HASS Intake Triage: Getting Started

Overview

What are the most common reasons people surrender their pets? Common shelter intake data collection processes are not comprehensive or consistent enough to understand the nuances surrounding the root cause of a request to surrender a pet. The following processes will improve understanding of the main causes of pet relinquishment, help assess the effectiveness of existing support measures, and create pathways to reduce unnecessary separation of people and pets.

Intake Reasons

Using intake reasons data to capture the circumstances leading to a pet entering the shelter, we can effectively allocate resources, expand programming, develop policy, and implement targeted interventions aimed at providing better support and reducing shelter intake. See more about how you can collect better intake data, including a comprehensive list of suggested intake reasons, **here**.

Intake-Based Data Collection

Existing shelter software may not always be able to collect a fully accurate or comprehensive view of both the human and pet-related reasons for pet relinquishment. Implementing a more comprehensive approach, updating intake reasons within the software, and integrating a capability to select multiple reasons for relinquishment can provide the best support for people and pets in the community. The following examples highlight types of pet relinquishment data that can be collected at different touchpoints to identify trends and show changes over time.

1. **Initial Contact or Online Form:** Client submits information through a public-facing form or contacts your shelter with a surrender request (owned pet or stray or other).
    a. Initial contact form should
        i. Identify the reasons for pet surrender as identified by current caretaker or finder
        ii. Provides basic information for the pet including medical, behavior, and other known history.
    b. Sample first point of contact form
        i. This form may be used as a starting point to create questions that align with your organizational needs. The purpose of this form is to

give shelter personnel ample information to provide support when able and strategically coordinate intake requests.

   ii. Providing a space for client submissions virtually may improve transparency in responses to uncomfortable situations.

   c. See this Intake Reasons Quick-Sheet to help guide intake reason selections.

2. **Pet and People Support Touchpoint:** Reach out to the client to discuss options.
   a. Review the pre-submitted initial contact form and identify potential support that can be provided.
      i. Review surrender reasons
      ii. Review pet status (emergency vs. non-emergency)
      iii. Identify support your organization can **directly** offer
      iv. Identify support your organization can offer through partnerships
      v. Identify support your organization can offer through an external referral or information-sharing
   b. Connect with the client. Offer identified support options to determine if they can/would like to keep their pet with a little help. Prioritize emergencies.
      i. **If yes,** set the client up with the support offered directly or provide them with information/resources on how to access support. Make a note in the person's file of what was provided and remove the surrender request from the queue.
      ii. **If no**, schedule an intake appointment following organizational protocol.
   c. Schedule recurring check-ins for upcoming appointments and services.

3. **Intake Appointment** (Scheduled or Urgent)
   a. Review the original surrender request form, if available.
   b. **Sample at-intake form**
      i. This form creates an opportunity for the shelter to get updated reasons for surrender (if an initial contact form was completed) through a conversational approach.
      ii. Responses at intake may be compared to the initial contact to identify changes, trends, and what support services may have helped reduce intake for future strategic planning. Shelters with an extended wait for an intake appointment may see greater differences in data collected at these two time points.

c. Fill out the at-intake form on behalf of the client utilizing a tablet, laptop, or other device and a conversational approach.
    i. Person ID from shelter software, when applicable (i.e. created already from first contact)
    ii. Confirm basic pet information and condition
    iii. Utilize a conversational interviewing approach (see section below) and the form as a reference to fill in the remaining details
        1. Resources offered prior to today
        2. Resources offered today that could help them keep their pet
            a. If a resource offered is accepted, update their file with the resource provided and remove the surrender request from the queue.
        3. Resources that would have helped them keep their pet, if available *(Note: This is meant to act as tracking trends in future pet and people support options that can be implemented*)
        4. Reasons for pet surrender
            a. Select multiple reasons when applicable to the situation–both person and pet related– to ensure you are collecting data on the complex situations that lead to pet relinquishment. These reasons may be used to provide better support in the future and advocate for changes outside of animal welfare to help keep families together.

d. **Note:** The form should **not** be read verbatim and many options can be omitted if they do not apply to the client's situation. See the "Conversational Interviewing" and "Exercise" sections below for more information on how to have effective support and surrender conversations.

4. **Data Consolidation**
    a. If a person proceeds with relinquishment, create a pet record in shelter software or other tracking form as a surrender and connect it to the person record created at the initial contact (outlined in Step 1).
    b. If needed, update relevant contact information in the person's file.

Conversational Approach Overview

A conversational approach, or "conversational interviewing," is a style of communication that your organization can utilize when interacting with the public to create a more naturally flowing, authentic conversation, as opposed to the traditional question-and-answer format.

Conversational interviewing creates a two-way conversation structure, allowing both the organization and the individual to ask questions, build rapport, and exchange information and feedback. This process can often result in collecting higher-quality, more holistic information, allowing your organization to better support people and pets.

Benefits of Conversational Interviewing

- Builds rapport between individuals
- Builds trust between the organization and the public
- The process starts where a person is at and empowers them to drive the conversation forward

Conversational Interviewing Checklist

The following checklist items align with the keystones of a conversational interviewing approach and may be used by your organization to ensure consistency and commitment to this process.

- [ ] Lead conversations with empathy
- [ ] Approach with non-judgment
- [ ] Approach with cultural sensitivity
- [ ] Ask open-ended questions
- [ ] Practice active listening and reflection techniques
- [ ] Observe and be mindful of body language
- [ ] Redirect the conversation as needed

Getting Started

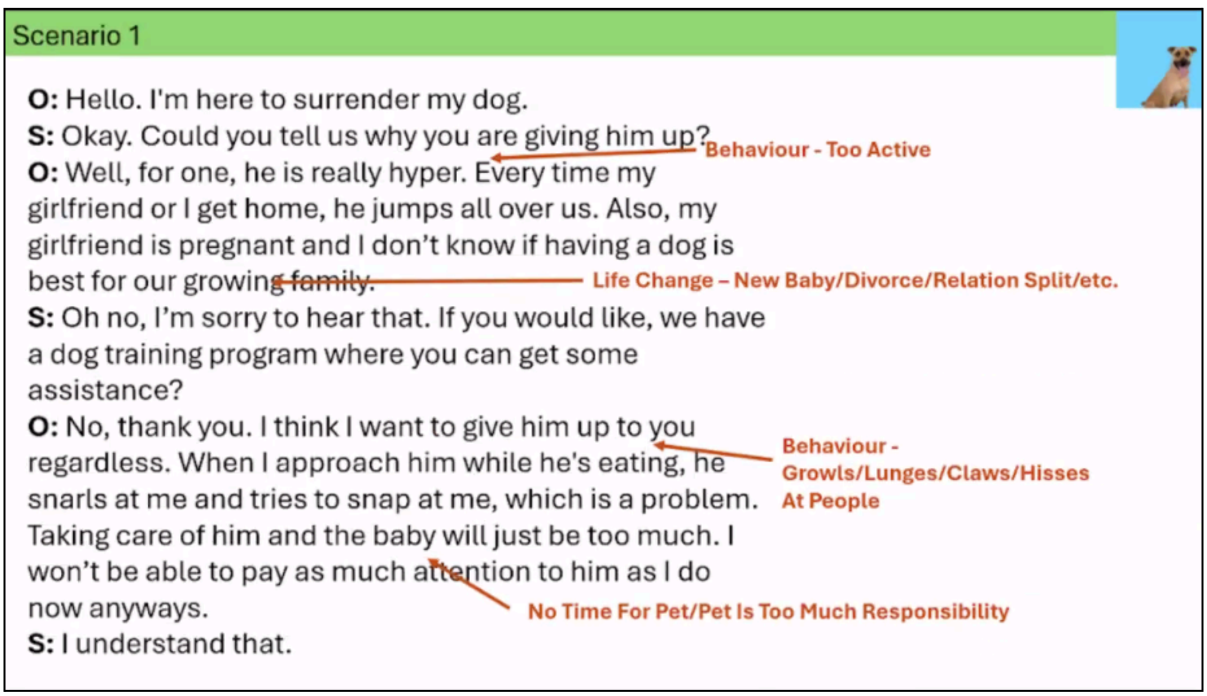
1. **Prepare**. Using the **existing list of intake questions** you ask the public during surrender requests, support, matchmaking, or other conversations, brainstorm potential answers to those questions. Consider using responses you often provide based on common questions or come up with your own. Consider the many directions a single topic may take so you have evolving conversation points to practice, within reason. You can always guide the conversation back to the primary purpose if it begins to move out of scope. *Here is a list of sample scripts that may help guide intake-related conversations*.

2. **Practice**. Conversational interviewing requires you to be flexible and comfortable with pivoting topics as appropriate. Practicing scenarios with your pre-set questions, potential answers, and adjacent topics that may come up can help build confidence in your ability to have conversations with the public. While preparation is important, it is impossible to prepare for all potential responses and outcomes in a conversation. Committing to flexibility and the possibility of needing to re-evaluate in real time can help reduce a potentially stressful situation. Be prepared to redirect the conversation if it gets off track.

3. **Be Present**. It is common when meeting with members of the public to write notes as specific questions are answered. In a conversational interviewing approach, you should aim to be as present as possible during the discussion. This may mean delaying certain notetaking until the end of the conversation and reducing other potential distractions such as reducing the volume on a phone or closing a door, if available.

Exercise

Review the following scenario.



Slide presented as part of "[Maddie's Insights: Beyond Animal Shelter Walls: Using Community Data to Understand Intake Diversion of Owner Surrendered Animals]" on Maddie's University.

1. Note the variety of potential reasons this person is requesting to surrender a pet.
2. Consider trends.
    a. Are there similar reasons repeated throughout?
    b. Do their reasons lead back to one main topic?
3. Consider reasons that might hold more weight than others.
    a. Do any reasons constitute an emergency for a person or pet?
    b. Were there offers of support that they declined?
4. Dig a little deeper.
    a. Ask follow-up questions for ambiguous or broad reasons
    b. Ask follow-up questions for clarification on specific behavior, medical, or other complex reasons.
5. Use reasons identified in #2, #3, and #4 to ask relevant follow-up questions to identify the primary surrender reason
    a. Since you mentioned *reason #1* and *reason #2* as potential reasons for surrender, what would you say is the biggest reason?
    b. Would you say of the reasons you mention, *reason #1* or *reason #2* as being the main reason you are looking to surrender today?

Additional Resources

- Conversational Interviewing Training Video - HASS
- From Transactions to Conversations - HASS
- Case Management Training - HASS
- A mixed-method analysis of the consistency of intake information reported by shelter staff upon owner surrender of dogs | Lexis H Ly and Alexandra Protopopova
- Intake Triage: Supporting Research