Competitive Pet Placement (CPP) Project Case Study
Charlotte-Mecklenburg Animal Care & Control

Overview

Charlotte-Mecklenburg Animal Care and Control (herein "Charlotte-Mecklenburg") was seeing a decline in adoption rates in 2023 compared to 2022. While Charlotte-Mecklenburg brought some unique challenges* to the Competitive Pet Placement (CPP) project because it works within a police department, it had two factors in its favor in overcoming the downward trend in pet placements, (1) leadership that understood the importance of improving customer service as a basis for improving adoptions, and (2) a well-managed base of volunteers eager to improve adoptions.

*The CPP project first paid close attention to factors that would influence success, either as potential obstacles or as strengths to build on.

CPP Project's Participating Shelters at a Glance					
	Charlotte-Mecklenburg Animal Care and Control	**LifeLine Animal Project: DeKalb County Animal Services**	**Cincinnati Animal CARE Shelter & Resource Center**	**Riverside County Department of Animal Services** *(Western Riverside Shelter)*	**Wisconsin Humane Society** *(Milwaukee Campus)*
Organization Type	Government/ Municipal Shelter	Non-Profit With Government Contract	Non-Profit With Government Contract	Government/ Municipal Shelter	Non-Profit
Location	North Carolina	Georgia	Ohio	California	Wisconsin
2022 Intake*	9,969	6,402	7,268	22,899	5,820
Admission Type	Strays: Open O/S: Managed, some walk-ins	Strays: Open O/S: Managed, some walk-ins	Strays: Open O/S: Managed, some walk-ins	Strays: Open O/S: Managed, some walk-ins	Strays: N/A** O/S: Managed, some walk-ins
Intervention Type(s)	Foot traffic data tracking, volunteer adoption matchmaker role	Foot traffic data tracking, matchmaking process improvements	Foot traffic data tracking, strategic in-person adoption events, virtual adoption meet and greets	Foot traffic data tracking, adoption field trips, streamlined interest forms	Foot traffic data tracking, matchmaking process improvements

Intakes: Includes born in care, owner surrender, owner requested euthanasia, returns, seized/confiscate/quarantine, stray, transfer in, and wildlife. Excludes disposal/DOA, foster return, other, report, service in/public assistance.
**The Wisconsin Humane Society Milwaukee Campus itself does not hold a contract for holding strays, but does place strays transferred to them past their holds.*

Charlotte-Mecklenburg and HASS in Brief

Charlotte-Mecklenburg is a government shelter, located in Charlotte, North Carolina. Its jurisdiction extends over Mecklenburg County, which has a large population of some 1,146,000 people.* In general, the county is more prosperous than other areas where the CPP project was launched. In 2022, Charlotte-Mecklenburg had a live intake of 9,969 animals.

The characteristics of both the shelter and community can influence success in improving adoptions.

Since 2020, Charlotte-Mecklenburg has been one of 22 HASS organizations working to pilot the implementation of a new model for animal services. HASS prioritizes working with families and communities to divert pets from shelters by offering resources to help people and pets stay together, thereby interrupting conditions that lead to shelter overcrowding and high rates of euthanasia. The CPP project aligns with one of the four main parts, or pathways, of the HASS model, called Intake to Placement. This pathway comes into play for animals that have no other option but shelter care and is designed to move them as quickly as possible to foster homes and permanent live outcomes, primarily adoptions. HASS project staff, based at Austin Pets Alive!, provide expertise in education and training, data, policy, and communications to support the 22 pilot organizations, including Charlotte-Mecklenburg, that are bringing the HASS model to their communities.

Preparing to Launch the CPP Project at Charlotte-Mecklenburg

Charlotte-Mecklenburg is the second of the five shelters participating in the CPP project to be visited by the HASS implementation support team, which traveled to Charlotte-Mecklenburg in late November 2023 to work with the shelter's director, managers, and frontline staff. Prior to their week-long visit, the HASS team first relied on what it knew about a key characteristic of Charlotte-Mecklenburg operations: Unlike the other CPP shelters, Charlotte-Mecklenburg is nestled under the police department, a feature that would bring some special challenges.*

*This allowed testing CPP activities in a different context, answering a goal of the CPP project to demonstrate how shelters can understand barriers to adoptions in any variety of circumstances.

Through virtual meetings before traveling to Charlotte-Mecklenburg, the HASS team worked with leadership to discuss which CPP activities would help most to address declining adoptions. These discussions soon centered on the current flow of visitors in the shelter's lobby and a situation familiar to many shelters, maintaining that flow while being short-staffed. The discussions also identified Charlotte-Mecklenburg's strengths, high among these the shelter's enthusiastic volunteer corps.*

*Working from a shelter's strengths sets it up for success in improvements.

Indicators that Charlotte-Mecklenburg would be a good fit for CPP participation:

- Adoption rates declined in 2023, creating an opportunity for intervention
- Charlotte-Mecklenburg had previously demonstrated a commitment to improving adoptions by participating in an [earlier phase of the CPP project](#) focused on the easier fixes to adoption barriers
- The shelter's leadership understood the importance of good customer experience in improving adoption rates, and saw the need to introduce some efficiencies to the shelter's lobby flow to enable more adoptions

- A robust volunteer program offered an opportunity to expand adoption services at little cost

The HASS and Charlotte-Mecklenburg teams settled on implementing two interventions* to improve adoption rates, and approached the two under a single unified lens, "improving the customer experience." Under this plan, Charlotte-Mecklenburg would track who is coming to the shelter, and why and would also prioritize potential adopters to set them up for success. Approaching Charlotte's interventions through the single lens of improving the customer experience also made it easier for staff to understand the project's goal of improving adoptions:

- Foot Traffic Data Tracking
- Creating a Volunteer Matchmaker Role

*The HASS team had learned from its experience with the first shelter participating in CPP to narrow planned activities. Three interventions happening at once had proved to be ambitious in another shelter.

Implementing CPP Onsite: Foot Traffic Data Tracking

While Charlotte-Mecklenburg had a strong desire to track foot traffic as the basis for improving adopters' experience, a short-staffed lobby presented a significant challenge.* All foot traffic that comes into the shelter is caught by lobby staff—potential adopters, some fosters, people surrendering family pets, and turning over strays, etc.—and the shortage of staff to help visitors there was creating a bottleneck at the point of entry. Shelter leadership understood that a solution for improving adopters' experience had to start at the front end, yet the lack of enough staff would be difficult to overcome.

*Short-staffing is common in shelters. With the CPP project, technology was key to overcoming the problems this creates.

Frontline staff described several consequences for potential adopters arriving at their door, including lengthy wait times in long lines, confusion among many visitors around directions on where to go, and oftentimes finding that customers had waited in line unnecessarily because they lacked guidance when stepping into the lobby and staff were already busy with other visitors. The Customer Service Team was also undergoing a change in leadership, making a solution even harder during a time of transition.

The HASS support team came prepared with a technology solution for better managing the lobby flow and for data collection on adopters' experience. But upon arrival, the HASS team quickly realized that for a front lobby staff at half capacity, time to train outside of open hours would be

limited.* The additional time and effort around changing their processes also felt daunting to a staff already overwhelmed with existing priorities.

*Because we had limited time (one hour) with staff outside open hours, the change process could have been easier, had time allowed for more hands-on and exploratory training for staff.

What got shelter staff over the hump was seeing how the emerging data could help with managing customer flow. Visitors would check-in through a QR code instead of waiting for a human. The code would then give them access to a check-in form asking for a name, contact information, the reason for the visit, and the names of any animals they are interested in visiting if coming to adopt. Responses would feed a spreadsheet that staff could view on their digital screens, forming an online queue of customers shared by all staff, while also preserving data on the shelter's foot traffic.

What the HASS team had not anticipated was the limitations of the lobby on using needed technology. The check-in process and method for foot traffic data tracking depended on visitors using a smartphone to use the QR code posted in the lobby. The team discovered, however, that the lobby building's cell service was too weak, and this was paired with wifi locked down and accessible only to staff because of police department rules.

The HASS team had to immediately find an alternate option, and together with Charlotte-Mecklenburg staff settled on a device that was connected to the organization's wifi and set up for visitor check-ins to add an additional check-in means when some visitors had no cell service.* This change had a rapid effect on the situation in the lobby for both visitors and staff. The experience for visitors changed dramatically with use of the QR code, and staff were able to treat visitors as individuals rather than a mass of customers.

"The culture of the lobby has changed" says Shannon Harkey, Shelter Manager, "It is so great to hear front desk staff call clients by their names . . . . Before, it was hard to pass through the front lobby, but now people are sitting and you can tell they are more relaxed knowing they have their place in line."

*When introducing new processes and technology, we had to expect the unexpected and be ready to create solutions on the fly.

Seeing the possibilities for overcoming the stressful situation in the lobby, frontline staff began participating* in improving the process further, bringing their own insights to the project and together with the HASS staff began to make improvements on the spot. Staff suggested adjustments to the check-in form that, for example, added directions for visitors who needed nothing more and reduced the number of people waiting in line unnecessarily.

*The buy-in of staff carrying out new practices is essential in any change-making process if it is to endure, so coaching patience in the process, and allowing for staff member's own ideas was critical. Here, the staff could see that even small suggested tweaks had a big impact on efficiently moving people to where they needed to go.

The next step of the foot traffic tracking process consisted of a follow-up survey sent to visitors at the end of the day, specifically targeting those who *did not* adopt. This survey got at the question we want to answer: if people come to the shelter to adopt, why aren't they adopting?* While Charlotte-Mecklenburg was unique among CPP participants in that they already had a customer experience survey sent to those who did adopt, our aim was to bridge the gap and learn more from those who did not. The follow-up survey also asks visitors to rate their experience in the shelter, which gives the staff quick feedback on how they are doing, and in this case increased morale. Given an average rating of 4.4 out of 5, shelter staff were no longer flying blind with customer experience, and were empowered to better address where they needed to improve.

If a visitor coming to adopt did leave with a pet, this information is added to the staff's spreadsheet, allowing the shelter to track its conversion of visitors to adopters. Seeing that short-staffing could endanger data collection, the HASS team worked out a way to fully automate the follow-up survey. This was a huge win for the Charlotte-Mecklenburg staff, as it was one less thing for them to do, and ensured the project would get the information needed to assess the effectiveness of the shelter's new activities.

*Knowing the "why" of what is happening offers a path to even more adoption improvements. If you see, for example, many of the same responses, such as "fees too high," you have grounds for a discussion on effective next steps.

Tracking foot traffic has also given the shelter useful new data.* In the two months that followed foot traffic project implementation, they and the HASS support team were able to see that, so far, 45% of people visiting the shelter are interested in adopting. Now knowing that foot traffic is heavily geared towards adoptions, Charlotte-Mecklenburg can now work on ensuring that community members are well supported in the adoption process.

*With compassion fatigue common in sheltering, and cases like owner surrenders weighing heavily on shelter staff, having data to show that a large portion of visitors are coming to help can contribute to a change in outlook for staff members.

Implementing CPP Onsite: Creating a Volunteer Adoption Matchmaker Role

Charlotte-Mecklenburg's plan to improve adoption rates carried through past the lobby experience, and wisely deployed a major asset to overcome a problem, common among shelters, of

often being short-staffed. Charlotte-Mecklenburg turned to its strong volunteer program* and planned to create a new role for volunteers as adoption matchmakers. Here again, an unanticipated challenge required a fast solution after the HASS team arrived in Charlotte. Access to the detailed animal information in the shelter's software, essential for matchmaking, was heavily restricted to staff under police department rules.

*We saw the importance of creating a robust volunteer program at Charlotte-Mecklenburg. Cody Trespalacios, Volunteer Coordinator, had created one by making volunteers feel welcomed, empowered, and cared for.

While working in the background to find a solution for this, the HASS support team also worked at ensuring the shelter would have the means to create and sustain a new matchmaker role for volunteers. First, essential to making any important change, they involved both staff and volunteers in the planning process by getting their insights into the current situation. For the volunteers this was through a roundtable. The HASS team gathered information from a variety of volunteers. The team heard that volunteer help offered in the front lobby has historically been traffic control and welcoming the community. This meant that volunteers would often have to go off script, as they fielded questions. While long-term volunteers felt comfortable completing the tasks, new volunteers stated that the traditional role felt overwhelming. This impacted volunteer retention, and left the shelter with only a few volunteers comfortable performing these tasks. From shelter staff, the HASS team learned that volunteers wanted to be even more involved with customers in the front lobby but needed more clear directions on the role and tasks they would be responsible for. With this information, and because the new foot traffic process eliminated the need for traffic control, it was decided that volunteers could take on a new and more impactful role in getting pets adopted by offering additional resources and clarifying the new role.

With their customer service experience, knowledge about the shelter's animals, and desire for more involvement, the volunteers were ideal candidates for adoption matchmaking, and their inclusion in this work would extend the time the shelter could give to potential adopters with personalized attention. Some volunteers would also be able to play the role of matchmaking trainers to help grow the program with new volunteers. Volunteers were provided with new badges, and resources to refer to when interacting with customers, turning what had been a transactional adoption process into one that was more conversational and would enrich the customer experience.

By the end of the week, the HASS and shelter teams had built out this role with a job description and supportive volunteer materials, including sample matchmaking scripts and an adoption matchmaker tip sheet. In order to facilitate recruitment for this role, HASS provided a strategy and sample communications for the volunteer base, which the volunteer manager used to announce this new and exciting role at the close of the onsite visit.

Still remaining was the limitation on their access to animal data. The HASS team contacted the shelter's provider of shelter software, Chameleon, to work out a solution.* Charlotte's rep from the company built a custom view and report for the volunteer matchmakers, who receive a log-in with permissions limited to a custom report with details on animals available for adoption. The program was now fully equipped. Having been implemented for roughly a month and a half, Charlotte-Mecklenburg volunteers have dedicated 80 hours in the month of December alone, and have trained eight additional volunteers for the matchmaker role.

*Shelter software companies can often offer solutions to increase operational efficiency