



HASS Rubric: Intake-to-Placement

Which personnel are trained in case management?

Terminology

1. **Case management:** The process by which a pet or person's unique interactions with the organization are assessed and custom recommendations and pathway plans are made. Case management processes aim to find the best and most positive outcomes for people and pets in shelters.

Beginner

Leadership roles responsible for matchmaking, case management, or customer service are trained in case management best practices. Training protocols and information is distilled and distributed to relevant personnel including direct reports and public-facing personnel responsible for these tasks.

Intermediate

All staff and volunteers responsible for matchmaking, case management, or customer service are trained in case management best practices.

Advanced

Not applicable.