#) as a guide. This is a list of resources that ideally exist in your community for pet caretakers to access.
 - b. For human services, check out pets.findhelp.com for a robust list of services provided in your community.



HUMAN ANIMAL SUPPORT SERVICES

2. Create a list that can be frequently updated and post it on your website. Make a paper copy to hand out when people come into the shelter and share this list with all staff and volunteers.
 - a. Complete the [HASS Pet Support Guide and Worksheet](#) to outline resources you have in-house and externally to support the staff and volunteers working with the families needing help.
 - b. To identify existing resources in your community, check out: [Justshelter.org](#) & [Findhelp.org](#)
 - c. Research local and national organizations that can provide financial assistance, such as [Red Rover's Relief program](#)
3. Create intake questionnaires that provide you key information about pets and their people. You may want to even create it online: [HASS Pet Support Online Survey](#).
4. Learn about case management in human social services and see how case management can help you provide better service to pets and people. Check out the [Case Management](#) section of the Keeping Families Together Eviction Response Toolkit.
5. Train staff and volunteers on how to use a case management, versus a transactional approach. Keep it simple. Case management just means we treat every person and animal as an individual and ask questions so we can help find the best possible solution. This may require a [workplace culture change](#) for your organization.
6. Communicate with staff, volunteers, foster caregivers, rescue partners, community partners and the public about your shift to providing more individualized service to pet owners and finders. A great example of this is [LifeLine Animal Project's Facebook announcement](#).
7. Determine what resources you need most and how you will get them. Some common needs related to case management are:
 - a. More staff/volunteer support and time
 - b. Funding to provide medical services, behavioral support, housing assistance, and other pet support services that can keep animals home
 - c. Training for staff and volunteers on trauma-informed approaches to helping people, particularly those in crisis
 - d. Updated position titles and job descriptions. For example, an intake specialist may become a pet support specialist or pet help counselor.



- e. Funding to provide medical services, behavioral support and items such as wheelchairs for individual pets that need extra support.
 - f. A hotline or call center to help people BEFORE they come to the shelter
 - g. Boarding services or vouchers to provide temporary housing for people in crisis
 - h. A private area in the shelter to have one-on-one conversations with people who are bringing in pets
 - i. Written educational materials in multiple languages to provide support, information and help to people seeking assistance with pet-related challenges
8. Evaluate your technology options and work with your team to determine how technology can help you implement case management.
 - a. Check out the [HASS Community Request Tracking White Paper](#) developed by the HASS Tech & Tools Working Group. This document provides information on different tools that can be used for tracking.
 - b. Reach out through the HASS network for recommendations related to technology challenges and solutions. Chances are, someone else has used the same technology and overcome similar issues.
 - c. Utilize the [HASS Technology Catalog](#) to review Case Management technology options.
9. Start big or small, but use this [How to Pilot a Program template](#) to ensure success.
 - a. You'll want to consider how many staff or volunteer hours you need, what you want your case managers to accomplish, and how you'll provide alternatives to intake. Some organizations train their entire intake staff team on case management, whereas others identify one or two positions on each shift to focus on case management.
10. Monitor progress.
 - a. As a supervisor or manager, you'll want to be part of case management in the first few months. When your staff get busy, they'll tend to slip back into a transactional approach, so you'll need to pay attention to make sure staff are following case management practices. Having SOPS, checklists, and measurable goals will all help make the program successful. You can even have a friendly competition among staff. "Who can help the most people keep their pets this month using a case management approach?" is a great way to get staff and volunteers excited.



Success Story

[LifeLine Animal Project](#)

Nalla the cat swallowed some string and needed help right away. Her mom searched for a vet to help her, but when she wasn't sure she could afford the emergency costs, she thought the only option might be to surrender Nalla to the shelter so the kitty could get the treatment she needed. Nalla's owner didn't want her cat to suffer so she brought Nalla to LifeLine Animal Project in Atlanta, where her owner had the option to work out a payment plan so she and Nalla didn't have to separate after all. Together, they got Nalla into an emergency clinic and LifeLine was grateful to play a part in keeping this family together.

Nalla is back to her old self, and the two are glad to be together.

Lifeline Animal Project has recently started using case management software so every family can be treated like individuals. Lifeline will be following up and maintaining relationships with families like Nalla's, because now, it's easier than ever.

[East Bay SPCA](#)

Mama was diagnosed with a uterus infection in November 2020. Her mom, Jamie, called East Bay SPCA in California asking for help in getting Mama in for surgery that she could afford. Together, Jamie and the Case Manager at East Bay filled out a Humane Advocacy financial assistance application over the phone and booked Mama's surgery a few days later.

The next morning, however, Jamie called in tears as Mama had crashed overnight and her situation became an emergency. Jamie worried she might have to surrender Mama in order to get her the care she needed if Jamie couldn't find a clinic to provide the surgery at the last minute. After a few calls, Jamie got an appointment with a discount at a nearby clinic. With support from the Case Manager, Jamie secured a \$1500 grant from Pets in Need to help cover the cost of the surgery. Mama was going to get the help she needed, and Jaime could breathe again. A month after surgery, Mama was happy and healthy at home again with her family.

[Maui Humane Society](#)

Whiskey's family did not want to surrender her, but they didn't know what else to do. They had other dogs and her behavior was becoming too much to handle. The case managers at Maui Humane Society worked with the family to set them up with their behaviorist to get a better idea of what the situation was at home. They provided a free spay surgery to help with hormones, the behaviorist provided many resources on training and education, and [4EverPets](#) provided enrichment supplies and necessary materials such as a Kong Wobbler, snuffle mat, licky mat, tough toys, clicker, calming mask, etc. With this combination of approaches, Whiskey was able to stay with her family!



[Maui Humane Society](#)

A family came in to surrender their two cats, Maui and Caramel, to the shelter because they couldn't afford to stay on the island anymore due to COVID (the cost of living is incredibly expensive), and they had no money to bring their beloved pets with them. MHS case managers called them to discuss the conditions of surrender, and determined that the best thing for Maui and Caramel would be to remain with their family. Both cats are currently in a foster home with a staff member while they wait to be eligible for their second rabies vaccine (Hawaii and NZ are both rabies-free), and then they will be flown out to rejoin their owners in New Zealand!

Sample Documents

- ***Communications docs***
- ***Sample SOPs***
 - [Denver Animal Protection Community Navigator Program Description](#)
 - [Denver Animal Protection Outreach Standard Operating Procedure](#)
- ***Sample Intake Questionnaires***
 - [PACC Owner Surrender Intake Questionnaire](#)
 - [LifeLine's Case Management Intake Questions](#)
- ***Intake needs assessments used in human health***
 - [Brief Intake Assessment for the NY State Dept of Health](#)
 - [Homeless Management Information System Universal Intake Form](#)
- ***Sample Position Descriptions***
 - [Denver Animal Protection Community Navigator Job Description](#)
 - [Gateway Pet Guardians Community Pet Support Manager Job Description](#)
 - [LifeLine Animal Project Case Worker Job Description](#)
- ***Additional Resources***
 - [Guideline to Writing Case Notes](#)
 - [How to Use Chameleon for Case Management](#)

Assess your current operations

1. In what parts of the organization do you treat people and animals as individuals? evaluate each on a case-by-case basis
2. Where does your organization have blanket rules or restrictions:
 - a. Adoption?
 - b. Admissions/intake?
 - c. Foster?
 - d. Rescue?



3. Where could a case management approach make the biggest difference for your organization?
4. Meet with the people who work in admissions and learn about their biggest challenges.
 - a. Asses and ask the following questions
 - i. Do you lack resources to help people?
 - ii. Do you only have time to take animals because they are overwhelmed?
 - iii. Do you lack information or handouts to share with the public?
 - iv. Do you lack awareness of shelter policies or programs like supported self-rehoming or intake-to-placement that can keep pets out of the shelter?
5. What barriers does the organization face when it comes to taking a case management approach to pets and people? Some common barriers include:
 - a. Volunteers are not empowered or trained to help people and support intake operations
 - b. No pet support or pet resource services are available, either in-person or remotely
 - c. Resistance by staff to adopt a case management approach.
 - i. This resistance may be due to time, workplace culture, or the belief that intake is the best solution for every animal, every time.
 - d. External ordinances and regulations require impoundment
 - e. Lack of resources on the website, on flyers, or in the lobby to provide help for people facing pet-related challenges
 - f. Lack of knowledge on the part of staff about partner organizations who provide human services that may include pets
6. What is the reason you want to take a case management approach in your organization? Select all that apply:
 - a. Provide better customer and client service
 - b. Treat people more humanely, especially when they are in crisis or facing a life challenge
 - c. Keep more pets with their families
 - d. Prevent unnecessary intake of animals into the shelter
 - e. Improve morale among staff and volunteers
 - f. Help people and pets in need
 - g. Other