Competitive Pet Placement (CPP) Project Case Study
LifeLine Animal Project, DeKalb County

Overview

The shelter in DeKalb County, Georgia, saw a dramatic rise in intake in 2023 (17% over 2022). With adoption rates not keeping pace with record intake, the shelter's need to accelerate adoptions to relieve overcrowding has been acute. In its favor, the organization that operates the shelter, LifeLine Animal Project (LifeLine), has an especially progressive leadership team, adept at innovative solutions.* As the HASS implementation support team began the Competitive Pet Placement (CPP) project by collaborating with staff at DeKalb, it saw a foundation already in place for increasing adoptions through DeKalb's system to manage the flow of customers, and an existing technology solution for managing a large matchmaker program for adoptions. The shelter's greatest need was support for bringing to new heights what had already been built and had proven successful at a sister location.

*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				
	LifeLine Animal Project: DeKalb County Animal Services	**Charlotte-Mecklenburg Animal Care and Control**	**Cincinnati Animal CARE Shelter & Resource Center**	**Riverside County Department of Animal Services** *(Western Riverside Shelter)*	**Wisconsin Humane Society** *(Milwaukee Campus)*
Organization Type	Non-Profit With Government Contract	Government/ Municipal Shelter	Non-Profit With Government Contract	Government/ Municipal Shelter	Non-Profit
Location	Georgia	North Carolina	Ohio	California	Wisconsin
2022 Intake*	6,402	9,969	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, matchmaking process improvements	Foot traffic data tracking, volunteer adoption matchmaker role	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.

DeKalb County and HASS in Brief

DeKalb County's shelter is operated by the nonprofit LifeLine Animal Project under contract with the county. Part of the greater Atlanta metropolitan area in Georgia, DeKalb County has a population of nearly 765,000.* LifeLine takes in roughly 20,000 animals per year across its three locations in Atlanta with 41% entering their DeKalb County Animal Services shelter.

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

Since 2020 LifeLine has been one of 22 HASS organizations working to pilot the implementation of a new model for animal services in its three locations. 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 LifeLine, that are bringing the HASS model to their communities.

Preparing to Launch the CPP Project in DeKalb County

The first step in launching the CPP project at LifeLine's DeKalb location was to understand their current operations and identify strengths that the project could build from to improve adoption rates.* The HASS implementation support team was already familiar with LifeLine, an active partner in piloting the HASS model for the previous three years.

The HASS team knew that LifeLine already had an interest in matchmaking and have been working with its skilled internal marketing and IT departments towards revamping the available animals pages on their website for the public. The challenge was to improve on matchmaking with hundreds of dogs in care and an overwhelming adoption gallery, by adding improvements to their existing onsite matchmaking support for potential adopters who had come to the shelter. An advantage was an engaged volunteer group already working on matchmaking alongside staff. We also knew that LifeLine would be a little different than other shelters when it came to CPP's foot traffic data tracking initiative because they already had a system in place for managing the flow of visitors to build upon.

*An advantage with DeKalb's CPP project was the organization's detailed understanding of problems even within their well thought out systems and their resourcefulness in collaborating with the HASS team on solutions that build from existing processes. Improving rather than creating anew also has the advantage of less disruption for frontline staff familiar with existing practices.

LifeLine's DeKalb County Animal Services was a good fit for the competitive pet placement project:

- DeKalb's shelter had an urgent need to alleviate overcrowding caused by record-setting intake and adoptions not keeping pace

- LifeLine had previously demonstrated their commitment to improving adoptions by participating in an [earlier phase of the CPP project](#) focused on the easier fixes to adoption barriers
- The shelter had an existing system for managing customer experience that could be improved further to accelerate adoptions
- Across its three locations, LIfeline has the advantage of especially progressive leadership and has experience in using technology to help with improving adoption rates through matchmaking

The HASS support team and DeKalb staff settled on implementing two changes to improve adoption rates:

- Foot Traffic Data Tracking
- Supercharging Adoption Matchmaking

With two initiatives chosen, DeKalb, shelter staff and the HASS team planned DeKalb's CCP project through a series of virtual meetings. The meetings first heavily focused on learning more about the current processes at DeKalb involving foot traffic data tracking and matchmaking to ensure the HASS team had a deep understanding of what was already in place. Through this discovery phase, we began to zero in on an opportunity to bring matchmaking to new heights using a tool already successfully in use at LifeLine's largest location, Fulton County Animal Services.

Onsite Implementation: Foot Traffic Data Tracking

The HASS team's onsite visit to DeKalb took place in January 2024. The agenda included time scheduled for observation and staff feedback for both initiatives,[*] which was critical since each involved several departments and many, many staff and volunteers.

For the foot traffic data tracking initiative, the schedule included an overview presentation at the beginning of the week, followed by 1:1 meetings with staff that regularly interact with the process for individualized support.

*In any change-making process, investing enough time in helping all involved understand the why and how of the change is a prerequisite. We knew it would be necessary to get both the insight and the buy-in of staff carrying out new processes, as they can make or break the desired change.

The CPP foot traffic initiative both tracks information about why each visitor comes to the shelter (to adopt, foster, turn in a stray, find a lost pet or surrender a family pet, etc.) and for frontline workers provides a tool to help manage their work with visitors. At entry, visitors are asked to check in using a QR code to access a Google form that gathers information, including a name, contact information (phone, email), zip code of residence, their reason for visiting, and the names

of any pets they have seen online and may wish to adopt. The digital form feeds a shared Google spreadsheet that all relevant staff can see on their devices, creating a customer queue on their screens, with customer details from the form alongside each one's name. This process is used by frontline staff to manage and improve customer experience, and by managers to collect information that allows them to assess why visitors come to the shelter and—for adoption programs—see if people intending to adopt are leaving with a pet successfully. The HASS team has also built a visual dashboard* that allows staff to see things like the adoption conversion rate, the breakdown of why visitors have come to the shelter, and visitors' rating of their service. Key to this for improving adoptions is consistent use of the form and collection of data, and effective use of the data.

*During the rollout of the CPP project across 5 shelters, we realized that visual tools like dashboards really help shelter staff understand how information can help them. In some of the CPP shelters the HASS team saw staff motivated to see their adoption conversion rate tick upward or their star rating for customer service change with customer feedback.

With an existing similar process to track and manage customer flow, DeKalb started this project with the most advanced existing foot traffic data tracking and served as the inspiration for the intervention at other shelter locations. This allowed more advanced data tracking and tech innovations in their own revised process, since staff already had a foundational process to build off of. Prior to HASS staff implementing a revised process, staff collected information from visitors using a jotform to check in. Their responses to questions fed to a digital spreadsheet and captured specific details to help route visitors to departments appropriately. Staff then interacted with the data to add notes and assign a card number corresponding to a color-coded (by department) card physically handed to visitors. They could keep track through the sheet on which visitors were being helped, which were still waiting, and which shelter department was responsible for serving each visitor. They called this process "dispatch," and though it was functional, DeKalb staff had already identified a need to revamp this process to make it more customer friendly and more efficient for the staff. The shelter's staff saw opportunities to improve efficiency on a much more advanced level than other shelters that implemented the CPP project's foot traffic data tracking and used the new version to connect operations across their entire organization for departments interacting with the public.

During the preparation phase, the HASS team used LifeLine's existing check-in form and Google sheet as a guide to ensure the current and future processes matched as closely as possible for ease of staff use. After reviewing the new check-in materials, the DeKalb leadership team suggested a few minor adjustments. The shelter staff also felt good about adding data entry requirements needed to track why visitors leave without a pet.

During onsite implementation, staff were impressed with the level of detail that went into the new check-in process and began brainstorming ways to improve its use.* In one example, when a visitor checks in to foster, whoever is handling the check-in process sends a Google chat to the foster team letting them know they have a visitor. The HASS team asked themselves if this was something that could be automated from the customer queue (yes!) and so began a collaborative development process for enhancing the foot traffic data tracking in new and exciting ways.

*The collaboration with staff meant the process benefited from the wisdom of those who are carrying out new processes, which is key to the success of change-making. Without buy-in, changes were unlikely to last.

The impact of this particular enhancement is that the person managing the check in process has one less step, the foster team sees animal level details and notes about what they need, and can be more prepared for the visit. In fact, early feedback about this specific automation indicates that foster-related wait times have already been significantly reduced with this enhancement:

"In the past I have waited extreme amounts of time for routine foster appointments. Today I was in and out in 15 minutes. Big improvement for the team! The energy in the adoption area was friendly and enthusiastic." The adoption team benefits because visitors coming to foster are immediately sent off to another department, leaving more time to attend to potential adopters.

An additional enhancement the HASS team was able to make for the foster team was to send an automated email at the end of each day with details and animal ID numbers for animals sent to foster. This automation allows for easy reconciliation of animals that left for foster care but were not updated in PetPoint because the visit was handled by a volunteer.

Another of the challenges the HASS team learned from staff was that adoption visitors often get "lost" after checking in, which leads to long wait times and customer frustration. To address this issue the team set up timestamps linked to when the visit status is changed, then wrote a formula that highlights in red the entire row in the customer queue if someone has been waiting for 20 minutes, prompting staff to prioritize the visitor. *

*The capacity to use automations at LifeLine was important to the project's success, as it makes staff more efficient, which is especially important for shelters, where overburdened staff is common.

With the new timestamps in place, staff were also now able to capture data about the duration of each piece of the adoption process. Using a "status" column, a timestamp was added for when the status is changed to "Awaiting Assistance," then again when it is changed to "In Progress," and lastly when the status is marked "Complete." This is augmented with formulas to automatically calculate

the time spent in each category. LifeLine's leadership team was very excited with this additional data point because it will allow for increased accountability and insight into staffing needs.

With all of LifeLine's requests accommodated, enhancements implemented and materials ready, the foot traffic data tracking initiative was successfully launched on January 25th, a Thursday. Preliminary data collected through the following weekend indicates that DeKalb has already embraced the new process and is off to a great start entering data capturing why visitors are leaving without a pet, so that they can address what they are now able to know better about why this is happening.

Onsite Implementation: Supercharging Adoption Matchmaking

The CPP matchmaking initiative at DeKalb focused on the greatest need there, dog adoptions.* The DeKalb shelter already had staff and volunteers helping potential adopters find their best match to a dog, but they lacked a clear, efficient and centralized system for sharing detailed information about dogs available for adoption for both staff and volunteers. For some time, DeKalb staff and volunteers had been piecing together information about each pet from many sources, including the shelter's PetPoint software (available only to staff), various spreadsheets, Awesome Table, Facebook groups, and white boards as they helped adopters pick out from the hundreds of animals in custody those that met the characteristics each potential adopter was looking for. The shelter badly needed a fast and efficient way to narrow the pool of dog candidates for visitors based on key characteristics important to each potential adopter.

*Improved matchmaking for cats is also possible with the method adopted for dogs, but we wanted to address DeKalb's largest needs first instead of asking for too much change at one time.

Meanwhile, at LifeLine's larger location in neighboring Fulton County, staff and volunteers had a fully functioning and impactful tool in place that did all the DeKalb staff and volunteers needed by sharing all animal information on a centralized platform, the task management software Asana.

Asana* allows for information sharing via online project boards, accessible on digital devices including smartphones. At LifeLine's Fulton location the project board is set up to allow staff and volunteers to view and interact with critical pet information previously only available for PetPoint users. Each pet has a "card"on the project board that contains basic demographic information, photos, volunteer instructions and a task list of "to-do" items like writing an adoption bio or prioritizing for a walk. The basic pet information fields such as location, weight, heartworm status, level of volunteer training needed to handle the dog, etc. are exported from PetPoint and imported into Asana daily via custom code written by one of LifeLine's own volunteers. Once the basic card is created, staff and volunteers are able to add information, search for matching attributes, view information or complete tasks.

*There is a world of technology solutions already available to shelters that simply need to be translated for shelter use.

With the solution needed in place at Fulton shelter, why wasn't Asana being used by the LifeLine team at DeKalb? The answer was simple: DeKalb hadn't had the bandwidth to implement it and train everyone. When asked if implementing Asana and training staff and volunteers how to use it as a matchmaking tool would be of interest to them, the answer was a resounding "yes!"

The next challenge was to introduce the Asana method to a very large group of new users, a staff of nearly 70 employees and hundreds of volunteers,* all with valuable animal information to contribute. Among them were several very invested volunteers already doing matchmaking using various other online and paper methods created over the years. If change were to happen successfully, their buy-in would be essential.

*LifeLine sets a great example in its use of a large volunteer team and giving volunteers substantial responsibilities. Enabling them to do more through technology would be key to improving adoption rates.

To ensure the people using the new system would adopt it and sustain it, the HASS support team began the implementation process with a critical first step, a dialogue through roundtable discussions with the key players involved, one roundtable with staff and one with volunteers.

For the volunteer roundtable discussion, the HASS support team invited a cross section of volunteers to ensure a diverse representation of the volunteer population, and ultimately 10 volunteers participated. They shared that there was a huge desire for centralized animal information. Most volunteers were aware of Asana's use at the Fulton shelter, but misunderstanding of the tool's functionality was widespread, lending to its tarnished reputation among the DeKalb volunteer team.

For the staff roundtable discussion, the HASS support team again invited a cross section of team members from different departments and levels of responsibility, and ultimately had seven staff participants, in addition to the core management implementation team for the project. From staff members, the team learned that there is a struggle for adoption team members to get to know the animals since they interact with customers all day, so they heavily rely on volunteer and coworker insight and would especially benefit from a centralized source of animal information. Concerns shared about implementing Asana as a matchmaking tool included the possibilities of inconsistent use, unreliable wifi access, and fear of redundancy with existing information sources. Staff also identified opportunities the tool could provide such as increased collaboration with community support staff and animal care staff and improved safety.

With the scope narrowed down to utilizing Asana as a matchmaking tool, and staff and volunteer feedback received, the HASS team began developing materials for upcoming onsite training sessions.

For the "Matchmaking with Asana" training the HASS team held 5 training sessions scheduled throughout the week, training 63 staff and volunteers.* The sessions took place throughout the week of the HASS team's onsite visit. A recorded training would be provided the following week to send out to staff and volunteers unable to attend an in-person session.

*Ensuring thorough training was seen as a key to the success of DeKalb's new matchmaking method.

At the beginning of each training session, participants were asked to complete a pre-training survey aimed at collecting information about how comfortable staff and volunteers are with matchmaking overall, their level of confidence using Asana, and general feedback about the topic of matchmaking. We collected 56 responses and sent out the post-training survey one week after training was completed. The HASS team also collected feedback, questions, and suggestions throughout its weeklong visit to ensure everyone involved with matchmaking felt heard and so their insights could become part of planning.

Throughout the training sessions staff and volunteer engagement was constructive and positive. The diversity of staff and volunteers represented enhanced the experience by allowing attendees to hear how their work impacts others. One example was a volunteer telling a staff member from the clinic that when she sees notes about how a dog did for medical procedures it really helps her assist potential adopters.

Overall, implementation of foot traffic data tracking and matchmaking training at LifeLine DeKalb was wildly successful. Both initiatives are now in use and we expect to report outcomes in adoption rates in the summer of 2024 once sufficient time has passed to get good data.