HUMAN ANIMAL SUPPORT SERVICES

HASS Intake Triage: Getting Started

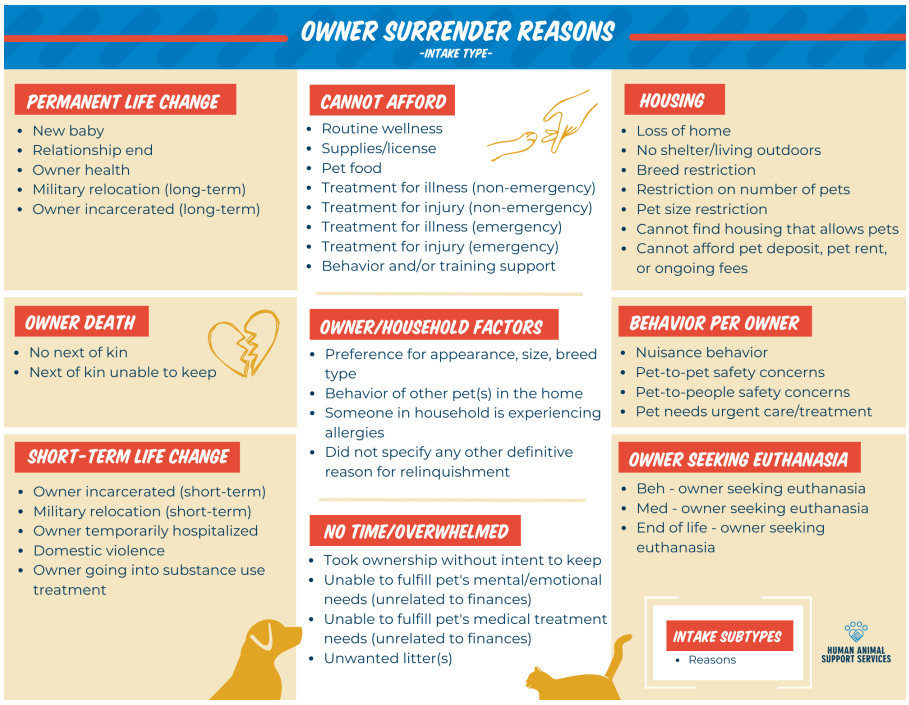
Overview

Planning a roadmap to best support your community's people and pets may seem daunting (spoiler alert: this resource will help you!). Do you know 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. Do you know **what steps finders of lost pets take when they pick up a loose pet?** Understanding finder behavior can help you tailor messaging to your community about what actions they can take when they find a lost pet, such as looking in the surrounding area where the pet was found in an attempt to locate the owner.

The following processes will improve understanding of the leading causes of pet relinquishment, help assess the effectiveness of existing support measures, create pathways to reduce the unnecessary separation of people and pets and help more lost pets get home.

Owner Surrender Reasons

Using intake reasons data to capture the circumstances leading to a pet being surrendered or returned to the shelter, you can effectively allocate resources, expand programming, develop policy, and implement targeted interventions to provide better support and reduce shelter intake. See more about how to collect better intake data, including a comprehensive list of suggested intake reasons, here.



Lost/Found Pets

To learn more about finders, ask them about what steps they take before bringing a lost pet to the shelter. Do they search for the owner in the area where the pet was found, or do they come straight to the shelter? Understanding how your community interacts with lost pets can help your shelter target messaging to leverage the advocacy of finders, including encouraging

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them to help you reunite the pet with their caretaker. You can also gather important information from finders about their observations of lost pets' physical condition and behavior to assist with pathway planning or determine eligibility for finder-to-foster programs.

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 and standardizing 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 over time.

Step 1: Initial Contact

Prior to visiting your shelter, the client submits information through a public-facing form or contacts you with a surrender or support request (owned, stray, or other).

- ☐ Initial contact form should
  - Identify the reasons for pet surrender as identified by current caretaker or finder.
  - Collect basic information for the pet including medical, behavioral, and other known history.

- ☐ Sample initial contact form (see questions notated with the blue circle - 🔵)
  - This form can be used to create questions that align with your organization's needs. The purpose of this form is to give shelter personnel ample information to provide support when able and strategically coordinate intake requests.

- ☐ See this Intake Reasons Quick-Sheet or expanded list to standardize intake reason selections.

Step 2: Pet Support Services

Reach out to the client to discuss options.

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- ☐ Review the initial contact form submission and identify potential support that can be provided.
    - Review support request reasons
    - Evaluate to determine emergency vs. non-emergency requests
    - Identify support your organization can offer directly or through partnerships, referrals or information-sharing

- ☐ Connect with the client. Offer identified support options to determine if they can/would like to keep their pet with support. Prioritize emergencies.
    - **If yes,** provide direct support or provide them with information/resources on how to access support. Make a note in the person's file of support provided and remove/resolve the surrender request from the queue.
    - **If no**, schedule an intake appointment following organizational protocol. **Continue to Step 4**.

- ☐ Schedule recurring check-ins for future support, appointments, and services as needed.

Step 4: Intake Appointment

- ☐ Review the original surrender request form, if available.

- ☐ Collect comprehensive intake data using this form through a conversational approach at intake on behalf of the client utilizing a tablet, laptop, or other device to include:
    - Basic client information
    - Basic pet information and reported condition
    - Record the reasons a caregiver is seeking surrender
        - Select multiple reasons when applicable to the situation, both person and pet-related, to ensure you are collecting data on the complex reasons contributing 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.
    - Potential support options for retention
        - Record resources that will help the client today and those that *could have helped* them, even if you cannot provide them currently. This will help you track trends in what your community needs to support future support offerings.

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    - If a resource offered is accepted, update their file with the resource provided and remove the surrender request from the queue.
- Lost pet and finder details
    - How long the finder has been caring for the pet
    - Finder's attempts to locate the pet's owner
    - Visual ID worn by the pet
    - Finder's willingness to foster
    - Physical and behavioral observations of the lost pet

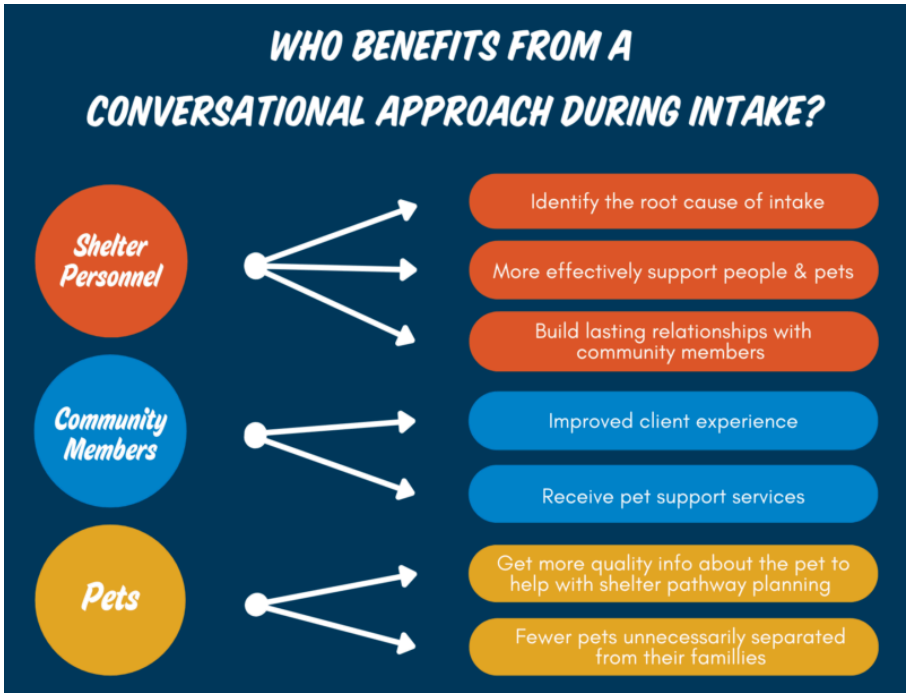
Note: The form should **not** be read verbatim and many of the intake reason options do not need to be discussed if they do not apply to the client's situation. See the "Conversational Interviewing" and "Practice" sections below for more information on how to have effective support and surrender conversations.

Applying Findings

Once the data has been collected, the next critical step is to consider how you will learn from the data to make meaningful changes. For a detailed guide on how to visualize, analyze, and take action from your data, view this resource: **HASS Intake Triage: Applying Findings**.

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 communication structure, allowing both the shelter representative and the individual to ask questions, build rapport, and exchange information. This process can result in collecting higher-quality, more holistic information, allowing your organization to better support people and pets.



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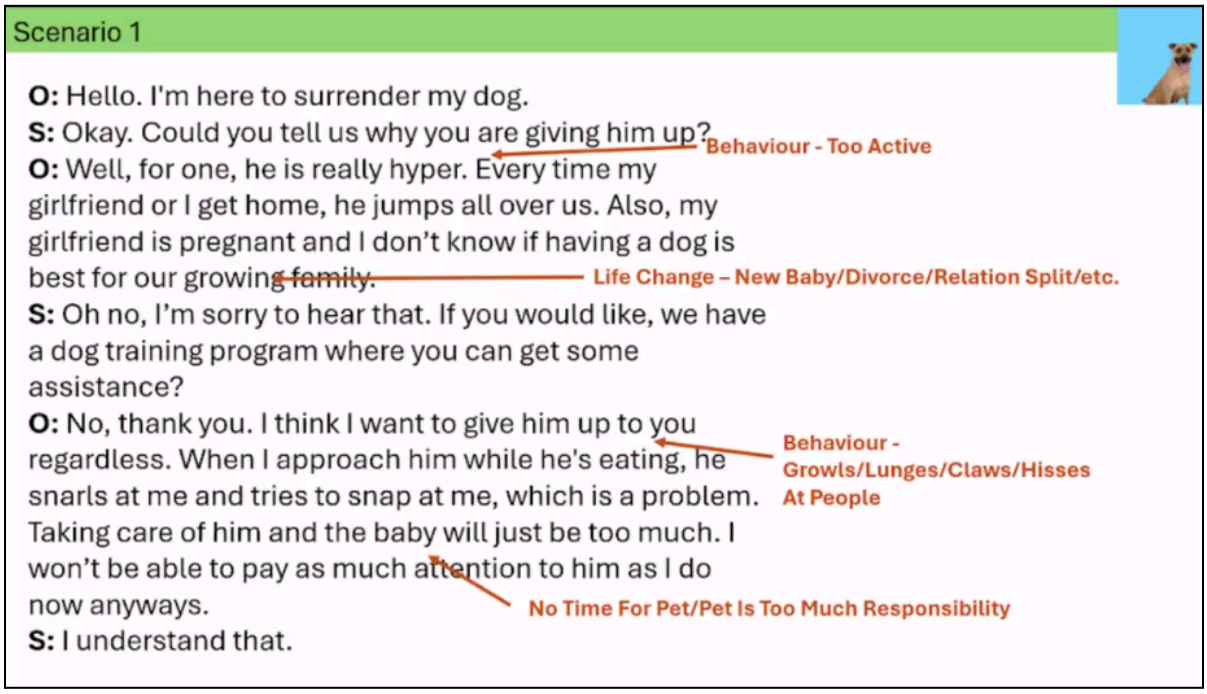
Conversational Interviewing Checklist

The following checklist items align with the tenets 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

Practice: Integrating a Conversational Approach to Intake Scenarios

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, 2024.

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.

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   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 of 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 main reason you are looking to surrender today?
6. **Resource**: *Sample scripts that may help guide intake-related conversations*

Additional HASS Resources

- Collecting Better Intake Reasons Data
- Conversational Interviewing Toolkit
- Conversational Interviewing Training Video
- From Transactions to Conversations - *blog*
- Case Management Training
- De-escalation Resource Collection
- Intake-to-Placement Supporting Evidence (see *Intake Reasons Data Collection*)

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