



## HASS Playbook

### **About the Human Animal Support Services (HASS) Playbook:**

The HASS Playbook is a data-informed comprehensive collection of quick-start guides created to support the implementation of programs that address the major challenges facing both the animal welfare industry and the communities they serve. These guides provide the framework to start a customized program from scratch or expand upon existing pet support services, lost pet reunification, supported self-rehoming, and intake-to-placement efforts.

The HASS Playbook is accompanied by a self-paced assessment tool that helps organizations evaluate current initiatives, and upon completion of the assessment, provides instantaneous customized recommendations that may be used to create or enhance current programming.

To access the HASS Playbook self-assessments or see further details in the HASS Playbook announcement, visit [www.humananimalsupportservices.org/press-release/hass-playbook/](https://www.humananimalsupportservices.org/press-release/hass-playbook/).

### **About HASS:**

The HASS project is a movement seeking to revolutionize the animal welfare industry by leading with and embracing a community support model. By providing both private and municipal animal organizations with equitable access to data-driven resources, education, and implementation tools, HASS aims to create pathways toward a unified support system for pets and their people in every community. To learn more, visit [www.humananimalsupportservices.org](https://www.humananimalsupportservices.org).

### **Acknowledgments**

The HASS Playbook would not be possible without the expertise provided by our dedicated social-service provider community including countless trusted animal welfare professionals, pilot shelters, and partner organizations committed to prioritizing the human-animal bond. It is through our collaboration, the support of our funders, and project facilitator Austin Pets Alive!, that HASS is able to put our mission into action.

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## HASS Foundations HASS 101

### What is HASS 101?

[Human Animal Support Services: Animal Sheltering Reimagined](#), commonly referred to as “HASS 101”, is a free online self-paced course created by HASS and hosted by Maddie’s® University. This short course introduces the Humane Animal Support Services model, which strives to keep pets and people together with support both to and from the community. This course highlights the mission, vision, and values of HASS, as well as the pathways of HASS program implementation.

### HASS Self-Paced Courses

In addition to HASS 101, a [complete HASS curriculum](#) of self-paced courses is available, providing a more in-depth look at community-centric programs that support the HASS model. As a bonus, the completion of each course provides CAWA and NACA CE credits.



## HASS Foundations Program Communications

### HASS At-a-Glance

The following topics may be shared with personnel, in addition to the completion of the [self-paced HASS 101 online course](#), to build a strong foundation and understanding of Human Animal Support Services and community-centric program implementation efforts.

- **[HASS Project Mission](#):** The Human Animal Support Services (HASS) mission is to revolutionize the animal welfare industry by leading with and embracing a community-centric sheltering model. By providing both private and municipal community shelters with equitable access to data-driven resources, education and implementation tools, HASS aims to create a movement of unified support systems for pets and their people.
- **[HASS Vision and Values](#):** The Human Animal Support Services project reimagines a world where the human and animal welfare industries work together to serve people and pets in need. Preserving and prioritizing the human-animal bond is at our core through a new, social services perspective.
- **[Our Philosophy](#):** A HASS-led sheltering method aims to unite the best practices of human welfare and the best practices of animal welfare to support pets and people in need, equally. This involves four core pathways that are rooted in data, education, and policy work. It's through this method that HASS provides resources to implement a new, human approach to animal welfare.
- **HASS Core Pathways**
  - **Pet Support Services:** Community services identified or developed by a shelter to assist people and pets in need
  - **Lost Pet Reunification:** Shelter services that prioritize reuniting pets with their families
  - **Supported Self-Rehoming:** Programs that enable the community to participate in finding new homes for pets without having to enter the shelter system
  - **Intake-to-Placement:** Process of taking in and caring for animals in need while identifying and placing them in the best environment available

- **Terminology:** A guide that covers common animal services jargon to be used in onboarding materials and supports the consistency of language used in the shelter.
- **Implementation:** Access **FREE how-to guides and resources** to support implementing a community-centric approach at your organization by visiting [www.humananimalsupportservices.org](http://www.humananimalsupportservices.org)



## Organizational Culture Foundations

### Communicating Organizational Changes

#### Overview

There are three key touchpoints of organizational communication to consider to ensure all personnel receive important organizational updates and changes—in-person communication, written notices, and always accessible follow-up in a centralized resource hub. Utilizing **all** of these methods can ensure staff and volunteers are receiving consistent information in a timely manner and are well-informed on initiatives, programs, or other major shifts being implemented at the organization.

#### In-Person Communication

A combination of [recurring group meetings](#) such as monthly staff meetings, standalone training for new initiatives, and one-on-one discussions with relevant personnel should be utilized to distribute organizational updates and changes and allow for the [collection of feedback](#). In-person communication methods should always be followed by a written recap to ensure consistency and understanding.

#### Written Communication

##### Flyers

Flyers may be used in addition to another form of written communication as a way to communicate organizational updates for staff and volunteers. Flyers should be posted in high-traffic areas of your facility such as a break room, bathroom, or meeting space for maximum visibility. Consider having these in multiple languages where appropriate.

##### Emails and Newsletters

Establishing a recurring cadence of communicating organizational updates, wins, new programs or resources, and requests can improve consistency and base knowledge among personnel. Recurring emails can be scheduled directly in an organization's existing email platform, or through a supporting software such as a CRM or communications application.

[Customer Relationship Management \(CRM\) software](#) can often incorporate cross-departmental communications automations in addition to its primary organizational functions. These communications may be as simple as an organization-wide email update or as advanced as a recurring internal newsletter. Here are a few examples of how to send emails through an existing CRM:

- [Create and send marketing emails in the updated classic editor | Knowledge Base](#) - Hubspot
- [Create and Send a Regular Email](#) - Mailchimp
- [How to Send Email Through a CRM Guide](#) - CRM Business

A [standalone newsletter platform](#) can support organizational communications if you do not require a more advanced CRM. These platforms can be utilized to create both internal and external newsletters. Templating organizational email formats or specific categories is advised for recurring communications for efficiency purposes and to ensure staff/volunteers easily recognize or prioritize specific communications.

### Google Groups

A Google Group is a free option that allows an organization that utilizes Gmail-based email addresses to create an email distribution list with customizable privacy, posting permissions, and more. If an organization does not already have an established CRM or email distribution application, this can be a simple way to get started. [Learn all about Google Groups here](#) including creating or joining a group, sending communications, organizing events, tracking assignments, and more.

### Outlook Groups

A Microsoft Outlook group is a free option that allows an organization that utilizes Microsoft-based email addresses to create an email distribution list. If an organization does not already have an established CRM or email distribution application, this can be a simple way to get started. [Learn all about Outlook Groups here](#)

### Chat Groups

If using an established email service such as Google or Outlook, consider utilizing the generic chat functions or more customizable [Google Spaces](#) or [Microsoft Teams](#) functions to establish live chat groups for individual teams, departments, or specialty projects. These spaces not only allow live responses, but have functionality to share photos, presentations, video chats, and more. If you do not have an established email service that offers this functionality, consider utilizing a service like [Slack](#) to create live communication groups.

### Centralized Resource Hubs

Creating an easily accessible and always available central place to reference important organizational resources and updates can support further consistency in messaging and understanding of organizational efforts among staff and volunteers. This may include an organizational handbook, an Intranet, and more. To learn more about sharing resources with personnel through a centralized hub, [see our guide here](#).



## Organizational Culture Foundations Creating a Handbook and Intranet

### Creating an Organizational Handbook

An [organizational handbook](#) provides an easy-to-access guide outlining the organization's primary policies and procedures. This guide may be utilized in new employee onboarding and should be regularly updated to ensure accuracy. The handbook should not include individual protocols for programs or departments.

#### Handbook Creation Tips:

- Keep it simple. Avoid using jargon and ensure instructions are clear and concise.
- Keep it updated. When a major change occurs, update the handbook. If no major changes occur over a 12-month period, review the handbook for accuracy at least once per year.
- Accept feedback. Allow users to submit feedback that may help improve the handbook's usability.

#### What to Include:

- Organization mission, vision, values
- Brief history of the organization
- DEI, anti-harassment, and non-discrimination policy
- Code of conduct
- Dress code
- Attendance and breaks/meal policy
- Communications policy
  - Company phone or other device usage protocol
  - Communications with media
  - Social media posting
- Personnel organizational chart
  - Where applicable, organizational chart for sub-brands and/or organizational projects
- HR forms or procedures
  - Company programs and benefits
  - Holidays, events, or other dates that impact the organization
  - Procedures for formal complaints

- Employment at-will policy
- Work authorization
- Overtime and leaves of absence policies
- Direct deposit information
- Other legal requirements such as FMLA or worker's compensation
- Performance standards and review information
- Performance Improvement Plan (PIP) procedures
- Offboarding procedures
- A statement noting the handbook does not create or act as an employee contract
- Acknowledgment of receipt

## Creating an Intranet Network

Intranet is a private communications network created with the intention of sharing important internal information such as the employee handbook, pay or performance information, HR documents and forms, important dates, and more. Intranet portals can be created in a variety of ways and may vary based on your organization's existing setup and website hosting abilities.

- [How To Create An Intranet: A Step By Step Beginner's Guide](#) - My Hub Intranet
- [How to Make an Intranet: 8 Steps \(with Pictures\)](#) - WikiHow
- [How to Set Up a WordPress Intranet: A Comprehensive Guide](#) - Hostinger
- [Sharing and Publishing New Google Sites](#) - Steegle
- [How to Build a Company Intranet on Google Sites](#) - Better Cloud

**Note:** If your organization has a centralized online HR and communications platform such as Paycor or BambooHR that house internal documents, an official Intranet page may be redundant and unnecessary.

## Onboarding and Training Tracking

Consider digitizing all staff and volunteer resources and basic onboarding protocols and converting them into a trackable onboarding course or outlined format. This will ensure all relevant personnel have completed onboarding, received the organization's handbook and basic resources, and have a larger process to track assignments or continued training.

### Creating a tracking process for staff and volunteer training

- Before the creation of a new training tracking process, discuss options with leadership and Human Resources at your organization. If available, this may be an opportunity for collaboration within an existing employee management or project management software. Confirm whether volunteers may also be able to use this software if volunteer training is also required.

- If an existing software solution is not available, consider who may need access to the tracking information and how the organization currently tracks training progress such as spreadsheets, documents, forms, etc.
- Identify the person(s) responsible for the management and distribution of training. How do they currently track training efforts? Is this process working, or should it be updated?
  - Who needs access to monitor training progress files? How do they currently monitor progress? Is this process working, or should it be updated?
  - Should the training progress files be digital or physical documents?
  - Is there a budget to purchase a Learning Management System (LMS) for the organization to track training progress? *Note: An LMS can both distribute training materials and track progress.*
- Consider if there are different processes in place for employee versus volunteer training efforts. Is there an opportunity to combine the processes? If not, ensure both are updated when changes are made.
- If creating a new tracking system, consider including the following items:
  - First and last name (Trainee)
  - Email (Trainee)
  - Title/Role (Trainee)
  - Direct supervisor
  - Type of training assigned
  - Training required? Y/N
  - Date assigned
  - Assigned by or required by (Ex: Supervisor assignment, HR requirement, Grant fulfillment requirement)
  - Due date
  - Scheduled check-in date
  - Responsible for check-in (Person)
  - Date of completion
  - Notes
- If there is an interest in tracking not only the status and progress of training, but also time spent, consider adding a metric for the length of time the training will take. You may later use this in reports to calculate time spent as an organization, or individuals, to complete assigned training assignments.
- Consider adding training to the onboarding process for all new personnel
- Consider integrating collection of training process feedback for continuous improvement.

### Sample Solutions (Spreadsheet Based)

- [Simplified Tracking Sheet for Training Assignments](#) - Suitable for any size group or training assignments, but does not elaborate on details or follow-up procedure.
- [Tracking Sheet for Training Assignments I](#) - Suitable for small personnel groups and limited training assignments.



- [Tracking Sheet for Training Assignments II](#) - Suitable for larger groups and training assignments if software is not available. As resources allow, it may be beneficial to consider non-spreadsheet tracking options for ease.

### **Learning Management Systems (LMS)**

Learning management systems vary greatly when it comes to cost, capacity, simplicity of use, and best fit for organizational goals. We highly recommend your organization take the time to complete individual research on the solution that makes the most sense for your organizational needs. To get you started, here is a short list of existing LMS systems you may consider:

- Cypher Learning LMS
- TalentLMS
- Absorb
- iSpring
- Docebo
- D2L Brightspace LMS
- Blackboard Learn LMS
- Canvas LMS
- Moodle LMS
- Adobe Learning Manager



## Organizational Culture Foundations Trauma-Informed Care Training

### What is Trauma-Informed Care?

Trauma-informed care is an approach to care that acknowledges that most individuals have experienced some level of trauma in their life and provides organizations with a framework for recognizing, respecting, and appropriately responding to the effects of trauma. The approach helps facilitate safe, nonjudgmental communication and trust and reduces the potential for re-traumatization for both organizational staff and the public they serve.

The Trauma-Informed Care Implementation Resource Center provides [an overview of this approach](#), emphasizing six key principles:

1. Safety
2. Trustworthiness and transparency
3. Peer support
4. Collaboration and mutuality
5. Empowerment, voice, and choice
6. Cultural, historical, and gender issues

A trauma-informed approach has historically been implemented in healthcare organizations, social work, and other human-welfare industries. Because of this, many training and learning resources are directed towards human health services and may need adjustments to better reflect pet-based processes. As animal welfare continues to lean into the [One Health methodology](#) which supports both people and their pets holistically, a trauma-informed approach is increasingly important to prevent unnecessary separation of pets and the people who care for them.

### Organizational Overview

If your organization is approaching trauma-informed care for the first time, the following guides include supporting research to build a foundation of understanding on key concepts and recommendations for organizational changes. Training recommendations may vary by organizational goals and resources.

- [Laying the Groundwork for Trauma-Informed Care](#) - Trauma-Informed Care Implementation Resource Center

- This brief offers practical recommendations for healthcare organizations looking to create a more welcoming clinical environment for patients who have experienced trauma.
- [Adopting a Trauma-Informed Approach to Improve Patient Care: Foundational Organizational-Level Steps](#) - Better Care Playbook
  - The goal of this play is to help practitioners understand potential organizational-level steps to begin incorporating trauma-informed care into a healthcare organization (Adjust as needed for animal welfare purposes).
- [5 Key Elements to Trauma-Informed Care](#) - RELIAS
  - A white paper highlighting trauma-informed care basics and organizational steps to implementation.
- [SAMHSA's Concept of Trauma and Guidance for a Trauma-Informed Approach](#) - SAMHSA
  - The purpose of this paper is to develop a working concept of trauma and a trauma-informed approach and to develop a shared understanding of these concepts that would be acceptable and appropriate across an array of service systems and stakeholder groups.
- [Vicarious Trauma Organizational Readiness Guide for Victim Services](#)
  - The Vicarious Trauma—Organizational Readiness Guide (VT-ORG) for Victim Services will help you to recognize and appreciate your organization's strengths regarding supportive vicarious trauma-informed policies, procedures, practices, and programs already in place. You will likely also discover gaps that deserve attention
- [Trauma-Informed Systems \(TIS\)](#) - Trauma Transformed
  - TIS is an organizational change model developed by the San Francisco Department of Public Health to create context that nurture and sustain trauma-informed practices.

## Training Options

Training Options for Trauma-Informed Care may vary based on available resources. To ensure your organization can provide the training best suited for your needs and capacity, consider the following options in addition to the Organizational Overview section above.

## Free/Low Cost

### Basic Guides and Information

The following resources contain reading materials and video-based information related to trauma-informed care. They do not contain supplemental tests or worksheets.

- [Trauma-Informed Care 101: Basics of Trauma and the TIC Framework](#) - RELIAS
  - Webinar, 1 hr.
- [Trauma-Informed Care](#) - Trauma Policy
  - Trauma-informed care overview and video of what NOT to do.

- [What is Trauma-Informed Care?](#) - Trauma-Informed Care Implementation Resource Center
  - Core principles, benefits, and preliminary steps to implementation
- [10 Key Ingredients for Trauma-Informed Care](#) - Trauma-Informed Care Implementation Resource Center
  - Infographic overview

## Training Modules/Series

- [Trauma-Informed & Culturally Safe Training](#) - Vancouver Humane Society
  - Free training program for the animal services sector
- [Intro to Trauma Informed Care Training Modules](#) - Trauma Informed Oregon
  - Four free, self-directed, self-paced modules that walk you through the basics of trauma-informed care, as well as an introduction and closing video. Each module includes a course content video, an additional Voices from the Community video that highlights how trauma-informed care is being implemented in a specific community, additional resources that you can read to further your learning, questions that can be used for personal reflection, and a knowledge check. Upon successful completion of the course and submission of our feedback survey, you will be eligible to download a certificate of course completion.

## For Purchase

- [Introduction to Trauma-Informed Care \[Course Preview\]](#) - RELIAS
  - Over 90% of people receiving behavioral healthcare have a history of trauma. In this course, you will learn about the various types of trauma, the long-lasting consequences of trauma, and what it means to provide care through a trauma-informed lens.
- [Trauma Informed Care Training And Workshops](#) - Crisis & Trauma Resource Institute
  - Based on our book, A Little Book About Trauma-Informed Workplaces, this workshop explores five key principles to integrate a trauma-informed approach throughout the organization.
- [Trauma-Informed Care Practitioner Training](#) - TIC Training Center
  - This training covers questions like: What is trauma-informed care, how do you identify trauma, and how do you heal trauma?

## Tracking Efforts

When providing training to various personnel, tracking assignments and completion status may allow for easier follow-up or continued training and progress-tracking support for organizational goals. If your organization has an established employee and volunteer training

protocol, connect with the relevant personnel to integrate new training efforts into the existing process.

### Creating a tracking process for staff and volunteer training

- Prior to the creation of a new training tracking process, discuss options with leadership and Human Resources at your organization. If available, this may be an opportunity for collaboration within an existing employee management or project management software. Confirm whether volunteers may also be able to use this software if volunteer training is also required.
  - If an existing software solution is not available, consider who may need access to the tracking information and how the organization currently tracks training progress such as spreadsheets, documents, forms, or other formats.
- Identify the person(s) responsible for the management and distribution of training. How do they currently track training efforts? Is this process working, or should it be updated?
  - Who needs access to training progress files for monitoring? How do they currently monitor progress? Is this process working, or should it be updated?
  - Should the training progress files be live/online or offline documents?
  - Is there a budget to purchase a Learning Management System (LMS) for the organization to track training progress? *Note: An LMS can both distribute and track learning/training progress.*
- Consider if there are different processes in place for employee versus volunteer training efforts. Is there an opportunity to combine the processes? If not, ensure both are updated when changes are made.
- If creating a new tracking system, consider including the following items:
  - First and last name (Trainee)
  - Email (Trainee)
  - Title/Role (Trainee)
  - Direct supervisor
  - Type of training assigned
  - Training required? Y/N
  - Date assigned
  - Assigned by or required by (Ex: Supervisor assignment, HR requirement, Grant fulfillment requirement)
  - Due date
  - Scheduled check-in date
  - Responsible for check-in (Person)
  - Date of completion
  - Notes

- If there is an interest in tracking not only the status and progress of training, but time spent, consider adding a metric for the length of time the training will take. You may later use this in reports to calculate time spent as an organization or individuals to complete assigned training assignments.
- Consider adding training to the onboarding process for all new personnel
- Consider integrating the collection of training process feedback for continuous improvement.

### Sample Solutions (Spreadsheet Based)

- [Simplified Tracking Sheet for Training Assignments](#) - Suitable for any size group or training assignments, but does not elaborate on details or follow-up procedure.
- [Tracking Sheet for Training Assignments I](#) - Suitable for small personnel groups and limited training assignments.
- [Tracking Sheet for Training Assignments II](#) - Suitable for larger groups and training assignments if software is not available. As resources allow, it may be beneficial to consider non-spreadsheet tracking options for ease.

### Learning Management Systems (LMS)

Learning management systems vary greatly in cost, capacity, simplicity of use, and best fit for organizational goals. We highly recommend your organization take the time to complete individual research on the solution that makes the most sense for your organizational needs. To get you started, here is a short list of existing LMS systems you may consider.

- Cypher Learning LMS
- TalentLMS
- Absorb
- iSpring
- Docebo
- D2L Brightspace LMS
- Blackboard Learn LMS
- Canvas LMS
- Moodle LMS
- Adobe Learning Manager



## Organizational Culture Foundations Compassion Fatigue Training

### What is Compassion Fatigue?

Many individuals in animal welfare are brought to this work because of their empathy, compassion, and dedication to the mission. In any helping profession, leadership must pay attention to signs of compassion fatigue, both in themselves and their staff. [WebMD defines compassion fatigue](#) as “the physical, emotional, and psychological impact of helping others – often through experiences of stress or trauma.” It may show up through overworking, disrupted sleep, anxiety, depression, physical illness, emotional disconnection, and more, and can compound over time to become burnout.

### Organizational Overview

If your organization is approaching compassion fatigue training for the first time, the following are guides to build a foundation of understanding on key concepts of compassion fatigue. These introductory resources may be utilized in developing training or shared directly with staff and volunteers. Training recommendations may vary by organizational goals and resources.

- [Compassion Fatigue](#) - The American Institute of Stress
- [Compassion Fatigue, Burnout and the Strengths-Based Workplace](#) - NAADAC
- [Running On Empty: Compassion Fatigue in Health Professionals](#) - Compassion Fatigue Solutions and Professional Development
- [Compassion Fatigue, Burnout, and The Strengths-Based Workplace Slide Deck](#) - Indian Health Services Leadership Conference 2015

### Training Options

Training options for compassion fatigue may vary based on available resources. To ensure your organization can provide the training best suited for your needs and capacity, consider integrating the following resources and self-evaluations into your current offerings.

### Free/Low Cost

- [Compassion Fatigue Awareness Project](#)
  - This resource includes a TEDxTalk on managing compassion fatigue in caregiving.
- [Compassion Fatigue Coffee Talk](#) - HSUS

- A one-hour webinar hosted by Hilary Hegar (HSUS) on the topic of compassion fatigue.
- [Wellbeing Assessment for Veterinarians](#) - AVMA My Veterinary Life
- [Compassion Fatigue & Healthcare Professionals: An Online Guide](#) - EduMED
  - This series is specifically designed for healthcare professionals and may have some aspects that do not apply to animal services.
- [Free Intro to Compassion Fatigue Video Training](#) - CaringSafely
  - This series is specifically designed for healthcare professionals and may have some aspects that do not apply to animal services.

## For Purchase

- [Compassion in Balance](#)
  - This resource has options for individual and team training series, as well as live custom webinars for groups.
- [Compassion Fatigue Strategies Plus](#) - UF Shelter Medicine Program
  - An 8-week course on the topic of empathic distress aka compassion fatigue and burnout.

## Tracking Training Efforts

Tracking assignments and completion status allows for easier follow-up or continued training, as well as progress-tracking for organizational goals, especially when providing training to various personnel. If your organization has an established employee and volunteer training protocol, connect with the relevant personnel to integrate new training efforts into the existing process.

## Creating a tracking process for staff and volunteer training

- Before the creation of a new training tracking process, discuss options with leadership and Human Resources at your organization. If available, this may be an opportunity for collaboration within an existing employee management or project management software. Confirm whether volunteers may also be able to use this software if volunteer training is also required.
  - If an existing software solution is not available, consider who may need access to the tracking information and how the organization currently tracks training progress such as spreadsheets, documents, forms, etc.
- Identify the person(s) responsible for the management and distribution of training. How do they currently track training efforts? Is this process working, or should it be updated?
  - Who needs access to monitor training progress files? How do they currently monitor progress? Is this process working, or should it be updated?
  - Should the training progress files be digital or physical documents?



- Is there a budget to purchase a Learning Management System (LMS) for the organization to track training progress? *Note: An LMS can both distribute training materials and track progress.*
- Consider if there are different processes in place for employee versus volunteer training efforts. Is there an opportunity to combine the processes? If not, ensure both are updated when changes are made.
- If creating a new tracking system, consider including the following items:
  - First and last name (Trainee)
  - Email (Trainee)
  - Title/Role (Trainee)
  - Direct supervisor
  - Type of training assigned
  - Training required? Y/N
  - Date assigned
  - Assigned by or required by (Ex: Supervisor assignment, HR requirement, Grant fulfillment requirement)
  - Due date
  - Scheduled check-in date
  - Responsible for check-in (Person)
  - Date of completion
  - Notes
- If there is an interest in tracking not only the status and progress of training, but also time spent, consider adding a metric for the length of time the training will take. You may later use this in reports to calculate time spent as an organization, or individuals, to complete assigned training assignments.
- Consider adding training to the onboarding process for all new personnel
- Consider integrating collection of training process feedback for continuous improvement.

### Sample Solutions (Spreadsheet Based)

- [Simplified Tracking Sheet for Training Assignments](#) - Suitable for any size group or training assignments, but does not elaborate on details or follow-up procedure.
- [Tracking Sheet for Training Assignments I](#) - Suitable for small personnel groups and limited training assignments.
- [Tracking Sheet for Training Assignments II](#) - Suitable for larger groups and training assignments if software is not available. As resources allow, it may be beneficial to consider non-spreadsheet tracking options for ease.

### Learning Management Systems (LMS)

Learning management systems vary greatly when it comes to cost, capacity, simplicity of use, and best fit for organizational goals. We highly recommend your organization take the time to complete individual research on the solution that makes the most sense for your organizational needs. To get you started, here is a short list of existing LMS systems you may consider:

- Cypher Learning LMS
- TalentLMS
- Absorb
- iSpring
- Docebo
- D2L Brightspace LMS
- Blackboard Learn LMS
- Canvas LMS
- Moodle LMS
- Adobe Learning Manager

## Supporting Resources

- [Compassion Fatigue: Coping with Secondary Traumatic Stress Disorder in Those Who Treat the Traumatized](#) - Edited by Charles R. Figley, Ph.D.
  - This is the complete research-based book referenced in many compassion fatigue trainings, including those outlined above.



## Organizational Culture Foundations Staff and Volunteer Feedback

### Overview

Creating a process for collecting staff and volunteer feedback not only improves trust and team health, but also allows organizations to strategically collect information that can improve program implementation, communication, and leadership. Feedback may be requested for performance and management reviews, exit interviews, a recurring “suggestion box”, a new program or project implementation, and more. To ensure you are able to receive honest, constructive feedback every time, build a culture of trust and transparency with your team related to feedback requests.

Here are a few suggestions to get started:

- Allow anonymous responses to feedback requests
- Be transparent about the purpose of collecting the feedback
- [Ask specific, relevant questions](#)
- Utilize drop-down options within the survey for ease of use when possible
- Follow through and take action based on feedback
- Communicate changes that were made due to feedback received
- Create a recurring cadence for general feedback

### Survey Platforms

For organizations that have an established CRM or email-based communication software, a survey development option may already be integrated into the service. Locate your ‘help’ or ‘knowledge base’ section of the platform and search the keyword “survey” to determine if they already have an existing how-to guide. For example, [HubSpot has a quick and easy guide to creating custom surveys](#).

For organizations that do not already have established software that creates surveys, the following options can help get you started.

- [Google Forms](#)
  - A free service that has fully customizable form creation and an optional template library.
- [Jotform](#)
  - Has free and for-purchase options as well as a template library.

- [Lattice](#)
  - [Lattice](#) is primarily an HR software and can be used for more than just survey creation for personnel feedback.
- [Survey Monkey](#)
  - In addition to highlighting the benefits of this service, the bottom of the linked page has sample templates.

## Supporting Resources

The following resources outline best practices and samples for survey development with the goal of receiving transparent and comprehensive feedback.

- [Sample NEW Program Staff Feedback Form](#) - HASS
- [5 Ways to Collect Honest Employee Feedback](#) - Workleap
- [How to Collect Employee Feedback \(Tips & Examples\) \[2023\]](#) - Asana
- [Want Honest Feedback From Employees? 16 Strategies to Try](#) - Forbes
- [The 19 Best Totally Free Online Survey Makers, Tools & Services](#) - Hubspot



## Data Foundations Utilizing Software to Track Organizational Data

### Benefits of Using Software

A shelter software management system transforms animal shelters by increasing efficiency, improving communication, and enhancing overall management. With centralized records, easily reportable metrics, and streamlined communication, shelters can provide better care, support more pets in the community, and optimize resources. In summary, key animal shelter software benefits include:

- Reportable metrics and analytics
- Increased communication
- Optimized resources
- Centralized location for recording all activities related to animal care and support

### Animal Shelter Software Options

Though this resource details only animal shelter and case management software solutions, utilizing dedicated software for other key operations such as community engagement and volunteer tracking is highly recommended and beneficial. For a comprehensive list of software options see the [Human Animal Support Services Technology Catalog](#).

The following are animal shelter software options available to, among other features, store person and animal-level data, conduct standard shelter operations such as intakes and outcomes, and track case management data such as status, pet health information, foster placements, and customer service interaction details:

- [Animals First](#)
- [Chameleon](#)
- [Pawlytics](#)
- [PetPoint](#)
- [ShelterBuddy](#)
- [ShelterLuv](#)
- [Shelter Manager](#)
- [ShelterPro](#)

### Case Management Software Options

For details regarding case management solutions in animal shelter software listed above and customer relationship management (CRM) software, see the [HASS Tools and Technology White Paper: Community Request Tracking](#).

Should case management tracking needs exceed animal shelter software capabilities, particularly for Pet Support Services efforts, it may be beneficial to track case management data in supporting software. The following are case management software options an organization may consider:

- [Doobert](#)
- [Pets Find Help](#)
- [Clinic HQ](#)
- [Avimark](#)
- [Blackbaud](#)
- [Monday.com](#)
- [Presspoint CRM](#)
- [Salesforce](#)

*Organizations can also find extensive case management software options by searching online or via third-party platforms dedicated to specific Pet Support Services programming (i.e. [Rehome by Adopt a Pet](#)).*

## **Fundraising for Software**

Looking for support with fundraising to purchase software? See the [HASS Philanthropy Toolkit for Development and Fundraising](#).



## Data Foundations

### Best Practices and Data Tracking Recommendations

#### Data Entry Best Practices

Maintaining best practices for data entry supports quality data output and reporting to inform organizational health and **data accuracy, integrity, and reliability**. This introductory resource will cover common data entry issues, best practice recommendations for person and pet records, and recommendations for tracking data for specific operations related to the [HASS pathways](#) and more.

#### Common Data Entry Issues

Review the common data entry issues below to avoid when creating data entry protocols and practices to ensure the best results. [To audit your data and integrate best practices for common data issues and more, reference this guide.](#)

Issue	Why	Example of Issue
System contains redundant and unused fields	<ul style="list-style-type: none"><li>Consistent data reporting is needed to ensure data accuracy when aggregated.</li><li>Inconsistent categories of data will not accurately reflect operations.</li></ul>	<p>“DOA” “Dead on arrival” “DOA DOA Stray”</p> <ul style="list-style-type: none"><li><i>All of these are saying the same thing, but only one is needed.</i></li><li><i>Understanding DOA-related data becomes difficult when looked at in aggregate.</i></li></ul>
Information is tracked in the wrong field or too much information is tracked in a single field	<ul style="list-style-type: none"><li>Consistent data reporting is needed to ensure data accuracy when aggregated.</li><li>Inconsistent categories of data will not accurately reflect operations.</li></ul>	<p>“ACO pickup long hold” “ACO pickup under 3 months” “ACO pickup owner arrested”</p> <ul style="list-style-type: none"><li><i>Length of hold, age, and intake reason should all be captured in other fields.</i></li><li><i>Understanding data for ACO pickups becomes difficult.</i></li></ul>
Address/location data entry is incomplete	<ul style="list-style-type: none"><li>Location data may not be able to be used or accurately mapped for analysis.</li><li>Inaccurate or incomplete</li></ul>	<p>“Forest Road, FL” “Near Target and Walmart”</p> <ul style="list-style-type: none"><li><i>The first does not list a street number, city, or zip code.</i></li></ul>

Issue	Why	Example of Issue
	<p>location data may lead to missed opportunities for reunification.</p> <p><i>If full address information is unavailable, detailed cross-street data with city and zip codes may be entered. However, this data is less likely to be able to be mapped accurately by software.</i></p>	<ul style="list-style-type: none"> <li><i>The second relies on landmarks and does not include any definitive location data.</i></li> </ul>
Combining dead on arrival and died in care	<ul style="list-style-type: none"> <li>These are different circumstances that require different interventions and solutions.</li> </ul>	
Double counting foster as live outcomes	<ul style="list-style-type: none"> <li>Key metrics and calculations will be inflated.</li> <li>Reporting will be inaccurate.</li> </ul>	<p><i>This is more likely to occur in software that counts foster movement as an intake and outcome. If using software that does track foster movement as an intake and outcome, remove these intakes and outcomes from the data when reporting or doing calculations that depend on intakes and outcomes.</i></p>
Not counting individual animals or double counting individual animals	<ul style="list-style-type: none"> <li>Key metrics and calculations will be inflated.</li> <li>Reporting will be inaccurate.</li> <li>Animals may be missed and not accounted for.</li> </ul>	<p>Example: A litter of five kittens entered into the software is counted as one intake and then processed in the software as five outcomes.</p> <p>Every individual animal should have its own intake and outcome record.</p>
Delayed data entry/entry is not reconciled daily	<ul style="list-style-type: none"> <li>Reporting will be inaccurate, especially for length of stay calculations.</li> <li>Inventory will not reconcile.</li> <li>Animals may be missed and not accounted for.</li> <li>Critical details may be lost/forgotten.</li> </ul>	<p>Example: Data entry is done from paper intake and outcome forms weekly instead of at the point of intake and outcome, but the information is not backdated to the appropriate date and time.</p>



## Best Practices by Operation Type

The following sections detail data tracking best practices based on operation types. For support with common animal welfare terminology, [see our guide here](#).

### Animal Records

Individual animal records should, at minimum, include the following data points for detailed record-keeping and case management practices:

Data Point	Definition	What it Serves
Unique identifier	A unique number or code that is generated for each individual record. Also referred to as animal number or animal ID.	Unique record tracking and case management.
Name	The animal's name.	Identification of the animal by name.
Picture	A picture of the animal.	Visual identification of the animal.
Associated people	Person records associated with the animal record such as through ownership, intakes, and outcomes.	Tracks history of ownership, surrender, reclaim, adoption, and similar operations by connecting a pet to a person.  Supports pet support services tracking, case management, and potential lost pet reunification.
Associated operations and services	Operations and services associated with the animal record such as participation in pet food pantry and veterinary services programs.	Supports pet support services tracking, case management, and program development.
Intake date	Date animal was taken into shelter care.	Tracks history of intakes.  Essential intake operations data.  Required to determine legal holding period.
Intake type	Intake category assigned to an animal when they are taken	Essential intake operations data to categorize types and

Data Point	Definition	What it Serves
	into shelter care, such as “Stray/At Large” or “Relinquished by Owner.”	volume of animals taken into care.
Intake subtype	Intake subcategory is assigned to an animal when they are taken into shelter care.	Essential intake operations data to categorize types of animal intakes.
Intake condition	Physical condition of animal at intake.	Documentation of care needs.
Intake reason*  <i>*Though not all shelter software offers a dedicated field for this data point, there should be a standard process to capture this information, even if in an alternate field.</i>	The reason an animal was taken into shelter care.	Informs pet support services needs, program development opportunities, and case management for intake-to-placement pathway planning.
Found location, if applicable (Stray/At Large)	The complete address where the pet was found at large.  <i>If full address information is unavailable, detailed cross-street data with city and zip codes may be entered. However, this data is less likely to be able to be mapped accurately by software.</i>	Supports lost pet reunification and the ability to map data for analysis to inform support needs and program development.
Hold dates	The date range that a pet is on hold due to legal requirements, such as a Stray Hold, or while pending other operations such as a planned adoption or transfer-out placement.  <i>Hold release dates for legal requirements may also be referred to as emancipation dates.</i>	Informs pets pathway planning and the date that must pass before the pet can continue on various pathways.
Housing location on site	The location at the shelter where the animal is housed. Examples: kennel #, room name.	Informs population management and identifies pet's location.

Data Point	Definition	What it Serves
Species	Species of the animal.	Essential animal demographic information used for identification, pathway planning, population management, etc.
Age	Age of the animal, even if estimated.	Essential animal demographic information.
Weight	Weight of the animal per scale. This is best taken at the point of intake and again at the point of veterinary care if applicable.	Essential animal demographic information.
Size	Size group of animal based on weight and age.	Essential animal demographic information.
Date of birth	Date of birth for animal, even if estimated.	Essential animal demographic information.
Breed	Breed reported or assigned to animal.  <i>Some software may be set up to record "mixed breed," "unknown," or "looks like" data in this field. It is recommended not to use "unknown."</i>	Essential animal demographic information. This information can be used to identify rescue placement and other pathway options.
Gender/sex	Gender/sex of animal.	Essential animal demographic information.
Color/coat description	Color(s) and coat type of the animal.	Animal demographic information used for identification.
Intake altered status	Status of spay or neuter at intake.	Informs veterinary care needs, program development opportunities, and animal demographic information.
Medical records	Medical/veterinary records for the animal. Should include records from the animal's time in shelter care and may include pet history details collected from a former	Informs care needs and case management for intake-to-placement pathway planning.  Provides key documentation to

Data Point	Definition	What it Serves
	owner/organization.	be shared with the person the animal is released to.
Behavior records	Behavior records for the animal should include notes from the animal's time in shelter care and may include pet history details collected from a former owner/organization/finder.	<p>Informs care needs and case management for intake-to-placement pathway planning.</p> <p>Provides key documentation to be shared with the person the animal is released to.</p>
Pet History	Data on the pet's history collected from a former owner/organization/finder. Often includes details regarding a pet's likes, dislikes, medical history, and behavior.	<p>Informs care needs and case management for Intake to Placement pathway planning.</p> <p>Provides key documentation to be shared with the person the animal is released to.</p>
Outcome date	Date of animal's outcome/release from shelter care.	Essential outcome operations data to categorize types and volume of animals leaving care.
Outcome type	Outcome category assigned to an animal when they are released from shelter care, such as "Adoption" or "Return to Owner."	Essential outcome operations data to categorize types of animal outcomes.
Outcome subtype	Outcome subcategory assigned to an animal when they are released from shelter care.	Essential outcome operations data to categorize types of animal outcomes.
<i>All fields detailed in "Pet Microchips." section. See for more details.</i>		

## Intakes, Outcomes, and Animal Counts

Every animal should be counted regardless of the reason for intake, outcome, or service. Basic data tracking for pets in care and pets receiving services should include all of the following metrics on a monthly and yearly basis, at minimum, with daily inventory ("animal counts") reconciled in the software daily.

Intake Types	Cat	Dog	Other	Total (All Species)
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Stray/At Large				
Relinquished by Owner				
Returned to Shelter				
Transfer-In				
Seized/Confiscated				
Owner Requested Euthanasia (ORE)*				
Clinic/Service In**				
<b>Total Live Intake:</b>				
<b>Live Outcomes</b>	<b>Cat</b>	<b>Dog</b>	<b>Other</b>	<b>Total (All Species)</b>
Adoption				
Return to Owner (RTO)				
Transfer-Out				
SNR (differs from TNR***)				
Other Live Outcomes				
<b>Total Live Outcomes:</b>				
<b>Other Outcome Types</b>	<b>Cat</b>	<b>Dog</b>	<b>Other</b>	<b>Total (All Species)</b>
Died in Care*				
Euthanized*				
Missing/Lost/Stolen				
Clinic/Service Out**				
<b>Total Other Outcomes:</b>				
	<b>Total Cats</b>	<b>Total Dogs</b>	<b>Total Other</b>	<b>Grand Total</b>
<b>Animal Counts</b>	<b>Total in Care Onsite</b>	<b>Total In Foster Care</b>	<b>Grand Total</b>	
Beginning Count				
Ending Count				

*\*Every animal is counted regardless of the reason for intake, outcome, or service.*

*\*\*Clinic/Service In and Out data is often tracked in conjunction with data points in the Pet Support Services category and may not contribute to live intake/outcome totals.*

*\*\*\*TNR recommendations can be found in the Pet Support Services Operations section.*

## Person Records

Individual person records should include the following data points for detailed record-keeping and case management practices:

Data Point	Definition	What it Serves
Unique identifier	A unique number or code that is generated for each individual record. Also referred to as person number or person ID.	Unique record tracking and case management.
Name	The person's first and last name.	Identification of the person by name.
Address	The person's complete address.	Location data which may inform programming and development.
Contact information	The person's phone number and email address.	Methods to contact the person.
Status/Association	A tag added to the person record that identifies their relationship to the organization such as foster, adopter, staff, etc.	Provides an understanding of how people are interacting with the organization.
Associated pets	Animal records associated with the person record such as through ownership, intakes, and outcomes.	Tracks history of ownership, surrender, reclaim, adoption, and similar operations by connecting a pet to a person.  Supports pet support services tracking, case management, and potential Lost Pet Reunification.
Associated operations and services	Operations and services associated with the person record such as participation in pet food pantry and veterinary services programs.	Supports pet support services tracking, case management, and program development.

## Pet Microchips

Microchip information offers critical data to support the identification and reunification of pets.

Data Point	Definition	What it Serves
Microchip scan	The results of scanning a pet for a microchip:	Informs the number of animals coming in with microchips and whether the microchip tracing

Data Point	Definition	What it Serves
	<ul style="list-style-type: none"> <li>• <b>Yes</b> = has a microchip at time of intake/point of contact for found pet examination</li> <li>• <b>No</b> = does not have a microchip at time of intake/point of contact for found pet examination</li> <li>• <b>Unknown</b> = did not scan the pet</li> </ul>	<p>process can begin.</p> <p>This is separate from the microchip number, since the purpose is to tell whether a microchip existed prior to intake.</p>
Microchip number	The unique number assigned to a pet's microchip.	Unique identification of a pet by microchip number.
Microchip tracing	Details regarding the pet ownership information located on the microchip and contact attempts.	Case management and reunification.
Microchip issue/implantation date	The date a microchip was issued/implanted in a pet.	<p>Documents the medical procedure date when a microchip was implanted.</p> <p>Informs the number of animals coming in with microchips and the number of microchips being issued by the organization.</p>

## Lost and Found Reports

Standardizing the data collection and follow-up process for lost and found reports is key to listing lost and found pet details online to support reunification, showing the support provided to finders, and demonstrating the number of pets kept out of the shelter through reunification efforts.

Data Point	Definition	What it Serves
Person record	The person record associated with the finder or owner of a lost/found pet.	<ul style="list-style-type: none"> <li>• Person-level tracking for lost and found data</li> <li>• Informs reunification efforts</li> <li>• Tracks the support provided to finders and demonstrates the number</li> </ul>

Data Point	Definition	What it Serves
		of animals kept out of the shelter via reunification made by finders.
Animal record	The animal record associated with the pet who has been lost or found.	<ul style="list-style-type: none"> <li>• Animal-level tracking for lost and found data</li> <li>• Informs reunification efforts by listing animal details in a searchable/viewable database</li> <li>• Tracks the support provided to finders and demonstrates the number of animals kept out of the shelter via reunification made by finders.</li> </ul>
Lost/found location	<p>The complete address where the pet was lost or found.</p> <p><i>If full address information is unavailable, detailed cross-street data with city and zip codes may be entered. However, this data is less likely to be able to be mapped accurately by software.</i></p>	Supports lost pet reunification and the ability to map data for analysis to inform support needs and program development.
Outcome	<p>The outcome of the report, such as:</p> <ul style="list-style-type: none"> <li>• Reunited by finder</li> <li>• Brought to the shelter</li> <li>• Unknown outcome</li> </ul>	Documenting outcomes provides greater data on program efficacy and future development needs.
Date and time reported	The date and time a pet was reported to be lost or found.	Captures the amount of time an animal is lost/found. This information can lead to a better understanding of how quickly an animal is typically reunited.



## Foster Operations

Tracking foster program operations data provides valuable insights into this life-saving program. The following foster data should be tracked for each foster placement:

Data Point	Definition	What it Serves
Foster caregiver	The person record of the foster caregiver, also known as a foster parent.	Identifies a pet's foster caregiver.
Animal record	The animal record for the pet being placed into foster care.	Identifies a pet in foster care.
Foster start date	The date a pet was placed in foster care with a new caregiver.	Informs length of stay, or number of days, in foster care and the number of foster engagements during a given date range.
Foster end date	The date a pet's foster engagement ended.	Informs length of stay, or number of days, in foster care and the number of foster engagements during a given date range.
Foster placement reason	The reason a pet was placed in foster care.	Data for program reporting and development, case management for the pet.
Foster end (outcome) reason	The reason a pet's foster engagement ended.	Data for program reporting and development, case management for the pet.

## Volunteer Operations

Tracking volunteer program operations data provides valuable insights necessary for building a thriving, engaged volunteer community. Track the following data points for volunteer operations:

Data Point	Definition	What it Serves
Dates of service	The date a volunteer became "active" and "inactive."	Informs volunteer program size, conversation rate, and retention rate.
Volunteer hours served	The number of hours served per individual volunteer and in	Informs key program indicators/metrics (KPIs).

Data Point	Definition	What it Serves
	aggregate.	
Volunteer Retention Rate	The percentage of volunteers still active within one year of their start date.	Informs volunteer retention and satisfaction.
Volunteer Conversion Rate	The percentage of volunteer applicants who became active volunteers.	Informs volunteer recruitment strategies.
Volunteer Satisfaction	Annual survey to gather volunteer feedback.	Identifies programmatic wins and opportunities.
Volunteer assignments or roles	The assignment or role where the volunteer is serving, such as in animal care or administration.	Informs engagement with available volunteer assignments and roles.
How volunteers first hear about the organization	How volunteers first hear about the organization, such as on social media, website, word of mouth, etc.	Informs volunteer recruitment strategies.

## Pet Support Services Operations

Tracking data on pet support services operations can inform pets diverted from possible shelter intake, pets and people served in the community, program efficacy, program funding and resource needs, and overall program development.

Consider the following questions when setting up your pet support services tracking system:

- **Who** needs to be notified of case management alerts along the person and animal's pathway?
- **What** is the end goal of tracking?
- **When** do notifications/alerts need to occur for follow-up?
- **Where** will data be entered and referenced?
- **Why** is pet support services tracking important to your organization and stakeholders?

\*\*\***TNR (Trap-Neuter-Return) consideration:** As TNR is primarily an external process whereas the organization providing medical services does not intake the pet into their care, TNR may be best suited to be considered a "pet support service" for data tracking purposes.

In addition to the following data points, consider utilizing [this guide](#) and the [HASS Tools and Technology White Paper: Community Request Tracking](#) for additional support documenting case management efforts for customer interactions and support services.

Data Point	Definition	What it Serves
Person record	The person record associated with the service request.	Supports pet support services tracking, case management, and program development.
Animal record	The animal record associated with the service request.	Supports pet support services tracking, case management, and program development.
Case record	A unique record to track all case activity associated with the person and animal(s) for the service request.	Supports pet support services tracking, case management, and program development.
Date of request	The date of the request.	Tracks history of requests.
Reason for request	The initial reason service was requested or recommended.	Informs service needs and program development.
Case management notes	Additional documentation to support the individual needs of the case.	Informs service needs and individualized support.
Services provided or recommended	The services provided or recommended.	Informs service needs and program development – and whether the final service provided or recommended differed from the initial reason for the request.
Follow up	Documentation of follow up/check-ins, often at set intervals (i.e. 7 days) after the initial request.	Informs case management, individualized support, and the pathway of the pet.
Outcome of request	The outcome or resolution of the request, such as kept, rehomed, or surrendered pet.	Informs program efficacy and the pathway of the pet.
Date of outcome/case resolution	The date of the request outcome/case resolution.	Tracks history of service requests.  Identifies active vs. non-active cases.
Vouchers for free/discounted services	Documentation of vouchers issued or redeemed for free and discounted services.	Records use of services and informs service needs.

Data Point	Definition	What it Serves
Paid services transactions	Documentation of payment for services; receipts; transaction history.	Records use of services and informs service needs.

## Supported Self-Rehoming Operations

Tracking data on supported self-rehoming (SSR) operations can inform the number of pets diverted from possible shelter intake, pets and people served outside of the shelter, the outcomes of pets who participate in this program, and program development needs. This tracking often occurs in third-party self-rehoming platforms or alongside other pet support services tracking (*detailed above*).

Self-rehoming platforms often offer data tracking and reporting options that require little effort from shelter staff and primarily focus on user-generated data entry from pet owners. Some of the leading **self-rehoming platforms** include the following:

- [Rehome by Adopt a Pet](#)
- [Home to Home Animal Adoption](#)
- [Get Your Pet](#)

Additionally self-rehoming platforms are available on a variety of social media channels. Organizations may wish to moderate or create groups/pages on **social media**:

- [Facebook](#)
- [Nextdoor](#)

While the bulk of supported self-rehoming data can be captured on dedicated platforms, organizations may wish to track data regarding **owners who contacted the shelter and when** supported self-rehoming was offered. For more information on documenting case management efforts for customer interactions and support services, see the [HASS Tools and Technology White Paper: Community Request Tracking](#) and “Pet Support Services Operations” section above.

When documenting **supported self-rehoming data in your support services tracking system**, collect the following details:

- How the owner heard about your organization or the SSR platform
  - *Social media, word of mouth, website, etc.*
- Outcome or resolution of the SSR post
  - *Successful or unsuccessful? Was the animal adopted or did the original owner keep the pet? Was the post removed due to inactivity?*
- Initial post date and outcome date
  - *The time it takes to self-rehome an animal*
- Types of assistance offered by the shelter
  - *Assistance with advertising, behavior resources, post-adoption resources/services, etc.*
- Types of assistance the shelter could not provide, but were needed

- *This helps inform the gap between what is needed and what is available to drive programming decisions and funding proposals.*

## Supporting Resources

- [Shelter Jargon Mini Manual](#)
- [Identification and Solution Integration for Common Data Issues](#)
- [System and Software Recommendations to Track Organizational Data](#)
- [HASS Tools and Technology White Paper: Community Request Tracking](#)



## Data Foundations

### Creating and Maintaining Data SOPs

#### Standard Operating Procedures (SOPs)

Standard operating procedures (SOPs) are detailed instruction sheets that clearly outline a specific program or personnel role process. Benefits of SOP development include:

- Provide a tool for training staff and volunteers
- Maintain consistency
- Save time
- Establish best practices
- Save cognitive energy for decisions that need to be made “in the moment”
- Allow delegation to support staff

#### Data Entry SOPs

Establishing data entry SOPs supports best practices, quality data tracking, and accurate reporting to inform key performance metrics. Data entry protocols are often written within operational process documents. Data SOP documentation should include step-by-step instructions for all steps of data entry and should be easily accessible by staff and volunteers.

#### Taking Inventory of Current SOPs

1. Identify all programs and departments
2. Identify all key activities in those programs and departments
3. With that list compiled, count the number of SOPs available for each
4. Calculate the number of SOPs available compared to the number of processes
5. Set a goal to achieve 100%, with a written SOP in place for every process

#### Creating New SOPs

The creation of new SOPs should be led by program and department leadership and informed by the organization’s operations and best practices.

**Tip:** Many major software companies provide training materials on standard operations and base features of their system online and via customer support.

#### Sample SOP Template

- [Data - Sample SOP Template](#)

## Basic Elements of an SOP

1. Date created or updated
2. Procedure name
3. Procedure description
4. Position title, departments, or individuals responsible
5. Tools and materials needed
6. Step-by-step instructions of the process
7. *Optional: pictures or video of key steps in the process*

## How To Create a New Data Entry SOP

1. Identify qualified team members to participate in writing the new SOP
2. Collect and review resources to inform the development of the new SOP, such as:
  - a. Consultation with qualified professionals such as a veterinarian and certified professional behavior consultant
  - b. Peer-reviewed research
  - c. Best practices documents from trusted industry leaders
  - d. Samples from other organizations
  - e. Samples from software company training resources
3. Write out the process step-by-step, including the basic elements listed above
4. Identify whether data entry should occur in real-time as the process is occurring or if data entry needs to occur at a later date
5. Identify each step of the process that will require data collection and entry
  - a. See [Data Tracking Best Practices and Recommendations](#) to identify data points to capture.
6. Highlight each step in the process that requires data collection and entry and include step-by-step instructions for how to enter that data in the software.
  - a. Include the name of the field value where the data should be entered in the software (i.e. "Intake Reason").
  - b. Consider including screen images with pictures of the data entry fields or buttons in the software.
7. If a field in the software has been set up with a predetermined list of options for data entry (*data validation list*), include definitions for all data entry options (*field values*).
8. Share the SOP for review with relevant leadership
9. Incorporate feedback as needed
10. Record the date that the SOP was created/finalized in the document
11. Finalize, distribute, and establish a training plan as applicable
12. Document the date of distribution and confirmation of receipt

## SOP Development Tips

- Don't reinvent the wheel! Adapt other organizations' and software company protocols for your operations. These are most likely to be useful and relevant to you if developed by similar organizations in your area or a comparable location and software user.
- Keep them simple. They should be easily understood and straightforward how-to lists.
- Use direct speech.
- Use a consistent, accessible format.

- Ensure that staff are trained in and understand key protocols and know how to find others.

## Maintaining & Updating SOPs

SOPs remain most effective and useful to an organization when they are regularly maintained and updated to reflect organizational operations and best practices. It is recommended that a **yearly** schedule be established to review all SOPs and make updates as needed. Additionally, special circumstances may prompt the need to update an SOP more frequently.

### When to Update an SOP

- A process change occurred
- A new program or department developed
- A significant update was made to software features
- A new key performance indicator (KPI) or metric was identified that is not currently being tracked
- Yearly (*at minimum, if none of the above has occurred*)

### How to Update an SOP

1. Identify qualified team members to participate in updating the SOP
2. Assess current operations and new process goals
3. Assess the content in the current SOP
4. Collect and review resources to inform the development of the updated SOP, such as:
  - a. Consultation with qualified professionals such as a veterinarian and certified professional behavior consultant
  - b. Peer-reviewed research
  - c. Best practices documents from trusted industry leaders
  - d. Samples from other organizations
  - e. Samples from software company training resources
5. Write out the process step-by-step, including the basic elements listed above
6. Identify whether data entry should occur in real-time as the process is occurring or if data entry needs to occur at a later date
7. Identify each step of the process that will require data collection and entry
  - a. See [Data Tracking Best Practices and Recommendations](#) to identify data points to capture.
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  - a. Include the name of the field value where the data should be entered in the software (i.e. "Intake Reason").
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9. If a field in the software has been set up with a predetermined list of options for data entry (*data validation list*), include definitions for all data entry options (*field values*).
10. Share the SOP for review with relevant leadership
11. Incorporate feedback as needed
12. Record the date that the SOP was updated in the document
13. Finalize and distribute
14. Document the date of distribution and confirmation of receipt



## **Accessibility for Staff and Volunteers**

Data entry procedures should be accessible to all staff and volunteers. Store files in a drive with viewing permissions enabled and create a shortcut to this drive on all shared workstations. It may also be beneficial to have a binder available with printed copies of all current SOPs. Incorporate SOPs into the following operations to increase accessibility and use:

- Initial onboarding for staff and volunteers
- Continuing education/training opportunities
- Reference regularly in team meetings and internal communications



## Data Foundations Training for Data Best Practices

### Training Staff on Data Entry Best Practices

Training all staff and volunteers in basic data entry best practices and how your organization utilizes the data it collects ensures efficiency and consistency. At a minimum, it is highly recommended to include a data basics training element in all staff and volunteer onboarding relevant to specific departments or programs they are responsible for.

#### Training Basics

- A robust method of training should exist for all personnel
- Training should occur during onboarding, promotions, and any change in data SOPs
- Supervisors can/should serve as the trainer in most instances
- Training should be basic and easy to understand
- A process should be put in place to acknowledge the team member has been trained
- Training SOP documents should be easily accessible for future reference as needed

#### Communication Basics

- Projects and work that come out of meetings and training should be immediately communicated to key staff within 48 hours of implementation
- Establishing regular team and full staff meetings is important to ensure consistency of implementation and provide a space to ask questions and resolve cross-department challenges
- Regular communication from the Executive Director to personnel discussing vision and mission can also help ensure consistency and maintain transparency
- Consider establishing a process to collect and integrate team feedback
- Celebrate great work and accomplishments!

Consider hosting continued data training if at any point your organization:

- Implements a new software that comes with, or may require establishment of, a data tracking process
- Introduces a new program that requires implementation of a new data tracking process
- Major policy or procedure changes occur
- An existing SOP or data practice is updated

## Data Training Examples

All organizations and programs are unique, and as such the following data training examples may be used as a starting point for your organization to utilize directly, when relevant, and adjust to fit your unique setup where able. [Ensure language is consistent and shelter-specific jargon is understood](#) for all training efforts.

## Data Entry Best Practices

[This guide highlights what data entry best practices are and the importance of addressing them.](#) You may utilize this guide in addition to established protocols at your organization to create a data entry best practices training for staff and volunteers.

## Auditing Data

[This guide highlights basics of auditing animal-level data and solutions to address data entry issues.](#) This guide can support operations overall and be utilized to expand existing training materials for programs.

## SOP Development

[This guide highlights creating SOPs for data processes and ensuring they are maintained.](#) If you utilize shelter software, locate their internal resources or contact your software representative prior to creating SOPs from scratch, as many software companies provide training materials on standard operations and base features of their systems.

## Additional Training Considerations

### Accessibility

When creating training materials, consider integrating additional accessibility options such as the [English to ASL \(American Sign Language\) Translation Standards](#) and adding audio recordings and subtitled variations of materials for training use. In addition, consider those that utilize screen readers. Ensure your digital materials such as written protocols, [website](#), [email](#), and [social media](#) are screen reader-friendly. Examples of basic best practices include providing alternative text/visual descriptions, ensuring information is available as text and not just in images, and being mindful of the contrast ratio of colors. [Utilize this guide to create accessible PowerPoint presentations.](#)

### Onboarding

In addition to scheduled training with an individual at your organization, consider the integration of job shadowing. This may apply both to scheduling the personnel to shadow other departments or roles so they have a holistic understanding of your organization's practices, and the integration of ongoing shadowing with a peer or member of leadership while learning the material.

## Tracking Training Efforts

Tracking assignments and completion status allows for easier follow-up or continued training, as well as progress-tracking for organizational goals, especially when providing training to various personnel. If your organization has an established employee and volunteer training protocol, connect with the relevant personnel to integrate new training efforts into the existing process.

## Creating a tracking process for staff and volunteer training

- Prior to creating a new training tracking process, discuss options with leadership and Human Resources at your organization. If available, this may be an opportunity for collaboration within an existing employee management or project management software. Confirm whether volunteers may also be able to use this software if volunteer training is also required.
  - If an existing software solution is not available, consider who may need access to the tracking information and how the organization currently tracks training progress such as spreadsheets, documents, forms, etc.
- Identify the person(s) responsible for the management and distribution of training. How do they currently track training efforts? Is this process working, or should it be updated?
  - Who needs access to monitor training progress files? How do they currently monitor progress? Is this process working, or should it be updated?
  - Should the training progress files be digital or physical documents?
  - Is there a budget to purchase a Learning Management System (LMS) to track training progress for the organization? *Note: An LMS can both distribute training materials and track progress.*
- Consider if there are different processes in place for employee versus volunteer training efforts. Is there an opportunity to combine the processes? If not, ensure both are updated when changes are made.
- If creating a new tracking system, consider including the following items:
  - First and last name (Trainee)
  - Email (Trainee)
  - Title/Role (Trainee)
  - Direct supervisor
  - Type of training assigned
  - Training required? Y/N
  - Date assigned
  - Assigned by or required by (Example: Supervisor assignment, HR requirement, Grant fulfillment requirement)
  - Due date
  - Scheduled check-in date
  - Responsible for check-in (Person)
  - Date of completion
  - Notes
- If there is an interest in tracking not only the status and progress of training but also time spent, consider adding a metric for the length of time the training will take. You may later use this in reports to calculate time spent as an organization, or individuals, to complete assigned training assignments.
- Consider adding training to the onboarding process for all new personnel
- Consider integrating a collection of training process feedback for continuous improvement.
- All feedback and training provided to team members should be documented according to the organization's HR policies, such as in a personnel file.

## Sample Solutions (Spreadsheet Based)

- [Simplified Tracking Sheet for Training Assignments](#) - Suitable for any size group or training assignments, but does not elaborate on details or follow-up procedure.
- [Tracking Sheet for Training Assignments I](#) - Suitable for small personnel groups and limited training assignments.
- [Tracking Sheet for Training Assignments II](#) - Suitable for larger groups and training assignments if software is not available. As resources allow, it may be beneficial to consider non-spreadsheet tracking options for ease.

### **Learning Management Systems (LMS)**

Learning management systems vary greatly when it comes to cost, capacity, simplicity of use, and best fit for organizational goals. We highly recommend your organization take the time to complete individual research on the solution that makes the most sense for your organizational needs. To get you started, here is a short list of existing LMS systems you may consider:

- Cypher Learning LMS
- TalentLMS
- Absorb
- iSpring
- Docebo
- D2L Brightspace LMS
- Blackboard Learn LMS
- Canvas LMS
- Moodle LMS
- Adobe Learning Manager



## Data Foundations Auditing Animal-Level Data

### The Importance of Auditing Animal-Level Data

The primary goal of auditing animal-level data is to ensure quality data entry is in alignment with best practices and standard operating procedures (SOPs). This process supports data accuracy, integrity, and reliability. Additional functions include:

- Maintaining best practices for data entry
- Supporting quality data output and reporting
- Ensuring every animal is counted, regardless of the reason for intake, outcome, or service
- Identifying gaps in lifesaving

### Auditing Schedule

Organizations will have the best results if **data is audited on a monthly basis**. This will enhance opportunities for regular assessment and feedback to all team members completing data entry. This consistent schedule is preferred so that errors can be addressed promptly and data is not compromised for extended periods of time. To ensure auditing occurs on schedule, leadership can directly generate their data software's automated monthly reports or request a monthly scheduled email be sent from the organization's established software company.

### How to Audit Data

#### Collecting Reports to Audit

The reports needed to conduct an audit should include animal-level data, person-level data, and fields related to all operations such as intake, outcome, or service. This type of data is also referred to as **raw data**, or "noses in, noses out," which ensures every animal is counted, regardless of the reason for intake, outcome, or service. Animal shelter software often has a variety of stock reports with descriptions that should aid in selecting the needed reports to conduct this audit.

#### Conducting the Audit

Several critical elements should be evaluated for data entry best practices during the audit. Use the following to guide the audit process, assessing each report for these common data entry issues.

#### General Tips for Auditing Reports

- Download the reports as an Excel, Google Sheet, or CSV.
- Freeze the first row of data with the column headers/labels.
- Apply a filter to the sheet.
- Sort data alphabetically or numerically.

- Utilize pivot tables.
- Review software capabilities for existing reports that may conduct some audit work automatically (i.e. reports that check for duplicate records or missing fields).

Utilizing the tips above, audit for the common issues listed below. Pay specific attention to where duplicates or blanks appear within the data and use those as a reference to understand where data entry can be improved.

Issue	Example of Issue
System contains redundant and unused fields	<p>“DOA” “Dead on arrival” “DOA DOA Stray”</p> <ul style="list-style-type: none"> <li>• <i>All of these are saying the same thing, but only one is needed.</i></li> <li>• <i>Pulling all DOA-related data becomes difficult.</i></li> </ul>
Information is tracked in the wrong field or too much information is tracked in a single field	<p>“ACO pickup long hold” “ACO pickup under 3 months” “ACO pickup owner arrested”</p> <ul style="list-style-type: none"> <li>• <i>All contain information that should be tracked in other fields.</i></li> <li>• <i>Pulling data for ACO pickups becomes difficult.</i></li> </ul>
Address/location data entry is incomplete	<p>“Forest Road, FL” “Near Target and Walmart”</p> <ul style="list-style-type: none"> <li>• <i>The first does not list a street number, city, or zip code.</i></li> <li>• <i>The second relies on landmarks and does not include any definitive location data.</i></li> </ul>

The following data entry issues may require more complex auditing processes. Utilize the tips above and audit recommendation notes in the right-hand column to consider potential resolutions and steps that can be taken to reach ideal solutions (*more on this below!*).

Issue	Example of Issue	How to Audit for Issue
Combining dead on arrival and died in care		<ul style="list-style-type: none"> <li>• Discuss with team members responsible for data entry.</li> <li>• Review the pet’s medical status (condition) at intake and outcome.</li> </ul>

Issue	Example of Issue	How to Audit for Issue
Double counting foster as live outcomes	<i>This is more likely to occur in software that counts foster movement as an intake and outcome.</i>	<ul style="list-style-type: none"> <li>Filter for foster outcome types in outcome data used to generate reporting.</li> </ul>
Double counting puppies and kittens	A litter of five kittens entered into the software is counted as one intake and then processed in the software as five outcomes.	<ul style="list-style-type: none"> <li>Filter <u>intake</u> data by <b>age</b> to view only puppies and kittens. Filter <u>outcome</u> data by <b>age</b> to view only puppies and kittens. Compare results, taking into consideration current pets in care.</li> </ul>
Delayed data entry/entry is not reconciled daily		<ul style="list-style-type: none"> <li>Discuss with team members responsible for data entry.</li> <li>Compare animal inventory data in the software with physical counts of animals onsite.</li> <li>Utilize stock reports in the software to check for missing fields.</li> <li>Filter columns in the reports to view missing fields.</li> </ul>

## Assessing Audit Results

### Documentation of Results

The results of an audit should be documented for future reference, to develop solutions for improvement, and to share feedback with team members responsible for data entry. Documentation should include the audit date, auditor name, results, and next steps for the opportunities identified. Some options for recording results of the audit include:

- Color coding the audited reports to identify areas for improvement
- Calculating the percentage of records with data entry issues
- Calculating the percentage of records that contain data entry best practices

### Assessment of Results

If data entry issues have been identified during the auditing process, solutions should be developed to resolve these issues and implement data best practices. **In addition to [updating SOPs to reflect data entry best practices](#) and [providing training for all team members](#) on those procedures**, the following table details additional solutions for addressing the common data entry issues detailed in this guide.



Issue	Solutions
System contains redundant and unused fields	<ul style="list-style-type: none"> <li>Update base fields (<i>data validation lists</i>) in the software to remove any redundant or unused fields/data points.</li> </ul>
Information is tracked in the wrong field or too much information is tracked in a single field	<ul style="list-style-type: none"> <li>Post SOPs and training materials that include clear terms and definitions for data entry fields near all workstations.</li> </ul>
Address/location data entry is incomplete	<ul style="list-style-type: none"> <li>Bookmark/link shortcuts to a map website, like Google Maps, to the home screen of workstations where address/location data entry occurs.</li> <li>Update software to require data entry in address/location fields so that users cannot progress to the next screen without entering data in all fields.</li> </ul>
Combining dead on arrival and died in care	<ul style="list-style-type: none"> <li>Discontinue merging dead on arrival and died in care operation types.</li> <li>Post SOPs and training materials that include clear terms and definitions for dead on arrival and died in care.</li> </ul>
Double counting foster as live outcomes	<ul style="list-style-type: none"> <li>Remove foster outcome types from the outcome data used to generate reporting.</li> </ul>
Double counting puppies and kittens	<ul style="list-style-type: none"> <li>Use “duplicate record” features in software, if available, to streamline data entry.</li> <li>Create templates to be copied and pasted for common puppy and kitten data entry points.</li> </ul>
Delayed data entry/entry is not reconciled daily	<ul style="list-style-type: none"> <li>Enlist and train volunteers to support data entry processes.</li> <li>Schedule dedicated time in team members' shifts to conduct data entry daily.</li> </ul>
Missing information	<ul style="list-style-type: none"> <li>Post SOPs and training materials that include clear terms and definitions for data entry fields near all workstations.</li> <li>Update software to require data entry in the mandatory fields so that users cannot progress to the next screen without entering data in all those fields.</li> </ul>



## Data Foundations

### Creation of KPIs

#### What is a KPI?

A Key Performance Indicator (KPI), is a quantifiable measure used to evaluate the success of an organization, employee, etc. in meeting objectives for performance.

#### Why are KPIs important?

The identification of KPIs for an organization, department, or individual establishes clear goals or targets for current and future activities. By aligning strategic goals with data-driven KPIs, organizations can more easily measure progress and success.

#### Identifying KPIs

##### Assessing Current KPIs

Whether you are creating KPIs for the first time, or looking to enhance existing ones, consider the **current organizational requirements and goals** in place at your organization – *these are often KPIs!* These may include requirements set by leadership, grant fulfillment, strategic planning, and/or other mandatory KPIs that are used to evaluate the success of the organization.

Current Requirements & Goals	Examples
Budget Requirements	<ul style="list-style-type: none"><li>• Distribute pet food to 400 community members by EOY to fulfill pet support budget requirements.</li><li>• Receive funding from 25% of grant proposals.</li></ul>
Grant Requirements	<ul style="list-style-type: none"><li>• Place 100 senior dogs in the month of December.</li><li>• Administer 400 microchips to dogs and cats by EOY.</li></ul>
Legal Requirements	<ul style="list-style-type: none"><li>• Meet 100% of the regulatory requirements for applicable laws and regulations.</li><li>• Conduct and document 5 safety inspections.</li></ul>
Organizational Goals	<ul style="list-style-type: none"><li>• Achieve a Live Release Rate of 90% or higher for the current year.</li><li>• Achieve a Return to Home Rate of 50% or higher for the current year.</li></ul>
Department Goals	<ul style="list-style-type: none"><li>• Reunite 500 pets with their owners by EOY.</li><li>• Send 50% of pets in care to foster homes.</li></ul>
Individual Goals	<ul style="list-style-type: none"><li>• Achieve X feedback or rating from supervising leadership.</li><li>• Complete 5 education opportunities by EOY.</li></ul>

### Enhancing KPIs

Consider data points your organization may already be tracking, especially if you have been tracking the data point over long periods of time, and brainstorm how you may be able to use this data to enhance established KPIs to ensure they reflect current organizational priorities. Evaluate your existing data collection trends and identify data that points to your organization doing well in specific areas such as:

- Fewer animals are being euthanized
- More animals have live outcomes (i.e. not getting stuck at the shelter)
- Animals that have live outcomes have them faster
- More families receive support to keep their animals with them and out of the shelter

**Exercise:** Consider the first example, “fewer animals are being euthanized.” This statement relates closely to Live Release Rate. Look at existing data to identify more specific KPIs that can help reach this goal. For example, examine which animals are euthanized and why, then determine a goal specifically aimed to reduce one of the largest categories.

### Developing New KPIs

With data assessments and existing KPIs compiled, identify potential KPIs the organization, department, or you as an individual, are interested in focusing efforts to measure progress. For best results, consider the following:

1. What results (*measurable outcomes, metrics*) are you/your organization trying to achieve?
2. Are tracking methods in place to measure those results?
3. When are you trying to reach those results?
4. What do you want to accomplish **this year**, and by when (within the year)?
5. Are all current initiatives and recommendations supported by data/evidence?
6. Sample topics:
  - a. Intakes/Outcomes
  - b. Lost and Found Reports
  - c. Foster
  - d. Medical/Veterinary
  - e. Supported Self-Rehoming
  - f. Pet Support Services
  - g. Case Management

New KPIs	Workspace
Organizational level	<ul style="list-style-type: none"><li>•</li><li>•</li></ul>
Department level	<ul style="list-style-type: none"><li>•</li><li>•</li></ul>
Individual level	<ul style="list-style-type: none"><li>•</li><li>•</li></ul>

Evaluating each potential KPI set above, ask the following questions and make adjustments to further clarify the goal's intent:

1. **Is this KPI measurable?** Whenever possible, measure outcomes over efforts.
  - a. **Example:** Instead of setting a KPI of hosting four adoption events by the end of the year, consider the end result expected from these events. Is the primary goal to have 200 pets adopted from four adoption events this year instead?
2. **Do you have the resources to complete this KPI?** Consider staffing and volunteer needs, existing and future funds, data capabilities, and other resource-based factors that may impact your ability to meet a goal.
3. **Does the KPI support the overall mission and vision of your organization?** Does the KPI have a strong "WHY" for its selection?
4. **Can one KPI be split into smaller KPIs** to support intended outcomes?

### **"Stretch Goals" as KPIs**

Stretch goals are not easy to achieve with your organization's current setup and resources but are not outright impossible. Identifying goals beyond what is realistically achievable comes with pros and cons. Consider if the stretch goal may inspire additional funding, staff buy-in, or other positive collaboration with your organization. Consider the goal's visibility to external stakeholders and make certain stretch goals internal only if not actively seeking additional funding or support from an external party. If a stretch goal has more cons than pros or causes concern for the effect it may have on stakeholder relationships, consider how to break the goal into smaller, achievable benchmarks over time.

### **Additional Consideration: SMART Goals**

A [SMART](#) goal is "Specific, Measurable, Achievable, Relevant, and Time-bound." We have highlighted elements of SMART goals in the above sections, and outlining each piece individually can further clarify your overall idea and objectives and utilize your time and resources wisely.

- **Specific:** What needs to be accomplished; what steps are required?
- **Measurable:** What data will measure the goal?
- **Achievable:** Can you reasonably accomplish the goal? Are the necessary skills and resources available?
- **Relevant:** How does the goal align with broader goals, strategy, or mission?
- **Time-bound:** What is the time frame to accomplish the goal?

### **Expanding KPI Details**

Now that you have identified both required and new potential KPIs, utilize the [KPI Outline Worksheet](#) to expand the details and considerations for each individual goal including:

- SMART goal breakdown
- If KPI is required
- Completion goal
- Primary responsible contact
- Frequency of monitoring and reporting
- Visibility status to external parties
- External factors that may affect data

## Buy-In Across the Organization

To effectively gain internal, organizational buy-in, stakeholders must include staff members outside of leadership roles, as they perform the work related to the KPI. Successful organizations are those that empower team members to strive to achieve these goals and include them in the KPI improvement process. By fostering a culture of transparent communication, empowerment and trust, team members feel valued, encouraged to take initiative, and are more likely to go the extra mile to achieve exceptional results.

When sharing goals internally, it is vital to ensure that **all goals have a clear and compelling “why” or purpose, are measurable, and have regular progress check-ins**. This shared understanding motivates team members to rally behind the goals and work collaboratively towards achieving them. Setting specific and quantifiable key performance indicators (KPIs) allows the organization to gauge its success and make data-driven decisions. Regular progress check-ins are essential, as they provide opportunities to evaluate the pace of advancement, identify any potential roadblocks, and make timely adjustments to stay on course.

It is important to acknowledge that implementing new ways to measure progress is an iterative process. The organization should approach these measurement efforts as tests or experiments, always open to learning and improvement. If a particular approach proves effective, it can be adopted more widely, contributing to the organization's overall advancement. However, if a test does not yield the desired results, the organization can pivot and adapt, revising the goal into something more effective and better aligned with the organization's objectives.



## Data Foundations Sharing KPIs and Data Internally

### Compile KPIs

Locate your organization's central tracking place for existing KPIs to build the KPI report. If a central tracking place does not exist, it is best practice to create one with leadership approval.

Consider the following:

- Are current KPIs organized by department or category for sharing?
- Are there requirements for reporting to specific leadership, teams, departments, or individuals that need to be taken into account?

*Need help with KPI development? See our [KPI creation resource here](#).*

*Need help considering options for a KPI reporting structure? See our [Sharing KPIs Externally](#) guide here.*

### Reporting Formats

After contact information for all staff and volunteers has been collected, work directly with relevant personnel who are responsible for providing progress data and collaborate on the preferred internal reporting structure. The format should be customized to your organizational needs and reporting purposes.

- **Document or PDF:** Basic documents or documents saved as PDFs offer an easy way to record and share information. Documents may be more simple and include bullet points or summary statements for internal reporting or can be formatted with graphic design elements for public-facing communication.
- **Spreadsheets:** For internal reporting, sharing information through spreadsheets is a great way to have visibility without a huge lift of resources. Ensuring columns and rows are appropriately labeled and easy to understand is important. When sharing information through spreadsheets, create an introductory tab with information on the organization's goals and how to use the sheet.
- **Slide Decks:** Similarly to spreadsheets, slide decks are a great way to share information without requiring many resources from the organization. Slide decks offer a more visual way of presenting information and therefore may be more engaging to varying internal audiences.
- **Booklets:** These are most commonly reserved for external reporting as they require time and expense to produce. If your organization has the resources to create a booklet-style report, make extra copies for staff. This can be an impactful way to not only share organizational progress, but also ensure personnel have a comprehensive understanding of your organization's priorities, big wins, goals, challenges, and more. Booklets often take

much more staff time than the other options in this list, and therefore may not be a viable option for all organizations. Free online services such as [Canva](#) have templates that can help get you started! Here is an example booklet: [Austin Pets Alive!'s 2021 Impact Report](#).

- **Posters and Visuals:** Organizational KPIs and progress toward meeting goals can be shared using posters around the organization's common internal spaces, such as break rooms and offices. These may include a temperature gauge showing progress toward a fundraising goal, return-to-home rate goals, monthly statistics posted in the Animal Services truck port, or monthly adoption rate projections in the staff break room. Visually displaying organization KPIs and the progress being made toward those KPIs keeps them front and center in the minds of staff at all levels.

**Tip:** Using tools like [Google Drive \(Docs, Slides, etc.\)](#) are free options for reporting formatting, have adjustable permission settings, and allow for multiple teams to interact within the same document in real time. Internal reports should include basic information for the larger organizational goals and success supported by tracking KPI progress. Data includes summaries or guides if any data being provided may require an explanation or a step-by-step process to read the results. Internal reporting is an opportunity to inspire and collect feedback from staff and volunteers to ensure the process continues to improve over time!

## Reporting Cadence

Regular reporting is an important way to ensure staff and volunteers are up to date with organizational progress, wins, challenges, unexpected happenings, and more. Reporting on a regular basis with internal audiences may increase staff satisfaction, collaboration, and improve progress tracking in the future. Organizations should strive to share KPIs and data internally once per month. If organizational capacity does not currently allow that frequency, implement reporting once per quarter with a slightly larger set of data. If neither of those options are suitable, a comprehensive report once per year should be provided at a minimum.



## Data Foundations

### Sharing KPIs and Data Externally

#### Identify KPIs for External Reporting

Locate your organization's central tracking place for existing KPIs. If a central tracking place does not exist, consider requesting one be created, or creating one directly if you have appropriate approval.

Consider which KPIs are best suited for public communications and reporting. While granular metrics such as **daily** vaccination administration or days in care by **individual animal** may not be relevant to a public audience, higher-level metrics such as average and median length of stay at your **organization overall** are essential. In determining which KPIs are meaningful to include in external reporting to communicate your organization's goals and efforts, ask the following about each KPI:

- Is the KPI identified as internal only?
- Is the KPI directly associated with a requirement for budget, grant, legal, or other entities? Is sharing allowed with others outside of this entity?
- If a KPI is **not** internal only, has the appropriate leadership team or individual approved it for external reporting?

Track all information regarding KPI sharing permissions in a central tracking place associated with each KPI.

*Need help with KPI development? See our [KPI creation resource here](#).*

#### Mandatory Reporting

Mandatory reporting may involve many external entities and expectations for reporting and KPIs should have been set at the point of agreement. This may include grants, budgeting, legal requirements, and more. If there is a contract, form, or other document outlining reporting requirements, reference these items to determine which KPIs to share, how frequently, and in what format. If you are not clear on the format or KPIs required, connect with the organization's leadership team to determine the next steps.

#### Creating External-Facing KPI Reports

Based on previously identified KPIs that can be shared with external audiences, identify appropriate personnel that should collaborate on determining the format, content, and visualizations of KPI results with external audiences. This may include the organization's leadership team, marketing and communications staff, program leads, data staff, and legal staff.

Consider the following for each KPI in developing the report content:



- What is the organizational goal we are highlighting by sharing this KPI?
- Is this KPI understandable to an external audience?
- Is there a graphic or visualization of this KPI that may help make it more easily accessible?
- What can we highlight about our organization by sharing this KPI?
- Is there specific data external audiences have been asking to see that we can include?
- Highlight KPIs that show the organization's major wins and successes

## Reporting Format

After KPIs have been identified, work directly with relevant personnel to collaborate on the format for the external facing report. Consider which format may work best in public-facing websites or social media pages, and make sure you are working with the appropriate teams to remove/redact metrics that are for internal use only, ensuring results are clear and concise.

**Tip:** When creating a public-facing report, include basic information such as the organizational mission, vision, values, high-level goals, and efforts that complement the data being provided to create a clear story the public can follow.

- **Document or PDF:** Basic documents or documents saved as PDFs offer an easy way to record and share information. Documents may be more simple and include bullet points or summary statements for internal reporting or can be formatted with graphic design elements for public-facing communication. Programs like Google Docs allow you to share a document easily online with adjustable permissions.
- **Spreadsheets:** If your organization has limited resources, sharing information through spreadsheets is a great way to have visibility with your external audiences on progress without a huge lift of resources. Keep in mind, some spreadsheets can be overwhelming! Ensuring columns and rows are appropriately labeled and easy to understand is important. Utilizing an online spreadsheet program like Google Sheets allows multiple teams to interact within the same document. When sharing information through spreadsheets, we recommend having an introductory tab with information on the organization and how to use the sheet.
- **Slide Decks:** Similarly to spreadsheets, slide decks are a great way to share information without requiring many resources from the organization. Slide decks offer a more visual way of presenting information and therefore may be more engaging to a public audience. Utilizing an online slideshow program like Google Slides allows multiple teams to interact within the same document.
- **Booklets:** If your organization has the resources to create a booklet-style report, this can be an impactful way to not only share organizational progress, but also ensure the public has a comprehensive understanding of your organization's priorities, big wins, goals, challenges, and more. Booklets often take much more staff time than the other options in this list, and therefore may not be a viable option for all organizations. Free online services such as Canva.com have templates that can help get you started! Here is an example booklet from [Austin Pets Alive!'s 2021 Impact Report](#).

## Reporting Cadence

Regular reporting is an important way to promote organizational transparency and ensure external audiences are up to date with organizational progress, wins, challenges, unexpected happenings, and more. Organizations may aim to share KPIs and data externally once per month. If organizational capacity does not currently allow that frequency, consider reporting once per quarter with a slightly larger set of data. If neither of those options are suitable, a comprehensive report once per year should be provided at a minimum.



## Marketing and Communications Foundations Public-Facing Communications Channels

### What Does Marketing and Communications Achieve?

Gone are the days when marketing included only one thing: advertising. In fact, over the last decade, and especially since the 2020 COVID-19 crisis, the marketing and communications landscape has [changed dramatically](#). Now, organizations are encouraged to think about marketing from a holistic and integrated approach through multiple “communications channels.” An integrated approach increases visibility and accessibility because community members utilize or have access to different channels and technologies. Some of these channels may include:

Communication Channel	Activities Involved
Brand Development	<ul style="list-style-type: none"><li>• Website</li><li>• Brand guidelines</li><li>• Core messaging</li><li>• FAQ development and reputation management</li></ul>
Public Relations	<ul style="list-style-type: none"><li>• Media relations</li><li>• Media monitoring and reporting</li><li>• Thought leadership</li><li>• Crisis communications</li><li>• Fundraising support</li></ul>
Social Media	<ul style="list-style-type: none"><li>• Facebook (Meta) pages &amp; groups</li><li>• Twitter (X)</li><li>• Instagram</li><li>• LinkedIn</li><li>• Tiktok</li><li>• Youtube</li><li>• NextDoor</li></ul>
Content Marketing	<ul style="list-style-type: none"><li>• Video content development</li><li>• Newsletter &amp; email marketing</li><li>• Direct mailers</li><li>• Blog posts</li><li>• Multi-media marketing: Webinars/podcasts</li></ul>
Community & Partnership Engagement	<ul style="list-style-type: none"><li>• Community or corporate partnerships</li><li>• Government relations</li><li>• Community Events</li></ul>
Other	<ul style="list-style-type: none"><li>• Co-brand alignment initiatives</li></ul>

## Examples and Opportunities to Utilize These Channels

### Internal Audiences

Opportunities and Tactics	Messaging Sources, Guides and Examples	Suggested Ways to Share
Introduce HASS through staff training, onboarding or executive leadership strategy sessions	<ul style="list-style-type: none"> <li>• <a href="#">Mission, vision, value</a> statements</li> <li>• <a href="#">HASS Resource Center</a></li> <li>• <a href="#">Facility Guidelines</a></li> </ul>	<ul style="list-style-type: none"> <li>• Employee manual or onboarding guides</li> <li>• Website</li> <li>• In-lobby/break room hand-outs</li> <li>• Staff email or newsletter</li> </ul>

### External Audiences

Opportunities and Tactics	Messaging Sources, Guides and Examples	Suggested Ways to Share
Introduce a new pet support service, event or program	<ul style="list-style-type: none"> <li>• <a href="#">HASS Resource Center</a></li> <li>• Cabot <a href="#">48-Hour Program</a> Example</li> <li>• KC Pet Project <a href="#">Home Away from Home</a> Example</li> <li>• BARCS <a href="#">Community Connectors</a></li> <li>• <a href="#">P.A.S.S Program</a> Example</li> </ul>	<ul style="list-style-type: none"> <li>• Press release and local media outreach</li> <li>• Social media</li> <li>• Website or blog</li> <li>• Text, email or newsletter</li> <li>• Mailers</li> </ul>
Communicate with existing and potential fosters, volunteers or donors	<ul style="list-style-type: none"> <li>• <a href="#">Integrating Volunteers Toolkit</a></li> <li>• <a href="#">Philanthropy Toolkit</a></li> <li>• <a href="#">Foster Centric Programming Toolkit</a></li> </ul>	<ul style="list-style-type: none"> <li>• Press release and local media outreach</li> <li>• Social media</li> <li>• Website or blog</li> <li>• Text, email or newsletter</li> <li>• Mailers</li> </ul>
Reporting activities to and requesting support from government entities	<ul style="list-style-type: none"> <li>• <a href="#">Government communications guide</a></li> <li>• <a href="#">2024 HASS policy platform</a></li> </ul>	<ul style="list-style-type: none"> <li>• Impact Reports</li> <li>• Town halls or round-tables</li> <li>• Press release and local media outreach</li> </ul>
Getting ahead of the critics and/or establishing best practices in crisis response	<ul style="list-style-type: none"> <li>• <a href="#">Myths vs Facts infographic</a></li> <li>• <a href="#">Crisis Communications Toolkit</a></li> <li>• <a href="#">Crisis communications</a> Job-Alike</li> </ul>	<ul style="list-style-type: none"> <li>• Press release and local media outreach</li> <li>• Social media</li> <li>• Website or blog</li> <li>• Email or newsletter</li> <li>• Impact Reports</li> </ul>
Establishing a communications strategy through proactive media relations and social media	<ul style="list-style-type: none"> <li>• <a href="#">Basics of Media Relations Toolkit</a></li> <li>• <a href="#">Creating a Marketing &amp; Communications Program</a></li> <li>• <a href="#">Proactive Sample Story Example</a></li> <li>• <a href="#">KCPP Impact Report Example</a></li> <li>• <a href="#">BARCS Success Story Example</a></li> </ul>	<ul style="list-style-type: none"> <li>• Press release and local media outreach</li> <li>• Social media</li> <li>• Website or blog</li> <li>• Email or newsletter</li> <li>• Impact Reports</li> </ul>

## Templates

- [Communications planning templates](#)
- [Press release template](#)
- [Social media editorial calendar](#)



## Marketing and Communications Foundations

### Data Tracking

#### Overview

Utilizing research and data to inform marketing and communications activities is a core principle of any successful campaign. Without the consistent monitoring, tracking, and utilization of marketing data, getting a message out often falls flat. The following guide outlines what marketing and communications data is, typical metrics that are tracked, and tools for how to both monitor and utilize the results to inform communications strategy.

#### What is Marketing and Communications Data?

Marketing and communications data—often referred to as “marketing analytics” is a system of measurement to track the impact of marketing and communications initiatives. This includes metrics such as what is listed below associated with the specific communication channel.

Best practices and how-to’s to track these metrics are hyperlinked within the table below.

Marketing Initiative	Communications Channel	Metrics Tracked	Free or Low-Cost Tool
Brand Management	Website & program pages	Website traffic Bounce rate Click through rate Webpage ranking (SEO)	<a href="#">Google Analytics</a> <a href="#">Semrush</a> <a href="#">SimilarWeb</a>
Public Relations	Media Relations Thought Leadership Funder/Donor Relations	Media mentions Lead generation metrics Donation codes	<a href="#">Google Alerts</a> <a href="#">Google News Search</a> <a href="#">MuckRack</a> <a href="#">Classy</a>
Social Media	Facebook pages/groups Twitter (X) Instagram LinkedIn Youtube Tiktok Next Door	Followers/Subscribers Likes/Hearts Comments/Tags Shares/Reposts Saves Link Clicks Views Hashtags  Other terms for the above include:	<a href="#">Facebook Analytics</a> <a href="#">Instagram Analytics</a> <a href="#">LinkedIn Analytics</a> <a href="#">Twitter (X) Analytics</a> <a href="#">Youtube Analytics</a> <a href="#">TikTok Analytics</a> <a href="#">NextDoor Analytics</a>  Comprehensive Tools: <a href="#">Sprout</a> <a href="#">Later</a>

		Engagement, impressions, interactions, reach	<a href="#">Khoros</a>
Content Marketing	Email Marketing Blog Posts	Open rate Bounce rate Read through rate Click through rate Webpage ranking (SEO)	<a href="#">Google Analytics</a> <a href="#">Hubspot</a> <a href="#">Mailchimp</a> <a href="#">Semrush</a>
Community Events	Website Media Relations Social Media Facebook Events Evites Printed Collateral	Specific event page link clicks Event-specific media mentions Social engagement RSVP's/registrations Attendees	<a href="#">Event tracking template</a> <a href="#">Facebook Analytics</a> <a href="#">Google Alerts</a> <a href="#">Mailchimp</a> <a href="#">Paperless Post</a>

## How to Use Tracked Marketing Data

Upon establishing preferred communication channels and tools to gather the metrics an organization most wants to review, it's best practice to establish a metric monitoring schedule, determine how the analytics are reported internally, and utilize findings to inform go-forward communication strategies.

For instance, if an organization is posting on one social media platform 5-6 times a day (*something that is not advised due to algorithms viewing it as spam*), and the data shows low engagement rates, a new communications tactic might be to limit the number of posts to two times per day and time them strategically.

For more information on how to develop a marketing and communications strategy and suggested timelines associated, see [this guide](#).



## Marketing and Communications Foundations

### Marketing Team Roles and Responsibilities

#### Overview

It is best practice to have at minimum two communications professionals within an organization's marketing team. The role of marketing and communications is pivotal to an organization's success and should be prioritized accordingly. The following document outlines marketing and communications roles to consider and example job descriptions to utilize when building a marketing department. Please use these examples as a foundation to build a job description best suited for your organization.

#### Marketing Roles & Job Descriptions

- [Director of Marketing and Communications](#)
- [Public Relations Specialist](#)
- [Social Media Manager](#)
- [Event Marketing Manager](#)
- [Community Engagement Manager](#)
- [Donor Relations and Fundraising Manager](#)
- [Brand and Corporate Partnerships Manager](#)
- [Graphic Designer](#)
- [Content Specialist \(Photographer/Videographer\)](#)





## Marketing and Communications Foundations

### Understanding Organizational Marketing Workflow

#### Understanding Who Maintains Marketing and Communications Channels

Whether an organization has an in-house marketing and communications team or it relies on the communications direction provided by a municipality (PIO), it is important for members of the organization to understand who is maintaining the communications channels. While in-house protocols will likely vary from those of municipalities, the table below outlines specific marketing activities and their associated communication channels to provide a baseline understanding.

Communication Channel	Activities Involved
Brand Development	<ul style="list-style-type: none"><li>• Website</li><li>• Brand guidelines</li><li>• Core messaging</li><li>• FAQ development and reputation management</li></ul>
Public Relations	<ul style="list-style-type: none"><li>• Media relations</li><li>• Media monitoring and reporting</li><li>• Thought leadership</li><li>• Crisis communications</li><li>• Fundraising support</li></ul>
Social Media	<ul style="list-style-type: none"><li>• Facebook (Meta) pages and groups</li><li>• Twitter (X)</li><li>• Instagram</li><li>• LinkedIn</li><li>• Tiktok</li><li>• Youtube</li><li>• NextDoor</li></ul>
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Internal Communications	<ul style="list-style-type: none"><li>• Internal metric reporting to boards, leadership, and all</li></ul>

Communication Channel	Activities Involved
Brand Development	<ul style="list-style-type: none"> <li>• Website</li> <li>• Brand guidelines</li> <li>• Core messaging</li> <li>• FAQ development and reputation management</li> </ul>
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	staff <ul style="list-style-type: none"> <li>• Copy-editing/Template Development</li> <li>• Co-brand alignment initiatives</li> </ul>

## Best Practices to Request Marketing Support

### Organizations with In-House Marketing and Communications Support

Organizations with an in-house marketing and communications professional or team on staff will have the freedom to create the appropriate protocols for the management of each of their communications channels. Below are three tips to get you started:

1. **Create a Marketing Team Email:** Having a group or catch-all email such as [marketing@organizationname.org](mailto:marketing@organizationname.org) allows for both internal and external individuals to contact the marketing team directly via a designated inbox. Developing a response protocol for the email, such as requiring the marketing professional to reply within two business days, allows for consistent monitoring of requests and eases the flow of communication. In addition, a catch-all marketing inbox allows for the team to vet requests and delegate them to the appropriate personnel or respond accordingly.
2. **Create a Marketing Request Form:** Marketing and communications staff receive a multitude of requests such as website updates, creating graphics, drafting media responses, posting urgent pleas on social media, event planning questions and more. Developing and creating an internal protocol for an in-house marketing request form utilizing free [Google Forms](#), or a project management tool, allows the marketing team to gather all information about a request in one place efficiently and prioritize next steps accordingly. See a sample [marketing request form here](#).

3. **Volunteers and Supporting Staff:** While it is recommended to have at least two marketing and communications professionals on staff, especially for media relations and social media, often budgets can limit that availability. Volunteers specifically utilized for initiatives like event management, graphic design, or photography can still be an effective way to achieve marketing goals. See some sample requests for [marketing volunteers here](#).

## Organizations with External Marketing and Communications Support

Organizations with external marketing and communications support often fall under municipalities. However, there is also an option to outsource your marketing and communications efforts to a firm or a consulting communications professional. The former requires organizations to follow the established protocols in place by the government entity. While these protocols may vary, the following outlines the best places to start understanding those protocols and who organizations can lean on for communications support.

1. **[Public Information Officer \(PIO\)](#)** - Most, if not all, local government entities have a PIO on staff. Their role is to oversee all communications efforts for each government-funded public service organization and be a liaison between them and the public. Often working directly with the mayoral office, this individual is a relationship animal welfare organizations want to develop. Check your local government website for this role and corresponding contact information to begin building that relationship and discover how their office can support your organization.
2. **Additional External Support** - There are many communications firms that specialize in non-profit activities and marketing initiatives that offer pro-bono OR low-cost retainers for their services. Consider researching this option and requesting more information to gauge if at minimum they can provide branding, media relations or website development support. In addition, state university communication departments often house a student-led marketing and communications agency. Contact your local state university to see if their department might be interested in supporting your organization's needs.

## Marketing and Communications Foundations

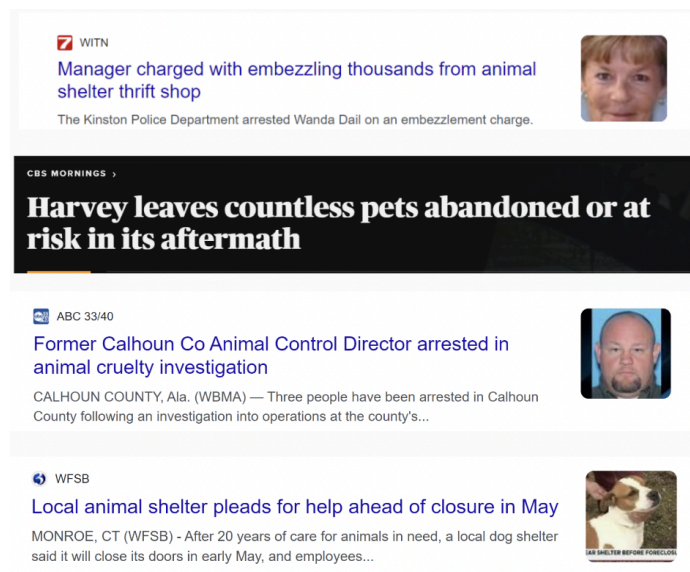
### Crisis Communications

#### Overview

This guide outlines the basics of crisis communications including stages to include in a crisis communications plan, common mistakes, and options for free and low-cost tools to help your organization maximize a crisis communication strategy to best fit your needs.

Crisis communications are necessary when a “crisis” or any event/circumstance, whether internal or external, is negatively impacting an organization’s mission, reputation, credibility, or brand. Usually picked up in social or broadcast media, today’s headlines are often fueled by crises. Examples may include:

- Natural disasters
- Incidence of crime, violent and non-violent
- Intake capacity issues
- Funding-related crisis
- Operational crisis
- Internal staff or personnel injury/death
- Quality of pet care and healthcare standards
- DEI or HR-related crisis
- Employee workplace environment



#### Managing Crisis Communications

Regardless of crisis type, there are three foundational practices to consider when approaching a crisis management plan: **Pre-crisis, crisis response, and post-crisis.**



## Stages of crisis management



### Pre-Crisis Needs

These are the tangible action items a marketing and communications team can take to ensure once a crisis hits, you're already prepared.

- Designate key decision-makers
- Evaluate Risks
- Identify target audience affected and target audience to receive crisis communications
- Build supportive relationships and canned responses or templates NOW

### Crisis Response Needs

These are the action items to execute when a crisis hits. It is imperative to do so in a timely, calm, and proactive vs reactive manner.

- Gather the facts of the situation promptly and confirm accurate information with the appropriate parties. If local authorities are involved, follow their instructions first and foremost.
- Transparent evaluation. Identify fault and the core problem needing to be solved, practice accountability, and determine the level of crisis. Determining whether a crisis is "low, medium, or high-impact" will allow decision-makers to act accordingly. This also allows teams to decide whether an internal and/or external response should be immediate or delayed.



# HUMAN ANIMAL SUPPORT SERVICES

- Review core messaging and/or canned responses. Upon doing so, designate an internal spokesperson for the specific crisis. Often, regardless of crisis, the spokesperson should be the most senior individual in the organization.



It is important to continually monitor all public communication channels when in crisis, especially your organization's owned channels. More public spaces or channels of communication within the crisis response phase typically include:

- [Social and Multimedia](#)
  - Facebook group, individual posts
  - Instagram advocate pages or movements
  - TikTok and/or Twitter-specific freelance reporters
  - Yelp, Glassdoor, and Google Reviews
  - Blogs/Online Forums (Reddit)
  - Podcasts
- [Traditional Media](#)
  - Newspapers / Magazines
  - Trade-specific media outlets
  - Local online news outlets
  - Broadcast stations
  - Radio

## Common Mistakes in Crisis Response:

- **Saying "no comment" or "I don't know"**: You never want the public to control the narrative or fill in the blanks that you are able to fill with proper messaging. Ensure your spokesperson is clear on what the message is and how to properly convey it



# HUMAN ANIMAL SUPPORT SERVICES

- **Reacting vs Responding:** Take a moment to pause and evaluate before responding. Ensure multiple individuals, of all diverse backgrounds, review and provide feedback on responses prior to going public. Reacting with emotion first vs logic and reasoning will only fan the flame.
- **Hiding or Challenging vs Addressing:** Especially on social media, DO NOT respond to critics, nay-sayers, or misinformation spreaders by direct messaging the individual either publicly or privately. Instead, allow the public forum space to be exactly that and respond accordingly with one, separate, clear, and concise message.
- **Personal vs Professional:** All statements made in crisis response come from the point of view of the organization, not any one individual. As such, all statements should be anchored in the organization's mission, vision, and values. Do not allow personal biases, emotions, or specific language use to be at the center of a crisis response.
- **Sharing Insider Baseball:** In the evaluation phase of crisis response development, ensure there is a balance between sharing too much or too little. You want the public to be informed without using defensive tones with too much information to guide a response.

**Instead, all crisis responses should prioritize acknowledgment, accountability, and action.**

## Post-Crisis Needs

Once the air inevitably clears, post-crisis needs are just as vital to implement. Best practice is to gather as a marketing and communications team with senior leadership to do the following:

- Schedule time to reflect
- Ask the following questions:
  - Am I and my staff okay?
    - Mental, physical, and emotional evaluation
    - Provide internal HR-related support if/where appropriate
  - Did we follow the crisis protocol with our mission as our guide?
    - This includes EVERY department within the organization
  - How did this protocol perform with this specific crisis?
    - Strengths, weaknesses, opportunities, threats
    - Write down the lessons learned, both positive and negative
  - Audience and communication channel monitoring for 2-4 weeks following crisis
  - Follow up with both internal and external audiences with positive news to follow



## Marketing and Communications Foundations

### Local Media Connections

#### Media Connections

When considering potential media connections, identify the primary print, television, and online media organizations you may want to begin building partnerships with first such as a morning news show or an online-only local news site. Media connections that reach the widest audience are ideal to prioritize first, followed by specialty media that may focus exclusively on community news, events, and highlights.

#### How to get started when contacting local media outlets:

- Identify the local print, broadcast, and multi-media outlets located in your city through simple Google searches or using media relations tools like [MuckRack](#) or Cision
  - Most local outlets list their editorial staff on their websites
  - Twitter and Instagram are great resources for finding freelance local reporters
  - Focus on reporters and journalists that cover animal welfare, local organizations, politics and philanthropy, human interest pieces, as well as professionals with “Editor” in their title
  - Broadcast outlets have “news desks” departments dedicated to receiving news in bulk. The contact information for news desks can be found using the resources mentioned above or simply calling the outlet directly and asking for the email
- Once your potential media list and contacts have been developed, you’re ready to send your first “pitch” or “story idea.” [Here are some best practices](#) to consider when drafting your pitch to increase your chances of not only getting seen by your target reporter, but ultimately used in upcoming news coverage!
  - It is best to follow up with the reporter 48 hours after sending the initial pitch. Keep in mind, reporters receive on average 500 pitches a day so a follow-up is just as important as your initial outreach.
- You are on the deadline of the reporter.
  - Typically, print publications have deadlines on Wednesdays and Fridays whereas broadcast deadlines are more often within 24 hours. Please keep this in mind if you are hoping to schedule interviews or obtain assets for your story.



- Broadcast segments only get assigned in the outlet's daily “pitch meeting” which usually takes place between 8 A.M.-9:30 A.M.. Ensure your pitch hits the news desks in time accordingly.
- To build the strongest relationships with local media, ensure every interaction with them is NOT only transactional.
  - Remember: There is always a person on the receiving end of your email, so meet them with timeliness, respect, gratitude, and a willingness to collaborate on the story together
  - If/when your story is covered, go out of your way to thank the reporter with a thank you note!



## Marketing and Communications Foundations

### Creating a Marketing and Communications Program

#### Overview

Marketing and communications tactics are constantly changing and it can be difficult to know where to start. The following toolkit outlines five foundational steps an organization can take to establish and implement a successful marketing and communications program. These initial steps aim to set up your marketing staff, volunteers, and leadership with preliminary best practices to be built upon to meet your goals.

#### What Does Marketing and Communications Achieve?

Gone are the days when marketing included only one thing: advertising. In fact, over the last decade and especially since the 2020 COVID-19 crisis, the marketing and communications landscape has [changed dramatically](#). Now, organizations are encouraged to think about marketing from a holistic and integrated approach through multiple “communications channels.” Some of these may include:

Communication Channel	Activities Involved
Brand Development	<ul style="list-style-type: none"><li>• Website launch &amp; maintenance</li><li>• Brand guidelines</li><li>• Core messaging</li><li>• FAQ development and reputation management</li></ul>
Public Relations	<ul style="list-style-type: none"><li>• Media relations</li><li>• Media monitoring and reporting</li><li>• Thought leadership</li><li>• Crisis communications</li><li>• Fundraising support</li></ul>
Content Marketing	<ul style="list-style-type: none"><li>• Social media</li><li>• Newsletter &amp; email marketing</li><li>• Direct mailers</li><li>• Blog posts</li><li>• Multi-media marketing: Webinars/podcasts</li></ul>
Industry & Partnership Engagement	<ul style="list-style-type: none"><li>• Community or corporate partnerships</li><li>• Government relations</li><li>• Industry-Specific Events</li></ul>
Internal Communications	<ul style="list-style-type: none"><li>• Internal metric reporting to boards, leadership, and all staff</li><li>• Copy-editing/Template Development</li><li>• Co-brand alignment initiatives</li></ul>

## Five Steps to Establish a Marketing and Communications Program

### Establish [Mission, Vision, and Values](#)

This is **THE** foundational practice in which all initiatives, not just marketing and communications, should be built for your organization. Using mission, vision, and values statements act as a north star to guide programming, policies, and procedures as well as internal and external communications allow organizations to have a clear picture of where priorities and projects should be.



#### How to Write a Mission Statement

1. Explain your company's product or service offering.
2. Identify the company's core values.
3. Connect how your company's offering aligns with your values.
4. Condense these statements into one.
5. Make sure it's clear, concise, and free of fluff.

Image Source: Hubspot; Click image for more information

Take a look at [these resources](#) from Non-profit Hub for more information. It's suggested that the marketing team does the above exercise with the key decision-makers at your organization. This may include the founder/CEO, executive directors, board members, and primary funders. Working together, the marketing team can then finalize the copy of these statements.

### SWOT Analysis

A SWOT analysis includes the evaluation of an organization's strengths, weaknesses, opportunities, and threats within your existing market or community. This step is critical to determine what makes you different, what specific services or programs support your community, areas of growth or improvement, and any roadblocks that might prevent your efforts. It is recommended that an exercise like this is conducted at least once a year.

Here is an [online webinar](#) you can watch for a step-by-step breakdown of how to maximize this exercise.

# How to Do a SWOT Analysis



semrush.com

Image Source: Semrush; Click Image for more information

## Identifying Audiences

A target audience is a group of people that programs, services, or marketing efforts are aimed toward, typically defined by traits like age, gender, income, interests, challenges, and goals. Targeting the right audiences can help you increase brand awareness, garner community interest and support, increase government affairs or funding support, and more. See a [helpful guide here](#) for more information.

**Audiences in human and animal welfare can include:**

- General Public:
  - Potential adopters
  - Existing and potential fosters
  - Donors and potential donors
  - Local animal welfare advocates and supporters
  - Nay-sayers and/or organization's critics
- Policy Makers
- Funders or Grant Makers

- Local corporate sponsors or partner organizations
- Fellow industry peers within animal or human welfare
- Internal staff, volunteers, and support teams
- Board members

## Determine Priority Communications Channels

As mentioned above, there are multiple communications channels a marketing and communications team can plug and play to achieve internal and external goals. Upon establishing a program, it's imperative to prioritize your efforts in the channels that speak to your target audiences the most. For some, that may mean social media, specifically Facebook groups or Instagram, for others, that may mean direct mail.

Here are three questions to ask to help inform your decision-making:

- Identify the **kind** of message you're sending or the message's **purpose**
- Ensure mission, vision, and values are aligned with the communication needed
- Choose a communication channel most utilized by your target audience for that specific piece of communication

Especially when considering social media, a social platform's specific algorithm determines how your message is engaged with. The three primary algorithms to take note of are Meta, Google, and TikTok. All have different functions, goals, and determining factors and it's important to note: social media reach is **ONLY** as good as your use of the appropriate algorithm. See more information on [understanding algorithms](#) to help get you started.

## Establish KPIs to Inform Communications Strategy

KPIs, or key performance indicators, within marketing, evaluate how an organization is performing within its established communication channels. These indicators inform whether you are on the right track to meet your goals or objectives and are measured on a monthly, quarterly, and annual basis.

[Examples may include:](#)

- Website traffic or UVM (Unique Visitors Monthly)
- Click-through and bounce rates
- Email/newsletter open rate or sign-ups
- Social media engagement and follower growth
- Event attendance
- Donations received and retained
- Foster and volunteer network growth
- Foot traffic
- Program participation and/or resources downloaded online
- Conversion rates
- Return on ad spend

Upon determining these metrics, developing and executing a communications plan is the final step. It's encouraged to proactively build strategies using a **90-day timeline** and by communication channels to ensure all efforts are complementary to one another and maximize audience reach.



## Marketing and Communications Foundations

### Defining Audiences

#### Identifying Audiences

A target audience is a group of people that programs, services, or marketing efforts are aimed toward, typically defined by traits like age, gender, income, interests, challenges, and goals. Targeting the right audiences can help you increase brand awareness, garner community interest and support, increase government affairs or funding support, and more.

Often, an animal and human welfare organization's audiences can include:

- General Public:
  - Potential adopters
  - Existing and potential fosters
  - Donors and potential donors
  - Local animal welfare advocates and supporters
  - Nay-sayers and/or organization's critics
- Policy Makers
- Funders or Grant Makers
- Local corporate sponsors or partner organizations
- Fellow industry peers within animal or human welfare
- Internal staff, volunteers and support teams
- Board members

#### Segmented Audiences

Once you have identified your target audience, consider segmenting that audience into groupings that may benefit from customized outreach or marketing efforts. For example, if your target audience is potential donors, consider creating segmented audiences for prospective donors, new donors, and major donors to provide more tailored communications and potentially receive more donations.

#### Creating Audience Personas

An audience persona is created by combining details from your segmented audience to create a detailed target customer profile reflective of the common trends within your audience. Creating a persona for each of your segmented audiences can help further define your marketing and communications efforts. To learn more about audience personas, see ["The Beginners Guide to Creating Marketing Personas and Free Templates" Buffer blog here.](#)

#### Additional Resources

To learn more about target audiences, personas, and more, see the ["Target Audience: What It Is & How to Find Yours, Plus Examples" Semrush blog here.](#)



## Government Communications Foundations Establishing Contact with City and Municipal Liaisons

### Overview

Establishing a plan for recurring contact with local municipal liaisons provides an opportunity for your organization to establish rapport with your municipality and creates a pathway to share major wins, challenges, and goals (programmatic, funding, legislative, or other) to gain municipal support. This [example one-pager](#) can give you a few ideas on how this information can easily be shared.

### Not sure who your liaisons are?

- **Government Animal Services:** There is likely already a predetermined contact for your organization with specific guidelines for outreach. Clarify all municipal contact guidelines with the shelter director. Still not sure? The shelter director should contact their primary city supervisor to get clarification.
- **Other:** Utilize your city or municipal website, a general online search, or a direct call to your city information office to find this information. 501(c)(3) organizations without a government contract may also start directly with a city council member.

**Note:** Some organizations, such as municipal shelters or rescues with a government contract, **may not be allowed to establish contact** with individuals outside of a directly assigned liaison or representative. Ensure you have proper permissions through your organization, board, local laws or ordinances, and other relevant governing bodies before engaging with the municipality.

### Getting Started with Government Communications

View the [complete guide on getting started with government communications here](#). This guide highlights the rules for legislative engagement, how to connect with state legislators, lobbying versus advocacy considerations, and more.

### Project-Specific Coalition Outreach

If you are completing a project intending to find solutions to challenges facing the community as a coalition, consider creating a letter to the newly established municipal contacts that requests a follow-up meeting or discussion. Include the following:

- **INTRO:**

- Your name OR group/coalition name and group members
  - Example: This coalition is comprised of individuals from [x organization], [y organization], and [z organization]
- If writing on behalf of a coalition, explain the coalition's purpose, a brief history of the group, and the problem the group is trying to address
- A request to meet or further discuss and a recommended time frame
- **BODY:**
  - Propose solutions to address the problem, evidence-backed benefits the solutions bring to the community, and the suggested strategy to accomplish the goals
- **CLOSING/ASK:**
  - Ask for a meeting to collaborate on the above and potential next steps
    - If sharing data results or other impact reporting, highlight what you are hoping to share
  - Sample days and times you or your group are available
  - Sample location to meet





## Government Communications Foundations Offering Facility Tours to Elected Officials

### Overview

Offering tours of your facility to elected officials and other stakeholders provides an opportunity to directly highlight the programs, services, and day-to-day operations of the organization and highlight the goals you would like to accomplish in the future to expand or create new opportunities to support people and pets. Seeing programs in person may build a greater understanding of your mission, vision, values, and the impact your organization has on the community, creating greater opportunities for fundraising and legislative support.

### Building Relationships with Elected Officials

Some organizations, such as municipal shelters or rescues with a government contract, may not be allowed to establish contact with individuals outside of a directly assigned liaison or representative. Ensure you have proper permissions through your organization, board, local laws or ordinances, and other relevant governing bodies before engaging with the municipality. See our guide to get started with [establishing contact with city and municipal liaisons here](#).

### Advanced Government Communications

View the [complete guide on getting started with government communications here](#). This guide highlights the rules for legislative engagement, how to connect with state legislators, lobbying versus advocacy considerations, and more.



## Government Communications Foundations Sharing Organizational Success

### Overview

Organizational success should be shared internally and externally whenever possible. Noting animal welfare organizations have multiple audiences to showcase operational impact to, such as municipalities, funders, volunteers, and community members, it's important to establish a consistent approach to communicating the positive impact of an organization's work. Establishing external transparency can improve stakeholder relations and create an avenue to increase funding and public support.

A document outlining organizational successes may include:

- Adoption, foster, or transport numbers compared to intake
- Pet support provided to community members (by service category and number of individuals served)
- Lost pets reunited with families
- Stories of impact with quotes from those involved
- New program launches/implementation
- Existing and/or sub-brand program achievements
- Mission, vision, values (for longer documentation)
- Priorities for the future (for longer documentation)

### Additional Consideration

When developing one-pagers or documentation that will be shared with city officials, ensure the template and/or resource is approved by leadership or the municipality staff responsible for your organization.

### Sample Documents

- [This comprehensive report](#) takes a deeper dive into the information you might highlight in a one-pager, as outlined above. Public-facing annual impact reports are a great way to highlight major wins, provide data, tell stories, and provide a deeper look at your organization's focus areas.
- [This sample graphic](#) highlights legislative accomplishments over a full year. This **easy-to-understand one-pager** highlights major wins, primary focus areas and their progress, and goals for the coming year. One-pagers are especially impactful

when building new relationships with stakeholders and wanting to share a high-level overview of your organization's primary goals and progress to achieve them.

- Sharing results for new standalone projects or programs your organization launches can provide a more focused approach to sharing success if looking to gain support for a specific topic.
  - This [data project sample](#) focuses on Lost Pet Reunification and the changes animal services can implement to support getting more pets home.
  - This [community survey project sample](#) highlights the importance of increased funding for programs and services that can support keeping people and pets together.



## Pet Support Services Public-Facing Contact Information

### Overview

This guide highlights options for creating accessible and remote options for the public to contact your organization. Creating an avenue by which the public can remotely connect to the organization allows for faster, more efficient responses to provide support to people and pets in your community. Remote options also ensure that those with transportation limitations can still receive assistance.

### Contact Options

#### Phone Number (Calls and Text Messages)

##### Already Have an Established Phone Number?

Ensure your organization's primary contact line or dedicated pet support line is advertised on all public-facing materials. This may include social media, a website, or physical materials such as onsite signage or handouts. Include specific instructions such as extension numbers or voicemail instructions. Consider providing instructions in multiple languages as well.

**Tip:** Highlight in your messaging whether your phone number accepts **only** phone calls, or phone calls and text messages!

##### Need to Establish a New Phone Number?

Consider your organization's current setup and needs to determine which new phone number route is the best fit.

- **Landline:** Companies that offer landline services may vary by location. You may search online or through the local directory for companies that can establish a contract for your organization's new landline and compare prices and features.
  - Pros: Does not require recurring charging. Does not require internet connection. Quality of sound is often better than other options. Often ideal for emergency use.
  - Cons: Requires time for physical installation. There is a cost for maintenance and installation. No text messaging.
- **Cell phone:** Companies that offer cell phone services may vary by location. You may search online or through the local directory for companies that can establish a contract for your organization's new cell phone and compare prices and features.
  - Pros: Often accommodates calls, texts, voicemails, video calls, and app-based communications. Portable. Some automatic security measures already in place.

- Cons: Requires a consistently charged device. Reliant on service quality in the current location.
- **VoIP (Voice-over-Internet-Protocol)/Cloud-based call services:** When considering internet-based services, compare your organization's needs to the cost and benefits offered. There are many options for VoIP services!
  - Pros: Some low-cost and free options. Flexible and portable locations (computers, phones, other internet-based devices). Often higher security measures are automatically in place. Often accommodates calls, texts, voicemails, and video calls (may vary by service).
  - Cons: Requires a steady internet connection. Reliant on the chosen device being fully charged, as applicable.
  - *Unsure where to start? Consider examples from our [48-Hour Program Text SMS Platform Recommendations guide here](#) or [this comparison article written by Forbes](#):*
    - [Google Voice](#)
    - [Simple Texting](#)
    - [EZ Texting](#)
    - [RingCentral](#)
    - [Nextiva](#)
    - [Grasshopper](#)
    - [8x8](#)
    - [Vonage](#)
    - [Dialpad](#)
    - [MagicJack](#)

## Email Address

### Already Have an Established Email Address?

Ensure the organization's primary contact or dedicated pet support email address is advertised on your public-facing materials. This may include social media, a website, or physical materials such as onsite signage or handouts. Include any specific instructions that need to be followed when contacting the organization as needed, such as details an individual should provide about themselves, their pets, or their request that can help get them an answer more quickly.

### Need to Establish a New Email Address?

Consider your organization's current setup and needs to determine which new email route is the best fit.

- Does your organization have an official website? Are there existing [@\[website-domain-name\]](#) emails used for staff and/or volunteers? Could a generic email address, such as [info@\[website-domain-name\]](#), be created specifically for public-facing communications?
  - If there are no existing emails associated with your organization's official website address, consider the cost and benefits of integrating this into your current setup. This process can often occur through the same service the domain name and/or web hosting is through. Prices and capacity may vary by service.
  - Alternative email options:
    - [animalservices@\[city-website-domain-name\]](#)

- support@[website-domain-name]
- inquiries@[website-domain-name]
- hello@[website-domain-name]
- If your organization does not have a website or domain name, consider creating an email address specifically for public-facing interactions that can be accessed by any staff or volunteers responsible for public outreach or response. For consistency, consider creating this email address through the same service current staff or volunteers utilize to communicate with external parties or the service you intend to use exclusively in the future.

## Online Contact Form

When creating an online contact form, consider which personnel are responsible for responding to public inquiries, what information you're hoping to collect, and what your organization can offer. A contact form should reflect all information needed to best provide support. Some example contact form fields include:

- Name
- Email/Phone
- Preferred method of contact (email, phone call, text, other)
- Category of request (lost pet, found pet, surrender, pet support, medical, behavior)
- When do you need a response? (Urgent, within 48 hours, within a week, any)
- Text box / Provide details for your request / Message

## Already Have an Established Website With Connected CRM or Marketing Integrations?

Evaluate if your website and marketing software have an option for creating contact forms. You may find this option in "marketing", "create", "new form", or other categories in your menu field. This will vary widely between services, so please reference their available FAQ or help page for more information. Here are example walkthroughs for how to create a contact form through [HubSpot](#) or [Mailchimp](#).

## Need to Establish an External Contact Form for a Website?

If you have a website but do not have an option for internal form creation through a website/marketing integration, evaluate what the minimum requirements are to embed or change website HTML code to add an external form to your current website before deciding where to create a contact form. You may consider using sites such as [Google Forms](#) (FREE), [Jotform](#), or [Mailchimp/HubSpot](#) to create an embeddable form for a website.

## Don't Have a Website?

If you don't have a website, free services such as [Google Forms](#) are a great place to start! You may create a custom form to fit your organization's needs, adjust privacy settings, share the form through a short link, and all form responses can be viewed on an overall review page or an auto-generated Google Spreadsheet. You can also [turn on notifications](#) so that each response you receive will contact a dedicated email address, allowing you to respond promptly. If Google Forms is not your preference, services such as Jotform, SurveyMonkey, and Typeform can yield similar results.

If you are **exclusively utilizing social media to communicate** with the public, consider tracking outreach and responses in a [tracking spreadsheet](#) collecting the person's name, the best form of contact, basic details about the request/outreach, what action was taken, and when. Establishing an internal formalized method of tracking pet support efforts will ensure there is a centralized place for staff or volunteers to monitor services provided, social media comments and feedback, and utilize data for strategic planning for funding, staffing, and more.

## Website Chatbot

An AI-based chatbot may be a beneficial addition to your organization's website to help support individuals with smaller, basic requests so that your staff and volunteers can focus their time on the most complex cases. When integrating a chatbot ensure that there is a clear protocol for how requests are handled and who is responsible for responding to them if a chatbot cannot answer a request, or if direct communication with an organization's representative is requested. Ensure protocols outline the expected timeframe for responses from your organization and instructions for urgent requests.

Here are some considerations before implementing a chatbot:

1. Do you want to build your own, or find an existing chatbot program you can customize and embed in your website? *Search online for AI chatbots that are compatible with your website's development/editing program prior to making a decision.*
2. What is the primary function of the chatbot? For pet support, customer service chatbots will be largely helpful!
3. Who will be responsible for getting the chatbot integrated into your system and helping it absorb the information it needs to be able to best help the public that uses it?
4. Who or what department will be responsible for responding to requests that the chatbot cannot answer? During business hours, can the chatbot be directed to a live representative for assistance? Will that chatbot automatically connect the person to an email address monitored by the organization daily?
5. In the event of an emergency, what steps should someone take that is utilizing the chatbot service? Ensure these steps are integrated into the chatbot's programming.

## Resources to Set up a Website Chatbot

- [ChatGPT](#), one of the most common AI chatbots currently in circulation, can be used in WordPress-based websites through a plug-in to create an AI chatbot.
- [HubSpot CRM also offers a Chatbot Builder Software](#) you can integrate responses into, if you are a HubSpot CRM user.

## Partnerships with 3-1-1 and Other Government Services (U.S. Specific)

### What is 3-1-1?

3-1-1 is a specialized telephone number supported in many cities in the United States (*and Canada!*) that provides access to non-emergency municipal services. This number is associated with the area you are calling from and may provide geographically specific support. 3-1-1 is not a nationally

available option, and a quick online search, or phone call to your local operator or city hall, should provide information on whether it is available in your area.

### **Establishing a 3-1-1 Partnership for Animal Services**

3-1-1 highlights the various support options across municipal services, and as a result, they may provide information for non-emergency animal services requests automatically. In some unique instances, a partnership has been established so that the primary contact line for municipal animal services organizations goes directly through a 3-1-1 operator, allowing support requests for people and pets to be triaged when able, and truly urgent or specific animal services requests may be sent to the shelter. This process allows the community to receive more holistic support, reduces call volume to the shelter, and creates a safety net to ensure all requests from the public are responded to. In these unique instances, 3-1-1 and animal services work closely together to develop protocols and best practices for responses to the public, ensuring they are in alignment. For an example of the types of calls 3-1-1 may respond to, [see the Dallas 311 animals page here](#). Contact your local municipality to discuss how your organization may support or directly partner with this service.





## Pet Support Services Responding to Calls or Emails Requesting Support

### Who Should Respond to Calls, Emails, or Community Support Requests?

It is a best practice for organizations to have at least one dedicated individual responding to public requests for support. This ensures personnel not dedicated to this effort can focus on other lifesaving responsibilities, but also have a consistent and strategic approach to providing pet support solutions. The person(s) in this role should be well-versed in all available services or programs offered by the organization and established partners, as well as referral opportunities for programs and services for external programs and services. It's also encouraged to appoint a bilingual individual in this role.

**Considerations:** Some organizations may opt for this role to serve as an official case worker or counselor for the organization, supporting the assessment, coordination, and specific case-by-case recommendations to improve outcomes for both the pet and the person. Other organizations may find they prefer this role to have a specific customer service-oriented focus to provide support options and more complex case management to be handled by an additional team and/or individual. See a few sample job descriptions that may fit your organization's unique needs for this role below.

### Sample Job Descriptions

- [HASS Sample: Customer and Pet Support Supervisor](#)
- [Gateway Pet Guardians Sample: Pet Support Counselor](#)
- [Gateway Pet Guardians Sample: Community Hotline Assistant](#)
- [LifeLine Sample: Community Caseworker](#)
- [Arizona Humane Sample: Bilingual Pet Resource Call Center Specialist](#)



## Pet Support Services Surveying Community Needs and Values

### What Is the Purpose of a Community Survey?

To develop pet support services that meet the needs of your community, welfare organizations should have a thorough understanding of what those needs actually are. The best way to do so is by communicating directly with the source. [Surveying the people in your specific community](#) helps identify existing social services and identify specific gaps that your organization can potentially fill. Providing an opportunity for the individuals of your community to make their needs heard not only encourages trust in your organization, but can direct the development of future programs, make the case for additional funding, and garner support from policymakers by utilizing the survey data gathered.

Community surveys can cost money to facilitate, but if your organization does not currently have the funds to support a large-scale community survey effort, there are secondary options. However, smaller-scale, alternative options may not always yield holistic results, especially without targeted outreach to areas you do not regularly interact with. Still, they can be beneficial to collect preliminary community feedback.

Smaller-scale options can include:

- **Online form:** Creation of an online-based form such as [Google Forms](#), [Jotform](#), or a form integrated into your organization's existing CRM such as [HubSpot](#). This form should be embedded into your organization's website, or shared through a direct link in recurring outreach to connect with the widest audience possible. In addition to survey questions, the form should include instructions, purpose, and relevant deadlines. Results should be evaluated by organizational leadership and relevant teams for strategic planning.
- **In-person or virtual community meetings:** [Community meetings](#) may be hosted virtually or in-person and should have a facilitator or moderator to establish rules or expectations and maintain meeting flow. Sharing a list of questions in advance with potential attendees may also help with meeting structure and preparedness.
  - When hosting in-person community meetings, consider varying event locations between your organization, and local community hubs such as city hall, public libraries, or community event spaces across your service area to expand public reach.

## Defining Your Service Area and Creating Assessment Questions

The following resources can help define the geographic boundaries of your service area, identify primary objectives and the types of data you hope to collect, create assessment questions, and more.

- [Create the Assessment National Recreation and Park Association](#)
- [Conducting Needs Assessment Surveys - Community Tool Box](#)
- [Needs Assessment - U.S. Dept. of Health and Human Services](#)
- [Community Needs Assessment: The Resources and Examples Your Organization Needs - Galaxy Digital](#)

## Collaboration with Municipalities

Some municipalities may already be planning on administering, or have previously completed, community evaluations or surveys. Consider collaborating with municipalities to be included in any existing initiatives, specifically within an animal services section. If any animal services questions are already in place, consider if they align with services currently offered. If you are not a municipal animal services organization, begin building connections with your local municipal shelter and city representatives to advocate for the adjustment or addition of survey questions to best support your collective animal services efforts.

*Not sure where to start building relationships with local officials? [See the HASS government communications guide here.](#)*



## Pet Support Services

### Communicating Support Services with the Public

#### Overview

Consider all [available channels of communication](#) that can disperse information regarding pet and people support offered by your organization, partner organizations, or other services available in your community. This may include in-person interactions (customer service in-shelter, community event presentations, field responses), emails, text messages, phone calls, social media, websites, and other avenues for digital communication.

By expanding the reach of where your organization shares support information, more people have a chance to access programs and services when experiencing complex or challenging situations to ensure both they and their pets have what they need to stay together. Consider creating a [quick sheet of the most commonly requested services](#) to easily share in paper or digital formats.

#### Getting Started on a Communications Strategy

Keeping more people and pets together requires a strategic approach to getting the word out about your organization's community-focused philosophy and programs. In collaboration with HeARTs Speak, we have created a series of communications kits to help you talk to your community members about the many ways that you are supporting people and pets, including a 12-month communications planner, strategic considerations, a detailed planning document, and more! This [Communication-Focused Communication Strategy](#) will get you started considering which communication-based steps your organization should take for your unique setup and needs.



## Pet Support Services

### Offering Pet Support Materials in Multiple Languages

#### Important Considerations for Offering Services in Multiple Languages

- Does your organization have staff or volunteers who are directly from the community you are serving, know the community well, and speak the most commonly spoken language(s) in your community?
- How can your organization focus on hiring future staff who speak the language(s) that are present in your community and are willing to serve as translators?
- Who within your team of volunteers speaks the language(s) that are present in your community and is willing to serve as a translator?

#### Why Translate Materials Into Other Languages?

It is crucial to identify the different languages spoken in your community and provide services for these families. Many community members learn about service providers by word of mouth and if your organization is not providing resources and service information in other commonly spoken languages, you are missing a huge population within your own backyard. Having inclusive, multi-language resources allows even more support for the entire community.

Translating a service flyer or temporary foster agreement into another language is not always easy, especially when considering the different variations of one language category. For example, not all Spanish-speaking communities use the same vernacular. The Spanish spoken by Cuban-Americans in South Florida is different from the Spanish spoken by Mexican-Americans in Southern California! There are variations in the use of certain words as well as idiomatic expressions, so it's important to ensure service descriptions reflect accordingly. This may require evaluating multiple translation program options, inclusive of having a person from that specific community, to achieve the desired result.

#### Where to Begin

##### Option 1

There are many different free translating websites available online, such as [Google Translate](#) and [Microsoft Translator](#). With each, you can easily type in what you are trying to translate and it will provide you with a translation.

However, these translations aren't always 100% accurate. So once you have used the internet to translate, it is best practice to have the translation reviewed by at least 2-3 different staff members, volunteers, or community members from different backgrounds and lived experiences (i.e. educational backgrounds and socio-economic statuses) who speak the language. You want to make sure the translation is fully accessible to anyone in your community who may need it. By having others review the translation, this process can help ensure that the message is clear, regardless of a person's education or economic background.

## Option 2

Check out this [list of organizations and platforms that offer translations for nonprofits](#). Some of these organizations offer their services for free with services provided by actual translators. However, as with any open platform, the quality of service can vary widely, so make sure to still have a native speaker review the translated materials before sharing publicly.

Here are some examples of translated materials from English to Spanish created by HASS collaborators:

- [Dallas Animal Services Housing Resources in English and Spanish](#)
- [San Diego Humane Society Mobile Clinic Flyer in English and Spanish](#)
- [Denver Animal Protection Displacement/Eviction Relief Program \(Temp Boarding\) in English and Spanish](#)
- [Denver Animal Protection Displacement/Eviction Relief Program \(Pet Supplies/Services\) in English and Spanish](#)
- [Pima Animal Care Center bag insert for food distribution in English and Spanish](#)

If your website software does not provide an option for viewers to experience your website in another language, check out this step-by-step alternative on [How to Turn Translation On or Off in Chrome](#).

## Additional Considerations

### ESL

When translating materials, consider integrating additional accessibility options such as the [English to ASL \(American Sign Language\) Translation Standards](#) and adding audio and subtitled variations of materials for public use.

### Screen Readers

Another level of accessibility to consider is for those that utilize screen readers. Ensure your digital materials such as [website](#), [email](#), and [social media](#) are screen reader friendly. Examples

of basic best practices include providing alternative text/visual descriptions, ensuring information is available as text and not just in images, and being mindful of the contrast ratio of colors.

### **Track Your Progress**

Consider utilizing a [tracking sheet](#) to record which documents need translation, who is responsible, and goal completion dates to help you determine the resources needed to complete translations across the organization. To gain buy-in for additional resources, consider watching this [how-to presentation](#) for translation ideas and best practices (*including [this language map application](#) and [this PowerPoint accessibility guide](#)*).



## Pet Support Services

### Scripts to Support Pet Support-Based Interactions

#### Identify Available Programs and Services

When creating scripts and templates, start by identifying the top 3-5 pet support frequently asked questions.

Is there a specific pet or human support service being referenced most often by staff and volunteers? What are the biggest challenges your community face that may also impact their pets? What support can be provided? Include any direct services your organization, or established partners, offer.

Topic of interest	What we can offer the community
<i>Example: Pet food/food pantries</i>	<i>Example: A list of available local resources</i>

[Use this template](#) to list out the most requested pet support services and resources in your community. Having this type of list easily available can help save staff and volunteer time when responding to requests. Update the list at least once per quarter to ensure accuracy.

**Use [pets.findhelp.com](https://pets.findhelp.com) to Share Options Not Directly Offered by Your Organization or Partners**  
[pets.findhelp.com](https://pets.findhelp.com) can help locate local free and low-cost programs and services and help ensure services offered by your organization are reflected!

#### Identify Ideal Messaging Focus

When creating new scripts, ensure the dialogue reflects your organization's core mission, vision, values, and overall priorities—and provides the community with the information they need. Scripts may vary by the organization's size, available programs/partners, resources (time, financial, and other), and community.

Topics could include:

- A conversational-interviewing approach to a support request



- Identification of preliminary programs/services that may help with the request
- Options for people seeking to surrender a pet, like supported self-rehoming, fostering, human support programs, and pet support programs.

### **Sample Scripts**

Reference the [SAMPLE Pet Support Scripts](#) document as a starting place to brainstorm how your organization's support options may best be shared.

### **Update Policies and Procedures**

Ensure that scripts and templates are included in organizational policies and procedures, and are regularly evaluated and updated for consistency and relevancy.



## Pet Support Services Community Outreach Activities

### Community Outreach Activity Examples

The most frequent purposes of a community outreach activity are to inform the community of something, ask the community for input or support (financial or otherwise), or provide the community with a solution. Community outreach activities may include all three! A few examples of a community outreach activity focused on people and pet support include:

- A [community values/needs survey](#) to identify the primary needs of the community regarding pet support
- A town hall to answer questions about available or upcoming programs/services and fundraising information
- An event at a local library to meet community members in person and provide information on available resources
- A booth or table at an existing community event to promote pet support services (even if the event is focused on other topics!)
- A mobile, free spay/neuter for owned pets event
- A monthly pet food pantry available to everyone

### Building Community Partnerships

If your organization currently does not have the capacity to directly host community outreach events or otherwise be the primary facilitator of an outreach activity, consider what steps you might take to build partnerships with other organizations in your community.

To learn more about building [Community Partnerships, see our complete guide here](#). This guide includes partner organization recommendations and resources to locate potential partners, instructions on how to map your local ecosystem (available community programs/services), worksheets to identify and prioritize potential partnerships based on organizational goals and needs, and real-life examples of partnerships between animal welfare and non-animal welfare organizations in the US.

### Additional Resource

[HSUS Pets For Life Community Outreach Toolkit](#)



## Pet Support Services Marketing Pet Support Services Topics

### Why Focus Marketing Efforts on Pet Support Services?

Regularly communicating about your organization's pet support services helps to proactively spread awareness of available programs or options that may help keep people and pets together in moments of crisis and unexpected challenges.

### Pet Support Services Program Examples

The following program examples may occur directly at your organization or through partnerships, referrals, and local recommendations.

- Pet food pantry
- Pet supplies drive
- Free/low-cost veterinary care
- Pet-friendly housing resources
- Behavior support
- Emergency pet boarding
- Long-term pet boarding

### Frequency and Strategic Planning

To get started communicating about pet support services, use the following toolkits. These toolkits were created in collaboration between Human Animal Support Services (HASS) and HeART's Speak.

- [Communications Kit: Keeping Families Together](#)
  - In this kit, you will find editable graphic templates, customizable tools, a media pitch template, talking points, real-world examples, and more that you may use to introduce or enhance your pet support services through marketing and communications.
- [Community-Focused Communications Strategy](#)
  - In this kit, you will find a list of general marketing and communication strategic considerations, a detailed planning document, and a sample editorial content calendar for you to download and customize for the year.



## Pet Support Services

### Establishing Community Partnerships for Pet Support

#### What is an Established Partner?

A core virtue of HASS is encouraging animal services to form community partnerships with human welfare organizations—such as child welfare agencies, chambers of commerce, food pantries, and more—to better support people and pets.

[\*View a few examples of community partnerships here!\*](#)

#### Getting Started

To identify potential partners, consider [completing an ecosystem map](#) for your community. An ecosystem map is, put simply, a list of available programs and services, sortable by type, availability, cost, and other defining factors. This process will help identify existing service gaps, highlight partnership opportunities, and give all community-facing staff and volunteers an easy-to-use resource for recommending pet and people support options.

This [Pet Support Guide and Worksheet](#) will help you identify services and support being offered, and gaps that show the need for new services and/or partnerships.

Use tools like [pet.fndhelp.com](https://pet.fndhelp.com) to search for existing pet support services by zip code.

#### Next Steps: Brainstorming

The following worksheets highlight two ways your organization can identify potential community partnerships. Both worksheets use a unique approach to lead to a similar result.

1. Use the [Community Partnerships by Service Worksheet](#) to outline support service providers and organizations in your community. This sheet works by **identifying organizations that match a pre-identified service topic**. The results of this worksheet can be used to build partnerships in a variety of service topics and make recommendations to the public during support requests.
2. Use the [Community Partnerships by Need Worksheet](#) to **outline the needs of your community prior to pursuing partnerships**. Unlike the worksheet above, this sheet works by identifying potential partner organizations that can directly support the highest community needs as prioritized by your organization.

## **Building Community Partnerships**

To learn more about building [Community Partnerships](#), see our [complete guide here](#).

## **Community Partnership Communications**

Community partnerships come in all shapes and sizes, and truly the sky is the limit! But like any good partnership, success will come from clear communication and a collaborative spirit. For communications recommendations, see the [HASS and HeARTs Speak Community Partnerships toolkit](#). It's fully customizable—and free to use— with sample graphics, social media posts, news releases, talking points, and more.

## **Volunteer Integration**

Consider utilizing [skilled volunteers](#) for tasks related to community partnerships. Building and maintaining an ecosystem map is an ongoing process that requires maintenance, attention-to-detail, and administrative skills that a volunteer could easily fill to ensure resource lists stay up-to-date.



## Pet Support Services

### Providing Financial Support for Pet Medical Emergencies

#### Overview

Providing financial support for owned pets that are experiencing a medical emergency in the event a pet owner cannot afford care achieves three primary functions:

- Prevent the unnecessary surrender of a pet who has a caretaker
- Improve community relationships through an established support system
- If your organization cannot directly provide financial support, you can create a network of community partners that can

#### Ecosystem Mapping and Community Partnerships

People and pets in your community are going to need support in times of crisis. Ecosystem mapping allows shelters to prevent pets from being surrendered to shelters unnecessarily by outlining support programs and services that are available in your community that help keep people and pets together and identify service gaps. Establishing a strong network of community partners provides a more holistic support approach to the public.

Our [HASS Pet Support Services guide, Establishing Partnerships for Pet Support](#) outlines how to map your local ecosystem and begin establishing partnerships. Don't forget to search [pets.findhelp.com](https://pets.findhelp.com) by zip code and category to find support in your community!

**Tip:** You may be asked for support—say, financial support for an owned pet emergency—that you are able to provide. Sounds straight-forward! But make sure you aren't leaving other important human-service-oriented support options on the table that will address a current situation or even root causes. The [HASS Pet Support Guide and Worksheet](#) can help get you started with this type of problem-solving. This worksheet works best if you fill one out in advance so you can pre-identify programs and services.

#### Collaborating With Local Veterinary Hospitals

HASS data shows that two of the primary reasons animals are given up are their health and the lack of access to affordable and available veterinary care.

[Working with local veterinary practices](#) can be the most efficient way to address that issue, without the expense of running your own public-facing clinic or managing a crowdsourcing

page. Start by collaborating with veterinarians to bridge the accessibility gap, discuss [incremental care](#), and implement financing options.

Use this [letter](#) and this [insert](#) to reach out to veterinarians in your community!

### Payment Resources for Private Veterinarians

- [AVMF Veterinary Care Charitable Fund Information](#)
- [Veterinary Care Foundation](#)
- [Increasing Access to Veterinary Care Ideas](#)
- [Open Door Veterinary Collective Expanding Care Project](#)

### Direct Program and Service Offerings

Looking for support with fundraising to create a new program? See the [HASS Philanthropy Toolkit for Development and Fundraising](#).

### External-Facing Medical Care

[This resource](#) highlights multiple ways your organization may establish an external-facing medical care program through partnering with existing veterinary practices, establishing in-shelter care programs, and creating an external-facing medical facility from scratch.

### Supporting Research and Resources

- [Access to Veterinary Care—A National Family Crisis and Case for One Health](#) (Blackwell & O'Reilly, 2023)
  - “Due to the significance of the human–animal bond in our society, the lack of veterinary care negatively influences both human and nonhuman members of communities.”
  - **“More than 1 out of 4 families struggle to access veterinary care in the United States.”**
  - “Barriers to veterinary care are human-related, requiring a One Health solution.”
  - “Access to veterinary care is the social justice call to action of veterinarians”
- [Assessment of canine health and preventative care outcomes of a community medicine program](#) (Mueller et al., 2018)
  - The study hypothesizes that “the racial, ethnic, and socioeconomic disparities that exist with regard to access to high quality human health services, especially related to preventative care,” are likely similar in regard to access to preventative vet care for the dogs of underserved communities.
  - “Existing research exploring the impact of affordability in veterinary care has found that pet owners with lower incomes (less than \$35,000 a year) or who are unemployed were less likely to have taken their pet to a veterinarian within the previous year. . . (Volk et al., 2011).”

- “Capitalizing on **low-cost, community health models** that have been successful in human healthcare settings may be an effective **method of addressing access to veterinary care** (particularly preventative care) in underserved canine populations . . . .”
- [Goodbye to a Good Friend: An Exploration of the Re-Homing of Cats and Dogs in the U.S.](#) (Weiss et al., 2015)
  - “**Services that might have helped pet retention** were examined for the lower income category since the services listed were all described as free or low cost. **The service that was selected most commonly as something that might have helped respondents was free or low cost veterinary care (40%).** Other service options were free or low cost training or behavior help (34%, more common for dog owners), access to pet friendly housing (33%), free or low cost spay/neuter services (30%), free or low cost pet food (30%), free or low cost temporary pet care or boarding (30%) and assistance in paying pet deposits (17%).”
- [The Impact of the Social Determinants of Human Health on Companion Animal Welfare](#) (McDowall et al., 2023)
  - “In a study of rehomed companion animals, **40% of the participants identified that free or low-cost veterinary care could have prevented relinquishment [57].**”
  - “The proposed integrated framework considers the interconnection between the social determinants of health, One Health, One Welfare and the five domains of animal welfare, providing a model for a more comprehensive approach to better outcomes for companion animals, their guardians and the community.”
- [More Than a Pet](#) (The Humane Society of the United States, n.d.)
  - “20M+ pets live in poverty and that's three times more than the number who enter animal shelters every year.”
  - “70% of pets living in poverty have never seen a veterinarian.”
  - “28% of pet owners are unable to access veterinary care.”
- [Human Animal Support Services \(HASS\) Releases Community Values Survey Results](#) (Human Animal Support Services, 2023)
  - “In fact, **71% of pet owners could not afford nor had access to the means necessary to meet their pets’ needs with the largest barrier being accessibility to affordable veterinary care of all types.** These results point to communities in distress and in agreement for the prioritization of offering direct assistance when care grows beyond the capabilities of pet owners.”





## Pet Support Services

### Providing Free or Low-Cost Medical Care for Owned Pets

#### Overview

Access to veterinary care is limited or may be nonexistent for some pet owners due to cost. Providing free or low-cost veterinary care for people and pets experiencing financial challenges related to pet care can prevent an already complex and often stressful situation from worsening.

#### Ecosystem Mapping and Community Partnerships

People and pets in your community are going to need support when unexpected or complex situations arise. You will be better equipped to prevent pets from being surrendered to shelters, if you know which support programs and services are available in your community. You can build that knowledge and identify gaps that show the need for new programs or community partnerships by mapping your local ecosystem.

Our [HASS Pet Support Services guide, Establishing Partnerships for Pet Support](#) outlines how to map your local ecosystem and begin establishing partnerships. Don't forget to search [pets.findhelp.com](https://pets.findhelp.com) by zip code and category to find support in your community!

**Tip:** You may be asked for support—say, access to pet vaccines—that you are able to provide. Sounds simple! But make sure you aren't leaving other important support options on the table that will address a current situation or even root causes. The [HASS Pet Support Guide and Worksheet](#) can help get you started with this type of problem-solving. This worksheet works best if you fill one out in advance so you can pre-identify programs and services.

#### Collaborating with Local Veterinary Hospitals

Most communities have veterinarians who serve the public, even if a shelter doesn't have veterinary staff. Since one of the primary drivers of relinquishing owned animals is the lack of resources to address an animal's health, working with existing practices can be the lowest-hanging fruit without the expense of running your own public-facing clinic or managing a crowdsourcing page. Helping veterinarians understand the gap in access to care, the techniques around Incremental Care, and how they can offer financing to owners who can't pay immediately and who don't qualify for Care Credit can bring your community together to help more people and animals.

Use this [letter](#) and this [insert](#) to reach out to veterinarians in your community!

## Payment Resources for Private Veterinarians

- [AVMF Veterinary Care Charitable Fund Information](#)
- [Veterinary Care Foundation](#)
- [Increasing Access to Veterinary Care Ideas](#)
- [Open Door Veterinary Collective Expanding Care Project](#)

## Direct Program and Service Offerings

Looking for support with fundraising to create a new program? See the [HASS Philanthropy Toolkit for Development and Fundraising](#).

## Build a Network of Veterinarian Partners During the Crisis

### Tasks for Staff and High-Level Volunteers

- Identify potential veterinarians in your community and reach out to them about contributing to or partnering in crisis situations.
- Please see Pima Animal Care Center's sample email to Veterinarians in your community and their letter to partner clinics explaining the Keeping Families Together Program in [additional resources](#).
- Connect with local Veterinary Schools for student or faculty support. Check out Pima Animal Care Center's pilot Outreach program with the University of Arizona Shelter Medicine Student Club in [additional resources](#).
- Establish guidelines on what would be considered free and/or low-cost vet care.
- Learn more about [incremental veterinary care](#) and consider shifting toward this approach with vet care and vet care partnerships.

### Tasks for Any Volunteers

- Reach out to your pets' veterinarians about joining the effort and partnering with local shelters.

## Host or Co-Host a Drive-Thru or Stationary Clinic to Provide Low-Cost Vet Care, Vaccines, Microchipping and Licensure

### Tasks for Staff and High-Level Volunteers

- Check out [Kansas City Pet Project's toolkit](#) on how they organized their Community Drive-Thru Clinic.
- Spread the news on all social media platforms, community bulletins, and with local community agencies.

## Tasks for Any Volunteers

- Assist staff in organizing and running service events.
- Reshare the news on all social media platforms, community bulletins, and with local community agencies.

## Create “General Care” Guidelines for Pet Owners Who Can’t Access Vet Care

- Check out Pima Animal Care Center’s general care guidelines for the following ailments/conditions in your [additional resources](#)
  - Diarrhea
  - Pregnancy (dog)
  - Vomiting
  - Helping Pets Lose or Gain Weight
  - Fleas
- Check out Maddie’s Fund general care guidelines about common medical concerns in your [additional resources](#).
- Check out [ASPCA Pet Care](#) for more information on general pet care.

**Additional Consideration:** Provide support for owned pets experiencing a medical emergency through [External Facing Medical Care](#) by starting a facility from scratch or creating an in-shelter support care program.

## Supporting Research and Resources

- [Access to Veterinary Care–A National Family Crisis and Case for One Health](#) (Blackwell & O’Reilly, 2023)
  - “Due to the significance of the human–animal bond in our society, the lack of veterinary care negatively influences both human and nonhuman members of communities.”
  - **“More than 1 out of 4 families struggle to access veterinary care in the United States.”**
  - “Barriers to veterinary care are human-related, requiring a One Health solution.”
  - “Access to veterinary care is the social justice call to action of veterinarians”
- [Assessment of canine health and preventative care outcomes of a community medicine program](#) (Mueller et al., 2018)
  - The study hypothesizes that “the racial, ethnic, and socioeconomic disparities that exist with regard to access to high quality human health services, especially related to preventative care,” are likely similar in regard to access to preventative vet care for the dogs of underserved communities.
  - “Existing research exploring the impact of affordability in veterinary care has found that pet owners with lower incomes (less than \$35,000 a year) or who are unemployed were less likely to have taken their pet to a veterinarian within the previous year. . . (Volk et al., 2011).”

- “Capitalizing on **low-cost, community health models** that have been successful in human healthcare settings may be an effective **method of addressing access to veterinary care** (particularly preventative care) in underserved canine populations . . . .”
- [Goodbye to a Good Friend: An Exploration of the Re-Homing of Cats and Dogs in the U.S.](#) (Weiss et al., 2015)
  - “**Services that might have helped pet retention** were examined for the lower income category since the services listed were all described as free or low cost. **The service that was selected most commonly as something that might have helped respondents was free or low cost veterinary care (40%).** Other service options were free or low cost training or behavior help (34%, more common for dog owners), access to pet friendly housing (33%), free or low cost spay/neuter services (30%), free or low cost pet food (30%), free or low cost temporary pet care or boarding (30%) and assistance in paying pet deposits (17%).”
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  - “In a study of rehomed companion animals, **40% of the participants identified that free or low-cost veterinary care could have prevented relinquishment [57].**”
  - “The proposed integrated framework considers the interconnection between the social determinants of health, One Health, One Welfare and the five domains of animal welfare, providing a model for a more comprehensive approach to better outcomes for companion animals, their guardians and the community.”
- [More Than a Pet](#) (The Humane Society of the United States, n.d.)
  - “20M+ pets live in poverty and that's three times more than the number who enter animal shelters every year.”
  - “70% of pets living in poverty have never seen a veterinarian.”
  - “28% of pet owners are unable to access veterinary care.”
- [Human Animal Support Services \(HASS\) Releases Community Values Survey Results](#) (Human Animal Support Services, 2023)
  - “In fact, **71% of pet owners could not afford nor had access to** the means necessary to meet their pets’ needs with the **largest barrier being accessibility to affordable veterinary care of all types.** These results point to communities in distress and in agreement for the prioritization of offering direct assistance when care grows beyond the capabilities of pet owners.”



## Pet Support Services

### Providing Support for Free or Low-Cost Spay/Neuter Services

#### Collaborating with Local Veterinary Hospitals for Spay/Neuter Services

Since one of the primary drivers of relinquishing owned animals is the lack of pet healthcare accessibility, working with veterinary practices can mitigate the expense of running a public-facing clinic or managing a crowdsourcing page. Helping local veterinarians understand the gap in access to care, the techniques around Incremental Care, and how they can offer financing can bring your community together to help more people and animals.

Use this [letter](#) and this [insert](#) to reach out to veterinarians in your community!

#### Payment Resources for Private Veterinarians

- [AVMF Veterinary Care Charitable Fund Information](#)
- [Veterinary Care Foundation](#)
- [Increasing Access to Veterinary Care Ideas](#)
- [Open Door Veterinary Collective Expanding Care Project](#)

#### Direct Program and Service Offerings

Looking for support with fundraising to create a new program? See the [HASS Philanthropy Toolkit for Development and Fundraising](#).

Providing free and low-cost spay/neuter options may be a standalone practice or part of a larger public-facing medical service offering. Consider integrating spay and neuter services through External Facing Medical Care by [Starting a Facility From Scratch](#) or creating an [In-Shelter Support Care Program](#).

For example, medical-based programs that could encompass spay and neuter services, reference the HASS Pet Support Guide to [providing options during Medical Emergencies](#) and [Free or Low-Cost Medical Care](#) to help you get started.

#### Ecosystem Mapping and Community Partnerships

People and pets in your community are going to need support when unexpected or complex situations arise. You will be better equipped to prevent pets from being surrendered to

shelters, if you know which support programs and services are available in your community. You can build that knowledge and identify gaps that show the need for new programs or community partnerships by mapping your local ecosystem.

Our [HASS Pet Support Services guide, Establishing Partnerships for Pet Support](#) outlines how to map your local ecosystem and begin establishing partnerships. Don't forget to search [pets.findhelp.com](https://pets.findhelp.com) by zip code and category to find support in your community!

**Tip:** You may be asked for support—say, access to pet food—that you are able to provide. Sounds simple! But make sure you aren't leaving other important support options on the table that will address a current situation or even root causes. The [HASS Pet Support Guide and Worksheet](#) can help get you started with this type of problem-solving. This worksheet works best if you fill one out in advance so you can pre-identify programs and services.

## Supporting Research and Resources

- [Goodbye to a Good Friend: An Exploration of the Re-Homing of Cats and Dogs in the U.S.](#) (Weiss et al., 2015)
  - **“Services that might have helped pet retention** were examined for the lower income category since the services listed were all described as free or low cost. The service that was selected most commonly as something that might have helped respondents was free or low cost veterinary care (40%). Other service options were free or low cost training or behavior help (34%, more common for dog owners), access to pet friendly housing (33%), **free or low cost spay/neuter services (30%)**, free or low cost pet food (30%), free or low cost temporary pet care or boarding (30%) and assistance in paying pet deposits (17%).”
- [A Pilot Program to Assess and Address the Veterinary Health Care Needs of the Hispanic Community in Knoxville, TN](#) (Weisent et al., 2023)
  - “Key survey results (n=45) showed that 28% of Centro community members obtained pets through an animal shelter or rescue organization, friends or family gifted 28%, and 26% came from breeders or pet stores. The primary reason for pet ownership included a love of animals and the perspective that the pet is part of the family (76%). **Forty-eight percent reported that pets were not spayed or neutered (s/n), and of these, 39% said s/n was too expensive, whereas 22% did not know where to receive s/n services.** Respondents reported that they would access local veterinary services for annual exams (56%), vaccinations (82%), and parasite prevention (58%). Twenty-six percent identified a time over the past two years when they could not get needed treatment for a sick pet, the primary reason being lack of affordable care. Other reasons included not knowing where to find care (22%), language barrier (11%), and a concern that the care provider would think badly of them for not seeking care earlier (22%). Participants said they would be interested in services and resources on vaccines and parasite prevention (64%), training and behavior (36%), information on clinics, and pet care resources (29%).”
  - “The survey findings **led to implementation of a vaccine clinic** for Knoxville’s Latino community. The municipal shelter attended, and local resources and AVMA brochures in

Spanish were provided on pet ownership, internal parasites, external parasites, vaccines, heartworm disease, and spay-neuter options.”

- [Race and ethnicity are not primary determinants in utilizing veterinary services in underserved communities in the United States](#) (Decker Sparks et al., 2018)
  - “When veterinary and animal welfare organizations deliberately remove structural barriers embedded with racial inequalities, individuals, regardless of race and ethnicity, proceed with companion-animal sterilization. Therefore, service providers must use **unbiased, informed, and culturally competent practices to improve companion-animal welfare** through the optimization of veterinary services, **including spay and neuter.**”



## Pet Support Services Pet Deposit Assistance

### Pet Fees and Deposits

Housing is already costly. Additional pet fees and deposits only add to this already expensive cost and can simply be out of reach for families to meet, sooner leading to pet relinquishment. Welfare organizations offering to cover a one-time fee is money well spent when the result is keeping people and pets together.

### Creating a Special Fund for Pet Fees and Deposits

#### Tasks for Staff and High-Level Volunteers Specific to Philanthropy, Marketing & Fundraising

- Identify and connect with a new donor audience.
- Create a case for support to help the community understand the direct impact of the unmet need of paying pet deposits and the fiscal implications of increased animal intake.
- Allocate a separate fundraising budget, or restricted fund, specific to this new program to not interfere with existing fundraising initiatives
- Where possible, reallocate funds from other areas to respond to the eviction disaster.
- Share donation campaigns on all communications channels and the channels of brand partners where applicable to garner support.
- Create a flyer to inform community members that your organization can provide pet deposit/fee assistance.
- Reach out to local property management companies and let them know that your organization is providing pet fee/deposit assistance for tenants in need of support.
- Collaborate with local governments to increase accessibility to pet-friendly housing
- Examples of the above include:
  - KC Pet Project's Pet Care Assistance Program application which can provide funding for pet deposits and fees, in addition to other financial assistance, located in your [additional resources](#).
  - Check out the [Pets For Life Sustainability Guide](#) for detailed guidance on how to message and fundraise for pet owner support services.

#### Tasks for Any Volunteers



- Reach out to existing donors and connect with people from within your network to support
- Reshare donation campaign on all personal social media platforms Identify and list local property management companies.

### Provide Community Members with Resources on Tenant Rights

- Inform yourself on tenant rights and share this information with community members. See resources on [Tenant rights by state here](#).
- Use [The HSUS Pets are Welcome toolkit](#) to learn how to work with property owners to build more pet-inclusive rental properties, a key solution in our efforts to help mitigate unnecessary pet surrenders due to widespread evictions.

### Ecosystem Mapping and Community Partnerships

People and pets in your community are going to need support when unexpected or complex situations arise. You will be better equipped to prevent pets from being surrendered to shelters, if you know which support programs and services are available in your community. You can build that knowledge and identify gaps that show the need for new programs or community partnerships by mapping your local ecosystem.

Our [HASS Pet Support Services guide, Establishing Partnerships for Pet Support](#) outlines how to map your local ecosystem and begin establishing partnerships. Don't forget to search [pets.findhelp.com](#) by zip code and category to find support in your community!

**Tip:** You may be asked for support—say, access to pet food—that you are able to provide. Sounds simple! But make sure you aren't leaving other important support options on the table that will address a current situation or even root causes. The [HASS Pet Support Guide and Worksheet](#) can help get you started with this type of problem-solving. This worksheet works best if you fill one out in advance so you can pre-identify programs and services.

### Fundraising

Looking for support with fundraising to create a new program? See the [HASS Philanthropy Toolkit for Development and Fundraising](#).

### Supporting Research and Resources

- [Goodbye to a Good Friend: An Exploration of the Re-Homing of Cats and Dogs in the U.S.](#) (Weiss et al., 2015)
  - “**Services that might have helped pet retention** were examined for the lower income category since the services listed were all described as free or low cost. The service that

- was selected most commonly as something that might have helped respondents was free or low cost veterinary care (40%). Other service options were free or low cost training or behavior help (34%, more common for dog owners), access to pet friendly housing (33%), free or low cost spay/neuter services (30%), free or low cost pet food (30%), free or low cost temporary pet care or boarding (30%) **and assistance in paying pet deposits (17%).**"
- [Pet-Friendly for Whom? An Analysis of Pet Fees in Texas Rental Housing](#) (Applebaum et al., 2021)
    - "...low-income communities and communities of color were more likely than higher income and predominantly White communities **to pay disproportionately higher fees to keep pets in their homes.**"
    - "The burden of pet rental fees may contribute to both housing insecurity and companion animal relinquishment."
    - "Overall, our findings indicate that, within Texas, the costs associated with housing a family that includes a pet disproportionately harm populations that are already economically disadvantaged. Specifically, pet-friendly rental units come at a higher relative cost for low-income communities and communities of color."
  - [Pets for Better Wellbeing: Mars Pet Nutrition North America 2022 Report - Better Cities For Pets™](#) (Mars Pet Nutrition, 2022)
    - "When pet parents struggle, here's what they say would help them keep their pets: **short-term support for pet costs** including food (35%), **pet-friendly housing options** (29%), and affordable training for pet behavior issues (24%)."
  - [2021 Pet-Inclusive Housing Report](#) (Michelson Found Animals Foundation & Human Animal Bond Research Institute, 2021)
    - The 2021 Pet-Inclusive Housing Report identified that **72% of residents report that pet-friendly housing is hard to find.** Additionally, 24% of renters with pets said that "my pet has been a reason for me needing to move," which means as many as **6 million people have experienced a move related to pet ownership** at some point in their lives.



## Pet Support Services

### Identifying Affordable, Pet-Inclusive Housing

#### Direct Program and Service Offerings

##### Identifying Temporary Housing Solutions in Your Community

Assist pet owners in finding temporary pet housing solutions within their own network, or provide temporary care within the shelter or existing shelter programs such as foster while the pet owner seeks new housing accommodations.

##### Assist Community Members in Identifying Existing Resources Within Their Own Networks

- Encourage people to think through their own circle of friends, family and social networks for temporary placement of their pets.
- Connect person with local veterinarians or emergency care locations who offer temporary crisis sheltering
- Offer assistance packages, veterinary care, food and behavior advice can open up options for people willing to provide a short-term place for the pet to stay.

##### Provide Matchmaking Tools for Self-Identified Temporary Placement

- Provide an organization-run online platform that allows people to identify others in their community willing to be a temporary guardian. See an example of the [Temporary Pet Guardians program](#) from the Animal Welfare Association, which includes a sample Temporary Pet Guardian Contract, located in your [additional resources](#).
- [911fosterpets](#) can now connect individuals and families to temporary foster homes.
- Advocate for searching temporary housing solutions on [pets.findhelp.com](https://pets.findhelp.com)

##### Hotel and Motel Partnerships

When friends or family isn't an option, many reside in a hotel or motel to avoid relinquishing pets. Often, even pet-friendly hotels require additional fees, and [being able to cover a one-time fee](#) will be incredibly helpful. In addition, from the hotel/motel perspective, their biggest concern is potential property damage, so validating that concern can go a long way in developing rapport and responsiveness with your local hotels and motels.

## Build a List of Pet-Friendly Hotels

### Tasks for Staff and High-Level Volunteers

- Research and create a list of pet-friendly hotels in your community to share with community members.
  - Example: [www.bringfido.com](http://www.bringfido.com).
- Reach out to hotels to request and encourage relaxation of policies on allowing pets. Since their biggest concern is usually potential property damage, it might be easier to reduce the nightly rate compared to reducing their pet fees.
- Reach out to someone in the hotel/motel sales, marketing, or brand partnerships department. They have the ability to make deals while the hotel manager will be the one to make any.

### Tasks for Any Volunteers

- Research and create a list of pet-friendly hotels in your community to share with community members.

## Provide Support for Families While They Stay in Hotel/Motels

- Provide families with support packages detailed above to make sure they have everything they need while staying at hotels/motels
- Consider providing additional supplies that can help prevent property damage, such as crates and kong wobblers.

## Partner with Hotels and Motels

You can use the sample dialogue to start the conversation with hotels and motels, located in your [additional resources](#).

## Create a Special Fund for Pet Hotel Fees

### Tasks for Staff and High-Level Volunteers

- Contact donors in and outside of the animal welfare industry
- Create a case for support to help donors, volunteers, foundations and other stakeholders understand the fiscal implications of increased animal intake versus keeping pets with their people.
- Allocate funds to cover pet hotel fees so that pets can remain with their people.
- Share donation campaigns on all social media platforms to engage new donors.
- Check out the [Pets For Life Sustainability Guide](#) for detailed guidance on how to message and fundraise for pet owner support services.

### Tasks for Any Volunteers

- Reach out to donors that could potentially bring in new support and connect with people from within your network to become new donors.

- Reshare donation campaign on all social media platforms to engage new donors.

## Emotional Support Animals (ESA)

[One in every four adults in the United States](#) have some type of disability. Many people are not aware of or do not understand the legal requirement for reasonable accommodations under the Fair Housing Act that allows people to have emotional support animals. This can be one more option for keeping people and pets together.

### Provide Community Members Resources on ESA Rights

#### Tasks for Staff and High-Level Volunteers

- Create an instructional flyer to provide pet owners details on how to navigate the ESA process and offer a sample letter that can be taken to a health care provider to make the process easier. Examples can be found in your [additional resources](#).
- More information on ESA rights can be found at the Bazelon Center for Mental Health Law. Resources can be found in your [additional resources](#).

#### Tasks for Any Volunteers

- Inform yourself on ESA rights to help spread awareness to community members.
- More information on ESA rights can be found at the Bazelon Center for Mental Health Law. Resources can be found in your [additional resources](#).

### Provide Community Members Resources on Tenant Rights

- Inform yourself on tenant rights and share this information with community members. See resources on [Tenant rights by state here](#).
- Use [The HSUS Pets are Welcome toolkit](#) below to learn how to work with property owners to build more pet-inclusive rental properties, a key solution in our efforts to help mitigate unnecessary pet surrenders due to widespread evictions.

## Fundraising

Looking for support with fundraising to create a new program? See the [HASS Philanthropy Toolkit for Development and Fundraising](#).

## Ecosystem Mapping and Community Partnerships

People and pets in your community are going to need support when unexpected or complex situations arise. You will be better equipped to prevent pets from being surrendered to shelters, if you know which support programs and services are available in your community. You can build that knowledge and identify gaps that show the need for new programs or community partnerships by mapping your local ecosystem.

Our [HASS Pet Support Services guide, Establishing Partnerships for Pet Support](#) outlines how to map your local ecosystem and begin establishing partnerships. Don't forget to search [pets.findhelp.com](https://pets.findhelp.com) by zip code and category to find support in your community!

**Tip:** You may be asked for support—say, access to pet food—that you are able to provide. Sounds simple! But make sure you aren't leaving other important support options on the table that will address a current situation or even root causes. The [HASS Pet Support Guide and Worksheet](#) can help get you started with this type of problem-solving. This worksheet works best if you fill one out in advance so you can pre-identify programs and services.

## Supporting Research and Resources

- [Pet-Friendly for Whom? An Analysis of Pet Fees in Texas Rental Housing](#) (Applebaum et al., 2021)
  - "...low-income communities and communities of color were more likely than higher income and predominantly White communities **to pay disproportionately higher fees to keep pets** in their homes."
  - "The burden of pet rental fees may contribute to both housing insecurity and companion animal relinquishment."
  - "Overall, our findings indicate that, within Texas, the costs associated with housing a family that includes a pet disproportionately harm populations that are already economically disadvantaged. Specifically, pet-friendly rental units come at a higher relative cost for low-income communities and communities of color."
- [Preventing Eviction and Housing Loss: Taking Advantage of a One Health Approach and the Human-Companion Animal Bond](#) (Uhlir et al., 2023)
  - **Makes the case for animal shelters as an entry point for human services:** Many clients surrendered their companion animals while under financial stress, particularly prior to eviction or housing loss. These observations suggest that it might be possible to learn more about the facts leading up to housing loss by looking at companion animal relinquishment. This also opens the possibility that intervention strategies at the point of companion animal relinquishment could delay or prevent housing loss. If such strategies were implemented and found to be effective, they would have the immediate benefit of preventing housing loss for both companion animals and their owners.
- [Pets for Better Wellbeing: Mars Pet Nutrition North America 2022 Report - Better Cities For Pets™](#) (Mars Pet Nutrition, 2022)
  - "When pet parents struggle, here's what they say would help them keep their pets: short-term support for pet costs including food (35%), **pet-friendly housing options** (29%), and affordable training for pet behavior issues (24%)."
- [2021 Pet-Inclusive Housing Report](#) (Michelson Found Animals Foundation & Human Animal Bond Research Institute, 2021)
  - The 2021 Pet-Inclusive Housing Report identified that **72% of residents report that pet-friendly housing is hard to find**. Additionally, 24% of renters with pets said that "my pet has been a reason for me needing to move," which means as many as **6 million people have experienced a move related to pet ownership** at some point in their lives.



## Pet Support Services Extended Temporary Boarding for Pets

### Direct Program and Service Offerings

#### Support for Domestic Violence (DV) Survivors

If a family is facing eviction and/or experiencing domestic violence (DV), often, access to a safe temporary pet housing is the primary factor in seeking support, especially when an individual wishes to stay at a domestic violence shelter. [Seventy-one percent of pet-owning women](#) entering shelters have reported that their abuser has harmed (injured, maimed, threatened, killed) their pet within the past year. Families coming into your organization may be dealing with multiple stressors in their lives and making sure they have the appropriate support is key. Consider the many ways your organization can possibly provide support. If you or someone you know is in need of DV support, visit:

<https://www.thehotline.org/>

#### Share Resources on the Legal Rights of Survivors of Domestic Violence

- See an informational document on Legal Rights as a survivor of domestic violence, located in your [additional resources](#).
- If someone is evicted, denied housing, or had assistance terminated because they are a victim of domestic violence, they are also likely a victim of sex discrimination, in direct violation of the [Fair Housing Act](#).

#### Provide Financial Support Resources for DV Survivors Looking to Temporarily Board Their Pets

- Inform clients about [Red Rover's Domestic Violence Resources](#) and relief programs:
  - [Safe Escape Grants](#), which offers financial assistance to cover the cost of boarding while a DV survivor is staying at a DV Shelter.
  - [Safe Housing Grants](#), which offers a variety of grant opportunities ranging from on-site housing at a DV shelter to housing at an animal shelter/rescue.
  - Refer families to [Red Rover for Urgent Care Relief Grants](#).
- Depending upon your location in the U.S., [BestyBNB](#) is also an affordable option for care.

#### Additional Resources

Check out the [Urban Resource Institute's People and Animals Living Safely \(PALS\) program](#) in New York City. Their program offers co-living options for DV survivors and their pets, as well as safety and discharge planning with pets in mind, case management, pet behavior support, humane education, subsidized veterinary care and pet supplies, and advocacy. Additionally, they provide technical assistance and training to human services and animal welfare groups to learn more about the link

between the human-animal bond, domestic violence, and how to support survivors. For more information, contact [PALSInfo@urinyc.org](mailto:PALSInfo@urinyc.org).

People will only utilize DV support services if they are fully informed and feel safe seeking support. Promote programs clearly and concisely, translate information into languages other than English if your community demographics indicate the need, and anticipate ways people in underserved areas will access the information. See how to translate materials here: [Offering Services in Other Languages](#)

See the following examples of support service program descriptions from Denver Animal Protection and Animal Protective Association of Missouri in [additional resources](#):

- Denver Animal Protection Displacement/Eviction Relief Program (Temp Boarding)
- Denver Animal Protection Displacement/Eviction Relief Program (Pet Supplies/Services) in English and Spanish
- Animal Protective Association of Missouri Pet Partners Crisis Housing Program

## Replicating Existing Programs

### Adapt Existing Safe Haven Programming for Eviction Support

See Humane Rescue Alliance's protective custody agreement (located in your [additional resources](#)) that could be adapted for eviction support.

### Adapt Existing Temporary Boarding Programs to Other Housing Needs

East Bay SPCA's Hold for Home program has been used to provide temporary boarding for pets on veterinarian-prescribed pain medication when those pets' owners are in substance use recovery or are currently misusing substances. This protects owners from relapse through the use of these controlled substances. This should be pet-guardian led with decision-making power falling solely on the guardian to decide what is best for their recovery and their pet.

- See details in [additional resources](#).
- See [KC Pet Project "Home Away From Home"](#)

### Provide Resources on Existing Co-Sheltering Programs

Co-sheltering refers to sheltering that allows pets to stay with their people.

#### Tasks for Staff and High-Level Volunteers

- Inform individuals and families in need of temporary housing about co-sheltering programs in your area.
- If your organization is located in or around the New York Area, check out the [Urban Resource Institute PALS program](#) which offers co-living services for DV survivors and their pets (any species), as well as safety planning with pets in mind, case management, pet behavior support, humane education, subsidized vet care and pet supplies, discharge planning, and advocacy!

#### Tasks for Any Volunteers



- Identify and list all co-sheltering programs that exist in your area.

## **Encourage Human Shelters to Implement Co-Sheltering Policies**

### **Tasks for Staff and High-Level Volunteers**

- Reach out to existing human shelters and discuss the importance of letting pets stay with their people while temporarily unhoused.
- Advocate on behalf of individuals and families in need of temporary housing with their pets.
- Offer to provide pet supplies and care such as crates, vaccinations, KONG wobblers, etc.

### **Tasks for Any Volunteers**

- Identify and list all human shelters in your area.

## **Temporary Foster Placement For Owned Pets**

Providing the option to temporarily house an owned pet with a foster parent can be extremely helpful while the individual or family finds housing. Knowing that their pet will return to them safely can reduce fear and feelings of being taken advantage of during a moment of crisis, and increase the likelihood of people utilizing the service. The key is to set clear expectations from the beginning including parameters of visitation and communication, length of stay\*, and relinquishment terms so the shelter minimizes challenges in the unfortunate situation where someone can no longer keep their pet.

*\*When establishing length of stay for temporary foster placement, we recommend starting with 30 days and offering an option to extend as needed.*

## **Provide Temporary Foster Placement for Owned Pets**

### **Tasks for Staff and High-Level Volunteers**

- Connect with existing foster networks and inform them about the ways that they could be helping human-families stay together during crisis.
- Adapt existing temporary housing programs, such as safe haven programming.
- Establish clear expectations for all temporary fosters and pet owners.
- Build a team of volunteer ambassadors that provide support for temporary foster homes and the pet owners they are working with.

### **Tasks for Any Volunteers**

- Connect with existing foster networks and inform them about the ways that they could be helping human-families stay together during crisis.
- Assist in providing support for temporary foster homes and the pet owners they are working with through follow up communication.

## Recruit New Foster Parents

### Tasks for Staff and High-Level Volunteers

- If your organization is struggling to recruit more foster parents, especially for bigger dog breeds, check out [this presentation on foster recruitment](#) by the HASS Foster Working Group.
- See [this resource](#) on how to get more pets into foster right now and [this resource](#) on creating a community culture that values fostering.

### Tasks for Any Volunteers

- Assist staff in recruitment efforts.
- Consider temporarily fostering an owned pet, if you are able to, to help more families stay together.

## Additional Fostering Resources

For general tips and tools on foster programs check out resources from [Maddie's Fund](#), [Bad Rap](#), and [Jackson Galaxy](#). In addition, [Doobert](#) has two great new features on their website, called [Fosterspace](#) which allows you to better communicate with fosters, keep track of their needs, recruit new foster homes, as well as an ["Instagram" style Ambassador page](#) that allows fosters to update their foster animal's page with stories, pictures and videos.

**Tip:** The key to success for temporary housing of owned animals is to identify fosters who understand the need to support people going through a crisis situation and believe in extending compassion and non-judgment. The shelter should be the liaison between the permanent guardian and foster home to minimize complications and challenges.

## Temporary Boarding for Owned Pets

In the absence of foster home availability, or in addition to foster homes to maximize temporary placement, consider using shelter kennel space to house owned animals with the same agreements provided below in place. While not as cost-effective, partnering with local boarding facilities to provide additional space for temporary housing is another option. During slow travel seasons, most boarding facilities have available space and may be willing to provide a discount.

### Use Available Shelter Kennel Space to Provide Temporary Housing

- Discuss and agree on how to offer free or low-cost options with boarding facilities.
- Set clear expectations for visitation, length of stay, and relinquishment terms.

### Connect With Local Boarding Facilities to Provide Additional Space for Temporary Housing

### Tasks for Staff and High-Level Volunteers

- Reach out to local boarding facilities and discuss the importance of offering temporary housing in order to keep more families together during a crisis.

- Set clear expectations for visitation, length of stay, and relinquishment terms within your partnership.

### Tasks for Any Volunteers

- Identify and create a list of local boarding facilities that shelter staff can reach out to.

### Additional Temporary Boarding Resources

When it comes to starting a temporary boarding program, a straightforward, simple safekeeping agreement like the ones from the Animal Welfare League of Arlington, All About Animals Rescue, Pima Animal Care Center, Lifeline Animal Project, and Greenville County Animal Care may be all your organization needs. Please see the agreement samples in [additional resources](#). For more in-depth paperwork, Paws Between Homes has great sample documents to use when structuring your program in this way. They can be found in [additional resources](#):

- Agreement for Services
- Pet Information Sheet
- Permanent Guardian Sheet
- Foster Home Agreement

See Greenville County Animal Care's Temporary Hold for Pet Owner Agreement and Cincinnati Animal CARE Humane Society's comprehensive documents for their SAFE Coalition to "Save Animals From Eviction" in [additional resources](#):

- SAFE Coalition Explanation of Benefits
- SAFE Emergency Assistance Request Form
- SAFE Owner Agreement and Release of Liability
- SAFE Public Flyer

**Note:** Consider adding to your foster home agreement that posting photos of animals on social media is not allowed. With the pets being owned, public sharing in this way could create misunderstandings.

### Human Social Services

There is a significant need for human and animal services to learn from each other and collaborate on ways to better support human-animal families. Pets are finally being widely recognized as members of the family and social service agencies are learning more about the human-animal bond and the impact it can have on families. Experiencing a pet crisis may be just one of the many challenges people and their pet(s) may be faced with, so being able to connect them to further social services can result in a better outcome for the entire family.

### Connect Community Members With Local Social Services

You may connect community members with local social service agencies using sites such as [findhelp.org](http://findhelp.org), [pets.findhelp.com](http://pets.findhelp.com), and [justshelter.org](http://justshelter.org). You may also find that other local agencies have created resource lists of local services. If you have not already done so, consider connecting with local service providers to confirm if they have a public-facing resource list or are able to be shared through developing a partnership.

## Create a List of Local Social Service Resources to Share With Community Members

### Tasks for Staff and High-Level Volunteers

- Complete an [Ecosystem Map](#) of your community
- Create a shareable spreadsheet with contact information accessible on your website. Check out Nashville Humane Society's directory of resources in [additional resources](#).
- Create a flyer with resources to be shared at your organization, on social media, with other community agencies, and at community bulletin boards. Take a look at Nashville Humane Society's COVID-19 resource flyer, located in your resources.

### Tasks for Any Volunteers

- Identify social service agencies in your area.
- Assist staff in sharing the directory and resource flyer with community members.

## Build Partnerships With Local Social Services

### Tasks for Staff and High-Level Volunteers

- Reach out to potential social service partners and discuss the importance of collaborating so that human-animal families have access to all the resources they need during crisis. Make sure to emphasize how keeping families together can benefit their clients and not just their animals.
- Co-create action plans and resource kits for people being evicted who have pets, that can be shared in the shelter and by social services agencies. Resource kits may include a care package with supplies, instructions on next steps, housing solutions, and other supporting items.

### Tasks for Any Volunteers

- Make a list of social service agencies in the area.

## Fundraising

Looking for support with fundraising to create a new program? See the [HASS Philanthropy Toolkit for Development and Fundraising](#).

## Ecosystem Mapping and Community Partnerships

People and pets in your community are going to need support when unexpected or complex situations arise. You will be better equipped to prevent pets from being surrendered to shelters, if you know which support programs and services are available in your community. You can build that knowledge and identify gaps that show the need for new programs or community partnerships by mapping your local ecosystem.

Our [HASS Pet Support Services guide, Establishing Partnerships for Pet Support](#) outlines how to map your local ecosystem and begin establishing partnerships. Don't forget to search [pets.findhelp.com](https://pets.findhelp.com) by zip code and category to find support in your community!

**Tip:** You may be asked for support—say, access to pet food—that you are able to provide. Sounds simple! But make sure you aren't leaving other important support options on the table that will address a current situation or even root causes. The [HASS Pet Support Guide and Worksheet](#) can help get you started with this type of problem-solving. This worksheet works best if you fill one out in advance so you can pre-identify programs and services.

## Supporting Research

- [Human Animal Support Services \(HASS\) Releases Community Values Survey Results](#) (HASS, 2023)
  - “A core principle of HASS is that an animal shelter should be among a community’s options for pet care, rather than the first and only line of defense. In agreement of this principle, 81% of one community’s respondents indicated overwhelming support for care provided in foster homes versus in-shelter care when asked their preference if they had to relinquish their pet.”
- [Emergency Animal Boarding: A Social Return on Investment](#) (Ma et al., 2023)
  - “The most valuable changes were being able to keep their companion animal and improved mental health and wellbeing. **We estimate that this program results in social value worth AUD 8.21 for each AUD 1 invested into running the program.** This study shows the importance of considering companion animals as part of the family unit and supporting people experiencing a crisis to keep their companion animal.”
- [The Impact of Pet Care Needs on Medical Decision-Making among Hospitalized Patients: A Cross-Sectional Analysis of Patient Experience](#) (Polick et al., 2021)
  - “**Respondents (n = 113) expressed interest in a low/no-cost pet-boarding or foster program for adult patients struggling to find pet care assistance.** The majority of respondents (n = 71; 63%) reported challenges securing pet care during a prior hospitalization, and/or knew someone who encountered similar challenges. Respondents also indicated that these challenges had a negative impact on health, recovery, or their own decision to receive medical care. Pet care challenges during hospitalization are likely common and have the potential to hamper medical decision-making and health outcomes of inpatients.”
- [Human-Animal Relationships and Social Work: Opportunities Beyond the Veterinary Environment](#) (Arkow, 2020)
  - “This article identifies **six reasons why social workers should be cognizant of human-animal relationships** and introduces nine ways, with action steps, in which social workers can include these relationships into training and practice outside the more developed field of veterinary social work. These venues include: agencies working in child protection and child sexual abuse; children’s advocacy centers and courthouse facility dogs; animal shelters; domestic violence shelters; public policy advocacy; clinical practice;

agencies working with older and disabled populations; veterinary sentinels for intimate partner violence; and pet support services for homeless populations.”

- [The PALS Report and Survey - National Survey on Domestic Violence and Pets: Breaking Barriers to Safety and Healing](#) (Urban Resource Institute & National Domestic Violence Hotline, n.d.). Also see the [Executive Summary](#).
  - This is the first study of its kind to interview survivors in a moment of outreach and decision-making, in contrast to studies of survivors already settled in a shelter and removed from their abusive environment. The results confirmed and expanded upon numerous such studies of survivors in shelters who similarly reported harm and threats to their pets had kept them from leaving an abusive situation.
  - “**97%** of respondents said that keeping their pets with them is an important factor in deciding whether or not to seek shelter.”
  - “**91%** indicated that their pets’ emotional support and physical protection are significant in their ability to survive and heal.”



## **Pet Support Services**

### **Short-Term Emergency Boarding/Foster for Pets**

#### **Direct Program and Service Offerings**

##### **Temporary Foster Placement For Owned Pets**

Providing temporary housing with a foster parent can be extremely helpful while an individual or family is in crisis. Knowing a pet will return safely can reduce fear and increase the likelihood of more people utilizing the program. Set clear expectations including parameters of visitation and communication, length of stay\*, and relinquishment terms so the shelter minimizes challenges in the unfortunate situation relinquishment is the only option.

*\*When establishing length of stay for temporary foster placement, we recommend starting with 30 days and offering an option to extend as needed.*

##### **Provide Temporary Foster Placement for Owned Pets**

###### **Tasks for Staff and High-Level Volunteers**

- Connect with existing foster networks about ways they can help families stay together during a crisis.
- Replicate existing temporary housing programs, such as safe haven programming.
- Establish clear expectations and lines of communication for all temporary fosters and pet owners.
- Build a specific team of volunteers that provide support for temporary foster homes and the pet owners they serve.

###### **Tasks for Any Volunteers**

- Connect with existing foster networks about ways they can help families stay together during a crisis.
- Assist in providing support for temporary foster homes and the pet owners they are working with through follow-up communication.

##### **Recruit New Foster Parents**

###### **Tasks for Staff and High-Level Volunteers**

- Check out [this presentation on foster recruitment](#) by the HASS Foster Working Group for recruitment tips.
- See [this resource](#) on how to quickly get more pets into foster and [this resource](#) on creating a community culture that values fostering.

### Tasks for Any Volunteers

- Assist staff in recruitment efforts using the tips above.
- Consider temporarily fostering an owned pet

### Additional Fostering Resources

For general tips and tools on foster programs:

- [Maddie's Fund](#)
- [Bad Rap](#)
- [Jackson Galaxy](#)

In addition, [Doobert](#) has great new features on their website, called [Fosterspace](#) that allows you to better communicate with fosters, keep track of their needs, recruit new foster homes, as well as an "[Instagram](#)" style [Ambassador page](#) that allows fosters to update their foster animal's page with stories, pictures and videos.

**Tip:** The key to success for temporary fostering of owned animals is to identify community members who understand the need to support people going through a crisis and believe in extending [compassion and non-judgment](#). The shelter should be the liaison between the permanent guardian and foster home to support the temporary fostering process with the ultimate goal of reunification.

### Temporary Boarding for Owned Pets

When necessary, consider using shelter kennel space to house owned animals with the same agreements provided below in place. While not always as cost-effective, partnering with local boarding facilities for temporary housing is another option. During slow travel seasons, most boarding facilities have available space and may be willing to provide a discount.

### Use Available Shelter Kennel Space to Provide Temporary Housing

When starting a temporary boarding program, a straightforward, simple safekeeping agreement. Animal Welfare League of Arlington, All About Animals Rescue, Pima Animal Care Center, and Greenville County Animal Care have examples shared in [additional resources](#).

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**Note:** Consider adding to your foster home agreement that posting photos of animals on social media is not allowed. With the pets being owned, public sharing could create misunderstandings.

#### Tasks for Staff and High-Level Volunteers

- Reach out to local boarding facilities and discuss the importance of offering temporary housing in order to keep more families together during crisis.
- Set clear expectations for visitation, length of stay, and relinquishment terms within your partnership.

#### Tasks for Any Volunteers

- Identify and create a list of local boarding facilities that personnel can reach out to.

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There is a significant need for human and animal services to learn from each other and collaborate on ways to better support families. Pets are finally being widely [recognized as members of the family](#) and social service agencies are embracing how the human-animal bond impacts families. Experiencing a crisis is one of the many challenges people and their pet(s) face, so being able to connect them to local social services can result in a better outcome for the entire community.

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## Pet Support Services

### Providing Behavior and Training Support

#### Behavior Advice and Trainer Referrals

Offering behavioral support can be lifesaving and life-changing for pets experiencing behaviors that aren't easily managed. Changes in environment, new people, and other stressors can all create behavioral challenges or changes such as excessive barking, lunging while on a leash, not using the litter box, and more. Creating a safe space for a person to discuss these challenges and receive advice can help keep more people and pets together. Here are a few resources to get started:

- [Integrate Behavior into the Every Day: Gaining Buy-In and Training Your Staff](#)
- [Foster-Centric Programming \(See Behavior Foster section\)](#)
- [Learn more about community-based behavior support](#)

#### Offer Behavior Support From Volunteers in Shelter or at Home

- Create a behavior support email address and/or phone number.
- Develop protocols regarding support such as what volunteers can handle vs. staff, how support is provided, what resources and handouts are shared, how communication is tracked, and how follow-up is handled.
- Develop training for volunteers who directly or indirectly provide behavior support.
- Identify people to supervise, train, and schedule behavior support volunteers.
- Develop a list of local trainers and behavior professionals for referral.

#### Offer Free Training Programs or Resources

Investigate whether your organization or other organizations in your community offer free behavior support resources. [Pets.findhelp.com](https://pets.findhelp.com) is a great place to start.

#### Additional Resources

You may access [additional behavior resources available here](#), or reference the sections below.

#### Websites

- HRA [Humane Rescue Alliance Behavior Helpline](#)
- HRA [Head Halter Desensitization](#)
- HRA [Crate Training](#)
- HRA [Cat Behavior](#)

- [San Diego Humane Behavior Helpline](#)
- [Humane Dog Training Advocates](#)
- [Instinct Dog Training](#)
- [Maddie's Pet Assistant \(PetHealth\)](#) for newly adopted/fostered dogs and cats
- [East Bay SPCA Behavior Helpline](#)
- [ASPCA Pet Care](#)

#### Videos

- [The Family Dog](#)
- [Dog Training by Kikopup](#)
- [Pam's Dog Academy](#)
- [Zak George](#)
- [Grisha Stewart](#)
- [Dr. Sophia Yin](#)
- [Dunbar Academy](#)

#### Podcasts

- [Hannah Brannigan - Drinking from the Toilet](#)
- [How Do You Train That?](#)
- [Paws and Reward](#)

### Fundraising

Looking for support with fundraising to create a new program? See the [HASS Philanthropy Toolkit for Development and Fundraising](#).

### Ecosystem Mapping and Community Partnerships

People and pets in your community are going to need support when unexpected or complex situations arise. You will be better equipped to prevent pets from being surrendered to shelters, if you know which support programs and services are available in your community. You can build that knowledge and identify gaps that show the need for new programs or community partnerships by mapping your local ecosystem.

Our [HASS Pet Support Services guide, Establishing Partnerships for Pet Support](#) outlines how to map your local ecosystem and begin establishing partnerships. Don't forget to search [pets.findhelp.com](https://pets.findhelp.com) by zip code and category to find support in your community!

**Tip:** You may be asked for support—say, access to pet food—that you can provide. Sounds simple! But make sure you aren't leaving other important support options on the table that will address a current situation or even root causes. The [HASS Pet Support Guide and Worksheet](#) can help get you started with this type of problem-solving. This worksheet works best if you fill one out in advance so you can pre-identify programs and services.

## Supporting Research

- [Predictors of successful diversion of cats and dogs away from animal shelter intake: Analysis of data from a self-rehoming website](#) (Ly & Protopopova, 2023)
  - “Animals with behavioural challenges, including those who are being surrendered for behavioural issues, have greater odds of being surrendered to a shelter or rescue. As such, **animal shelters may consider redistributing their resources to accommodate for behavioural challenges.**”
- [Understanding feline feelings: An investigation of cat owners’ perceptions of problematic cat behaviors](#) (Powell et al., 2023)
  - “**Undesirable feline behaviors can detrimentally effects [sic] on the human-cat relationship, owner satisfaction, and animal welfare.** This study explored cat owners’ perceptions of cat behavior and identified specific behaviors that owners found problematic... Our results suggest cat owners were more likely to view their cat’s behavior as problematic if the behavior directly affected their lifestyle or environment, such as aggression, house soiling or activity during the night, while other behaviors, such as separation-related behavior, excessive self-grooming, and predatory behavior, did not influence owners’ perceptions of cat behavior within the multivariate models. **Further education may help cat owners** to recognize the importance of these other behaviors as indicators of animal welfare and understand the wider impacts of cat behavior, including through predation on wildlife.”
- [Reducing Dog Relinquishment to Rescue Centres Due to Behaviour Problems: Identifying Cases to Target with an Advice Intervention at the Point of Relinquishment Request](#) (Powdrill-Wells et al., 2021)
  - “Annually, thousands of dogs are relinquished to rescue centres globally. Dog owners report that **a leading cause for relinquishment are their dogs’ behavioural problems.** Efforts are needed to reduce dog relinquishment, by enabling dog owners to feel comfortable and confident with having them in their home. Free behavioural advice was offered to 1131 dog owners at the time of them calling to relinquish their dog to animal welfare charity. **Behavioural advice was accepted by 24.4% of the dog owners calling to relinquish their dogs.** The advice was accepted almost six times more often by owners with dogs with general management behaviour problems, compared to owners who had problems with aggression between dogs in their home. **Offering free behavioural advice reduced the number of dog relinquishments. Consequently, the stress associated with maintaining a dog in sheltered conditions and rehoming them, and the trauma for the owner was eliminated in a quarter of cases.** Moving forward, additional strategies are needed to enable more owners to keep their dogs in their homes and reduce relinquishment.”
- [Animal welfare deserts: human and nonhuman animal inequities](#) (Reese & Li, 2023)
  - “The study concludes that the overlap between human economic distress and pet resource deserts presents a threat to the goals of One Health. Potential policy solutions are proposed to address inequities in the distribution of animal welfare resources.”

- [Measuring Changes in Perceptions of Access to Pet Support Care in Underserved Communities](#) (Hawes et al., 2021)
  - “Access to veterinary care and other pet supportive services (e.g., grooming, **behavior training**, pet supplies) has been increasingly recognized within the animal welfare sector as a substantial barrier to the health and welfare of companion animals (henceforth referred to as “pets”).”
  
- [Owner-companion dog interactions: Relationships between demographic variables, potentially problematic behaviours, training engagement and shared activities](#) (Bennett & Rohlf, 2007)
  - “This confirms that strategies designed to increase participation in dog training activities and promote canine sociability may have significant benefits for both companion dog owners and their dogs.”
  - “...engagement in a range of training activities, but not only attending formal training classes, is predictive of a lower frequency of reported behavioural problems.
  - “...the extent to which owners engage in training activities and the extent to which their dogs are perceived to be unfriendly or aggressive, are predictive of engagement in a range of shared activities. **This suggests that interventions which aim to increase involvement in dog training and improve dog sociability may have significant implications for companion animal owners through reducing behavioural problems.** Such interventions may also have significant implications for companion dogs, whose welfare is likely to be considerably improved if they are sufficiently well mannered and sociable to engage in shared activities with their owners.”





## Pet Support Services

### Pet Supply Support for Owned Pets

#### Offering a Pet Supply Support Package

To combat unnecessary family separation, organizations can provide a free pet supply package to individuals experiencing pet food or supply insecurity, similar to what may be provided to foster caretakers. These supplies and services are invaluable in an overwhelming circumstance to avoid a negative outcome.

Potential supplies include:

- Leashes and collars
- Flea and tick prevention
- Indoor crates
- Litter boxes and litter
- Kennel, fences, or trolleys
- Dog houses
- Food
- Enrichment, toys, behavior management tools
- ID tags
- Tie-outs (where legal and with appropriate guidance on use)

#### Tasks for Staff and High-Level Volunteers

- If your organization has access to supplies normally provided for foster homes, consider using these supplies for families in between housing.
- Create a donation request letter and send to local stores that carry pet supplies.
- Create a volunteer team of trained ambassadors who will serve as assigned support for families throughout a crisis.
- Ask community members for donations of gently used supplies like leashes, collars, crates, dog houses, etc.
- Please see the slides [within this presentation](#) from Pima Animal Care Center on creating an Amazon Wishlist to obtain donations.
- Host a supply drive for community members to drop off gently used items.
- Share donation collection efforts on social media to recruit more donors and let community members know that supplies could be obtained from their local shelter.
- Add a line to your adoption application soliciting donations for KFT programs.

- Seek storage pod donations for supply storage.

### Tasks for Any Volunteers

- Ask community members for donations of gently used supplies like leashes, collars, crates, dog houses, etc.
- Deliver care packages to the hotels/motels or other locations.
  - Please see a guide on how to safely distribute products in your [additional resources](#).
- Reshare donation collection efforts on social media platforms, with local community partners, and on community bulletins.

### Fundraising

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### Ecosystem Mapping and Community Partnerships

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### Supporting Research and Resources

- [Animal welfare deserts: human and nonhuman animal inequities](#) (Reese & Li, 2023)
  - *This source supports the notion that there is an intimate connection between lack of access to human resources and lack of access to pet resources, further making the case that people and pets should be helped together when populations are distressed, and that helping one helps the other.*

- "The study concludes that the **overlap between human economic distress and pet resource deserts presents a threat to the goals of One Health**. Potential policy solutions are proposed to address inequities in the distribution of animal welfare resources."
- [Goodbye to a Good Friend: An Exploration of the Re-Homing of Cats and Dogs in the U.S.](#) (Weiss et al., 2015)
  - "Services that might have helped pet retention were examined for the lower income category since the services listed were all described as free or low cost. The service that was selected most commonly as something that might have helped respondents was free or low cost veterinary care (40%). Other service options were free or low cost training or behavior help (34%, more common for dog owners), access to pet friendly housing (33%), free or low cost spay/neuter services (30%), free or low cost pet food (30%), free or low cost temporary pet care or boarding (30%) and assistance in paying pet deposits (17%)."
- [The Impact of Pets on Everyday Life for Older Adults During the COVID-19 Pandemic](#) (Applebaum et al., 2021)
  - "It is estimated that at least 50% of older adults in the U.S. have pets"
  - "Our findings suggest that pets may be an important source of support and normalcy for older adults during the COVID-19 pandemic and beyond, and most view them as family members. Our results also provide useful insights of **potential challenges older pet owners may face in the event another pandemic or similar hardship occurs**. The pandemic's disruption may have revealed more of the nuanced benefits (e.g., emotional support) and disadvantages (e.g., another stressor) of pet ownership among older adults. Findings suggest the pandemic has increased worry among older adults caring for pets and as a result, **older adults with pets may benefit from special assistance during public health emergencies**. For example, to mediate these concerns, families, friends, and communities may **provide assistance with safely procuring pet supplies and food**, support for pets with behavioral issues, or making arrangements for contingency care in the event of owner illness. We recommend incorporating consideration of pets into family social services, particularly for economically vulnerable older adults, with the goal of keeping multispecies families together through adversity."
- [Pets for Better Wellbeing: Mars Pet Nutrition North America 2022 Report - Better Cities For Pets™](#) (Mars Pet Nutrition, 2022)
  - "When pet parents struggle, here's what they say would help them keep their pets: **short-term support for pet costs including food (35%)**, pet-friendly housing options (29%), and affordable training for pet behavior issues (24%)."



## **Pet Support Services**

### **Pet Food Support for Owned Pets**

#### **Direct Program and Service Offerings**

##### **Make Pet Food Pantries More Accessible for All Community Members**

###### **Tasks for Staff and High-Level Volunteers**

Research and inform community members of all the food pantries being offered in your community. Consider using [pets.findhelp.com](https://pets.findhelp.com) to help community members find support in their area.

###### **Tasks for Any Volunteers**

Share food pantry resource guide on all social media platforms, community bulletins, and with local community agencies.

##### **Host or Co-Host a Pet Food Pantry to Help Distribute Food and Supplies**

###### **Tasks for Staff and High-Level Volunteers**

- Work with other non-profits in your community to pool resources for pet food and supply pantries.
- Connect with national organizations such as [Greater Good Charities](https://www.greatergood.org/) (partnered with Chewy) that may be able to provide food and supplies to your organization.
- Ask for donations of gently used supplies like leashes, collars, crates, dog houses, etc.
- Appeal to large community groups or clubs to donate care package items and host assembly-day activities to prepare supplies.
- Create a trained team of volunteer ambassadors who will serve as assigned support for families throughout their crisis.
- Take pet food directly to human food pantries and allow them to distribute food.
- Deliver food to community members who do not have transportation or can not access the food pantry. See detailed guides in additional resources.

###### **Tasks for Any Volunteers**

- Ask for donations of gently used supplies like leashes, collars, crates, dog houses, etc.
- Connect with large community groups or clubs you are already involved in to donate care package items and host assembly-day activities to prepare supplies.
- Deliver care packages to the hotels/motels, call around to find possibly temporary, pet-friendly housing, or assume other duties to lessen the burden on existing shelter staff.

### **Additional Pet Food Resources**

The following resources can be found in the folder linked above.

#### **Pima Animal Care Center**

- Emergency Food Supply Protocol
- Sample Food Distribution Program Proposal
- [Presentation on creating a pet food drive-through distribution](#) (COVID safety guidelines included)
- Sample questions to collect data from clients' pet food distribution
- Sample template to record pet food distribution data
- Sample bag insert for food distribution (Spanish and English)
- Sample Off-Site Distribution Flier

#### **Los Angeles Animal Services**

- Pet Food Pantry Mission Overview
- How to Make Pet Food Pantry Appointments
- [Example of Pet Food Pantry Appointment Schedule for Staff](#)
- How to run a pet food pantry

#### **Humane Rescue Alliance**

- Pet Pantry Enrollment Form

### **Human Social Services**

There is a significant need for human and animal services to learn from each other and collaborate on ways to better support human-animal families. Pets are finally being widely recognized as members of the family and social service agencies are learning more about the human-animal bond and the impact it can have on families. Experiencing a pet crisis may be just one of the many challenges people and their pet(s) may be faced with, so being able to connect them to further social services can result in a better outcome for the entire family.

## Connect Community Members With Local Social Services

You may connect community members with local social service agencies using sites such as [findhelp.org](https://findhelp.org), [pets.findhelp.com](https://pets.findhelp.com), and [justshelter.org](https://justshelter.org). You may also find that other local agencies have created resource lists of local services. If you have not already done so, consider connecting with local service providers to confirm if they have a public-facing resource list or are able to be shared through developing a partnership.

## Create a List of Local Social Service Resources to Share With Community Members

### Tasks for Staff and High-Level Volunteers

- Complete an [Ecosystem Map](#) of your community
- Create a shareable spreadsheet with contact information accessible on your website. Check out Nashville Humane Society's directory of resources in [additional resources](#).
- Create a flyer with resources to be shared at your organization, on social media, with other community agencies, and at community bulletin boards. Take a look at Nashville Humane Society's COVID-19 resource flyer, located in your resources.

### Tasks for Any Volunteers

- Identify social service agencies in your area.
- Assist staff in sharing the directory and resource flyer with community members.

## Build Partnerships With Local Social Services

### Tasks for Staff and High-Level Volunteers

- Reach out to potential social service partners and discuss the importance of collaborating so that human-animal families have access to all the resources they need during a crisis. Make sure to emphasize how keeping families together can benefit their clients and not just their animals.
- Co-create action plans and resource kits for people being evicted who have pets, that can be shared in the shelter and by social services agencies. Resource kits may include a care package with supplies, instructions on next steps, housing solutions, and other supporting items.

### Tasks for Any Volunteers

- Make a list of social service agencies in the area.

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(30%), **free or low cost pet food (30%)**, free or low cost temporary pet care or boarding (30%) and assistance in paying pet deposits (17%)."

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# HUMAN ANIMAL SUPPORT SERVICES

## Pet Support Services [pets.findhelp.com](https://pets.findhelp.com) Custom Widget

### What Is [pets.findhelp.com](https://pets.findhelp.com)?

Through the extraordinary efforts of local community organizations, [pets.findhelp.com](https://pets.findhelp.com) is the first-of-its-kind platform for pet owners to find and access free and low-cost support such as pet food banks, veterinary care, eviction support, and more. [Pets.findhelp.com](https://pets.findhelp.com) is completely free for both organizations listing programs and those seeking services. Every month, [pets.findhelp.com](https://pets.findhelp.com) serves as a vital resource for thousands of families with pets.

If your organization, or an organization you know, offers pet support services, review our [pets.findhelp.com complete user guide](#) to learn how to ensure your programs are easily accessible by your community.

### Why Add a [pets.findhelp.com](https://pets.findhelp.com) Website Widget?

It's simple! [Pets.findhelp.com](https://pets.findhelp.com) creates more visibility of support services available in your community, which means more assistance is provided to your community. Having virtual support options may allow individuals who are not able to physically travel to your facility to receive guidance and support for pet support challenges they may experience. By adding a virtual, easy-to-use option for people to find support before ever having to enter the shelter facility, you not only support people and pets but also save staff time and resources.

### Getting Started

Custom [pets.findhelp.com](https://pets.findhelp.com) website widget codes are an exclusive perk to HASS Partner Organizations. To become a HASS partner and receive a custom widget code, email us at [hass-project@americanpetsalive.org](mailto:hass-project@americanpetsalive.org) and say, "I'm interested in becoming a HASS partner and receiving a [pets.findhelp.com](https://pets.findhelp.com) widget code!"



## Pet Support Services Leveraging Media to Gain Community Support

### Getting Started With Pet Support Communications

To identify potential pet support topics to share with local media connections, consider:

- Current community need
  - What is the most common pet support ask at this time?
  - Are there community-wide crises occurring that may impact pet support needs?
  - Are there any new legislative changes going into effect that may impact pet support?
- Current organizational need
  - Fundraising for new pet support programs
  - Ask for new pet and human support partnerships
  - Is there a specific category of pet intake at the shelter that is currently high and may benefit from support programs? (Ex: Owner surrender due to housing challenges)
- Future considerations
  - Is there a new pet support program or service becoming available soon that needs to be advertised?
  - Does the organization have a new or upcoming pet support partnership that should be highlighted?

### Media Connections

When considering potential media connections, identify the primary print, television, and online media organizations you may want to begin building partnerships with first such as a morning news show or an online-only local news site. Media connections that reach the widest audience are ideal to prioritize first, followed by specialty media that may focus exclusively on community news, events, and highlights.

### How to get started when contacting local media outlets:

- Identify the local print, broadcast and multi-media outlets located in your city through simple Google searches or using media relations tools like [MuckRack](#) or Cision
  - Most local outlets list their editorial staff on their websites

- X (formerly Twitter) and Instagram are great resources for finding freelance local reporters
- Focus on reporters and journalists that cover animal welfare, local organizations, politics and philanthropy, human interest pieces, as well as professionals with “Editor” in their title
- Broadcast outlets have “news desks” departments dedicated to receiving news in bulk. The contact information for news desks can be found using the resources mentioned above or simply calling the outlet directly and asking for the email
- Once your potential media list and contacts have been developed, you’re ready to send your first “pitch” or “story idea.” [Here are some best practices](#) to consider when drafting your pitch to increase your chances of not only getting seen by your target reporter, but ultimately used in upcoming news coverage!
  - It is best to follow up with the reporter 48 hours after sending the initial pitch. Keep in mind, reporters receive on average 500 pitches a day so a follow-up is just as important as your initial outreach.
- You are on the deadline of the reporter.
  - Typically, print publications have deadlines on Wednesdays and Fridays whereas broadcast deadlines are more often within 24 hours. Please keep this in mind if you are hoping to schedule interviews or obtain assets for your story.
  - Broadcast segments only get assigned in the outlet's daily “pitch meeting” which usually takes place between 8 A.M.-9:30 A.M.. Ensure your pitch hits the news desks in time accordingly.
- To build the strongest relationships with local media, ensure every interaction with them is NOT only transactional.
  - Remember: There is always a person on the receiving end of your email, so meet them with timeliness, respect, gratitude, and a willingness to collaborate on the story together
  - If/when your story is covered, go out of your way to thank the reporter with a thank you note!

## Sample Marketing Materials

The following samples have been developed to be a starting point for organizations to consider language and potential messaging for pet support communications. Adjust to fit your community and organization’s current interests and future planning.

- HASS and HeARTs Speak [Communications Kit: Keeping Families Together](#)
- HASS and HeARTs Speak [Community-Focused Communications Strategy](#)



## Pet Support Services Tracking Pet Support Data

### Why Is Tracking Pet Support Data Important?

In addition to the data your organization already tracks for pets in care, tracking pet support provided to owned pets creates a more comprehensive view of your community's current pet-related needs, interests, and trends. Tracking pet support data may also:

- **Provide funding and program development opportunities.** Showing increased interest in specific pet support programs may provide opportunities to raise funds to implement new programs or enhance existing ones. Creating programs that focus on pet support demand can decrease shelter intake and reduce the unnecessary separation of people and pets.
- **Inform current and future marketing and communications efforts.** By evaluating the trends in pet support being provided, communications can be tailored to highlight the available options that can provide solutions to the most common requests. The easier support can be found, the less likely it is for situations to escalate! This can also save the organization time and resources.

### Tracking Pet Support Services Data

Tracking data on Pet Support Services operations can inform pets diverted from possible shelter intake, pets and people served in the community, program efficacy, program funding and resource needs, and development. The [Community Request Tracking White Paper](#) highlights minimum requirements, a sample overview, request tracking categories for shelter software, CRM solutions, and more.

Consider the following when creating Pet Support Services tracking systems:

- **Who** needs to be notified of case management alerts?
- **What** is the end goal of tracking?
- **When** do notifications/alerts need to occur for follow-up?
- **Where** will data be entered and referenced?
- **Why** is Pet Support Services tracking important to your organization and stakeholders?

Data Point	Definition	What it Serves
Person record	The person record associated with the service request	Supports Pet Support Services tracking, case management, and program development
Animal record	The animal record associated with the service request	Supports Pet Support Services tracking, case management, and program development
Case record	A unique record to track all case activity associated with the person and animal(s) for the service request	Supports Pet Support Services tracking, case management, and program development
Date of request	The date of the request	Tracks history of requests
Reason for request	The initial reason service was requested or recommended	Informs service needs and program development
Case management notes	Additional documentation to support the individual needs of the case	Informs service needs and individualized support
Services provided or recommended	The services provided or recommended	Informs service needs and program development – and whether the final service provided or recommended differed from the initial reason for the request
Follow up	Documentation of follow up/check-ins, often at set intervals (i.e. 7 days) after the initial request	Informs case management, individualized support, and the pathway of the pet
Outcome of request	The outcome or resolution of the request, such as kept, rehomed, or surrendered pet	Informs program efficacy and the pathway of the pet
Date of outcome/case resolution	The date of the request outcome/case resolution	Tracks history of service requests  Identifies active vs. non-active cases
Vouchers for free/discounted services	Documentation of vouchers issued or redeemed for free and discounted services	Records use of services and informs service needs
Paid services transactions	Documentation of payment for services; receipts; transaction history	Records use of services and informs service needs



## Pet Support Services

### Submitting Data to Shelter Animals Count (SAC)

#### What is Shelter Animals Count (SAC)?

[Shelter Animals Count \(SAC\)](#) is a centralized animal shelter statistics reporting platform. Statistics are created and shared by way of optional data submissions from animal shelters.

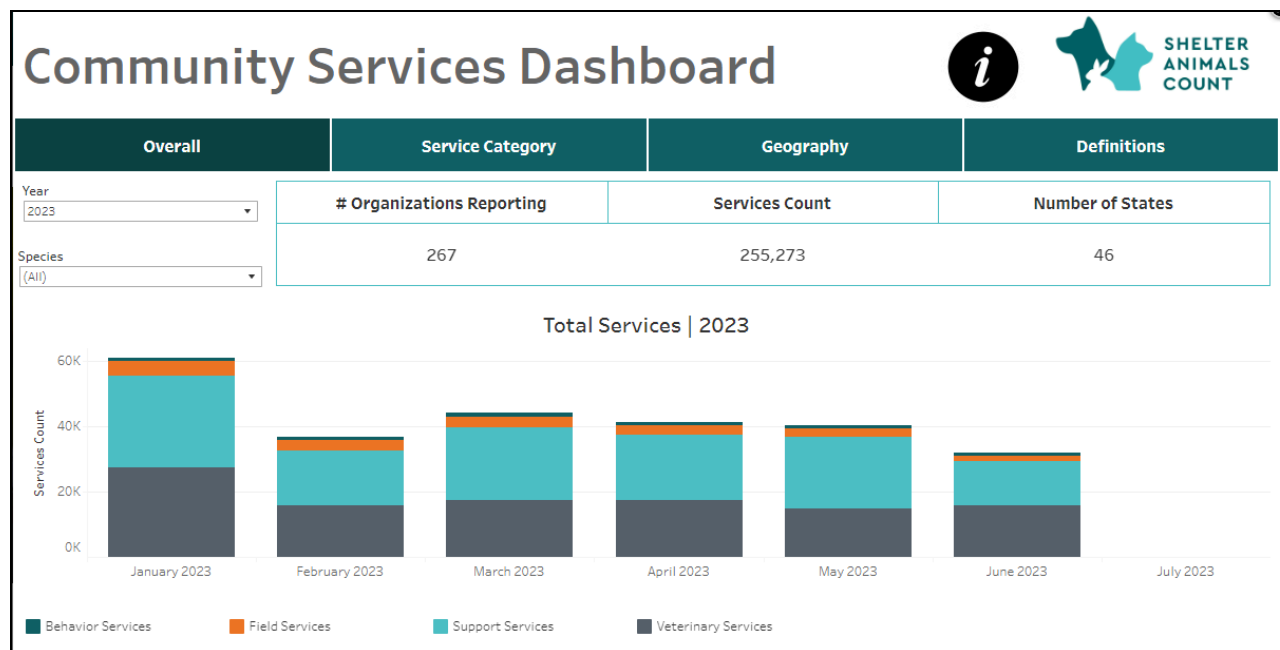
#### Getting Started

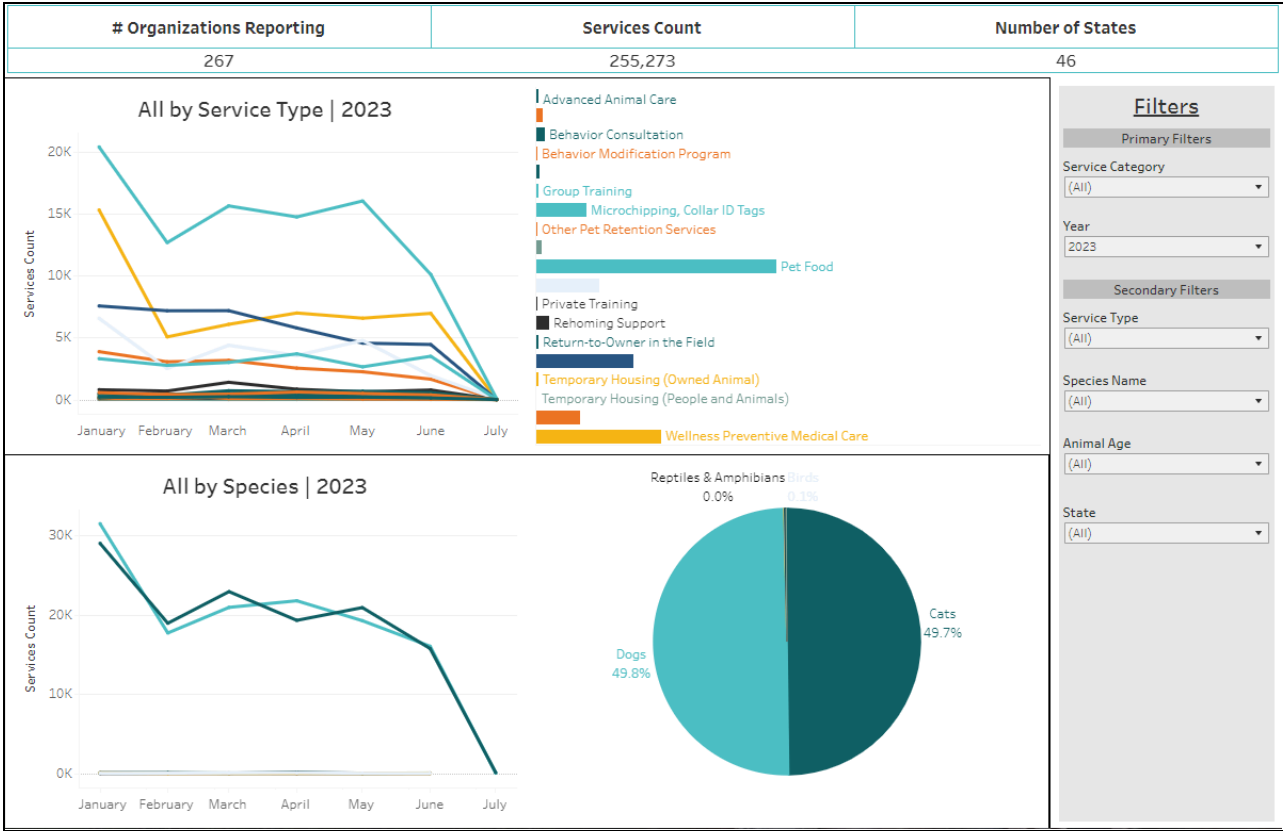
To submit data to Shelter Animals Count, you must create an account. To learn more about the two primary ways you can enter data, see the SAC help page titled, "[How do I enter data?](#)". For more usability questions, reference the [FAQs here](#).

#### Submitting Data to the Community Services Database (CSD)

According to the Shelter Animals Count website, they began collecting community services data in 2021 with a goal to, "capture the most common ways shelters, rescues, and service-based organizations are supporting pets and people in our communities." The Shelter Animals Count Community Services Database collects information on the support provided to **owned** pets to help keep more people and pets together. This data entry option is available to animal sheltering and non-sheltering organizations, allowing pet support and community service information across multiple vectors to be shared in one central database.

#### Database Samples







# HUMAN ANIMAL SUPPORT SERVICES

## Pet Support Services Staff Social Workers and Case Workers

### Why Include a Social Worker in Animal Welfare?

As organizations shift program focus to a community-oriented and prevention approach to care, hiring a social worker who is skilled in health and human services can ensure that people receive holistic support alongside their pets.

### Getting Started

Hiring a social worker, social work intern, or staff member actively pursuing social work accreditation can enhance an organization's pet support goals and more comprehensively provide support to the community. Learn more about this below:

- [Integrating Veterinary Social Work into Animal Shelters](#) - Veterinary Social Workers (VSW), “attend to the human needs that arise at the intersection of veterinary and social work practice” according to [UT-Knoxville's Veterinary Social Work Program](#). They help facilitate relationships between humans and animals in a variety of medical settings including clinics, hospitals, and shelters. Social workers serve to support veterinary staff in emotionally demanding workplaces, support clients as they navigate the medical needs of their pets and access to veterinary care, and serve as a critical component within the One Health approach of veterinary medicine.
- [Hiring a Social Worker or Intern](#) - This guide highlights the “why” of hiring social workers for your unique organization, how to get started, sample job descriptions, and a few tips and tricks.



### Additional Consideration

In the process of hiring a social worker or social work intern, ensure existing training protocols provide basic process information for individuals who may be unfamiliar with animal welfare to create a well-informed, holistic approach for the community **and** their pets. In addition, consider integrating [compassion fatigue](#) resources for current staff and volunteers who frequently deal with complex and challenging situations.



## Not Sure You're Ready to Begin Integrating Social Workers Into Your Processes?

Consider hiring a Case Manager or integrating case management best practices into existing customer-facing and intake staff processes. Trained case managers help people keep their pets, provide resources and support to struggling pet owners, assist owners who need to rehome their pets, and help people find missing or lost pets. Case management means every person and animal is treated as an individual and asked questions so animal services can help find the best possible solution.

## Additional Resources

- [Case Management Toolkit](#)
- [Case Management FAQs](#)
- [Blog: Make Case Management Your Animal Shelter's Superpower](#)
- [They Did It: Hired a Social Worker for Their Animal Shelter](#) - ASPCA
- Sample Job Descriptions:
  - [LifeLine Sample Community Caseworker](#)
  - [Gateway Pet Guardians Pet Support Manager](#)
- Video Resources
  - [What is a veterinary social worker?](#) - MedVet Northern Virginia
  - [Bringing Social Work and Animal Welfare Together to Support People and Pets](#)

## Supporting Research

- [Human-Animal Relationships and Social Work: Opportunities Beyond the Veterinary Environment](#) (Arkow, 2020)
  - **"This article identifies six reasons why social workers should be cognizant of human-animal relationships and introduces nine ways, with action steps, in which social workers can include these relationships into training and practice outside the more developed field of veterinary social work. These venues include: agencies working in child protection and child sexual abuse; children's advocacy centers and courthouse facility dogs; animal shelters; domestic violence shelters; public policy advocacy; clinical practice; agencies working with older and disabled populations; veterinary sentinels for intimate partner violence; and pet support services for homeless populations."**
  - **"More homes in the U.S. are said to have companion animals than have children (Vincent, McDonald, Poe, & Deisner, 2019)."**
  - **"In addition to appreciating a client's individual and familial attachments or antipathy toward pets, social workers can achieve a fuller understanding of a client's connectivity or isolation from the community by seeing human-animal relationships in a social context."**

- “Social capital . . . is the connectivity among people which enhances cooperation for mutual benefit.”
- “Hoy-Gerlach et al. ([2019](#)) described promising opportunities for social work field placements in community animal shelters, including: reducing staff and volunteers’ compassion fatigue in an exceedingly difficult and emotionally draining work environment; placement of shelter pets as Emotional Support Animals; strengthening community responsiveness to violence through assessing overlaps and differences between child, elder and animal abuse investigations; creating and implementing educational programming across child and animal protection systems; and increasing community awareness of the link between violence to animals and violence to humans.”
- [Rediscovering connections between animal welfare and human welfare: Creating social work internships at a humane society](#) (Hoy-Gerlach et al., 2018)
  - “Increased awareness of the potential **relevance of human–animal interaction across social work practice** settings allows for explicit identification of/response to clients’ human–animal interaction-related strengths and concerns, ultimately supporting the well-being of both humans and animals.”



## Lost Pet Reunification Lost Pet Reunification Resources

### Benefits of Sharing Lost Pet Reunification Resources

For most shelters, the highest intake type is stray pets. We may often find that a number of pets are not “strays” at all, but are lost pets who are healthy and appear cared for. Many are [found only blocks away from their homes!](#)

Frequently sharing your lost and found pet resources, especially in high-incident seasons like the fourth of July or extreme weather, and offering educational opportunities, can help inform community members who lose or find pets what actions to take —without requiring external support first.

The following resources can be customized to fit your organization’s marketing and communications campaigns, in-person and social media interactions, email outreach, and resources to share on your website.

*Need recommendations for establishing a line of contact for the public to reach you? [See our guide here.](#)*

### Organizational Resources

The following resources highlight ways to focus your public-facing communications on lost pet reunification, including customizable templates, best practices, sample web pages, and technology solutions.

- [Lost Pet Toolkit Overview - HASS](#)
- [From Lost to Found: How a 48-Hour Window Can Help Reunite Pets With Their Families - HASS](#)
- [Communications Kit: Lost Pet Reunification – HASS and Hearts Speak](#)
- [Tech Catalog - Lost Pet Reunification Technology Solutions - HASS](#)
- [Sample Found an Animal Handout - Austin Pets Alive!](#)
- [Volunteer Found Pet Support Job Description - HASS](#)
- [Design Template: Lost & Found Social Graphics – Hearts Speak](#)
- [Editable Template: Lost & Found Pet Action Guide – Hearts Speak](#)
- [Sample Social Post: Reminder to Keep Microchip & Tag Info Current - Fur Ever Yours Dog Rescue](#)
- [Return-to-Owner Strategies - Best Friends](#)
- [Sample Web Page for Lost & Found Pets - Maui Humane Society](#)
- [Sample "Lost Pet Alert!" Video to Locate Potential Owners - Greenville County Animal Care](#)
- [Radical Return-to-Owner: Innovative Programming to Keep Families Together - HASS](#)

### Posting Lost and Found Pet Information Online and In Person

The following resources can support the community in developing flyers and posting lost and found pet information in online spaces, to help directly reunite pets with their people. In addition to the

following support options, we recommend sharing lost and found pet information in community spaces such as libraries, fire stations, or online local lost and found pet pages.

- [PetHub Solutions Templates](#)
- [Petco Love Lost](#) - Lost and found pet database
- [PawBoost](#) - Includes posting and creating a [flyer](#)
- [Pet FBI](#) - Includes posting and creating a [flyer](#)
- [Adopt-a-Pet Lost and Found Pet Flyer](#)
- [Found Dog Infographic - AmPA!](#)
- [Found Cat Infographic - AmPA!](#)
- [Found Pet Photo Tips - Hearts Speak](#)
- [How to Find a Lost Cat Tips - Lost Cat Finder](#)

## Microchips

Encouraging community members to microchip their pets, and ensuring the microchip information stays up to date, can go a long way in ensuring lost pets are reunited with their people.

- [New Analysis: Pets With Microchips Are THREE TIMES More Likely to Get Home - HASS](#)
- [Microchips reunite pets with families - American Veterinary Medical Association](#)
- [National Check the Chip Day - American Veterinary Medical Association](#)
- [Microchip Registry Lookup - AAHA](#)
- [Microchipping FAQ - American Veterinary Medical Association](#)
- [Microchip Help](#)

## Supporting Evidence

### [Lost Pet Reunification: Supporting Evidence](#)

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- **Microchip Registration Needs**
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- Field Services Support
- Community Cats



## Lost Pet Reunification Marketing Lost Pet Reunification Topics

### Why Focus Marketing Efforts on Lost Pet Reunification?

Regular communication about your organization's lost pet reunification programs proactively spreads awareness on initiatives that help reunite lost pets and potentially prevent future lost pets.

### Lost Pet Reunification Marketing Examples

The following highlights ways your organization can support lost pet reunification efforts through marketing, communications, and community engagement. See the [Lost Pet Reunification Resources](#) guide here.

- Publicly list local lost and found pets on your organization's website.
- Provide accessible resources to help get lost pets home including recommendations for what to do when a lost pet is found and what to do if you have lost a pet, including options for where to post lost or found posters.
- If you have a finder-to-foster program, communicate the options and benefits of holding onto a pet you've found.
- Provide preventative reminders for microchipping and ID tags.
- Provide information on where community members can find free or low-cost ID tags and microchips and how to keep registrations up to date.
- Create "community ambassadors" in various neighborhoods that can have a presence on [NextDoor](#) to remind people of best practices and help reunite pets, or even better – are equipped with microchip scanners and can help assist community members who lose or find a pet.

### Frequency and Strategic Planning

The following toolkits were created in collaboration between Human Animal Support Services (HASS) and HeARTs Speak.

- [Community-Focused Communications Strategy](#)
  - In this kit, you will find a list of general marketing and communication strategic considerations, a detailed planning document, and a sample editorial content calendar for you to download and customize.
- [Communications Kit: Lost Pet Reunification](#)
  - This kit will help you communicate with your community about your and their role in getting lost pets back home using a multimedia approach to

reach more people. This kit includes editable graphics, media pitch templates, FAQs, and more.

## Supporting Evidence

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## Lost Pet Reunification

### Leveraging Media Connections to Highlight Lost Pet Reunification

#### Getting Started With Lost Pet Reunification Communications

To identify potential topics to share with local media connections, consider:

- Current community need
  - Are lost pet reunification numbers down? Is there an identifiable reason?
  - Is the community well-informed on what to do if they lose or find a pet?
  - Are there community-wide crises occurring that may impact lost pet reunification needs?
  - Are there any new legislative changes going into effect that may impact lost pet reunification?
- Current organizational need
  - Fundraising for new lost pet reunification programs
  - Ask for new pet and human support partnerships
  - Is there a specific category or location of lost pet or “stray” intake at the shelter that is currently high and may benefit from additional support?
    - (Ex: Seeing an increase in lost pet intakes from a specific zip code or geographic area that may benefit from targeted community outreach to share supportive resources for preventative measures that can be taken to help reduce potential lost pets)
- Future considerations
  - Is there a new lost or found pet program or service becoming available soon that needs to be advertised?
  - Does the organization have a new or upcoming partnership to assist with lost pet reunification that should be highlighted?

#### Media Connections

When considering potential media connections, identify the primary print, television, and online media organizations you may want to begin building partnerships with first such as a morning news show or an online-only local news site. Media connections that reach the widest audience are ideal to prioritize first, followed by specialty media that may focus exclusively on community news, events, and highlights.

#### How to get started when contacting local media outlets:

- Identify the local print, broadcast and multi-media outlets located in your city through simple Google searches or using media relations tools like [MuckRack](#) or Cision
  - Most local outlets list their editorial staff on their websites
  - Twitter and Instagram are great resources for finding freelance local reporters
  - Focus on reporters and journalists that cover animal welfare, local organizations, politics and philanthropy, human interest pieces, as well as professionals with “Editor” in their title
  - Broadcast outlets have “news desks” departments dedicated to receiving news in bulk. The contact information for news desks can be found using the resources mentioned above or simply calling the outlet directly and asking for the email
- Once your potential media list and contacts have been developed, you’re ready to send your first “pitch” or “story idea.” [Here are some best practices](#) to consider when drafting your pitch to increase your chances of not only getting seen by your target reporter, but ultimately used in upcoming news coverage!
  - It is best to follow up with the reporter 48 hours after sending the initial pitch. Keep in mind, reporters receive on average 500 pitches a day so a follow-up is just as important as your initial outreach.
- You are on the deadline of the reporter.
  - Typically, print publications have deadlines on Wednesdays and Fridays whereas broadcast deadlines are more often within 24 hours. Please keep this in mind if you are hoping to schedule interviews or obtain assets for your story.
  - Broadcast segments only get assigned in the outlet's daily “pitch meeting” which usually takes place between 8 A.M.-9:30 A.M.. Ensure your pitch hits the news desks in time accordingly.
- To build the strongest relationships with local media, ensure every interaction with them is NOT only transactional.
  - Remember: There is always a person on the receiving end of your email, so meet them with timeliness, respect, gratitude, and a willingness to collaborate on the story together
  - If/when your story is covered, go out of your way to thank the reporter with a thank you note!

## Sample Marketing Materials

The following samples have been developed to be a starting point for organizations to consider language and potential messaging for pet support communications. Adjust to fit your community and organization’s current interests and future planning.

- HASS and HeARTs Speak [Communications Kit: Lost Pet Reunification](#)
- HASS and HeARTs Speak [Community-Focused Communications Strategy](#)





## Lost Pet Reunification

### Providing Free and Low-Cost Pet Identification, Tags, and Microchips

#### Overview

Providing free and low-cost pet identification options for owned pets in your community makes it [three times more likely](#) that if the pet were to ever get lost, they will be able to be reunited. Consider a mobile event where you bring microchips to the community, a drive-through event at your organization where the community comes to you, or a virtual marketing and communications campaign to spread educational information and awareness.

#### Events and Outreach

##### Drive-through Microchip Event - Pima Animal Care Center

Most shelters first scan for a microchip when a pet is brought in as lost. By planning an event with a microchip drive-through focus you can not only increase your likelihood of reuniting lost pets in the future but you can use this opportunity to share educational resources with your community on best practices surrounding lost and found pets. We have outlined a few steps to get you started. See [next steps and learn more about the Pima Animal Care Center microchip event here](#).

1. Once you pick event dates, share them widely with your community!
2. Create a “stations” plan in your parking lot or location you have selected including the entrances and exits, check-in stations, and data entry.
3. Include as many staff and volunteers as possible!
4. Track microchip information with the pet and their caretaker!
5. [Download the complete Pima Animal Care Center microchip drive-through toolkit.](#)

#### Microchipping Resources to Share with the Public at Events

- [AVMA Microchip FAQ to share with Public](#)
- [Petfinder How-To](#)
- [24HR Petwatch](#)

#### Targeted Community Outreach

Review your organization’s data to identify any existing trends by area with high lost pet intakes and found pet reports. Consider a virtual marketing and communications approach that can directly reach these areas with educational resources on best practices for lost and

found pets, pet IDs and microchips, and an option for support. You may also consider hosting or hosting a booth at an event to highlight lost pet reunification resources and information.

## Ecosystem Mapping and Community Partnerships

People and pets in your community are going to need support when unexpected or complex situations arise. You will be better equipped to prevent pets from being surrendered to shelters, if you know which support programs and services are available in your community. You can build that knowledge and identify gaps that show the need for new programs or community partnerships by mapping your local ecosystem.

Our [HASS Pet Support Services guide, Establishing Partnerships for Pet Support](#) will teach you how to map your local ecosystem and begin establishing partnerships. Don't forget to search [pets.findhelp.com](https://pets.findhelp.com) by zip code and category to find support in your community!

**Tip:** You may be asked for support—say, access to pet food—that you are able to provide. Sounds simple! But make sure you aren't leaving other important support options on the table that will address a current situation or even root causes. The [HASS Pet Support Guide and Worksheet](#) can help get you started with this type of problem-solving. This worksheet works best if you fill one out in advance so you can pre-identify programs and services, then make copies or use the idea elsewhere!

## Fundraising

Looking for support with fundraising to create a new program? See the [HASS Philanthropy Toolkit for Development and Fundraising](#).

## Supporting Evidence

[Lost Pet Reunification: Supporting Evidence](#)

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- Field Services Support
- Community Cats



## Lost Pet Reunification Microchipping Pets in Care

### Microchips Matter

Microchipping pets is a crucial step in ensuring that if a pet were to be lost they can more easily be [reunited with their caretaker](#). Microchips not only create a unique ID for the pet, but they can hold contact information such as name, phone number, address, and more for reunification efforts when scanned. To support lost pet reunification in your community, it's important microchip scanners are kept on-site in addition to local vet clinics or rescues.

This process can also help track pets in the care of the shelter. By immediately microchipping all pets during the intake process you have created a safety net for reunification efforts if they get lost while in foster, on sleepovers, or at an off-site event, and are an easy way to resolve on-site identification issues if there is confusion with a pet's name, description, or location.

### Who Should Microchip Pets?

While most commonly implanted by a veterinarian or veterinary assistant, consider training additional staff to implant microchips and [register pets](#). This may include foster coordinators, volunteer pet caretakers, and other personnel who directly interact with pets in care.

[Implantation instructions](#) should be given by a veterinarian or other trained professional. Trainees should be observed while completing the process.

**Note:** Evaluate your state or local legislation to ensure there are no restrictions in place that dictate who can and cannot microchip a pet, as some regulations may require all microchips to be implanted exclusively by a veterinarian.

### Additional Resources

- [Microchip Registry Lookup - AAHA](#)
- [Microchipping FAQ - American Veterinary Medical Association](#)
- [Microchips reunite pets with families - American Veterinary Medical Association](#)
- [National Check the Chip Day - American Veterinary Medical Association](#)

### Supporting Evidence

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## Lost Pet Reunification Registering Microchips to Caretakers

### Microchip Registration

A microchip should always be registered to the current caretaker. This may include the organization currently responsible for the pet (shelter, rescue) or an individual pet owner or foster (not through the organization). Associating a pet's microchip to their current location with contact information creates a higher likelihood of reunification in the event they are lost. Consider making this a part of your adoption and long-term foster processes. By helping the new owner add their information to their microchip, you can more successfully reunite pets that do get lost.

### Supporting Evidence

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Looking for information on ***who at your organization should implant microchips?*** [Check out this guide.](#)

Looking for information on ***providing microchips to owned pets?*** [Check out this guide.](#)



## Lost Pet Reunification Repairing and Securing Public Fences and Yards

### How to Offer Support Securing Yards

Supporting your community with at-home fence repairs or securing yards can not only prevent lost pets but also educate the community on best practices to keep pets safe.

### Consider This Common Scenario

A pet owner starts work from home at 8 a.m. They let their large, adult dog play in the yard while they attend a meeting. At 10 a.m. a loose fence panel falls down and their dog sneaks out and walks around the neighborhood. A worried neighbor who does not recognize the dog calls animal services, who takes it straight to the city shelter. By the time the owner realizes what has happened, they head straight to the shelter and are now required to pay a reclaim fee and receive a citation.

### Improving the Process

When possible, reunification by animal services in-field should be prioritized before bringing a pet to the shelter. If a pet is brought to the shelter, especially in cases of accidental loose and lost pets, work with your city and animal services team to reduce or remove reclaim fees. Not requiring a citation prioritizes the safety of the pet and reunification of families without adding unnecessary costs to the public.

Proactive measures such as repairing known broken or missing fences can help prevent the same pet from getting loose in this way again, and provide a service that may be currently out of reach for members of your community already facing financial challenges.

### Fence Repair In Action - Cabot, Arkansas

“Animal service officers with Cabot Animal Support Services carry bags of fence-mending tools around on their trucks. When a dog gets loose, or if they see a fence with a hole in it leaving the potential for a dog to get loose, the Animal Services Officers fix the fence. This is Cabot’s [Fences for Fido](#) program.” To learn more about why this program was created, how it works, and recommendations from the people currently following this process, read the full blog [here](#).

### Fundraising and Partnerships

Looking for support with fundraising to **create a new program**? See the [HASS Philanthropy Toolkit for Development and Fundraising](#). If starting a program from scratch is not currently

feasible, consider [researching your current community ecosystem](#) to find any existing programs or services that may be able to **provide this service through a partnership** with your organization.

### Insurance Consideration

If your organization integrates direct fence repair into current practices, verify what is covered under your established insurance options. In the event of an injury during fence repair, create a plan for steps to take both for safety and insurance purposes.

### Additional Resources

- [How to keep your dog from escaping | The Humane Society of the United States](#) - A helpful resource you may provide to members of the community that highlights a few basic causes and recommendations for how to keep dogs from escaping yards.
- [Intake Diversion in the Field | Best Friends](#) - An excerpt from the “Humane Animal Control” manual highlighting best practices for Field Services related to in-field reunification efforts and intake diversion.
- [Field Return-to-Owner Playbook | Best Friends](#) - A resource focused on helping Field Services and other community-based staff maximize returning animals home without impounding them at the shelter

### Supporting Evidence

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## Lost Pet Reunification

### Offering Lost Pet Reunification Materials in Multiple Languages

#### Important Considerations for Offering Services in Multiple Languages

- Does your organization have staff or volunteers who are directly from the community you are serving, know the community well, and speak the most commonly spoken language(s) in your community?
- How can your organization focus on hiring future staff who speak the language(s) that are present in your community and are willing to serve as translators?
- Who within your team of volunteers speaks the language(s) that are present in your community and is willing to serve as a translator?

#### Why Translate Materials Into Other Languages?

It is crucial to identify the different languages spoken in your community and provide services for these families. Many community members learn about service providers by word of mouth and if your organization is not providing resources and service information in other commonly spoken languages, you are missing a huge population within your own backyard. Having inclusive, multi-language resources allows even more support for the entire community.

Translating a service flyer or temporary foster agreement into another language is not always easy, especially when considering the different variations of one language category. For example, not all Spanish-speaking communities use the same vernacular. The Spanish spoken by Cuban-Americans in South Florida is different from the Spanish spoken by Mexican-Americans in Southern California! There are variations in the use of certain words as well as idiomatic expressions, so it's important to ensure service descriptions reflect accordingly. This may require evaluating multiple translation program options, inclusive of having a person from that specific community, to achieve the desired result.

#### Where to Begin

##### Option 1

There are many different free translating websites available online, such as [Google Translate](#) and [Microsoft Translator](#). With each, you can easily type in what you are trying to translate and it will provide you with a translation.



However, these translations aren't always 100% accurate. So once you have used the internet to translate, it is best practice to have the translation reviewed by at least 2-3 different staff members, volunteers, or community members from different backgrounds and lived experiences (i.e. educational backgrounds and socio-economic statuses) who speak the language. You want to make sure the translation is fully accessible to anyone in your community who may need it. By having others review the translation, this process can help ensure that the message is clear, regardless of a person's education or economic background.

## Option 2

Check out this [list of organizations and platforms that offer translations for nonprofits](#). Some of these organizations offer their services for free with services provided by actual translators. However, as with any open platform, the quality of service can vary widely, so make sure to still have a native speaker review the translated materials before sharing publicly.

Here are some examples of translated materials from English to Spanish created by HASS collaborators:

- [Dallas Animal Services Housing Resources in English and Spanish](#)
- [San Diego Humane Society Mobile Clinic Flyer in English and Spanish](#)
- [Denver Animal Protection Displacement/Eviction Relief Program \(Temp Boarding\) in English and Spanish](#)
- [Denver Animal Protection Displacement/Eviction Relief Program \(Pet Supplies/Services\) in English and Spanish](#)
- [Pima Animal Care Center bag insert for food distribution in English and Spanish](#)

If your website software does not provide an option for viewers to experience your website in another language, check out this step-by-step alternative on [How to Turn Translation On or Off in Chrome](#).

## Additional Consideration

When translating materials, consider integrating additional accessibility options such as the [English to ASL \(American Sign Language\) Translation Standards](#) and adding audio and subtitled variations of materials for public use.

Another level of accessibility to consider is for those that utilize screen readers. Ensure your digital materials such as [website](#), [email](#), and [social media](#) are screen reader friendly. Examples of basic best practices include providing alternative text/visual descriptions, ensuring information is available as text and not just in images, and being mindful of the contrast ratio of colors.

## Supporting Evidence

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## Lost Pet Reunification Community Members Reuniting Lost Pets

### Encouraging Community Members to Participate in the Reunification Process

Did you know that [most lost dogs are found less than a mile from their home](#)? Engaging with your community and sharing resources that include them in the lost pet reunification process can help get pets home faster and empower individuals to spearhead finding the pet owner. Keeping a pet close to where they are found leads to a higher likelihood of successful reunification. Ensure your organization has a process for submission of lost and found pet reports that can be listed on your public-facing website for extra visibility. [Here's a sample form you can create if you don't have this process in place!](#)

### Sample Community-Facing Resources

Share these best practices and resources with your community.

#### A Community Member Has Lost a Pet:

- **Search!** Physically search the area immediately surrounding where the pet was lost.
  - **Tip:** Bring items your pet loves with you such as pet food/treats to shake or a toy that makes noise. This may help bring the pet out from hiding places if they recognize the noises or smells.
- **Post your lost pet information on local social media sites** like Lost and Found Facebook pages and [Nextdoor](#). Include the location where the pet was lost and a photo!
- **Notify your local animal services** and shelters/rescues that your pet is lost. Give them the pet's name, description, ID/microchip number, photo, location lost, and contact information. Depending on the shelter's process for following up with lost pet reports:
  - Schedule regular communication check-ins as needed
  - Visit the shelter to search as needed
- **Report your pet as missing on your microchip company's website** if known. [HomeAgain](#) or [24petwatch](#) are two common organizations that manage microchips.
- **Post your lost pet information on sites such as** [lost.petcolove.org](#) and [pawboost.com](#).
- **Post physical lost pet flyers** in your community and on community boards in public spaces such as libraries, fire stations, pet stores, and more.
  - [Pawboost flyer template](#)
  - [Pet FBI flyer template](#)
  - [Adopt-a-Pet Lost and Found Pet Flyer](#)

#### A Community Member Has Found a Pet:

- **Check for collars or ID tags.** Reach out to any visible contact information. If untagged/difficult to read, check if the pet is microchipped at your local shelter, veterinary clinic, or pet supply store after posting on social media and a potential walk.

- **Post your found pet information on local social media sites** like Lost and Found Facebook pages and [Nextdoor](#). Include the location where the pet was found and a photo!
  - [Found Pet Photo Tips – Hearts Speak](#)
- **Take a walk!** If you've found a dog that appears to be good on a leash, or found a cat and you have a pet carrier, take them around the neighborhood to see if any community members recognize them. Driving the pet around the neighborhood can also help! Ask neighbors you pass if they recognize them.
- **Notify your local animal services** and shelters/rescues that you found a pet. Give them the pet's name (if you know it), description, ID tag numbers, photo, location found, and contact information.
  - Let these organizations know you are attempting to find the pet's owner and can hold onto the pet while you search!
- **Post your found pet information on sites such as** [lost.petcolove.org](#) and [pawboost.com](#).
- **Post physical found pet flyers** in your community and on community boards in public spaces such as libraries, fire stations, pet stores, and more.
  - [Pawboost flyer template](#)
  - [Pet FBI flyer template](#)
  - [Adopt-a-Pet Lost and Found Pet Flyer](#)

## Proactive Communications

Share the following graphics highlighting lost and found pet best practices regularly to support the community **before** they experience a lost or found pet situation.

- [Share this graphic](#) to highlight that most pets are found close to their homes, and few pets who are brought to the shelter are reunited with their families.
- [Share this graphic](#) to highlight best practices for what to do if you find a lost pet in your community.
- [Share this graphic](#) to highlight dog-specific information about lost and found pets.
- [Share this graphic](#) to highlight cat-specific information about lost and found pets.

## Start a Lost and Found Texting Program

Check out this [blog on Greenville County Animal Care's lost and found pet texting program](#)—a simple, effective, inexpensive program that has essentially \*doubled\* the number of dogs GCAC is getting back home. See our guide highlighting text/SMS programs [here](#).

## Starting a Short-Term Foster Program for Found Pets

Consider offering a short-term foster program for found pets. Ask people who find friendly, healthy pets to make efforts to reunite the pet with their caretaker and hold them for up to 48 hours (or longer!) instead of immediately bringing the pet into the shelter's care.

## Getting Started: 48-Hour Foster Program Operations

### High-Level Program Outline

Consider the following steps when implementing a new 48-hour program. Below this outline, we have provided a sample program protocol, communications recommendations and scripts, and data tracking recommendations.

- Identify all teams or roles that will need to be informed of this new program and provide sample scripts and protocols.
- Identify which teams or roles will be primarily responsible for managing this program.
  - Highlight who will be responsible for training staff and relevant volunteers on the new program and scripts.
- Identify how volunteers may contribute to this program.
- Write a program description for internal use.
- Write a program description for the public.
- Draft an internal SOP including policies, procedures, and communications.
- Update data tracking processes as needed.
- Hold a staff/volunteer meeting to share details about this new program.
- Host trainings with relevant staff for public-facing communications.
- Ensure your organization's public-facing website lists all lost and found pets in your community.
- Update your organization's public-facing website with 48-hour program information and an FAQ on best practices for lost and found pets.

#### [48 Hour Lost Pet Program Sample Protocol: Cabot Animal Support Services](#)

This document defines the policy and procedures for helping community members find a pet's owner within the first 48 hours of finding the pet.

#### Internal and External Communications

- [48 Hour Practice Communications \(Internal and External Buy-In\)](#) - This document highlights steps you can take to gain buy-in for a new 48 hour program from staff, volunteers, and the community. This document includes frequently asked questions and a media pitch template.
- [48 Hour Lost Pet Program: Sample Talking Points from Cabot Animal Support Services](#) - This document defines the suggested verbiage and flow for in-person and over-the-phone interactions, helping community members locate a pet's owner within the first 48 hours of finding the pet.
- [48 Hour Lost Pet Program: Finder TEXT/EMAIL Communication Template](#) - When a conversation with a finder is not doable (you are unable to talk to them in person or reach them by phone) and you would like to ask them to participate by keeping the pet for (at least) 48 hours, send them an email and/or text. **Note:** *We have found in some Pilot communities that individuals are more likely to respond to a text than a phone call or email!*
- [48 Hour Lost Pet Program Text/SMS Platform Recommendations](#) - Organizations that experience high call volumes can overcome staff time constraints and other obstacles to implementing lost pet programming by using a text messaging/SMS platform to automate responses and follow up with finders of lost and loose pets. This allows the finder to receive information on lost pet reunification quickly and supports shelter staff efforts to easily follow up with finders.

#### Data Tracking Recommendations

- Found Pet Reports

- A found report should be created for every call, website form submission, or in-person contact about a stray/found animal.
- A designation in software indicates if a pet is part of a short-term foster program.
- Outcome of Found Pet Reports
  - Canceled - If the record needs to be deleted, or if the pet is duplicated and there are several reports for the same pet.
  - Shelter - The appropriate designation to close out a found report when the pet enters shelter care/has an impound/intake.
  - Keeping - When the finder decides to adopt the pet after the stray hold.
  - Rehomed - When the finder is able to rehome the pet (outside of their own home) after the stray hold.
  - Expired – If you are using animal shelter software to track your found reports, they may automatically expire after a set amount of time (check your software configuration). If not, you should regularly audit your found reports and mark them as expired after a designated amount of time—they should remain active for a minimum of 30 days.
  - RTO/Reunited – RTO, or returned to owner, is the most typical option for closing a lost or found report.
  - Any attempts at follow-up communications should be noted
- Intake of Found Pets into Shelter
  - For 48-hour program participants; Pets who are brought to the shelter after the 48 hour window closes should have an intake record linked to the original found pet report.

## Supporting Evidence

### [Lost Pet Reunification: Supporting Evidence](#)

This document contains a list of supporting evidence relevant to lost pet reunification interventions and support needs. Organizations may wish to use this information to guide programming aimed at increasing return-to-home rates and supporting the human-animal bond for lost pets. The following topics are included: ***See the topics in bold text for supporting evidence that accompanies this resource.***

- Microchip Benefits and Statistics
- Microchip Registration Needs
- Visual Pet Identification
- **Found Pets Are Close to Home**
- Benefits of Posting Signs/Flyers
- Access to Care and Pet Support Needs
- Field Services Support
- Community Cats



## Lost Pet Reunification Providing Collars and Tags to Pets

### Why Provide Collars and Tags to Pets Physically Leaving Your Facility?

When a pet leaves a shelter facility, having an extra safety net like a collar can help prevent that pet from getting lost, and attaching identification tags can support reunification efforts too. Whether through adoption, foster, or transfer to a partner, providing these items is a proactive step in keeping more pets safe from the start.

### Supporting Evidence

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**Looking for support with fundraising** to provide collars and IDs? See the [HASS Philanthropy Toolkit for Development and Fundraising](#).

**Looking for support building partnerships** with organizations that may be able to collaborate with you to provide collars or tags? Our [HASS Lost Pet Reunification guide, Establishing Partnerships for Lost and Found Pets](#) will teach you how to map your local ecosystem and begin establishing partnerships. Don't forget to search [pets.findhelp.com](https://pets.findhelp.com) by zip code and category to find support in your community!



## Lost Pet Reunification Establishing Partnerships for Lost and Found Pets

### Lost Pet Reunification Partner Considerations

To best identify potential partners within your community to support lost pet reunification efforts, consider which areas of lost pet reunification programming that your organization needs the most support. Use these gaps to strategize what types of partners to approach. Partnerships may include official organization-to-organization agreements or be informal such as a multi-organizational online lost and found Facebook group.

### Focus Area Examples

- Providing microchips/IDs
- Providing collars
- Case management for reuniting pets
- Community volunteers to help share flyers or do outreach
- Community members that have microchip scanners and educational materials that can support individuals who find pets in their neighborhoods.

### Potential Partner Examples

- Joint social media groups or pages to assist with lost pet reunification
- Local pet supply stores that may provide free/low-cost collars and leashes
- Microchip providers that may provide free or low-cost chips and scanners
- Fire stations, libraries, or other local hubs that can provide education if a community member loses or finds a pet

### Getting Started: Establishing Partnerships with Organizations

To identify potential organizational partners, consider [completing an ecosystem map](#) for your community. This process will help identify existing service gaps, highlight partnership opportunities, and give all community-facing staff and volunteers an easy-to-use resource for recommending pet and people support options. For example, this [Pet Support Guide and Worksheet](#) will help you identify pet support services and support being offered, and gaps that show the need for new services and/or partnerships.

### Next Steps: Brainstorming

The following worksheets highlight two ways your organization can identify potential community partnerships. Both worksheets use a unique approach to lead to a similar result.



1. Use the [Community Partnerships by Service Worksheet](#) to outline support service providers and organizations in your community. This sheet works by **identifying organizations that match a pre-identified service topic**. The results of this worksheet can be used to build partnerships in a variety of service topics and make recommendations to the public during support requests.
2. Use the [Community Partnerships by Need Worksheet](#) to **outline the needs of your community prior to pursuing partnerships**. Unlike the worksheet above, this sheet works by identifying potential partner organizations that can directly support the highest community needs as prioritized by your organization.

## Building Community Partnerships

To learn more about building [Community Partnerships](#), see our [complete guide here](#). You've already completed the first couple of steps, by using these worksheets!

## Community Partnership Communications

Community partnerships come in all shapes and sizes, and truly the sky is the limit! But like any good partnership, success will come from clear communication and a collaborative spirit. For communications recommendations, see the [HASS and HeARTs Speak Community Partnerships toolkit](#). It's fully customizable—and free to use— with sample graphics, social media posts, news releases, talking points, and more.

## Supporting Evidence

### [Lost Pet Reunification: Supporting Evidence](#)

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## Lost Pet Reunification Staff and Volunteers for Lost Pet Reunification Tasks

### Who Should Complete Lost Pet Reunification Tasks?

Lost pet reunification is time sensitive and allocating a full-time staff member or volunteer will make process management easier. To support individuals who lost or found a pet and have already followed [recommended steps](#), some tasks can be absorbed by the organization to provide a safety net for individuals who can't complete the recommended steps directly. This allows the shelter to be a support system versus the first and only line of defense. Lost Pet reunification tasks a staff member or volunteer is responsible for **may** include:

- Acting as the main point of contact for all lost and found pet inquiries
- Processing and updating lost and found pet reports in real time
- Creating lost/found pet flyers on behalf of the individual
- Posting lost/found pets on social media sites or shelter website
- Monitoring public sites for potential matches to known lost or found pets
- In-field tasks for found pets such as pet photos, microchip scanning, vaccinations, or providing supplies
- Coordination with marketing and communications personnel to improve public-facing lost and found pet campaigns
- Analyzing lost and found pet data and recommending process improvements
- Collaborating with Field Services on [lost pet reunification programming](#)

### Sample Job Descriptions

See a few sample job descriptions that may fit your organization's unique needs for this role below.

- [Volunteer Found Pet Support Job Description - HASS](#)
- [Lost and Found Team Coordinator Job Description - HASS](#)
- [Lost and Found Specialist Job Description - San Diego Humane Society](#)
- [Lost and Found Assistant Job Description - San Diego Humane Society](#)



## Lost Pet Reunification Lost Pet Reunification Personnel Training

### Training Personnel on Lost Pet Reunification

Involving all staff and volunteers in training and highlighting the basics of what to do if you find or lose a pet goes a long way in being able to support the community both as an organization and as individual community members. It is recommended to include this training in all staff and volunteer onboarding.

Consider hosting continued training if at any point your organization:

- Implements a new Lost Pet Reunification program
- Major policy or procedure changes occur
- Marketing and communication changes occur (especially regarding changes in public-facing language)
- Significant staff or volunteer turnover or onboarding

Training opportunities may vary depending on existing programs your organization has in place to support lost pet reunification efforts. It is highly recommended that all community-facing staff and volunteers receive training in **all** lost pet reunification efforts, as able. However, offering training to all staff and volunteers may provide an additional opportunity to have advocates in the community should they, their friends, their families, or their neighbors ever find themselves in a situation where lost and found pet information is needed. You may utilize the following guides for lost pet reunification recommendations that may be utilized in your organization's training practices.

- [Recommendations for Lost Pet Reunification practices to implement at your organization](#)
- [Recommendations on how to best encourage community members to help reunite pets they find](#)
- [Lost Pet Reunification staff or volunteer job descriptions](#)

### Tracking Training Efforts

Tracking assignments and completion status allows for easier follow-up or continued training, as well as progress-tracking for organizational goals, especially when providing training to various personnel. If your organization has an established employee and volunteer training protocol, connect with the relevant personnel to integrate new training efforts into the existing process.

### Creating a tracking process for staff and volunteer training

- Before the creation of a new training tracking process, discuss options with leadership and Human Resources at your organization. If available, this may be an opportunity for collaboration within an existing employee management or project management software. Confirm whether volunteers may also be able to use this software if volunteer training is also required.
  - If an existing software solution is not available, consider who may need access to the tracking information and how the organization currently tracks training progress such as spreadsheets, documents, forms, etc.
- Identify the person(s) responsible for the management and distribution of training. How do they currently track training efforts? Is this process working, or should it be updated?
  - Who needs access to monitor training progress files? How do they currently monitor progress? Is this process working, or should it be updated?
  - Should the training progress files be digital or physical documents?
  - Is there a budget to purchase a Learning Management System (LMS) for the organization to track training progress? *Note: An LMS can both distribute training materials and track progress.*
- Consider if there are different processes in place for employee versus volunteer training efforts. Is there an opportunity to combine the processes? If not, ensure both are updated when changes are made.
- If creating a new tracking system, consider including the following items:
  - First and last name (Trainee)
  - Email (Trainee)
  - Title/Role (Trainee)
  - Direct supervisor
  - Type of training assigned
  - Training required? Y/N
  - Date assigned
  - Assigned by or required by (Ex: Supervisor assignment, HR requirement, Grant fulfillment requirement)
  - Due date
  - Scheduled check-in date
  - Responsible for check-in (Person)
  - Date of completion
  - Notes
- If there is an interest in tracking not only the status and progress of training, but also time spent, consider adding a metric for the length of time the training will take. You may later use this in reports to calculate time spent as an organization, or individuals, to complete assigned training assignments.
- Consider adding training to the onboarding process for all new personnel
- Consider integrating collection of training process feedback for continuous improvement.

### Sample Solutions (Spreadsheet Based)

- [Simplified Tracking Sheet for Training Assignments](#) - Suitable for any size group or training assignments, but does not elaborate on details or follow-up procedure.
- [Tracking Sheet for Training Assignments I](#) - Suitable for small personnel groups and limited training assignments.

- [Tracking Sheet for Training Assignments II](#) - Suitable for larger groups and training assignments if software is not available. As resources allow, it may be beneficial to consider non-spreadsheet tracking options for ease.

### **Learning Management Systems (LMS)**

Learning management systems vary greatly when it comes to cost, capacity, simplicity of use, and best fit for organizational goals. We highly recommend your organization take the time to complete individual research on the solution that makes the most sense for your organizational needs. To get you started, here is a short list of existing LMS systems you may consider:

- Cypher Learning LMS
- TalentLMS
- Absorb
- iSpring
- Docebo
- D2L Brightspace LMS
- Blackboard Learn LMS
- Canvas LMS
- Moodle LMS
- Adobe Learning Manager



## Lost Pet Reunification Scripts to Support Lost Pet-Based Interactions

### Identify Available Programs and Services

When creating scripts and templates, start by identifying the top 3-5 lost pet reunification topics your organization gets asked about most frequently.

Is there a specific lost pet service being referenced most often by staff and volunteers? What do you most often get asked for help with and what can you provide that may help? Include any direct services your organization, or established partners, offer.

Topic of interest	What we can offer the community
<i>Example: Microchips</i>	<i>Example: Low-cost microchipping by appointment</i>

You can [use this template](#) to list out the most requested lost pet services and resources in your community. Having this list will be an important time-saver for anyone who responds to common requests.

### Use [pets.findhelp.com](https://pets.findhelp.com) to Share Options Not Directly Offered by Your Organization

Pets.findhelp.com can help locate local free and low-cost programs and services and help ensure services offered by your organization are reflected! Review this [pets.findhelp.com guide](#) to get started!

### Identify Ideal Messaging Focus

When creating new scripts, ensure that the potential dialogue reflects your organization's core mission, vision, values, and overall priorities—and provides the community with the information they need. Scripts may vary by the organization's size, available programs/partners, resources (time, financial, and other), and community makeup.

Topics you may want to include in scripts:

- Lost pet recovery resources and guidance

- Options for free or low-cost pet identification, tags, and microchips (provided directly or externally)
- Resources for people who have found a lost pet, like finder foster programs and support with medical care or supplies

## Sample Scripts

Reference the [SAMPLE Lost Pet Reunification Scripts](#) document as a starting place to brainstorm how your organization's support options may best be shared.

## Update Policies and Procedures

Ensure that scripts and templates are included in organizational policies and procedures, and are regularly evaluated and updated for consistency and relevancy. Standard operating procedures (SOPs) are procedures or systems of rules designed to promote consistency, efficiency, and implementation of best practices. SOPs:

- Provide a tool for training staff and volunteers
- Maintain consistency
- Save time
- Establish best practices
- Save cognitive energy for decisions that need to be made "in the moment"
- Allow delegation to support staff

The creation of new SOPs should be led by program and department leadership and informed by the organization's operations and best practices.

## Basic Elements of an SOP

[Sample SOP Template](#)

1. Date created or updated
2. Procedure name
3. Procedure description
4. Position title, departments, or individuals responsible
5. Tools and materials needed
6. Step-by-step instructions on the process
7. *Optional: pictures or video of key steps in the process*

## SOP Development Tips

- Don't reinvent the wheel! Reference other organizations' and software company protocols for your operations as available. These are most useful and relevant to you if developed by similar organizations in your area or a comparable location and software user.
- Keep them simple. They should be easily understood and straightforward how-to lists.
- Use direct speech.
- Use a consistent, accessible format.
- Ensure that staff are trained in and understand key protocols and know how to find others.

## Maintaining & Updating SOPs

SOPs remain most effective and useful to an organization when they are regularly maintained and updated to reflect organizational operations and best practices. It is recommended that a **yearly** schedule be established to review all SOPs and make updates as needed. Additionally, special circumstances may prompt the need to update an SOP more frequently.

### When to Update an SOP

- A process change occurred
- A new program or department developed
- A significant update was made to software features
- A new key performance indicator (KPI) was identified that is not currently being tracked
- Yearly (*at minimum, if none of the above has occurred*)





## Lost Pet Reunification Transporting Found Pets Home

### Why Offer to Transport Found Pets Home?

For many, traveling to the shelter is a barrier to reclaiming their lost pet, due to constraints like access to a vehicle or public transportation. Offering a transport service from the shelter can offer the pet a lifeline to reunification.

### Getting Started

1. Identify the staff or recruit volunteers who can transport pets. Make sure anyone transporting pets meets the mandatory state-issued requirements to drive, such as a valid license.
2. Add transportation job duties to existing job descriptions or collaborate with field services to coordinate joint efforts.
3. Which vehicles can be used? If you are unable to utilize existing organization vehicles, consider allowing individuals to use their personal vehicles. You will need to create a policy for mileage reimbursement, and a liability waiver. Have a policy expert review the waiver to ensure it is sufficient.
  - a. Use examples [such as this sample](#) to create your organization's liability waiver.
  - b. You can also work with programs like [The Salvation Army](#) to receive a donated vehicle for your organization
4. Create and distribute training materials and transport protocols to relevant staff and volunteers. These should include:
  - a. Steps 1-3 above
  - b. Any limitations to offering this service, such as available hours, and available staff/volunteers.
  - c. Eligibility requirements from public individuals requesting this service. Keep eligibility requirements as minimal as possible to ensure the highest number of reunited pets.
5. Advertise this service to the public by featuring it on your website and social media pages. Consider creating a marketing and communications campaign including this new program with details on eligibility requirements and available hours.
6. Create an [owner-receiving form](#) to acknowledge receipt of the pet upon arrival.
7. [Share success stories](#) with the community, along with compelling photos!

### Data Tracking Considerations

Develop a data tracking process for transporting pets to make the case for expanding program capacity, by showing positive impact, lower operational costs, and fewer pets needing to be physically

housed in a shelter. Consider using an existing field in your software, such as the “outcome subtype,” to highlight that the reunification took place through a staff or volunteer transport.

## Supporting Evidence

### [Lost Pet Reunification: Supporting Evidence](#)

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- Microchip Benefits and Statistics
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- Community Cats



## Lost Pet Reunification

### Linking People and Pet Records in Shelter Software

#### Overview

Entering sheltering data should be inclusive of both pets and people to promote the best outcomes. Linking pet and person records together when relevant allows for a more comprehensive approach to case management or internal reporting. Linked records can not only help track support requests to more holistically provide support to the pet and their caretaker, but also assist in reunification efforts in the event of a lost pet.

#### Shelter Software Options

It is common in most shelter software to have functionality allowing the connection of people and pet records directly. To consider shelter software options you may reference our [guide to data tracking systems](#) which provides benefits, software options, and case management considerations, or review a few common software options below.

The following are animal shelter software options available to, among other features, store person and animal-level data, conduct standard shelter operations such as intakes and outcomes, and track case management data such as status, pet health information, foster placements, and customer service interaction details:

- [Animals First](#)
- [Chameleon](#)
- [Pawlytics](#)
- [PetPoint](#)
- [ShelterBuddy](#)
- [ShelterLuv](#)
- [Shelter Manager](#)
- [ShelterPro](#)



## Lost Pet Reunification Remote Reporting for Lost and Found Pets

### Providing Accessible Lost and Found Pet Reporting for the Public

Since transportation to the shelter isn't possible for all, consider integrating options that can be completed over the phone, through email, or online to reduce barriers for the public to be reunited with their pets. Reduction of these reporting barriers not only provides an avenue of support not previously available to those that have lost or found pets, but it will also allow for a faster response time for reports received.

Looking for support in creating public-facing channels of communication for your organization?

[See our guide to contact types here.](#)

Not sure where to start with a lost and found pet report? You may use [this sample form from Cabot Animal Support Services](#) or consider including the following to get you started.

- Create one form that can be utilized for both lost and found pets. This may include creating a checkbox where the signer can select the appropriate field, a drop-down, or other. [Google Forms](#) is a simple, free option.
- Include an option to submit a photo of the pet with the report.
- Whenever possible, make forms less than one page long when printed.
- Collect the following information:
  - Today's date
  - Date pet was lost/found
  - Individual details
    - Name of the person who has lost/found a pet
    - Contact information
    - Alternate contact information
    - Is the pet microchipped? Y/N (include space for microchip number)
  - Address (where the pet was found or of the person who has lost the pet)
  - Pet Details
    - Type of pet (Dog, cat, etc.)
    - Name (if known)
    - Gender
    - Age
    - Spayed/neutered (if known)
    - Approximate breed
    - Color
    - Unique markings
    - Short or long fur (as applicable)
    - Approximate size/weight

- Items worn at the time of lost/found (collar including color, tags, clothing, other)

## Supporting Evidence

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## Lost Pet Reunification Posting Lost and Found Reports

### Why is Posting Reports Important?

Reports of lost and found animals should be displayed on your organization's website and relevant social media pages quickly to facilitate timely reunifications. Listing reports promptly allows owners to monitor your organization's listings for their lost pet, eliminating the need to physically visit the shelter daily, and increasing accessibility for pet owners who don't have the ability to physically visit your shelter frequently, or at all. Publicly available reports also allow individuals who have found a pet to monitor lost pet listings to help identify potential owners.

### How to Get Started

1. Ensure you have the ability to [file lost and found reports remotely](#).
2. Create an SOP, or add to an existing protocol, that outlines how to collect and publish lost and found reports to your website and relevant social media pages such as a local lost and found Facebook group. Ensure the SOP includes a timeline to ensure **timely uploads**. Lost and found reports should be displayed publicly within 24 hours of receipt.
  - a. For support creating an SOP, see our [guide on lost pet scripts and protocols here](#).
3. Provide training to staff and volunteers to ensure understanding and implementation of this new process.
  - a. For training support, [see our guide here](#)

### Additional Considerations

- Regularly audit the lost and found report upload times for opportunities to improve.
- If your process includes manual data entry, consider utilizing volunteers for administrative support.

### Integration with Existing Programs

If your organization cannot or does not directly accept lost and found reports, but you have a partnership with an existing program such as [PetcoLoveLost](#) to do so, ensure there is a clearly

labeled and prominently displayed space on your official website and social media pages that explains this partnership and directs the public to current lost and found pets.

## **Supporting Evidence**

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## Lost Pet Reunification Establishing Flexible Reclaim Fees

### Why is Establishing Flexible Reclaim Fees Necessary?

Reclaim fees can be a barrier to reunification for many pet owners, especially for those experiencing financial hardship. Offering flexibility with reclaim fees builds trust within the community and increases the likelihood that pet owners will be able to reclaim their pets. In addition to increasing your organization's return to home rate, other benefits include decreasing the overall length of stay for lost pets (which saves you money), increasing positive pet outcomes, preserving the human-animal bond, and boosting staff morale.

### Getting Started

Consider what flexibility your organization can provide when it comes to complete removal, reduction, or [flexible](#) or sliding-scale repayment options for reclaim fees. While the complete removal of reclaim fees will have the best results in the elimination of cost-related barriers to reunification, these alternative options are a great first step.

*Do you have a state or local policy that requires mandatory reclaim fees?* Begin building relationships with local legislators to advocate for change with the help of our [Government Communications starting guide](#).

*Need some help gaining buy-in from leadership or an external managing party for your shelter?*

Build a written proposal to present to your organization's leadership. Include why this practice is important and the benefits to your shelter and community. [Estimate cost savings based on fewer lost pets lingering in your shelter](#). Looking for support with fundraising to create a new program? See the [HASS Philanthropy Toolkit for Development and Fundraising](#).

### Additional Considerations

- Encourage pet owners to come to the shelter quickly by setting a time limit to when a pet's reclaim fee will be waived. [This shelter waives fees for pets reclaimed within three days, for example](#).
- Advertise flexible reclaim fees on your website and other platforms. Pet owners should be able to find this information easily.
- Issue a press release to spread the word about this new program.
- Do not require proof of hardship in order for individuals to receive assistance.



## Supporting Evidence

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- Community Cats



## Lost Pet Reunification Removing Citations for Reclaimed Pets

### Why Should Citations Be Removed for Reclaimed Pets?

Fear of a citation and/or inability to pay may cause people to avoid reclaiming their pets. Support community members by removing unnecessary barriers to the process, such as mandatory citations for reunification. Doing so will improve the number of pets able to be returned to home, and also community sentiment towards the organization.

**Do you have a state or local policy that requires mandatory citations be given for all pets being reclaimed?** Begin building relationships with local legislators to advocate for the change of these policies with the help of our [Government Communications starter guide](#).

### Supporting Evidence

#### [Lost Pet Reunification: Supporting Evidence](#)

This document contains a list of supporting evidence relevant to lost pet reunification interventions and support needs. Organizations may wish to use this information to guide programming aimed at increasing return-to-home rates and supporting the human-animal bond for lost pets. The following topics are included: ***See the topics in bold text for supporting evidence that accompanies this resource.***

- Microchip Benefits and Statistics
- Microchip Registration Needs
- Visual Pet Identification
- Found Pets Are Close to Home
- Benefits of Posting Signs/Flyers
- **Access to Care and Pet Support Needs**
- **Field Services Support**
- Community Cats



## Lost Pet Reunification Establishing Lost Pet Reunification Goals

### Why is Setting Lost Pet Reunification Goals Necessary?

When a lost pet enters the shelter system, reunification must be prioritized over all other outcomes to preserve the already existing human-animal bond. This includes setting measurable goals that identify effective strategies for getting as many pets back home quickly.

### How to Get Started

To better reunite more lost pets, it is necessary to track the appropriate [lost and found data](#) and establish [KPIs](#). Identifying **existing** return-to-home (RTH) rate is a critical component of setting your organization's KPIs and future RTH goals.

It is important to not only identify your existing RTH rate but also set incremental goals to increase that rate over time because the benchmark must be reflective of your unique organization and community makeup. While high-level or ambitious goals may be adjusted less frequently, the organization should evaluate RTH data at least once per month to adjust incremental goals accordingly.

**Note:** There is not currently a national RTH benchmark for organizations that intake lost/stray pets.

### Additional Considerations

To best support the creation and continued analysis of your organization's RTH goals, consider the following.

- **Geography:** By tracking detailed location data (zip code, street address, or at minimum the closest cross street) you can learn more about where lost pets are entering your shelter from. Location data can inform future outreach efforts to specific zip codes or neighborhoods.
  - For example, an area with high lost pet intake numbers may be best supported by proactive neighborhood events offering free microchips or pet identification, collars, leashes, fence repair, and educational materials on what to do if you lose or find a pet.
- **Detail tracking:** Consider utilizing an existing data field in your shelter software such as outcome subtype to track, in detail, how animals are being reunited.

- Some example categories are [shelter transport](#) programs, reunification in field, microchip identification, ID tag identification, or other.
- **Traces:** Completion of [microchip/tag traces](#) should be a required step for every stray pet to enter your organization's care.
- **Lost and Found reports:** [Quickly displaying reports of lost and found animals](#) on your online platforms (website, social media) reduces barriers for community members and supports quicker reunification efforts.

## Supporting Resources and Evidence

### [There's Likely a Better Way to Get Lost Pets Home: Public RTH - HASS](#)

Working with finders of lost pets in the community can be an effective way to increase return-to-home rates.

### [Lost Pet Reunification: Supporting Evidence](#)

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## Lost Pet Reunification Tracking Lost and Found Pet Data

### What is Included in Lost and Found Pet Data Tracking?

Lost and found pet data tracking includes the management of lost and found reports and the outcome results for reported pets. This may include reunification by a finder, adoption by a finder if an owner was not located, a finder-to-foster, shelter surrender, pets returned-to-home (RTH) from the shelter, and more. Tracking detailed lost and found pet data supports expanding existing lost pet reunification programs identifies geographic areas that could benefit from community outreach, and creates more accurate KPIs.

### Calculating a Return-To-Home Rate

When considering lost and found pet data, calculating the organization's return-to-home (RTH) rate should be one of the first data points identified to best support future organization goals surrounding lost pet reunification. To calculate the RTO rate, divide the total number of pets returned home by the total number of lost/stray pets taken into the shelter's care.

### Lost and Found Reports

Standardizing the data collection and follow-up process for lost and found reports is key to listing lost and found pet details accurately, showing the support provided to finders, and demonstrating the number of animals kept out of the shelter via reunification made by finders. The following data points can help you get started.

Data Point	Definition	What it Serves
Person record	The person record associated with the finder or owner of a lost/found pet	<ul style="list-style-type: none"><li>• Person-level tracking for lost and found data</li><li>• Informs reunification efforts</li><li>• Tracks the support provided to finders and demonstrates the number of animals kept out of the shelter via reunification made by finders.</li></ul>
Animal record	The animal record associated with the pet who has been lost or found	<ul style="list-style-type: none"><li>• Animal-level tracking for lost and found data</li><li>• Informs reunification efforts by listing animal details in a searchable/viewable database</li><li>• Tracks the support provided to finders and demonstrates the number of animals kept out of the shelter via reunification made by finders.</li></ul>

Data Point	Definition	What it Serves
Lost/found location	<p>The complete address where the pet was lost or found.</p> <p><i>If full address information is unavailable, detailed cross-street data with city and zip codes may be entered. However, this data is less likely to be able to be mapped accurately by software.</i></p>	Supports Lost Pet Reunification and the ability to map data for analysis to inform support needs and program development.
Outcome	<p>The outcome of the report, such as:</p> <ul style="list-style-type: none"> <li>• Reunited by finder</li> <li>• Brought to the shelter</li> <li>• Unknown outcome</li> </ul>	Documenting outcomes provides greater data on program efficacy and future development needs.
Date and time reported	The date and time a pet was reported to be lost or found.	Captures the amount of time an animal is lost/found. This information can lead to better understanding of how quickly an animal is typically reunited.

## Microchip Data Tracking

See [Data Insight: Microchips Work and They Could Work Better \(Part II\) - HASS](#) for more information on tracking microchip data within animal records.



## Lost Pet Reunification

### Lost Pet Reunification In-Field Focus for Field Services

#### Why Prioritize Lost Pet Reunification In-Field

[Most lost pets are found very close to home](#) and have a higher likelihood of being reunited with their family if they stay in the neighborhood they were found, even for just a short period of time. Reclaim rates decrease when a pet comes into the shelter, which is why it is imperative that lost pet reunification efforts are made **before** bringing a lost pet to the shelter. Encouraging field officers, formally known as animal control, who are often the first call the public makes when finding a lost pet, to walk the area they found the pet in first helps get more pets back home without entering the shelter system at all!

#### How to Get Started

1. Create or implement an SOP that outlines steps to reunite lost pets in the field.
  - a. Create a [Return to Owner Checklist](#). You can use this one as-is, or as a guide for creating your field reunification checklist.
2. Ensure field officers have the tools they need to complete the tasks within your checklist.
3. Regularly audit your success rate (reunifications in the field) to ensure protocols are being followed.

#### Provide Training

Create buy-in for this initiative by providing thorough training for those working in the field. This [free training module](#) covers the basic principles of community-centered field services that can get you started. Regularly check in with officers to ensure they're fully trained on the process.

#### Additional Resources

[HASS Webinar Replay: Beyond Enforcement: Insights into Community-Centered Field Services](#) - This webinar replay, featuring experts Dr. Josh Fisher, Director of

Charlotte-Mecklenburg Animal Care and Control and Board President for the National Animal Care and Control Association (NACA), Mike Wheeler, Director of Community Services for the City of Cabot and NACA Board Member, and Scott Giacoppo, Director of National Shelter Support for Best Friends Animal Society, provides insights into the transformation of field services and highlights practices to support people and pets through community outreach, supplies, access to vet care, and getting lost pets home.

## Supporting Evidence

### [Lost Pet Reunification: Supporting Evidence](#)

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## Lost Pet Reunification Community-Focused Field Services KPIs

### Creating Organizational KPIs

If your organization does not currently have established KPIs, review our [creation of KPIs](#) guide to help get you started. This guide includes basic terminology, how to assess organizational goals, a step-by-step guide to develop new KPIs, and additional considerations for stretch goals, S.M.A.R.T. goals, and gaining buy-in across your organization.

### Community-Focused Field Services KPIs

When establishing community-focused KPIs for field services, prioritize goals surrounding [support provided to community members](#), and prioritizing reunification efforts relative to the number of pets brought to the shelter, citations given, or other punitive measures. As of December 2023, there is no national benchmark for pets returned in the field. Because the benchmark must be reflective of your unique field services operation and community makeup, it is important to identify your existing rate of pets reunited in the field and set benchmarks to increase that rate over time.

### Examples:

- If the current rate of returned pets in field rate is 5%, consider an appropriate new goal, such as 7.5% for the next quarter, or 10% for the year (a 50% increase).
- Number of found or lost pet reports completed in the field increase of X% per quarter. This goal should be compared to reports completed on-site or remotely with shelter staff to track data trends and evaluated alongside successful reunification data.
- Set a goal of providing support to a greater percentage of the individuals who request it. If you received, for example, 1,000 requests for support last year, and provided direct support to 25% of them—consider setting a goal of 40 or 50% for the next year, and higher still the year after that. Be sure to track information related to what the initial request entailed and what was provided in return.
  - Pet support may include:
    - Providing pet food or supplies
    - Providing a referral to a free/low-cost veterinary service
    - Microchipping a pet
    - Fence repair to prevent loose pets

- Number of community cats brought in for vaccinations and sterilization prior to returning them to their original location.
  - Tracking these metrics can be especially helpful in demonstrating a decrease in loose cats over time, especially in areas where high numbers of pregnant and nursing cat families have been reported in the past.

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## Lost Pet Reunification Access to Shelter Systems and Information In-Field

### Overview

In order for field officers to have access to the information they need in the field and to capture activities completed or services provided, it is necessary to have them connected to shelter data systems. Whether it's animal shelter software or other data tracking mechanisms, direct access can help officers perform essential job functions with efficiency and be better equipped to support community members while in the field.

### Benefits of this Practice

- Access to human and animal records may:
  - Facilitate quicker reunifications
  - Provide relevant historical information
  - Assist with tracking community cat colonies
  - Help with case management (i.e. reports of complaints or dangerous animals)
- Data tracking in real-time for
  - [Return to Owner Checklists](#)
  - Completed reunifications
  - Pet support provided
  - Detailed notes for cases in progress

### Evaluate Needs

1. Identify the platforms that field officers need access to.
2. Identify how officers need to be granted access, such as login credentials.
3. Identify what physical technology officers need such as a computer, tablet, or smartphone.

### Create a Protocol

Create a protocol that outlines relevant platforms that will be used, access information, and basic usage guidelines with best practices to support shelter software integration in field services operations. Ensure that scripts and templates are included in organizational policies and procedures, and are regularly evaluated and updated for consistency and relevancy. Standard operating procedures (SOPs) are procedures or systems of rules designed to promote consistency, efficiency, and implementation of best practices. SOPs:

- Provide a tool for training staff and volunteers
- Maintain consistency
- Save time
- Establish best practices
- Save cognitive energy for decisions that need to be made “in the moment”
- Allow delegation to support staff

The creation of new SOPs should be led by program and department leadership and informed by the organization’s operations and best practices.

## Basic Elements of an SOP

### [Sample SOP Template](#)

1. Date created or updated
2. Procedure name
3. Procedure description
4. Position title, departments, or individuals responsible
5. Tools and materials needed
6. Step-by-step instructions of the process
7. *Optional: pictures or video of key steps in the process*

## SOP Development Tips

- Don’t reinvent the wheel! Reference other organizations’ and software company protocols for your operations as available. These are most useful and relevant to you if developed by similar organizations in your area or a comparable location and software user.
- Keep them simple. They should be easily understood and straightforward how-to lists.
- Use direct speech.
- Use a consistent, accessible format.
- Ensure that staff are trained in and understand key protocols and know how to find others.

## Maintaining and Updating SOPs

SOPs remain most effective and useful to an organization when they are regularly maintained and updated to reflect organizational operations and best practices. It is recommended that a **yearly** schedule be established to review all SOPs and make updates as needed. Additionally, special circumstances may prompt the need to update an SOP more frequently.

## When to Update an SOP

- A process change occurred
- A new program or department developed
- A significant update was made to software features
- A new key performance indicator (KPI) was identified that is not currently being tracked
- Yearly (*at minimum, if none of the above has occurred*)

## Supporting Evidence

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## Lost Pet Reunification Contacting Pet Owners in the Field

### Overview

Providing field services staff with the resources needed to directly contact pet owners or caretakers while in the field is an essential step in improving reunification efforts. If a positive identification through microchip scanning or local outreach is made for a loose pet that has been picked up by field services, efforts to locate and contact a potential caretaker to complete an in-field reunification should be prioritized first.

### Contact Options

- **Contacting caretakers by phone call or text message** is preferred for the most immediate response. Provide field services personnel with a phone, or [computer utilizing an internet-based \(hotspot for mobile travel\) phone service such as Google Voice](#), and sample scripts including the reason for the contact and general physical appearance information for the found pet.
- **Contacting a caretaker's email** should be reserved for those who do not respond by phone or text message, or if email is the only contact method available, due to the time delay in seeing and responding to this method of communication. Field services personnel should be provided a phone or computer with online capabilities, and an official email address, to utilize this method.
- **Go directly to the source! Attempt to reach a potential caretaker at their home address** if available and you are unable to reach them in another way.

### Return to Owner Checklist

For more recommendations on best practices to complete reunification tasks in the field, see our [Field Services Return to Owner checklist here](#).

### Supporting Evidence

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## Lost Pet Reunification In-Field Pet Status Updates

### Access to Shelter Software and Tracking Information In-Field

With a focus on reunification in the field and [finder to foster programming](#), being able to access shelter software or pet tracking data and update pet information, person information, and general status while in the field will improve efficiency tracking field operations. If Field Services does not currently have access to this information, [see our guide here](#).

### Why Prioritize Pet Status Updates In-Field?

Creating a process to immediately update intakes and outcomes while in the field is a core building block for a streamlined and successful reunification in-field focus.

If a lost pet is found by animal services and a caretaker is located, entering both the person and pet information into the existing database with outcome information begins to build appropriate data tracking for reunification efforts and creates a comprehensive file should this pet or person ever interact with field services or the shelter in the future, improving case management efforts.

In situations where the finder agrees to foster the lost pet, it will be essential to quickly input data for both the finder and pet into the database for the best chance at reuniting the pet with their caretaker.

If a pet must come to the shelter, creating an intake record prior to arrival to the shelter speeds up the process for a pet to be identified and allows on-site shelter staff to better prepare for an incoming pet.

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## Lost Pet Reunification Creating and Distributing Lost and Found Pet Signs

### Supporting Community Members with Lost and Found Pet Signs

Field officers can keep supplies on hand to create new or copy existing lost pet signs to assist members of the community who have lost or found a pet but do not have the resources to create physical posters or signs. Providing this service will bring more visibility to current lost or found pets and help expedite reunification efforts.

### Supply Needs for Field Services Vehicles

Consider the following supply recommendations to be able to print and/or create lost and found pet signs on behalf of community members who need assistance.

- Wireless copier/printer with Bluetooth and SD card or thumb drive input options
  - Note: Some wireless printers can operate exclusively on a Bluetooth connection to remotely send print materials to the device, however, some do require a WiFi connection to operate. Keep this in mind if you are purchasing a new device.
  - A copier option is essential to be able to produce many posters based on one single document provided by a community member.
- Many copies of a blank lost or found pet template including options to fill in:
  - If the pet was lost or found
  - Pet name (if known)
  - Species
  - Gender
  - Approximate size
  - Color/fur length (as applicable)
  - Unique notes such as “Do not chase/Scared”, medical conditions, or other.
  - “Last seen” information
  - Contact information for owner or finder
  - A space for a photo (as able)
- Blank printer paper
- Markers
- Tape or other posting supplies

### Distribution Suggestions

While the distribution of lost and found pet signs should be primarily focused on the area the pet was found first, expanding into heavily populated areas or common community hubs may be beneficial. Consider the following distribution locations for physical lost and found pet signs to reach the most community members possible:

- Light posts within a mile of a found pet location or lost pet's home. *Consider local rules against posting flyers or notices in public locations prior to posting on city-managed poles.*
- Doors of neighbors near the lost/found location
- Public libraries
- Fire stations
- Grocery stores or local food establishments

## Sample Flyers

- [PetHub Solutions Templates](#)
- [Petco Love Lost](#) - Lost and found pet database
- [PawBoost](#) - Includes posting and creating a [flyer](#)
- [Pet FBI](#) - Includes posting and creating a [flyer](#)
- [Adopt-a-Pet Lost and Found Pet Flyer](#)
- [Found Dog Infographic - AmPA!](#)
- [Found Cat Infographic - AmPA!](#)
- [Free Resources & Downloads - Lost Cat Finder](#)

## Supporting Evidence

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## Lost Pet Reunification Lost and Found Pet Door Notices

### Get Noticed: Sharing Lost and Found Pet Information

In the event a field officer cannot locate a caretaker for a lost pet and must bring the pet to the shelter, providing physical flyers or notices on doors near where the pet was found can help improve the chances of reunification. At a minimum, physical notices should include a statement that a pet was found, a few basic pet details including a description, and the relevant shelter contact information.

For ease, a templated notice provided to officers should have spaces where details can be completed while in the field. Notices should also come equipped with supplies to be able to attach notices to doors, poles, or other public spaces. If resources allow, creating notices that are custom-cut to fit door handles may improve efficiency.

### Example Notices

- Portsmouth Humane: Includes advanced selections for details of the found pet:
  - [Lost Pet Side A - Portsmouth Humane](#)
  - [Lost Pet Side B - Portsmouth Humane](#)
- [Are you missing your dog RTH Door Hanger English and Spanish - South Suburban Humane Society](#): Offers information in two languages and highlights key facts about the reclaim process including the lack of fees, tickets, or judgment.
  - **Note:** This flyer is exclusively for dogs. Make sure that, if this notice is used as a reference, you create multiple flyer variations for different species or one flyer that is for pets in general.
- [Missing Pet Door Hanger-Bilingual - Austin Animal Center](#): Offers information in two languages.
- [Found Dog Yard Sign - Metro Animal Care and Control Nashville](#): An alternative to door flyers, a yard sign is a creative alternative to traditional notices.

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## Lost Pet Reunification Utilizing Microchip Scanners in the Field

### Why Microchip Scanners Are Essential in Field Services

Especially in the case of dogs, lost pets are most likely to be [found less than a mile from their home](#). Beyond encouraging community members to microchip their pets, integrating microchip scanner usage in the field can go a long way in ensuring lost pets are reunited in a timely manner and without leaving their community.

### Integration of microchip scanners in the field operations process includes:

- Supplying all personnel that work in the field with individual microchip scanners.
  - Include backup batteries or a charger, and a user guide.
- Updating protocols to require microchip scanning of **all** loose pets.
  - Look up the microchip information to verify available contact information.
  - Attempting to contact potential caretakers to reunite pets in the field.
- Complete reunification in-field **if a caretaker is identified**.
  - Arrange a pick-up or drop-off of the pet with the caretaker.
  - Offer preventative resources to avoid a lost pet in the future including [educational information](#), or direct services such as [fence repair](#).

### Additional Resources

- [Microchips reunite pets with families - American Veterinary Medical Association](#): Includes the benefits of microchips and the science behind how they work.
- [National Check the Chip Day - American Veterinary Medical Association](#): National “Check the Chip Day” happens each year in August and aims to remind pet owners of the importance of microchipping pets, and keeping microchip information up to date.
- [Microchip Registry Lookup - AAHA](#): A site that can help anyone look up microchip information as long as they have the scanned number.
- [Microchipping FAQ - American Veterinary Medical Association](#): Answers to commonly asked questions about microchips including how they are inserted, privacy concerns, best practices, and “ISO” chips that may be required in countries outside of the USA.
- [The right tool reunites lost pug with family | Best Friends Animal Society - Save Them All](#): A heartfelt success story centered around the use of a microchip scanner.

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## Lost Pet Reunification

### Sharing Lost and Found Pet Resources Through Field Services

#### Benefits of Sharing Lost Pet Reunification Resources

For most shelters, the highest intake type is stray pets. Lost pets may often appear healthy and cared for, and [many are only blocks away from their homes](#). Frequently sharing your lost and found pet resources and offering educational opportunities can help prepare community members to help get lost or found pets back home faster and without needing to seek external support first.

The following resources can be selected and adjusted to fit your public-facing field services communication options such as in-person and remote interactions, email outreach, and resources shown on an official website. For additional resources, see our [extended guide here](#).

#### Sample Marketing and Communications Resources

The following resources highlight ways to focus your public-facing communications on lost pet reunification including customizable templates, best practices, sample webpages, and technology solutions.

- [Marketing Toolkit: Lost Pet Reunification - HASS](#)
- [Communications Kit: Lost Pet Reunification – HeARTs Speak](#)
- [Sample Found an Animal Handout - Austin Pets Alive!](#)
- [Design Template: Lost & Found Social Graphics – HeARTs Speak](#)
- [Editable Template: Lost & Found Pet Action Guide – HeARTs Speak](#)
- [Sample Social Post: Reminder to Keep Microchip & Tag Info Current - Fur Ever Yours Dog Rescue](#)
- [Sample "Lost Pet Alert!" Video to Locate Potential Owners - Greenville County Animal Care](#)
- [Microchips reunite pets with families - American Veterinary Medical Association](#)

#### Posting Lost and Found Pet Information Online and In Person

The following resources can support the community in developing flyers and posting lost and found pet information in online spaces to help directly reunite pets with their people. In addition to the following support options, we recommend sharing lost and found pet information in community spaces such as libraries, fire stations, or online local lost and found pet pages.

- [Petco Love Lost](#) - Lost and found pet database
- [PawBoost](#) - Includes posting and creating a [flyer](#)
- [Pet FBI](#) - Includes posting and creating a [flyer](#)
- [Adopt-a-Pet Lost and Found Pet Flyer](#)
- [Found Dog Infographic - AmPA!](#)
- [Found Cat Infographic - AmPA!](#)
- [Found Cats or Kittens Infographic - AmPA!](#)
- [Found Pet Photo Tips – HeARTs Speak](#)
- [How to Find a Lost Cat Tips - Lost Cat Finder](#)

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## Lost Pet Reunification Healthy Cats in the Community

### Pathway Planning for Healthy Cats in the Community

When considering the best plan of action for a cat in your community, consider their approximate age, health status, nail status (declawed), and risk of harm prior to making decisions for the best pathway. Not all cats are fit to live in the community, and **all** community cats should have the ultimate goal of being spayed, or neutered, and vaccinated to prevent the spread of disease before returning to their home location. Community cat programming overall provides humane, species-appropriate programs and services to reduce the number of outdoor cats, improve quality of life, keep families together and pets in their homes, reduce shelter intake, and reduce needless feline euthanasia.

*Do you have a state or local policy that requires mandatory pick up of all loose pets?* Begin building relationships with local legislators to advocate for the change of these policies with the help of our [Government Communications guide](#).

### Community Cat Programming

The following community cat resources highlight program basics, pathway planning, internal and external communications, and more.

- [HASS Resource: Community Cat Programming](#)
- [HASS Resource: Lost and Found Cats](#)
- [HASS Resource: Cat Intake and Pathway Planning](#)

### Supporting Evidence

#### [Lost Pet Reunification: Supporting Evidence](#)

This document contains a list of supporting evidence relevant to lost pet reunification interventions and support needs. Organizations may wish to use this information to guide programming aimed at increasing return-to-home rates and supporting the human-animal bond for lost pets. The following topics are included: ***See the topics in bold text for supporting evidence that accompanies this resource.***

- Microchip Benefits and Statistics
- Microchip Registration Needs
- Visual Pet Identification

- Found Pets Are Close to Home
- Benefits of Posting Signs/Flyers
- Access to Care and Pet Support Needs
- **Field Services Support**
- **Community Cats**



## Lost Pet Reunification Field Services Requirements for Loose Pets

### Overview

As field services [transform to a more community-oriented approach](#), considerations should be made regarding requirements for the pickup of loose pets in a community. In the past, practices such as “sweeps” may have occurred to bring all loose pets directly to the shelter. This process not only creates an unnecessary shelter space burden but, more critically, lessens their chances of successful reunification with a caretaker. Efforts including [reunification in-field](#), proactive and preventative support, community education, and community cat programming may replace previous priorities of traditional “sweeps”.

**Do you have a state or local policy that requires mandatory pick up of all loose pets?**  
Advocate for the change using the [Government Communications starting guide](#).

### Lost Pet Reunification In-Field

To [support lost pet reunification in the field](#), consider integrating the following tasks into existing protocols and procedures:

- [Scan the microchip](#) and attempt to find owner information in shelter software, or contact the shelter to have them check if access to shelter software is unavailable. [Contact the owner](#)’s information if a microchip is found.
- Assist in [transporting pets home](#) if an owner is confirmed and they are unable to drive to the current field services vehicle location.
- If a pet is loose, knock on doors nearby where the pet was found to try to get a positive identification of owner.
- Walk the pet around the block for visibility.
- Create a [door notice with found pet information](#) and details on which shelter the pet will be taken to if no owner is found, leaving it on nearby doors.
- Create a [found pet flyer](#) with basic information to post in the neighborhood.

### Proactive and Preventative Support

Proactive and preventative support includes both education and distribution of supplies whenever possible. We recommend providing proactive education highlighting best practices if a member of the community loses a pet, finds a pet, or is looking for supportive services. All educational resources provided to the community should have clearly defined contact information if support is needed past the listed recommendations.

Providing preventative support can lessen the chance of pets getting loose or lost in the future. Also, consider partnering with local organizations that may be able to assist. This may include but is not limited to:

- Fence repair/replacement
- Collars, leashes, and pet identification
- Pet food or supplies

## Community Cats

The following community cat resources highlight program basics, pathway planning, internal and external communications, and more.

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- [HASS Resource: Lost and Found Cats](#)
- [HASS Resource: Cat Intake and Pathway Planning](#)

## Supporting Evidence

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## Lost Pet Reunification Case Management for Field Services

### Why Include Case Management and Social Work in Field Services?

As field services shift focus from the [old model to a community-oriented and pet reunification focus](#), including case management training or a staff social worker who is skilled in health and human services can ensure that people receive holistic support alongside their pets.

### Getting Started

#### Case Management Training

Implementing [case management](#) into field services helps people keep their pets, provides resources and support, and helps people reunite missing or lost pets. Case management means every person and pet is treated as an individual with the goal of providing their specific desired option for support.

A case management focus may include:

- Interacting with a [conversational interview approach](#) to consider ways you may be able to resolve the root cause of a situation to keep more people and pets together.
  - Example: A person is trying to surrender a pet because they cannot afford the pet's special diet food. Utilizing directly available resources, existing partnerships with local pet stores or pet food pantries, or sites such as [pets.fndhelp.com](https://pets.fndhelp.com), provide the person with options for pet food support. Ask if they would like information about human-centric food pantries as well as the two challenges commonly coincide.
- Providing pet food or supplies (leashes, collars, tags).
- Providing information for commonly requested support services you cannot directly offer whenever possible. This may include free/low-cost veterinary care, behavior support, or other. Not sure where to start? Review our guide on [sharing support services with the public here](#).
- Providing information on available human-centric services (housing, treatment facilities, food pantries, etc.).
- Providing how-to guides and best practices for lost or found pet reunification efforts and assisting in community notification of a lost or found pet.

## Service Referrals

Consider integrating a referral system to connect individuals and their pets with programs or services you may not directly offer. A referral process connects an individual immediately to an external program or service to more quickly provide them with support. This may include providing information on pet food pantries, housing assistance, free/low-cost veterinary care, and more.

[Pets.findhelp.com](https://pets.findhelp.com) is a free platform for both the public and organizations listing programs to connect free and low-cost programs and services to those who need them. [Pets.findhelp.com](https://pets.findhelp.com) has an integrated referral system to utilize while managing in-field support. [Learn more about \[pets.findhelp.com\]\(https://pets.findhelp.com\) and the referral process here.](#)

## Hiring a Social Worker

Hiring a social worker, social work intern, or staff member actively pursuing social work accreditation can enhance your organization's pet support goals and more comprehensively provide support to the people and pets of your community. If hiring a full-time social worker is not currently a possibility, having a social worker provide training for Field Services staff on case management and crisis intervention on a short-term basis can go a long way in supporting staff with community interactions.

- [Hiring a Social Worker or Intern](#) - This guide highlights the “why” of hiring social workers for your unique organization, how to get started, sample job descriptions, and a few tips and tricks.
- Partner with an existing social work network familiar with your community to provide your organization with support and resources!

## Additional Consideration

In the process of hiring a social worker or social work intern, ensure your organization's existing training protocols provide basic process information for individuals that may be unfamiliar with the animal welfare field. This will help the social worker create the most well-informed, holistic approach when considering the best support options for members of the community **and** their pets. In addition to evaluating existing training protocols, consider integrating compassion fatigue resources into your current staff and volunteer offerings to assist in decompression when frequently dealing with complex and challenging situations.

## Supporting Evidence

### [Lost Pet Reunification: Supporting Evidence](#)

This document contains a list of supporting evidence relevant to lost pet reunification interventions and support needs. Organizations may wish to use this information to guide programming aimed at increasing return-to-home rates and supporting the human-animal

bond for lost pets. The following topics are included: ***See the topics in bold text for supporting evidence that accompanies this resource.***

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- Community Cats



## Supported Self-Rehoming Supported Self-Rehoming Resources

### Benefits of Supported Self-Rehoming Resources

As of 2022, nearly [27% of animals](#) entering shelters are owner surrenders. This means that people brought their pets to the local animal shelter where they were 'surrendered' into care. The goal of supported self-rehoming is to provide pet owners with resources, connections, and assistance to safely rehome their pet, while the pet remains in their familiar home environment. This allows for a more flexible and personal rehoming experience while reducing shelter population, shelter-specific illnesses, mental health decline, and risk of further space crisis. By establishing easily-accessible supported self-rehoming resources your organization can more effectively support your community's needs.

### Communication Channels

Consider all [available channels of communication](#) that share rehoming support offered by your organization, partner organizations, or other local community services. This may include in-person interactions (customer service in-shelter, community event presentations, field responses), emails, text messages, phone calls, social media, websites, and other avenues for digital communication.

### Communication Strategy

In collaboration with HeARTs Speak, this communications kit helps organizations talk to community members about the many ways you are supporting people and pets, including a 12-month communications planner, strategic considerations, a detailed planning document, and more! This [Communication-Focused Communication Strategy](#) will get you started considering which communication-based steps your organization should take for your unique setup and needs. Once a communication strategy is in place, you may utilize existing resources, or the following section to determine which rehoming resources are the best next step. Specific to rehoming, see the [basics of rehoming communications kit here](#).

### Establishing Resources

[This rehoming technology guide](#) can help you get started if you do not already have a set of established rehoming resources for your organization. This guide includes popular rehoming platforms, social media best practices, and sample protocols.

### Frequently Asked Questions (FAQs)

The following may be utilized to create or enhance existing supported self-rehoming programming and ensure public-facing messaging is consistent.

#### **If I'm helping someone rehome a pet, should I ever intake the pet or does it always stay in the custody of the owner?**

Ideally, your organization will provide rehoming support services to make it easier for families to keep their pets during the rehoming process, allowing animals to refrain from ever needing to unnecessarily enter the shelter system. g. In cases of emergencies or crisis rehoming, follow your organization's standard protocol.



### How long does supported self-rehoming usually take?

Timing varies due to many variables. Some include the species and age of the pet or how responsive the pet owner is to inquiries. The more time the pet owner can devote to rehoming their pet, the more likely it is that the pet can be successfully self-rehomed. **Due to these limitations in establishing a true estimate for the time it may take, pet owners should start the self-rehoming process as soon as they know they need to rehome their pet.**

### Should the original owner use an adoption application or screening process?

We encourage pet owners to screen potential adopters by asking questions that will help them determine if the new home is a proper fit for their pet. Sample screening questions are available in [PASS templates](#). Additionally, you can refer to examples from:

- [KC Pet Project Rehoming Playbook](#)
- [Cat Adoption Application](#)
- [Dog Adoption Application](#)
- [Transfer of Ownership Agreement](#)

**Additional adoption consideration:** Always recommend they include the microchip registration number and source company in the final adoption process so the new pet owner can update the microchip information accordingly.

### How should I handle a pet owner who is charging a rehoming fee?

Pet owners often charge a rehoming fee as a method to screen applicants. An opportunity exists to provide pet owners with information on how to screen adopters without a rehoming fee, and instead use quality conversations as the tool for finding a successful new home for their pet. **Some available rehoming tools do not allow pet owners to charge a rehoming fee.**

### Can the shelter help the owner do a meet and greet with the potential owner's pets or children?

This can vary depending on organizational structure, resources, and local/state-level laws. If this is possible for your organization, establish a protocol and structure for when this may be utilized and collaborate with the reservation of existing shelter spaces to ensure on-site needs are prioritized.

## Supporting Research and Resources

- [Predictors of successful diversion of cats and dogs away from animal shelter intake: Analysis of data from a self-rehoming website](#) (Ly & Protopopova, 2023)
  - "This study aimed to identify predictors of successful diversion of animals through the AdoptaPet.com 'Rehome' online platform. Data for dogs (n = 100,342) and cats (n = 48,484) were analysed through logistic regression to assess the association of animal- and owner-related factors and outcome. Overall, **87.1% of dogs and 85.7% of cats were successfully diverted from animal shelters**, out of which, 37.8% of dogs and 35.3% of cats were kept by their original owner."
- [Consumer Adoption Survey](#) (Best Friends Animal Society, 2022)
  - **Of the 39% of dogs** that were acquired from an individual, **14%** were acquired from someone the person connected with online.
  - **Of the 37% of cats** that were acquired from an individual, **5%** were acquired from someone the person connected with online.
- [Goodbye to a Good Friend: An Exploration of the Re-Homing of Cats and Dogs in the U.S.](#) (Weiss et al., 2015)

- “Pets were most likely to be re-homed by being given to a friend or family member (37%) closely followed by being taken to a shelter (36%, Table 1). Being taken to a veterinarian (14%), **given to someone not previously known (stranger, 11%)** and set free (1%) were less likely re-homing options.”
- “Forty two percent of respondents who re-homed to friends and family also considered a shelter for re-homing, and **18% of those who re-homed to a shelter considered re-homing to someone they did not know.** We hypothesize one of the drivers for shelter relinquishment may be lack of ready access to other options for re-homing.”



## Supported Self-Rehoming Self-Rehoming Pet Marketing

### Benefits of Pet Marketing

Providing community members seeking to rehome pets with pet marketing resources, such as best practices for adoption profile pet photos, can increase visibility and the likelihood of expediting the rehoming. Not everyone will want support with this process, and that's okay! However, you can still, ensure community members are aware they can connect with your organization for support at any time.

### Importance of Pet Photos

Pet photos are the first thing a potential adopter sees when looking for options. When taking a pet's photo, follow these best practices. See dog-specific examples through the [Dog Rescue Photography](#) guide and a quick guide for [cat photo tips from Pet Finder](#).

- Prepare the area you are photographing.
  - Clear the space of any debris or major distractions and ensure there is ample lighting. Full sun can be complicated, so indirect light is preferred.
    - Be careful of areas with harsh shadows that may be seen on your pet when taking a photograph. *(Be sure not to take a photograph with the sun directly behind you or your silhouette may accidentally block the light!)*
    - Ensure the sun is not directly in your pet's face to avoid squinting!
  - If photographing outdoors, secure a leash to a wall or anchor point so that your pet may stay in one place while you take photographs.
- Before you take your photos, ensure your pet is exercised to reduce distractions and energy bursts during the photo session.
- Have treats, squeakers, or other high-value items on hand to ensure you can get your pet to look at the camera when photographing.
- Check their face for fuzz, dirt, or other. Remove as necessary.
- Take photos on their level whenever possible. Kneeling to take photos at the pet's eye level can create more intimate shots.
- Use portrait mode on your phone or a small f-stop (aperture) on your camera to create a slightly blurred background and keep your pet as the main focal point.

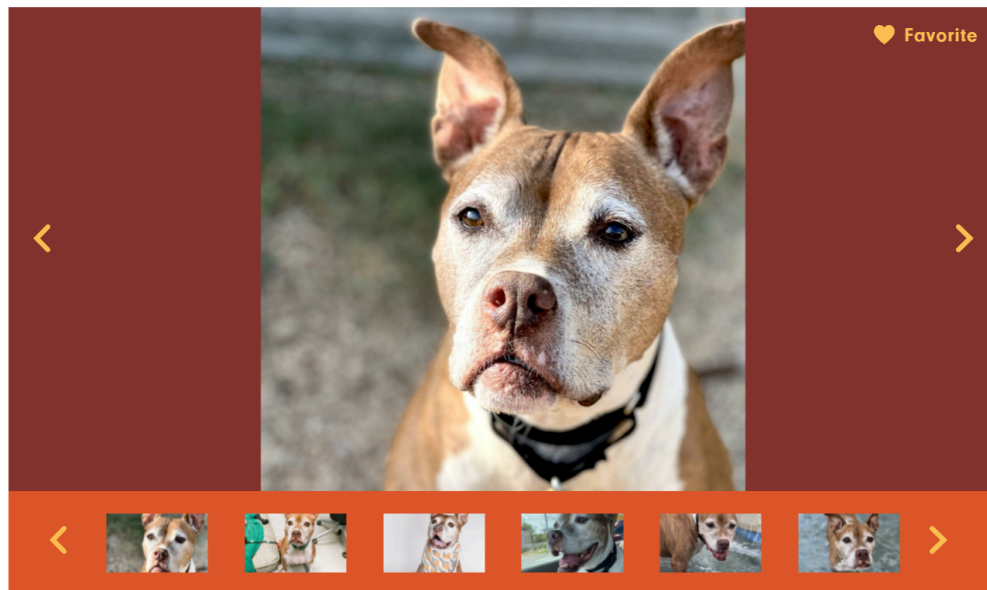
### Pet Biographies

Pet biographies should highlight a few key qualities of the pet for the best chances of increased visibility and clarity among potential adopters.

- Tell a story about the pet including things they like such as food, games, toys, or rolling in the grass.
- Highlight their strengths

- Training history or tricks they know
  - Cute quirks
- Keep good qualities at the forefront, but be transparent about any potential challenges the pet may have
  - When approaching medical or behavior challenges, do not include jargon that is not easily understandable by the general public such as 'HW+' or 'flight risk'.
  - Always provide context! If the pet is healing from a broken leg but is already in the middle of a care plan, ensure the biography mentions that they are already on the mend and how long they can expect until full recovery.
  - If a pet has a specific behavior challenge, place it in a story format whenever possible to create a full picture for potential adopters. For example, a pet that is fearful of new people you might say, "This girl can be shy when meeting new people and will prefer slow introductions. Once she is comfortable with you, she's a cuddle bug!"
- Keep relevant details up front and leave less relevant details out of biographies in favor of individual matchmaking conversations, such as "up to date on vaccines."

### Sample (Austin Pets Alive!):



This mature girl is ready for a new home! Just give her a yard and a spot on the couch and she is a happy camper. "Sugar Plum really is a sweet baby. She's a very easy girl," said her previous caretaker. Work full time? No worries, Sugar Plum does well left alone for extended periods of time. She loves having a yard and a way she can get to it by herself. She's quiet and easygoing. Sugar Plum's owner became ill and was unable to take care of her any longer, otherwise Sugar Plum wouldn't be available to join your home. She would make a wonderful companion to any number of loving homes. Come meet this sweet girl!

## Tips for Video and Keeping Up with the Social Media Algorithm

- See details on how to use videos to [promote adoptable pets here](#)
- Keep up with the social media algorithm [using these tips here](#)
  - **IMPORTANT:** Social media solely relies on the algorithm to push content and it changes frequently. Your content will NOT be seen unless you understand how the algorithm works. Tactics used even as recently as 2020 are no longer relevant nor are they the same across all platforms.

## Additional Resources

The following resources are primarily geared towards pets in the care of the shelter, but the content can also be utilized to support community members in their marketing efforts.

- [Ethical Standards for Marketing Shelter Pets](#)
- [Marketing FUNdamentals](#) - Maddie's® University
- [Bio Writing, Photography, + Marketing Resources](#) - HeARTs Speak
- [Shelter Pet Marketing is Not Adoption Counseling](#) - Maddie's Fund®
- [Refresh Your Marketing for Long-Term Shelter Animals](#) - ASPCApro

## Supporting Research

- [Showcasing Adoptable Pets Through Photos and Videos: Increasing Visibility, Interest, Traffic and Maybe Adoptions Too](#) (Dowling-Guyer, 2018)
  - **Photo quality and conditions** influence viewer perception of a pet.
- [Speed of Dog Adoption: Impact of Online Photo Traits](#) (Lampe & Witte, 2015)
  - "A subjective global measure of **photo quality had the largest impact on time to adoption**. Other photo traits that positively impacted adoption speed included direct canine eye contact with the camera, the dog standing up, the photo being appropriately sized, an outdoor photo location, and a nonblurry image."
  - "Improving the quality of online photos of dogs presented for adoption may speed up and possibly increase the number of adoptions."



## Supported Self-Rehoming Self-Rehoming Technology Solutions

### Rehoming Technology Platforms

[This document](#) compares three of the most commonly utilized rehoming tools including requirements, costs, and additional considerations. For example, if choosing to implement Home-to-Home, a case manager or similar role will be needed to moderate the profiles. This guide can help find the best option for your organization. See examples below of in-shelter and public-facing guides.

- [Greenville Self-Rehoming using Home-Home](#)
- [Getyourpet.com Step-By-Step Guide](#)

### Social Media

Supported self-rehoming can also be accomplished through social media (Facebook, Instagram, NextDoor). Prior to your organization creating a new social media page, evaluate what pet-specific social groups or pages already exist in your community. For example, the [Austin Pets Alive! PASS \(Positive Alternatives to Shelter Surrender\)](#) Facebook group is a communal space to request support with supplies, rehoming, financial aid, and more.

Build as many local partnerships with these existing pages or groups to reach the largest possible community audience! Consider establishing a check-in cadence and creating a how-to document to share with community members you may recommend utilizing these resources, if there is not one already available. If there are no current pages or groups in your service area that offer rehome support or partnerships, consider creating one that is primarily managed by your organization. For new social media group creation, ensure these elements are clearly defined before launch:

- **Group administrators:** Identify individuals or pages and create basic job descriptions and SOPs. Note, this can be staff or volunteer-run!
  - Facebook note: A **page** (instead of a singular individual) can be assigned as an administrator for a **group**. [Learn more about the differences here](#).
  - [Sample volunteer-based job description for Facebook moderation](#)
- **Establish rules:** Create rules for your page administrators and anyone who may be utilizing your social media space to request support.
  - **NOTE:** Facebook and other social media platforms all have unique regulations on what is and is not allowed in created groups. Ensure you and any group administrators are aware of the platform rules and continuously check for updates. For example, Facebook groups do not allow individuals to sell pets, so you must be **very clear** in both your group rules and administrative review that if you allow rehoming fees, any fees associated with a pet looking to be rehomed are clearly labeled as rehoming fees.
- **Create sample scripts:** Creating sample responses for common questions, outlining the support you can provide, and providing a list of partner service providers will help

page administrators more cohesively respond to inquiries.

- **Identify what you can and cannot offer:** Here is a [sample pet resources guide](#) based on Austin Pets Alive!'s PASS program for reference.

### What Does a Successful Supported Self-Rehoming Program Look Like?

Ideally, your organization should see a reduction in owner surrenders through the use of an integrated supported self-rehoming program. Promoting and increasing the visibility of pets that are in homes and available for adoption in your community will also ensure the success of your program. This can be done through your organization's **website, social media platforms, community bulletin boards or events, and marketing and communications campaigns**. To learn more, see the Maddie's® University [supported self-rehoming self-paced course](#).

### Supporting Research and Resources

- [Predictors of successful diversion of cats and dogs away from animal shelter intake: Analysis of data from a self-rehoming website](#) (Ly & Protopopova, 2023)
  - "This study aimed to identify predictors of successful diversion of animals through the **AdoptaPet.com 'Rehome' online platform**. Data for dogs (n = 100,342) and cats (n = 48,484) were analyzed through logistic regression to assess the association of animal- and owner-related factors and outcome. Overall, **87.1% of dogs and 85.7% of cats were successfully diverted from animal shelters**, out of which, 37.8% of dogs and 35.3% of cats were kept by their original owner."
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## Supported Self-Rehoming Supported Self-Rehoming Meet and Greets

### Sharing Resources: Introduce New Pets to Each Other

If your organization does not already have an accessible self-rehoming resource library, consider creating one that includes best practices, such as meet-and-greet support for pets. If you have already established a process for providing direct support for pets that were adopted from your organization, consider expanding this offering to community members seeking support rehoming their pets.

The topics below highlight resource options that span holistic behavior support and can be customized to your needs. Providing diversified resources, including **best practices for introducing new pets to each other**, can better support self-rehoming efforts and lead to more successful placements.

- Focus on community behavior needs that you don't have resources to directly support.
  - [HumanePro Animal Behavior and Training](#)
  - Common cat behavior example resources
    - [ASPCA](#)
    - [Best Friends](#)
    - [Alley Cat Allies](#)
    - [Cat Behavior Solutions](#)
    - [Feline Communication and Body Language](#)
    - [Introducing a New Cat - Best Friends](#)
    - [Introducing Your Cat to a New Cat - PAWS](#)
    - [Introducing a New Cat Into the Home - HSUS](#)
  - Common dog behavior example resources
    - [ASPCA](#)
    - [Best Friends](#)
    - [Maddie's Fund Dog Behavior Sample Documents](#)
    - [Dog-Dog Introductions - Austin Pets Alive!](#)
    - [Introducing Dogs to Each Other - Best Friends Animal Society](#)
    - [Introducing a New Dog to Your Dogs At Home - Dogs Playing For Life](#)
    - [Introducing a New Dog to Children - Regina Humane Society](#)
- Create a referral system for more complex problems (e.g., [private trainers](#), [applied animal behaviorists](#), [veterinary behaviorists](#), etc.)
  - [How to choose a dog trainer](#)
- Create a list of available community services to help people keep their pets (e.g., daycare, pet sitters, groomers, vet clinics )
  - [Ecosystem mapping toolkit](#)
  - Investigate whether there's an opportunity for discounted services or a free first exam in exchange for your publicizing their service.
- Develop a list of recommended training supplies, enrichment materials, etc.



- Get to know providers to ensure that they align with your policies and practices

## Methods of Direct Support

Consider the following options below for providing direct support to the public for owned pets. If a process is in place for pets adopted from your organization, consider expanding support offerings to be available for community members looking to self-rehome their pets.

- **Email-based support:** Consider creating a volunteer-led email team to filter common concerns and elevate higher-level requests. Initial questions may include: Is this to be a proactive follow-up or reactive response (or both)? Who will manage the inbox? What is your expected response time?
- **Online/website support:** Collect existing web-based resources from other organizations, to guide volunteers and share with community members.
- **In-person support** like behavior workshops (e.g. housetraining), live/on-demand online [classrooms \(e.g., Doggy Geeks\)](#), and one-on-one appointments; *In-person support varies widely depending on geographic location.*
- **App-based support:** Consider using broadly available industry resources for providing behavior support through apps (e.g., [GoodPup](#), [Maddie's Pet Assistant](#), [PetCoach](#) ).
- **Peer-to-peer support:** Online groups or meetings to allow pet people to connect with and support each other.
- **Training classes:** These can be offered in-person or virtually, in-house, or through local partnerships. For example, [San Diego Humane Society](#) partners with a handful of certified trainers and behaviorists to provide community-level support to families.

To learn more about community-based behavior support, see our [complete guide here](#).

## On-Site Meet and Greet Support for Self-Rehomed Pets

Consider providing a space on-site or managed by your organization for community members that are rehoming their pets to use to facilitate meet and greets with potential adopter's pets or family members. If possible, consider also integrating personnel at your organization to help facilitate these meetings and help them go as smoothly as possible. This process is primarily aimed at supporting **dog-dog meet and greets** but can be adjusted to support cat-cat meet and greets as appropriate. This process is not recommended for dog-cat meet and greets as introductions between species often require a much longer and slower introduction process.

Providing this type of rehoming support has a wide variety of potential benefits including:

- Creating a neutral environment for pets to meet other pets or strangers so that neither party feels the other is intruding on their space
- The ability to more easily manage introductions and potential behaviors
- Providing both the pet owner and potential adopter a neutral space to utilize so they do not need to make personal arrangements (potentially expediting the rehoming process!)

## Getting Started

If your organization already has established meet-and-greet spaces for on-site adoptable pets, consider allocating a certain time frame or day of the week to be available for public reservations. This space should be in a neutral location of the shelter that has lower foot traffic (people and pets) to

maintain a calm and safe environment. This space can be offered as a part of a rehoming support program or be visible on your organization's website or social media. Consider the following steps when establishing this new process:

- Create an internal meet-and-greet room reservation form to manage reservation requests and ensure internal personnel are aware of the room's usage.
  - Create guidelines for when personnel can utilize the room in blocked public times (Example: If the room is not reserved within two hours of the scheduled block, personnel may take the time and the room will be removed from available reservations).
- Create a usage protocol including:
  - Reservation guidelines, form links, and canned responses to the public that are hoping to reserve space
  - Cleaning protocols before and after room use
  - Staff and volunteer responsibilities
    - *Showing the room to the reserved parties upon arrival*
    - *Cleaning*
    - *Facilitating meet-and-greet support*
  - Terms of use and public safety liability waivers for public usage of space
  - Meet and green best practice resources to provide to those reserving the space.
- Create a public-facing agreement and protocol that must be signed by both parties **prior** to usage of space (preferably before arrival at the facility)
  - Contact information for both parties
  - Who will be using the space (names, ages, contact information)
  - Which pets will be in the space (basic information, S/N status, rabies verification\*)
  - Liability waivers for public usage of space
  - Usage agreements for public usage of space
  - Meet and greet best practice resources
- Communicate the addition of this practice to all staff and volunteers for visibility

To learn more about HASS facility guidelines including redefining and creating new spaces, sustainability considerations, and what the facility of the future looks like, [see our guide here](#).

## Supporting Research

- [Preference assessments and structured potential adopter-dog interactions increase adoptions](#) (Protopopova et al., 2016)
  - **Guiding meet-and-greets** between potential adopters and dogs through positive reinforcement training and play with toys can increase the likelihood of adoption.
  - In this study, potential adopters were guided to walk a dog for an elimination break, play with a toy that the dog found valuable, and encourage the dog to lie down with food rewards. Researchers found that the **dogs that participated in these constructive meet-and-greets with potential adopters were 2.49 times more likely to be adopted** than dogs in the control group.
- [When and Why Cats Are Returned to Shelters](#) (Mundschau & Suchak, 2023)
  - “We found that the reasons **cats were returned shortly after adoption were focused on specific issues with the cat, such as behavioral problems or conflicts with other pets**. In

contrast, cats who were returned in the long term often had to do with the owner, such as major life changes (births, deaths, illnesses, children) or the cost of owning the pet. Our findings suggest that shelters might need to consider different types of strategies for long-term and short-term returns to reduce the return rates overall.”

- [Intercat aggression in households following the introduction of a new cat](#) (Levine et al., 2005)
  - “Among households with multiple cats, **half reported fighting between cats when the new cat was introduced. Approximately half of the people introduced the cats into the home by simply putting the cats together immediately.** Neither age, sex, nor number of cats in the household was associated with current fighting (i.e. fighting that was occurring 2–12 months after the new cat was brought into the household); however, current fighting was associated with individual behaviors (i.e. scratching and biting) during the cats first meeting, outdoor access, and the owner's perception of the first meeting as unfriendly or aggressive.”
- [Evaluation of the relationship between cats and dogs living in the same home](#) (Thompson et al., 2018)
  - *This study emphasizes the importance of ensuring cats are comfortable in cat-dog relationships.*
  - “...comfortability of the cat was a stronger predictor of amicability than comfortability of the dog; frequency of the cat appearing uncomfortable with the dog was a better predictor for reduced amicability than the dog appearing uncomfortable in the presence of the cat. **These results highlight the need to attend to the cat's behavior in particular, along with age of introduction, to promote positive cat-dog relationships.**”
- [Introducing a Puppy to Existing Household Cat\(s\): Mixed Method Analysis](#) (Kinsman et al., 2022)
  - “Of the 1211 puppies who had been introduced to the household cat at the time of survey completion, playing (58.9%), being overexuberant or over-excited (56.6%), and chasing (48.6%) were the most common behaviours displayed towards cats. ‘Only desirable’ behaviours were shown by 7.3% of puppies. Multivariable logistic regression showed early (puppies aged <12 weeks), **gradual introductions** and living in a multi-dog household **increased the odds of ‘only desirable’ behaviours.** Qualitative analysis revealed two styles of introductions—owner-led and pet-led. Owners who led introductions anticipated amicable relationships between pets, whilst owners who let pets introduce themselves did not. **Early, gradual, owner-led introductions of puppies to household cats should be encouraged.**”
- [Conflict and affiliative behavior frequency between cats in multi-cat households: a survey-based study](#) (Elzerman et al., 2019)
  - “In multi-cat households, **73.3% of owners noted conflict signs from the very beginning when introducing the cats.** The recent addition of a new cat to the home was correlated with the frequency of conflict signs.”



## Supported Self-Rehoming Free and Low-Cost Medical Care for Pets Being Rehomed

### Overview

[Access to veterinary care is limited or nonexistent for many pet owners](#). When a pet owner is seeking to rehome their pet, regardless of the reason, providing an avenue for these pets to receive free or low-cost veterinary care can help their pet more easily be rehomed. Providing this care prior to rehoming not only allows the pet to get necessary veterinary support for any existing needs, but the up-front financial considerations are lessened, creating a wider pool of potential adopters.

### Ecosystem Mapping and Community Partnerships

If you do not directly offer free or low-cost medical care to owned pets, complete an ecosystem map and establish partnerships with local organizations or programs that do. People and pets in your community are going to need support when unexpected or complex situations arise. Our [HASS Pet Support Services guide, Establishing Partnerships for Pet Support](#) will teach you how to map your local ecosystem and begin establishing partnerships. Don't forget to search [pets.findhelp.com](https://pets.findhelp.com) by zip code and category to find support in your community!

### Collaborating with Local Veterinary Hospitals

Most communities have veterinarians who serve the public, even if a shelter doesn't have veterinary staff. Since one of the primary drivers of relinquishing owned animals is the lack of resources to address an animal's health, working with existing practices can be the lowest-hanging fruit without the expense of running your own public-facing clinic or managing a crowdsourcing page. Helping veterinarians understand the gap in access to care, the techniques around Incremental Care, and how they can offer financing to owners who can't pay immediately and who don't qualify for Care Credit can bring your community together to help more people and animals.

Use this [letter](#) and this [insert](#) to reach out to veterinarians in your community!

### Payment Resources for Private Veterinarians

- [AVMF Veterinary Care Charitable Fund Information](#)
- [Veterinary Care Foundation](#)

## Direct Program and Service Offerings

Looking for support with fundraising to create a new program? See the [HASS Philanthropy Toolkit for Development and Fundraising](#). The following sections outline three ways your organization can begin offering support for free or low-cost medical care for owned pets.

### Build a Network of Veterinarian Partners

#### Tasks for Staff and High-Level Volunteers

- Identify potential veterinarians in your community and reach out to them about contributing to or partnering for crisis situations and pet support efforts.
- Please see Pima Animal Care Center's sample email to Veterinarians in your community and their letter to partner clinics explaining the Keeping Families Together Program in [additional resources](#).
- Connect with local Veterinary Schools for student or faculty support. Check out Pima Animal Care Center's pilot Outreach program with the University of Arizona Shelter Medicine Student Club in [additional resources](#).
- Establish guidelines on what would be considered free and/or low-cost vet care.
- Learn more about [incremental veterinary care](#) and consider shifting toward this approach with vet care and vet care partnerships.

#### Tasks for Any Volunteers

- Reach out to your pets' veterinarians about joining the effort and partnering with local shelters.

### Host or Co-Host a Drive-Thru or Stationary Clinic to Provide Low-Cost Vet Care, Vaccines, Microchipping and Licensure

#### Tasks for Staff and High-Level Volunteers

- Check out [Kansas City Pet Project's toolkit](#) on how they organized their Community Drive-Thru Clinic.
- Spread the news on all social media platforms, community bulletins, and with local community agencies.

#### Tasks for Any Volunteers

- Assist staff in organizing and running service events.
- Reshare the news on all social media platforms, community bulletins, and with local community agencies.

## Create “General Care” Guidelines for Pet Owners Who Can’t Access Vet Care

- Check out Pima Animal Care Center’s general care guidelines for the following ailments/conditions in your [additional resources](#):
  - Diarrhea
  - Pregnancy (dog)
  - Vomiting
  - Helping Pets Lose or Gain Weight
  - Fleas
- Check out Maddie’s Fund general care guidelines about common medical concerns in your [additional resources](#).
- Check out [ASPCA Pet Care](#) for more information on general pet care.

**Additional Consideration:** Provide support for owned pets experiencing a medical emergency through [External Facing Medical Care by Starting a Facility From Scratch or creating an In-Shelter Support Care Program](#).

## Supporting Research and Resources

- [Human Animal Support Services \(HASS\) Releases Community Values Survey Results](#) (Human Animal Support Services, 2023)
  - “In fact, **71% of pet owners could not afford nor had access to** the means necessary to meet their pets’ needs with the **largest barrier being accessibility to affordable veterinary care of all types**. These results point to communities in distress and in agreement for the prioritization of offering direct assistance when care grows beyond the capabilities of pet owners.”
- [Access to Veterinary Care—A National Family Crisis and Case for One Health](#) (Blackwell & O’Reilly, 2023)
  - “Due to the significance of the human–animal bond in our society, the lack of veterinary care negatively influences both human and nonhuman members of communities.”
  - **“More than 1 out of 4 families struggle to access veterinary care in the United States.”**
  - “Barriers to veterinary care are human-related, requiring a One Health solution.”
  - “Access to veterinary care is the social justice call to action of veterinarians”
- [Assessment of canine health and preventative care outcomes of a community medicine program](#) (Mueller et al., 2018)
  - The study hypothesizes that “the racial, ethnic, and socioeconomic disparities that exist with regard to access to high quality human health services, especially related to preventative care,” are likely similar in regard to access to preventative vet care for the dogs of underserved communities.
  - “Existing research exploring the impact of affordability in veterinary care has found that pet owners with lower incomes (less than \$35,000 a year) or who are unemployed were less likely to have taken their pet to a veterinarian within the previous year. . . (Volk et al., 2011).”

- “Capitalizing on **low-cost, community health models** that have been successful in human healthcare settings may be an effective **method of addressing access to veterinary care** (particularly preventative care) in underserved canine populations . . . .”
- [Goodbye to a Good Friend: An Exploration of the Re-Homing of Cats and Dogs in the U.S.](#) (Weiss et al., 2015)
  - “**Services that might have helped pet retention** were examined for the lower income category since the services listed were all described as free or low cost. **The service that was selected most commonly as something that might have helped respondents was free or low cost veterinary care (40%).** Other service options were free or low cost training or behavior help (34%, more common for dog owners), access to pet friendly housing (33%), free or low cost spay/neuter services (30%), free or low cost pet food (30%), free or low cost temporary pet care or boarding (30%) and assistance in paying pet deposits (17%).”
- [The Impact of the Social Determinants of Human Health on Companion Animal Welfare](#) (McDowall et al., 2023)
  - “In a study of rehomed companion animals, **40% of the participants identified that free or low-cost veterinary care could have prevented relinquishment [57].**”
  - “The proposed integrated framework considers the interconnection between the social determinants of health, One Health, One Welfare and the five domains of animal welfare, providing a model for a more comprehensive approach to better outcomes for companion animals, their guardians and the community.”
- [More Than a Pet](#) (The Humane Society of the United States, n.d.)
  - “20M+ pets live in poverty and that's three times more than the number who enter animal shelters every year.”
  - “70% of pets living in poverty have never seen a veterinarian.”
  - “28% of pet owners are unable to access veterinary care.”



## Supported Self-Rehoming Post-Adoption Support for Rehomed Pets

### Post-Adoption Behavior Support Resources

If your organization does not already have an established resource library that can be shared with members of the public who have recently adopted a pet, consider creating a quick sheet with resources that can support integration into the home, best practices for meeting resident pets, basic behavior guides, and more. The topics below will highlight resource options that span holistic behavior support and can be adjusted to fit your organization's priorities.

### Identifying Resources

If you have already established a process for providing direct support for pets that were adopted from your organization, consider expanding this offering to community members seeking support rehoming their pets. If you do not have this process established, develop a list of resources for support that your organization can offer. Here are a few ideas to get started:

- Focus on community behavior needs that you don't have resources to directly support.
  - [HumanePro Animal Behavior and Training](#)
  - Common cat behavior example resources
    - [ASPCA](#)
    - [Best Friends](#)
    - [Alley Cat Allies](#)
    - [Cat Behavior Solutions](#)
    - [Feline Communication and Body Language](#)
    - [Introducing a New Cat - Best Friends](#)
    - [Introducing Your Cat to a New Cat - PAWS](#)
    - [Introducing a New Cat Into the Home - HSUS](#)
  - Common dog behavior example resources
    - [ASPCA](#)
    - [Best Friends](#)
    - [Maddie's Fund Dog Behavior Sample Documents](#)
    - [Dog-Dog Introductions - Austin Pets Alive!](#)
    - [Introducing Dogs to Each Other - Best Friends Animal Society](#)
    - [Introducing a New Dog to Your Dogs At Home - Dogs Playing For Life](#)
    - [Introducing a New Dog to Children - Regina Humane Society](#)
- Create a referral system for more complex problems (e.g., [private trainers](#), [applied animal behaviorists](#), [veterinary behaviorists](#), etc.)
  - [How to choose a dog trainer](#)
- Create a list of available community services to help people keep their pets (e.g., daycare, pet sitters, groomers, vet clinics)
  - [Ecosystem mapping toolkit](#)



- Investigate whether there's an opportunity for discounted services or a free first exam in exchange for your publicizing their service.
- Develop a list of recommended training supplies, enrichment materials, etc.
- Add free or low-cost programs you offer to [pets.findhelp.com](https://pets.findhelp.com) to increase visibility for your community
- Get to know providers to ensure that they align with your policies and practices

## Methods of Direct Support

Consider the following options for methods of providing direct support to the public for owned pets. If you already have a process in place for pets adopted from your organization, consider expanding aspects of your support offerings to be available for community members looking to self-rehome their pets.

- **Email-based support:** Consider creating a volunteer-led email team to filter through common concerns and elevate higher-level ones. Some initial questions may include: Is this to be a proactive follow-up or reactive response (or both)? Who will manage the inbox? What is your expected response time?
- **Online/website support:** Articles and handouts: collect existing web-based resources from other organizations, to guide volunteers and share with community members.
- **In-person support** like behavior workshops (e.g. housetraining), live/on-demand online [classrooms \(e.g., Doggy Geeks\)](#), and one-on-one appointments.
- **App-based support:** Consider using broadly available industry resources for providing behavior support through apps (e.g., [GoodPup](#), [Maddie's Pet Assistant](#), [PetCoach](#) ).
- **Peer-to-peer support:** Online groups or meetings to allow pet people to connect with and support each other.
- **Training classes:** These can be offered in-person or virtually, in-house, or through local partnerships. For example, [San Diego Humane Society](#) partners with a handful of certified trainers and behaviorists to provide community-level support to families.

## Sample Resources

- Use existing training videos to support clients
  - [San Diego Humane Society](#)
  - [The Family Dog](#)
  - [Dog Training by Kikopup](#)
  - [Pam's Dog Academy](#)
  - [Zak George](#)
  - [Grisha Stewart](#)
  - [Dr. Sophia Yin](#)
  - [Dunbar Academy](#)
  - [Head Halter Desensitization](#)
  - [Crate Training](#)
  - [Cat Behavior](#)

To learn more about community-based behavior support, see our [complete guide here](#).

## General Pet Support

In addition to behavior support, consider creating a short list of local veterinary clinics, training facilities or individuals, pet supply stores, and more that you can provide as post-adoption pet support. You may also want to include free or low-cost services in your recommendations, should the adopter(s) ever need them. For more information on how to best identify existing programs and services in your area that you can use to create quick sheets as outlined above, reference our [ecosystem mapping guide](#).

## Microchips

It is highly recommended that for all post-adoption support and outreach, microchip guidance is included. This includes recommending microchip information be transitioned from a previous owner to a new one, transitioning microchip information from organization to adopter, and more. All microchip information should be registered under the primary caretaker's name, phone number, and address. For more information on providing and updating microchips, see our [complete guide here](#).

## Supporting Research

### Behavior Support

- [Returning a Shelter Dog: The Role of Owner Expectations and Dog Behavior](#) (Powell et al., 2022)
  - “Shelters may benefit from utilizing **adoption counseling to ensure adopters understand the potential for dog behavioral problems** in the early stages of ownership and develop appropriate expectations for the human–dog relationship. Post-adoption **behavioral support may also help** some owners to overcome behavioral difficulties as their dogs adapt to the new environment.”
- [Predictors of successful diversion of cats and dogs away from animal shelter intake: Analysis of data from a self-rehoming website](#) (Ly & Protopopova, 2023)
  - “Animals with behavioural challenges, including those who are being surrendered for behavioural issues, have greater odds of being surrendered to a shelter or rescue. As such, **animal shelters may consider redistributing their resources to accommodate for behavioural challenges.**”
- [When and Why Cats Are Returned to Shelters](#) (Mundschau & Suchak, 2023)
  - “We found that the reasons **cats were returned shortly after adoption were focused on specific issues with the cat, such as behavioral problems or conflicts with other pets.** In contrast, cats who were returned in the long term often had to do with the owner, such as major life changes (births, deaths, illnesses, children) or the cost of owning the pet. Our findings suggest that shelters might need to consider different types of strategies for long-term and short-term returns to reduce the return rates overall.”
- [Understanding feline feelings: An investigation of cat owners’ perceptions of problematic cat behaviors](#) (Powell et al., 2023)
  - “**Undesirable feline behaviors can detrimentally effects [sic] on the human-cat relationship, owner satisfaction, and animal welfare.** This study explored cat owners’ perceptions of cat behavior and identified specific behaviors that owners found problematic... Our results suggest cat owners were more likely to view their cat’s behavior

as problematic if the behavior directly affected their lifestyle or environment, such as aggression, house soiling or activity during the night, while other behaviors, such as separation-related behavior, excessive self-grooming, and predatory behavior, did not influence owners' perceptions of cat behavior within the multivariate models. **Further education may help cat owners** to recognize the importance of these other behaviors as indicators of animal welfare and understand the wider impacts of cat behavior, including through predation on wildlife."

- [Reducing Dog Relinquishment to Rescue Centres Due to Behaviour Problems: Identifying Cases to Target with an Advice Intervention at the Point of Relinquishment Request](#) (Powdrill-Wells et al., 2021)
  - "Annually, thousands of dogs are relinquished to rescue centres globally. Dog owners report that **a leading cause for relinquishment are their dogs' behavioural problems**. Efforts are needed to reduce dog relinquishment, by enabling dog owners to feel comfortable and confident with having them in their home. Free behavioural advice was offered to 1131 dog owners at the time of them calling to relinquish their dog to animal welfare charity. **Behavioural advice was accepted by 24.4% of the dog owners calling to relinquish their dogs**. The advice was accepted almost six times more often by owners with dogs with general management behaviour problems, compared to owners who had problems with aggression between dogs in their home. **Offering free behavioural advice reduced the number of dog relinquishments. Consequently, the stress associated with maintaining a dog in sheltered conditions and rehoming them, and the trauma for the owner was eliminated in a quarter of cases**. Moving forward, additional strategies are needed to enable more owners to keep their dogs in their homes and reduce relinquishment."
- [Measuring Changes in Perceptions of Access to Pet Support Care in Underserved Communities](#) (Hawes et al., 2021)
  - "Access to veterinary care and other pet supportive services (e.g., grooming, **behavior training**, pet supplies) has been increasingly recognized within the animal welfare sector as a substantial barrier to the health and welfare of companion animals (henceforth referred to as "pets")."
- [Owner-companion dog interactions: Relationships between demographic variables, potentially problematic behaviours, training engagement and shared activities](#) (Bennett & Rohlf, 2007)
  - "This confirms that strategies designed to increase participation in dog training activities and promote canine sociability may have significant benefits for both companion dog owners and their dogs."
  - "... engagement in a range of training activities, but not only attending formal training classes, is predictive of a lower frequency of reported behavioural problems."
  - "... the extent to which owners engage in training activities and the extent to which their dogs are perceived to be unfriendly or aggressive, are predictive of engagement in a range of shared activities. **This suggests that interventions which aim to increase involvement in dog training and improve dog sociability may have significant implications for companion animal owners through reducing behavioural problems**. Such interventions may also have significant implications for companion dogs, whose welfare is likely to be considerably improved if they are sufficiently well mannered and sociable to engage in shared activities with their owners."

## Access to Care

- [Social Return on Investment\(SROI\) in Supporting Human-Animal Bonds Resource Collection](#) (Lynch & Kalman, 2023)
  - “The following is a **curated collection of research studies and other supporting resources** detailing evidence for the many benefits of human-animal bonds along with obstacles to maintaining them.”
  - For resources on access to care, see the following sections:
    - Addressing Human Needs and Structural Disparities to Protect Human-Animal Bonds
    - Gaps in Access to Veterinary Care

## Microchips

- [New Analysis: Pets With Microchips Are THREE TIMES More Likely to Get Home - HASS](#) (Kremer, 2023)
  - “What we found confirms again that microchips—along with other forms of pet identification—are effective: On average, **pets with a microchip were over three times more likely to be reunified** with their families than those without.”
- [Characterization of animals with microchips entering animal shelters](#) (Lord et al., 2009)
  - *Though published in 2009, this study in the Journal of the American Veterinary Medical Association is comprehensive research on microchips in shelter animals in the United States. This research investigated 7,704 microchipped animals across 53 shelters in 23 states. See also the [HASS microchip data analysis](#) above for a more recent publication (Kremer, 2023).*
  - “Results of the study reported here indicated that **animal shelters were able to find the owners of almost three-fourths of stray dogs and cats with microchips**. . . . Animal shelters had a much higher likelihood of finding an owner when the owner information was in the shelter’s own database (OR = 8.7) or registered with a microchip registry (OR = 4.9).”
- [Sensitivity of commercial scanners to microchips of various frequencies implanted in dogs and cats](#) (Lord et al., 2008)
  - “Microchipping should remain a component of a more **comprehensive pet identification program**.”
- [Problems Associated with the Microchip Data of Stray Dogs and Cats Entering RSPCA Queensland Shelters](#) (Lancaster et al., 2015)
  - “**The reclaim rate of microchipped animals is significantly higher than for those without, supporting the notion that microchips are a vital form of identification.** However, microchip data problems reduce the likelihood that an animal’s owner will be contacted and the animal reclaimed.”
  - “The proportion of animals reclaimed declined significantly between **microchipped animals with no data problems**, microchipped animals with data problems and non-microchipped animals—**87%, 69%, and 37%, respectively, for dogs and 61%, 33%, and 5%, respectively, for cats.** Strategies are needed to increase the accuracy of microchip data to facilitate the reclaiming of stray dogs and cats.”



## Supported Self-Rehoming Marketing Supported Self-Rehoming Topics

### Why Focus Marketing Efforts on Supported Self-Rehoming?

Regular communication about your community's available pets through a self-rehoming process helps improve the chances pets will have a better chance of successful rehoming. Additionally, ongoing communication about supported self-rehoming programming helps encourage more individuals to self-rehome instead of using shelter surrender as the only option.

### Supported Self-Rehoming Benefits

Supported self-rehoming is less stressful for the pet because they do not have to be in an unfamiliar shelter environment and provides the current and prospective pet owners with a personalized line of communication to discuss pet history, needs, and relevant information that can ensure the new adopter is set up for success. This process can also help reduce the overall shelter population therefore reducing illness and risk of further space crises.

### Supported Self-Rehoming Marketing Examples

The following process examples highlight just a few ways your organization can support self-rehoming efforts through marketing, communications, and community engagement. For additional support, view our [complete rehoming resources guide here](#).

- Highlight rotating local pets available for rehoming on social media or through local news and media partnerships. These pets could be already listed on your website through a rehoming platform or pets available for rehoming through a social support page such as [P.A.S.S. \(APA!\)](#).
- Provide accessible resources to support individuals looking to rehome their pets.
- If you have a partnership with a specific rehoming platform or social group, communicate the instructions and benefits of this platform for rehoming efforts.
- Invite pets who are part of a rehoming program to participate in on-site adoption or community engagement events facilitated by your organization.
- Provide preventative reminders for microchipping and ID tags.
- Provide preventative reminders for spay/neuter.

### Frequency and Strategic Planning

The following toolkits were created in collaboration between Human Animal Support Services (HASS) and HeARTs Speak.

- [Community-Focused Communications Strategy](#)

- In this kit, you will find a list of general marketing and communication strategic considerations, a detailed planning document, and a sample editorial content calendar for you to download and customize.
- [Communications Kit: Supported Self-Rehoming](#)
  - This kit will help raise awareness with pet owners about what self-rehoming is, how it can benefit their pets, and how your organization can support them through the process.



## HASS Playbook: Supported Self-Rehoming Offering Supported Self-Rehoming Resources in Multiple Languages

### Important Considerations for Offering Services in Multiple Languages

- Does your organization have staff or volunteers who are directly from the community you are serving, know the community well, and speak the most commonly spoken language(s) in your community?
- How can your organization focus on hiring future staff who speak the language(s) that are present in your community and are willing to serve as translators?
- Who within your team of volunteers speaks the language(s) that are present in your community and is willing to serve as a translator?

### Why Translate Materials Into Other Languages?

It is crucial to identify the different languages spoken in your community and provide services for these families. Many community members learn about service providers by word of mouth and if your organization is not providing resources and service information in other commonly spoken languages, you are missing a huge population within your own backyard. Having inclusive, multi-language resources allows even more support for the entire community.

Translating a service flyer or template adoption agreement into another language is not always easy, especially when considering the different variations of one language category. For example, not all Spanish-speaking communities use the same vernacular. The Spanish spoken by Cuban-Americans in South Florida is different from the Spanish spoken by Mexican-Americans in Southern California! There are variations in the use of certain words as well as idiomatic expressions, so it's important to ensure service descriptions reflect accordingly. This may require evaluating multiple translation program options, inclusive of having a person from that specific community, to achieve the desired result.

### Where to Begin

#### Option 1

There are many different free translating websites available online, such as [Google Translate](#) and [Microsoft Translator](#). With each, you can easily type in what you are trying to translate and it will provide you with a translation.

However, these translations aren't always 100% accurate. So once you have used the internet to translate, it is best practice to have the translation reviewed by at least 2-3 different staff members, volunteers, or community members from different backgrounds and lived experiences (i.e. educational backgrounds and socio-economic statuses) who speak the language. You want to make sure the translation is fully accessible to anyone in your community who may need it. By having others review the translation, this process can help ensure that the message is clear, regardless of a person's education or economic background.

## Option 2

Check out this [list of organizations and platforms that offer translations for nonprofits](#). Some of these organizations offer their services for free with services provided by actual translators. However, as with any open platform, the quality of service can vary widely, so make sure to still have a native speaker review the translated materials before sharing publicly.

Here are some examples of translated materials from English to Spanish created by HASS collaborators:

- [Dallas Animal Services Housing Resources in English and Spanish](#)
- [San Diego Humane Society Mobile Clinic Flyer in English and Spanish](#)
- [Denver Animal Protection Displacement/Eviction Relief Program \(Temp Boarding\) in English and Spanish](#)
- [Denver Animal Protection Displacement/Eviction Relief Program \(Pet Supplies/Services\) in English and Spanish](#)
- [Pima Animal Care Center bag insert for food distribution in English and Spanish](#)

If your website software does not provide an option for viewers to experience your website in another language, check out this step-by-step alternative on [How to Turn Translation On or Off in Chrome](#).

## Additional Consideration

When translating materials, consider integrating additional accessibility options such as the [English to ASL \(American Sign Language\) Translation Standards](#) and adding audio and subtitled variations of materials for public use.

Another level of accessibility to consider is for those that utilize screen readers. Ensure your digital materials such as [website](#), [email](#), and [social media](#) are screen reader friendly. Examples of basic best practices include providing alternative text/visual descriptions, ensuring information is available as text and not just in images, and being mindful of the contrast ratio of colors.





## Supported Self-Rehoming Staff and Volunteer Roles

### Who Should Complete Supported Self-Rehoming Tasks?

Supported self-rehoming tasks are most often combined with overall pet support efforts by a shelter's case manager, pet support coordinator, or rehome-focused volunteer. However, creating a dedicated position to support the public with rehoming their pets may allow for increased program development and in the long term keep more pets physically out of the animal shelter system. These individuals **may** be responsible for, but are not limited to:

- Providing case management for individuals looking to surrender their pet and instead may be appropriate for self-rehoming
- Acting as the main point of contact for all self-rehoming inquiries including:
  - Public-marketing support (photos, biographies)
  - Behavior support
  - Medical support
  - Meet and greet best practices
  - Adoption processing best practices
- Assisting with post-adoption support and resources
- Coordination with marketing and communications personnel to ensure community pets seeking rehoming are being advertised in public-facing organizational spaces and posts are up-to-date
- Data entry or collaboration with external tech solutions to collect data
- Analyzing rehome data and recommending process improvements as applicable
- Ongoing status and support check-ins

### Sample Job Descriptions

See a few sample job descriptions primarily geared towards overall pet support and case management that can be adjusted to fit your organization's needs for this role below.

- [HASS Sample: Customer and Pet Support Supervisor](#)
- [Gateway Pet Guardians Sample: Pet Support Counselor](#)
- [Gateway Pet Guardians Sample: Community Hotline Assistant](#)
- [LifeLine Sample: Community Caseworker](#)
- [Arizona Humane Sample: Bilingual Pet Resource Call Center Specialist](#)



## Supported Self-Rehoming Staff and Volunteer Training

### Training Staff on Supported Self-Rehoming

Involving all staff and volunteers in training and highlighting the basics of what to do if an individual is interested in self-rehoming their pet and how your organization can support them goes a long way. It is recommended to include this training in all staff and volunteer onboarding.

Consider hosting continued training if at any point your organization:

- Implements a new partnership with an external rehoming technology such as Home-to-Home, Adopt-a-Pet, or GetYourPet
- Introduces a new support option for the public when rehoming pets
- Major policy or procedure changes occur
- Marketing and communication changes occur (especially regarding changes in public-facing language)

Training opportunities may vary depending on your existing supported self-rehoming programs. It is highly recommended that **all** community-facing staff and volunteers receive training for **all** rehoming processes. However, offering training to those without public-facing roles may provide an opportunity to create community advocates should they, their loved ones, or neighbors ever find themselves in a situation where rehoming information is needed. The following guides for supported self-rehoming may be utilized in your organization's training practices.

- [Supported Self-Rehoming resources to implement at your organization](#)
- [Supported Self-Rehoming technology solutions](#)
- [Meet and greet support](#)
- [Medical support for owned pets](#)
- [Post-adoption support](#)

### Tracking Training Efforts

Tracking supported self-rehoming assignments and completion status allows for easier follow-up, continued training, and progress-tracking for organizational goals. If your organization has an established employee and volunteer training protocol, connect with the relevant personnel to integrate new training efforts into the existing process.

### Creating a Training Tracking Process

- Prior to the creation of a new training tracking process, discuss options with leadership and Human Resources at your organization. If available, this may be an opportunity for

collaboration within an existing employee management or project management software. Confirm whether volunteers may also be able to use this software if volunteer training is also required.

- If an existing software solution is not available, consider who may need access to the tracking information and how the organization currently tracks training progress such as spreadsheets, documents, forms, etc.
- Identify the person(s) responsible for the management and distribution of training. How do they currently track training efforts? Is this process working, or should it be updated?
  - Who needs access to monitor training progress files? How do they currently monitor progress? Is this process working, or should it be updated?
  - Should the training progress files be digital or physical documents?
  - Is there a budget to purchase a Learning Management System (LMS) for the organization to track training progress? *Note: An LMS can both distribute training materials and track progress.*
- Consider if there are different processes in place for employee versus volunteer training efforts. Is there an opportunity to combine the processes? If not, ensure both are updated when changes are made.
- If creating a new tracking system, consider including the following items:
  - First and last name (Trainee)
  - Email (Trainee)
  - Title/Role (Trainee)
  - Direct supervisor
  - Type of training assigned
  - Training required? Y/N
  - Date assigned
  - Assigned by or required by (Example: Supervisor assignment, HR requirement, Grant fulfillment requirement)
  - Due date
  - Scheduled check-in date
  - Responsible for check-in (Person)
  - Date of completion
  - Notes
- If there is an interest in tracking not only the status and progress of training but also time spent, consider adding a metric for the length of time the training will take. You may later use this in reports to calculate time spent as an organization, or individuals, to complete assigned training assignments.
- Consider adding trainings to the onboarding process for all new personnel
- Consider integrating a collection of training process feedback for continuous improvement.

### Sample Solutions (Spreadsheet Based)

- [Simplified Tracking Sheet for Training Assignments](#) - Suitable for any size group or training assignments, but does not elaborate on details or follow-up procedure.
- [Tracking Sheet for Training Assignments I](#) - Suitable for small personnel groups and limited training assignments.

- [Tracking Sheet for Training Assignments II](#) - Suitable for larger groups and training assignments if software is not available. As resources allow, it may be beneficial to consider non-spreadsheet tracking options for ease.

### **Learning Management Systems (LMS)**

Learning management systems vary greatly when it comes to cost, capacity, simplicity of use, and best fit for organizational goals. We highly recommend your organization take the time to complete individual research on the solution that makes the most sense for your organizational needs. To get you started, here is a short list of existing LMS systems you may consider:

- Cypher Learning LMS
- TalentLMS
- Absorb
- iSpring
- Docebo
- D2L Brightspace LMS
- Blackboard Learn LMS
- Canvas LMS
- Moodle LMS
- Adobe Learning Manager



## Supported Self-Rehoming Data Tracking

### Supported Self-Rehoming Operations

Tracking shelter data on supported self-rehoming (SSR) operations can inform the number of pets diverted from possible shelter intake, pets and people served outside of the shelter, the outcomes of pets who participate in this program, and program development needs. This tracking often occurs in third-party self-rehoming platforms or alongside other pet support services tracking. See our [complete guide for data tracking recommendations here](#).

Existing self-rehoming platforms often offer data tracking and reporting options that require little effort from shelter staff and primarily focus on user-generated data entry from pet owners. To acquire this data if you do not already have an established process, contact the support team of the platform your shelter currently partners with to determine what they can provide, how frequently, and any supporting instructions to analyze the data they share. This data may be internal in the platform and require a simple login or may be sent separately.

*Note: Not all platforms offer this service, so ask if you aren't sure!*

Some of the industry-leading **self-rehoming platforms** include the following:

- [Rehome by Adopt-a-Pet](#)
- [Home to Home Animal Adoption](#)
- [Get Your Pet](#)

Additionally, self-rehoming platforms are available on a variety of social media channels. Organizations may wish to moderate or create groups/pages on **social media**:

- [Facebook](#)
- [Nextdoor](#)

While the bulk of supported self-rehoming data can be captured on dedicated platforms, organizations may wish to track data regarding **owners who contacted the shelter and when** supported self-rehoming was offered. For more information on documenting case management efforts for customer interactions and support services, see the [HASS Tools and Technology White Paper: Community Request Tracking](#) and “Pet Support Services Operations” section above.

When documenting **supported self-rehoming data in your support services tracking system**, collect the following details:

- How the owner heard about your organization or the SSR platform

- *Social media, word of mouth, website, etc.*
- Outcome or resolution of the SSR post
  - *Successful or unsuccessful? Was the animal adopted or did the original owner keep the pet? Was the post removed due to inactivity?*
- Initial post date and outcome date
  - *The time it takes to self-rehome an animal*
- Types of assistance offered by the shelter
  - *Assistance with advertising, behavior resources, post-adoption resources/services, etc.*
- Types of assistance the shelter could not provide, but were needed
  - *This helps inform the gap between what is needed and what is available to drive programming decisions and funding proposals.*

## Supporting Resources

- [Shelter Jargon Mini Manual](#)
- [Identification and Solution Integration for Common Data Issues](#)
- [System and Software Recommendations to Track Organizational Data](#)
- [HASS Tools and Technology White Paper: Community Request Tracking](#)



## Intake-to-Placement Digitally Accessible Resource Requests

### Replacing Surrender Requests with Resource Requests

Trading out existing pet surrender request forms at your organization for resource request forms creates a more comprehensive case management approach. Resource request forms collect information on a pet and person's current situation, their primary goal for contacting your organization, and whether or not they have already received resources or services. Your organization may provide pet support, supported self-rehoming, or lost and found pet resources, as appropriate, to find positive outcomes and create pathway plans for the pet and keep on-site shelter space reserved for true emergencies and pet housing when no other options are available.

Resource requests may vary based on what your organization has the ability to offer. Consider this [example support request form from Austin Pets Alive!'s P.A.S.S. \(Positive Alternatives to Shelter Surrender\)](#). In this example, "rehome" is an option, which may lead to supported self-rehoming resources or a connection to shelter intake as a last resort. Upon selecting "rehome", additional fields appear (this can be done with conditional logic) to collect even more detailed information about the request.

**How can we assist you with your pet(s)? \***

<input type="checkbox"/> At Home Parvo	<input type="checkbox"/> PASS Pet Pantry
<input type="checkbox"/> Found Animal	<input type="checkbox"/> Medical Assistance
<input type="checkbox"/> Pet Deposit	<input checked="" type="checkbox"/> Rehome
<input type="checkbox"/> Temporary Housing	<input type="checkbox"/> Vaccine & Microchip Clinic
<input type="checkbox"/> Other	

**You have selected Rehome, which of the following options describes your situation? \***

<input type="checkbox"/> Eviction/moving	<input type="checkbox"/> Medical needs of owner
<input type="checkbox"/> Medical needs of pet	<input type="checkbox"/> Behavior/temperament of pet
<input type="checkbox"/> Behavior/temperament of resident pet	<input type="checkbox"/> Cannot afford basic care/food of pet
<input type="checkbox"/> Death of owner	<input type="checkbox"/> Other

### Getting Started

1. Evaluate your existing surrender request form.
  - a. Does it reflect the support your organization can offer?

- b. Are there any barriers currently in place that can be removed?
    - i. Example: Requiring verification such as an ID photo or other additional materials may reduce the likelihood someone completes the form.
  - c. Is the form able to be filled out digitally?
  - d. Is the form easy to locate on your organization's website and social media channels?
  - e. Does the form have clear instructions outlining how to fill out and submit it?
- 2. Update the form's content to reflect the support your organization can provide and remove potential barriers.
- 3. If the form is not already digitized, create a digital option.
  - a. For basic digital options, Google Forms is an easy place to start. In this program you may create a form and all responses can be tracked in a live-updating spreadsheet that can be modified to track responses.
    - i. [Creating a Google Form](#)
    - ii. [Google Form responses](#)
  - b. If your organization has an established CRM (customer relationship management) software, research if you are able to create a form directly in this software so all submissions are collected in one centralized location.
    - i. Example: [HubSpot form creation support page](#)
- 4. Embed the digitized form or a link to the digitized form in a visible, centralized location on your web page and social media platforms with usage instructions.
- 5. Tell everyone about this update! Share the new form and its purpose with your various audiences (email lists, social media followers) to increase visibility.

## **Accessibility of Resource Request Forms**

Consider all [available communication channels](#) to roll out resource request forms. Channels may include in-person interactions (customer service in-shelter, community event presentations, field responses), emails, text messages, phone calls, social media, websites, and other digital communication. By expanding how your organization shares information, more people can access resources at a moment's notice creating an avenue to provide support at the earliest touchpoint.

## **Supporting Evidence**

### [Intake-to-Placement: Supporting Evidence](#)

This document contains a list of supporting evidence on intake-to-placement interventions and support needs. Organizations may wish to use this information to guide programming aimed at increasing live outcomes and expediting those outcomes to reduce the time pets



spend housed in shelters. The following topics are included: ***See the topics in bold text for supporting evidence that accompanies this resource.***

- **Access to Care and Pet Support Needs**
- Applications/Interest in Adoption or Foster
- Foster Programming
- Impact of Kennel Housing/Kennel Stress
- Intake Reasons Data Collection
- Managed Intake
- Marketing
- Matchmaking
- Outcome Solutions



## Intake-to-Placement Offering Resources in Multiple Languages

### Important Considerations for Offering Services in Multiple Languages

- Does your organization have staff or volunteers who are directly from the community you are serving, know the community well, and speak the most commonly spoken language(s) in your community?
- How can your organization focus on hiring future staff who speak the language(s) that are present in your community and are willing to serve as translators?
- Who within your team of volunteers speaks the language(s) that are present in your community and is willing to serve as a translator?

### Why Translate Materials Into Other Languages?

It is crucial to identify the different languages spoken in your community and provide services for these families. Many community members learn about service providers by word of mouth and if your organization is not providing resources and service information in other commonly spoken languages, you are missing a huge population within your own backyard. Having inclusive, multi-language resources allows even more support for the entire community.

Translating a service flyer or temporary foster agreement into another language is not always easy, especially when considering the different variations of one language category. For example, not all Spanish-speaking communities use the same vernacular. The Spanish spoken by Cuban-Americans in South Florida is different from the Spanish spoken by Mexican-Americans in Southern California! There are variations in the use of certain words as well as idiomatic expressions, so it's important to ensure service descriptions reflect accordingly. This may require evaluating multiple translation program options, inclusive of having a person from that specific community, to achieve the desired result.

### Where to Begin

#### Option 1

There are many different free translating websites available online, such as [Google Translate](#) and [Microsoft Translator](#). With each, you can easily type in what you are trying to translate and it will provide you with a translation.

However, these translations aren't always 100% accurate. So once you have used the internet to translate, it is best practice to have the translation reviewed by at least 2-3 different staff members, volunteers, or community members from different backgrounds and lived experiences (i.e. educational backgrounds and socio-economic statuses) who speak the language. You want to make sure the translation is fully accessible to anyone in your community who may need it. By having others review the translation, this process can help ensure that the message is clear, regardless of a person's education or economic background.

## Option 2

Check out this [list of organizations and platforms that offer translations for nonprofits](#). Some of these organizations offer their services for free with services provided by actual translators. However, as with any open platform, the quality of service can vary widely, so make sure to still have a native speaker review the translated materials before sharing publicly.

Here are some examples of translated materials from English to Spanish created by HASS collaborators:

- [Dallas Animal Services Housing Resources in English and Spanish](#)
- [San Diego Humane Society Mobile Clinic Flyer in English and Spanish](#)
- [Denver Animal Protection Displacement/Eviction Relief Program \(Temp Boarding\) in English and Spanish](#)
- [Denver Animal Protection Displacement/Eviction Relief Program \(Pet Supplies/Services\) in English and Spanish](#)
- [Pima Animal Care Center bag insert for food distribution in English and Spanish](#)

If your website software does not provide an option for viewers to experience your website in another language, check out this step-by-step alternative on [How to Turn Translation On or Off in Chrome](#).

## Additional Consideration

When translating materials, consider integrating additional accessibility options such as the [English to ASL \(American Sign Language\) Translation Standards](#) and adding audio and subtitled variations of materials for public use.

Another level of accessibility to consider is for those that utilize screen readers. Ensure your digital materials such as [website](#), [email](#), and [social media](#) are screen reader friendly. Examples of basic best practices include providing alternative text/visual descriptions, ensuring information is available as text and not just in images, and being mindful of the contrast ratio of colors.

## Supporting Evidence

### [Intake-to-Placement: Supporting Evidence](#)

This document contains a list of supporting evidence on intake-to-placement interventions and support needs. Organizations may wish to use this information to guide programming aimed at increasing live outcomes and expediting those outcomes to reduce the time pets spend housed in shelters. The following topics are included: ***See the topics in bold text for supporting evidence that accompanies this resource.***

- **Access to Care and Pet Support Needs**
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- Outcome Solutions



## Intake-to-Placement Public Visibility of Eligible Pets

### Overview

Establishing a process that allows the public to visit pets in person at your shelter, at foster homes, and ensuring **all eligible pets in care are available to view** on your organization's website or social media pages can greatly increase the chances a pet is seen by their future adopter or foster. In-person visibility at the shelter facility may include scheduled meet-and-greet appointments or the ability for the public to walk through without an appointment.

### What Makes a Pet “Eligible”?

Whether your organization has a physical facility or pets are in foster homes, all pets should be visible in person and online whenever possible. Pets should be considered eligible for visibility unless they are unavailable for severe medical or behavior evaluations. Pets on stray hold should be visible to the public but unavailable for adoption. This not only increases their chance of being found by their owner, but if reunification does not occur, they may already have potential adoption or foster interest. Pets on hold for legal/court-related reasons may be case-by-case depending on local legal requirements and the specific situation.

### Pre-Availability Considerations

If a pet is expected to be available for adoption or foster within 1-2 weeks, consider creating an easily accessible, online profile with a photo and biography. Having an online profile allows you to collect interest forms in advance. This process can support pathway planning and efficiency by completing pre-adopt or pre-foster work in advance so that the pet may be able to leave the facility or foster home the same day they become available, creating an open space for another pet in need.

### Getting Started

Ensuring all eligible pets are visible can take time to get started if this is not part of the organization's current processes. Consider starting this process in batches with healthy, adult dogs and cats that have been in the shelter **longer** than two weeks and do not have any significant medical or behavioral considerations or require any special processes to be adopted. Avoid **beginning** this process with highly adoptable pets, or those that have the shortest average length of stay on-site such as puppies or kittens, as they will be requested regardless of additional visibility processes.

## Best Practices for Pet Photos and Biographies

### Pet Photos

Pet photos are the first thing a potential adopter sees when looking for options. When taking a pet's photo, keep in mind the following best practices. For more information on the following practices, see a dog-specific example through the [Dog Rescue Photography](#) guide from Friends of Marshall Animals. Here's also a quick guide for [cat photo tips from Pet Finder](#).

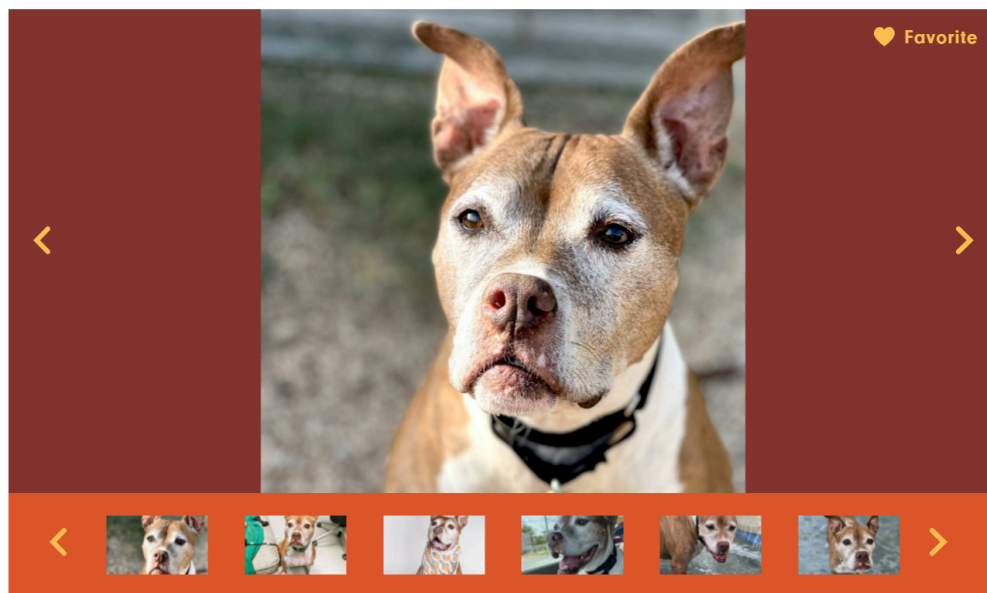
- Prepare the area you are photographing.
  - Clear the space of any debris or major distractions and ensure there is ample lighting. Indirect light is preferred.
    - Be careful of areas with harsh shadows that may be seen on your pet when taking a photograph. (*Be sure not to take a photograph with the sun directly behind you or your silhouette may accidentally block the light!*)
    - Ensure the sun is not directly in your pet's face to avoid squinting!
  - If photographing outdoors, secure a leash to a wall or anchor point so that your pet may stay in one place while you take photographs.
- Before you take your photos, ensure your pet is exercised to reduce distractions and energy bursts during the photo session.
- Have treats, squeakers, or other high-value items on hand to ensure you can get your pet to look at the camera when photographing.
- Check their face for fuzz, dirt, or other. Remove as necessary.
- Take photos on their level whenever possible. Kneeling to take photos at the pet's eye level can create more intimate shots.
- Use portrait mode on your phone or a small f-stop (aperture) on your camera to create a slightly blurred background and keep your pet as the main focal point.

## Pet Biographies

Pet biographies should highlight a few key qualities of the pet for the best chances of increased visibility and clarity among potential adopters.

- Tell a story about the pet including things they like such as food, games, toys, or rolling in the grass.
- Highlight their strengths.
  - Training history or tricks they know
  - Cute quirks
- Keep good qualities at the forefront, but be transparent about any potential challenges the pet may have.
  - When approaching medical or behavior challenges, do not include jargon that is not easily understandable by the general public such as 'HW+' or 'flight risk'.
  - Always provide context! If the pet is healing from a broken leg but is already in the middle of a care plan, ensure the biography mentions that they are already on the mend and how long they can expect until full recovery.
  - If a pet has a specific behavior challenge, place it in a story format whenever possible to create a full picture for potential adopters. For example, a pet that is fearful of new people you might say, "This girl can be shy when meeting new people and will prefer slow introductions. Once she is comfortable with you, she's a cuddle bug!"
- Keep relevant details up front and leave less relevant details out of biographies in favor of individual matchmaking conversations, such as "up to date on vaccines."

### Sample (Austin Pets Alive!):



This mature girl is ready for a new home! Just give her a yard and a spot on the couch and she is a happy camper. "Sugar Plum really is a sweet baby. She's a very easy girl," said her previous caretaker. Work full time? No worries, Sugar Plum does well left alone for extended periods of time. She loves having a yard and a way she can get to it by herself. She's quiet and easygoing. Sugar Plum's owner became ill and was unable to take care of her any longer, otherwise Sugar Plum wouldn't be available to join your home. She would make a wonderful companion to any number of loving homes. Come meet this sweet girl!

### Additional Pet Marketing Resources

The following resources are primarily geared towards pets in the care of the shelter, but the content can also be utilized to support community members in their marketing efforts.

- [Ethical Standards for Marketing Shelter Pets](#)
- [Marketing FUNdamentals](#) - Maddie's® University
- [Bio Writing, Photography, + Marketing Resources](#) - HeARTs Speak
- [Shelter Pet Marketing is Not Adoption Counseling](#) - Maddie's Fund®
- [Refresh Your Marketing for Long-Term Shelter Animals](#) - ASPCApro

## Supporting Evidence

### [Intake-to-Placement: Supporting Evidence](#)

This document contains a list of supporting evidence on intake-to-placement interventions and support needs. Organizations may wish to use this information to guide programming aimed at increasing live outcomes and expediting those outcomes to reduce the time pets spend housed in

shelters. The following topics are included: ***See the topics in bold text for supporting evidence that accompanies this resource.***

- Access to Care and Pet Support Needs
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## Intake-to-Placement Intake Appointment Scheduling

### Why Create Appointment Schedules?

Appointment scheduling can be a useful option to manage the flow of shelter pets, manage community member interactions, and allow personnel to provide better customer service through a case management approach. Appointment-based scheduling also supports:

- Non-Emergency Pet Intake
  - Owner surrenders
  - Found pets (with or without a finder-to-foster program)
- Adoption Programs
  - Matchmaking
  - Dog-dog introductions
  - Virtual meet-and-greets
- Foster Programs
  - Matchmaking of foster caregivers and shelter pets
  - Matchmaking between fostered pets and potential adopters
  - Virtual

### What Problem Do Appointment Schedules Solve?

Creating a process of scheduling appointments for non-urgent pet intake allows your organization to more easily reserve on-site space for true emergencies, create strategic on-site housing plans for incoming pets, and allow a small window of time before a pet's intake to create a pathway plan by locating a foster or adopter, or establishing transport plan to a partner shelter before arrival so the pet does not have to physically be housed on-site for an extended period of time. This process may also allow the restructuring of on-site housing space to create. For example, you may be able to dedicate space for short-term, temporary housing for pets with pre-planned outcomes that need to complete an on-site intake prior to placement.

From a customer service standpoint, appointment scheduling for matchmaking or general pet placements is meant to alleviate challenges with providing high-quality customer service by managing the flow of people, however, is not meant to prevent or limit interactions with community members. Appointment scheduling can also help reduce any confusion with existing shelter processes by ensuring a face-to-face interaction with a shelter representative. Consider adding it as an offering to the public but not necessarily requiring it in order to interact with your organization as appointment-exclusive practices may act as a barrier to support.

Appointment scheduling can be especially beneficial for organizations that are struggling to maintain adequate staffing and volunteer support. By analyzing appointment requests and primary purpose, staff and volunteers may be able to be adjusted to best fit community needs.

## Benefits of Appointment Scheduling

- Increased ability to pathway plan for incoming pets
- Improved customer satisfaction
- Increased accessibility by ensuring community members can access staff/volunteers at specific time frames of their choosing
- Improved case management
- Better preparing adopters and fosters
  - Increased attention to matchmaking

## How Organizations Can Begin

1. Identify what processes can be improved by implementing appointment scheduling
2. Identify an appointment scheduling tool (if your organization does not already have one)
3. Identify what managers or team leads need to be involved in setting up the process
4. Identify team members who need training on this essential function
5. Identify who will manage this on an ongoing basis

## Technology Needs

- Consider which available [public-facing contact methods](#) can be utilized for appointment scheduling. If you do not want to use an appointment scheduling platform, try a combination of phone or online contact forms, a calendar system accessible by various employees, and a spreadsheet for tracking.
- Computer with Internet access
- Appointment scheduling platform
  - Some animal shelter software offers an appointment scheduling tool. Check your shelter software's help page or directly connect with a customer service agent to verify if this is possible!
  - [Waitwhile](#)
  - [SignUpGenius](#)
  - [Calendly](#)
  - [Acuity](#)
  - [Full Slate](#)
- Channels for sharing the appointment scheduling process and platform
  - Email
  - Social media
  - Website
  - Text messages

## Personnel Needs

- Department manager, such as:
  - Intake/Case Management
  - Foster
  - Adoption
  - Matchmaking
  - Customer service
- Additional personnel may vary depending on which department or group of staff and volunteers are managing the appointment scheduling tool and its primary uses.

## Communications Considerations

- How will you share this offering with your organization's stakeholders?
- How will you inform the public about this option?

## Intake Diversion and Pathway Planning

When a potential intake appointment is requested by a member of the public, consider if any support options may be able to be offered to keep the person and pet together if that is an end goal they are interested in. This may include providing either direct support or referrals to partner organizations that offer free pet food, free and low-cost medical care, temporary boarding, and more. To learn more about [pet support interactions, see our guide here](#). Whenever possible, keeping people and pets together should be the ultimate goal. If that is not an option, consider the following pathway planning solutions that can be pursued in the time between first contact and the scheduled intake appointment:

- Provide the caretaker with information on [supported self-rehoming](#), ensuring they are aware that they may still hold the appointment time, but they could potentially rehome their pet before the appointment on their own, with support from the shelter. If the caretaker would rather work entirely through a supported self-rehoming process, release the appointment.
- Ensure information is collected for the pet's public-facing profile, including a photo and biography, before the intake appointment so it can go live as soon as the pet is available.
- Reference any adopter or foster-on-deck lists, or previously collected interest forms, that may be a good fit for the incoming pet and confirm a pre-placement in advance of arrival. This may include ensuring the pet only needs a temporary stay on-site for an intake appointment or does not need to be housed on-site at all.
- Consider any upcoming pet transports to partner organizations. Is this pet a good fit for that transport? If so, add them to the transport planning documentation!

## Supporting Resources

- [Going Home](#) - Maddie's® University
- [Shelterluv has an appointment scheduling feature](#) - ShelterLuv
- [NACA Guideline on Appointment-Based Pet Intake into Shelters | National Animal Care & Control Association](#) - NACA
- [The Foster Caregiver Marketing Guide: Getting Pets Adopted Directly from Foster Homes](#) - Maddie's® University
- [Intake Mitigation and Managed Intake](#) - Maddie's® University
- [Is Managed Intake Humane?](#) - Maddie's® University

## Supporting Evidence

### [Intake-to-Placement: Supporting Evidence](#)

This document contains a list of supporting evidence on intake-to-placement interventions and support needs. Organizations may wish to use this information to guide programming aimed at increasing live

outcomes and expediting those outcomes to reduce the time pets spend housed in shelters. The following topics are included: ***See the topics in bold text for supporting evidence that accompanies this resource.***

- Access to Care and Pet Support Needs
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## Intake-to-Placement Removing Barriers from Pet Interest Forms

### Why Focus on Removing Barriers?

Individuals can face a number of shelter-induced barriers when trying to adopt or foster pets. These barriers may range from overly long applications, home visits, references, and other practices that are all too common in the animal welfare industry. With at least 385,000 shelter pets being euthanized in 2022 alone ([Shelter Animals Count, full and partial data sets](#)), creating inclusive, accessible, and barrier-free processes is an essential solution.

This guide highlights immediately actionable steps to removing barriers to adoption and fostering interest forms, focusing on easy-to-implement practices that take minimal staff time or resources. This guide also briefly highlights actions that may be taken to reduce barriers in the matchmaking process and pet marketing. Interested in learning more about barriers beyond the basics? Check out our blog on 27 commonly identified barriers [here](#).

### Potential Benefits of Removing Barriers

- Increase positive outcomes for pets in care
- Improve community engagement
- Improve customer satisfaction
- Save staff time
- Support diversity, equity, and inclusion
- Increase marketing and media engagement

### How Organizations Can Begin

1. Reference the following checklist, or create a copy of the [HASS Breaking Down Barriers to Positive Outcomes Checklist](#) template. Save a copy of this document in a location accessible by others at the organization who may be implementing changes.
2. Select the check box of any items that have already been completed.
3. Prioritize which remaining checklist items your organization will complete next. Consider [creating a strategy document](#).
4. Need resources or research to support the implementation of this checklist? Review the Supportive Resources section!

### [Breaking Down Barriers to Positive Outcomes Checklist](#)

*Click the link above to see a standalone version of this checklist.*

### Adoption and Foster Interest Forms

- ☐ The following requirements have been removed:
  - ☐ Landlord calls
  - ☐ Home inspections
  - ☐ Income verification
  - ☐ Vet reference
  - ☐ Background check
  - ☐ Age restrictions (Ex: No college students, older adopters only adopt senior pets)
  - ☐ Military or frequent/long-term traveler restrictions
  - ☐ Application fees
  - ☐ Minimum time spent at home during the day
  - ☐ Vaccination status of resident pets
  - ☐ Yard requirements (minimum size, minimum fence height)
- ☐ Forms are accessible:
  - ☐ Available in multiple languages
  - ☐ Paperless options available
  - ☐ Printed forms are not longer than one page
  - ☐ Mobile-friendly (*if applicable*)
  - ☐ There is an easy-to-find and easy-to-understand process for how to fill out an interest form available

**Note:** *This guide is primarily focused on removing barriers to the interest forms, however, considering removing barriers to both the matchmaking and marketing for pets in care goes a long way in ensuring your organization has reduced barriers to positive outcomes for pets in many areas.*

## Matchmaking

- ☐ Strict home environment requirements have been removed (Ex: Yard or fence required)
- ☐ Specific breed or general pet ownership experience is not required
- ☐ Shelter-facilitated pet introductions are offered as a service, not a requirement.
- ☐ Pets can go home the same day they are adopted
- ☐ Pets can go home without in-person meetings with all members of the household
- ☐ Fosters are not required to keep the animal for a minimum time to be considered for fostering. (Short-term and emergency fostering is available)
- ☐ Behavioral needs of pets are communicated positively. “Can’t/Must go home with/without” language is not utilized. (Ex: “Frankie is looking for a relaxed furry friend about his size” instead of “Frankie can’t go home with large high-energy dogs”)

## Marketing

- ☐ All available pets are viewable online
- ☐ All pets in care have a biography within 48 hours of arrival
- ☐ All pets in care have a clear photo taken and added to their file on the day of arrival
- ☐ Public marketing emphasizes and highlights the positive qualities of a pet.

## Supportive Resources

The following toolkits, standalone resources, blogs, videos, slide decks, and more are available to support the implementation of the barrier-busting recommendations. For a more in-depth look at the **research** behind this breaking down barriers toolkit, [view our list here](#).

### Applications/Interest in Adoption or Foster

- [Offering Services in Other Languages](#) - HASS
- [Adopters Welcome Toolkit](#) - HumanePro by HSUS
- [Sample Cat Adopter Questionnaire](#)
- [Animal Welfare Is Turning Away Good Adopters While Animals Die in Shelters](#) - HASS
- [Barrier Busting Basics for Busy Animal Shelters](#) - HASS
- [Adoption Requirements vs. Open Adoptions: a Conversation](#) - HASS
- [Proven Barrier-Busting Strategies That Send Animals Home - Fast Track for Spring 2023 Shelter Summit](#) - Maddie's University
- [Adopter's Welcome DIY Action Plan](#) - HumanePro by HSUS
- [Pet adoption policies: More red carpets, fewer roadblocks, empty animal shelters](#) - Best Friends Animal Society
- [Pet Adoption: Barriers and Solutions | Network Partners](#) - Best Friends Animal Society
- [6 Tips for Building a Barrier-Free, Inclusive Foster Base](#) - HASS
- [Open Fostering: It's Time to Make Fostering Inclusive](#) - AmPA! and HASS
- [Adoptions Training Playbook](#) - Best Friends Animal Society

### Matchmaking

- [Client Services and Adoptions Best Friends Course](#)
- [Reduce Adoption Barriers & Get Pets Into Homes! An FAQ to Making It Happen](#) - HASS
- [Getting to Yes! Making Great Matches Between Pets and People](#) - AmPA!
- [Big Dog Master Class Block 7 - Get Dogs Into Great Homes Faster - Big Dog Master Class Sessions](#) - Maddie's® University
- [To find adopters and fosters for pets who are more difficult to place, start with your language](#) - Chew On This
- [No pets, no kids, no problem! Why your harder-to-place pets don't need to languish in the shelter](#) - Chew On This
- [Marketing and Adopting Hard-to-Place Pets](#) - Best Friends Animal Society
- [Increasing the Odds of a Successful Adoption](#) - ASPCApro

### Marketing

- [Ethical Standards for Marketing Shelter Pets](#)
- [Marketing FUNDamentals](#) - Maddie's® University
- [Bio Writing, Photography, + Marketing Resources](#) - HeARTs Speak
- [Shelter Pet Marketing is Not Adoption Counseling](#) - Maddie's® Fund
- [Refresh Your Marketing for Long-Term Shelter Animals](#) - ASPCApro

## Supporting Evidence

### [Intake-to-Placement: Supporting Evidence](#)

This document contains a list of supporting evidence on intake-to-placement interventions and support needs. Organizations may wish to use this information to guide programming aimed at increasing live outcomes and expediting those outcomes to reduce the time pets spend housed in shelters. The following topics are included: ***See the topics in bold text for supporting evidence that accompanies this resource.***

- Access to Care and Pet Support Needs
- **Applications/Interest in Adoption or Foster**
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- Intake Reasons Data Collection
- Managed Intake
- Marketing
- Matchmaking
- Outcome Solutions





## Intake-to-Placement Collecting Interest Forms and Adopter-on-Deck

### What is Adopter and Foster “On-Deck”

An on-deck resource is a collection of information on individuals who have expressed interest in adopting and fostering but have yet to be matched with a pet. This information is often collected through a pet interest form, outlined below, or direct outreach specifically to be added to the on-deck system. Adopter and foster on-deck lists are often standalone but with similar purposes due to the frequency by which adoption and foster interest forms are separate. Once this information is collected, personnel responsible for pet matchmaking, and adoption and foster placements can reference the information provided and match pets to families that best fit.

### Why Collect General Pet Interest Forms

Creating a process that allows the public to submit general adoption and foster interest forms holistically supports matchmaking efforts both for pets already in care and are expected to be in care soon. These forms highlight basic information such as when a community member can care for a pet, the type of pet they are interested in, and basic information about their current home setup. Personnel can use this information to match people with pets strategically and by highest priority. Responses to general interest forms may directly update a live spreadsheet or response tracking tool, and responses may be filtered accordingly when matching people and pets by set criteria, creating an internal matchmaking, and potential “on-deck” resource.

### Benefits of General Interest Collection

- **Customer Service:** Adopters or fosters will receive more relevant communication and/or not receive last-minute emails, texts, calls, or other when urgent help is needed if they are not opted-in to emergency plea communication. Instead, they may be contacted only when a match can be made that aligns with their availability.
- **Facility:** Staff and volunteers responsible for placement can more appropriately plan for incoming pets and reduce the need for on-site housing.
- **Pet Care:** Pets with high placement urgency can be prioritized with strategic matchmaking alongside public pleas
- **Personnel:** There is less stress on personnel responsible for placement as they have a list of willing individuals to choose from when considering pet placement
- **Strategic Planning:** On-deck lists, and placements resulting from this list, may help evaluate the organization's overall capacity for care for specific populations.

### General Adoption Interest Form Sample Information

- Full Name and preferred pronouns
- Preferred Contact Information and form of communication (call, text, email)

- General location of residence (city, zip code)
- A few pets they are interested in from your organization's public-facing site
- General overview of pets they have in the home (species, gender)
- What they are looking for in a new pet (species, gender, qualities)
- When they are looking to take home a pet (today, next week, next month, any)

If a form is not already in place, programs such as [Airtable](#), [Google Forms](#), and [Smartsheet](#) all allow for online survey creation that populates into a tracking sheet.

**Additional consideration #1:** When possible, integrate “drop-down” menus into your interest forms with pre-set answers to more easily filter responses that are collected. For example, **qualities they are looking for in a new pet** may include a drop-down menu of words such as “energetic, couch potato, affectionate” with an option for the person to write in custom text if none match their interests.

**Additional consideration #2:** If you intend to use a general adoption or foster interest form to create an “on-deck” process (see below), it is highly recommended to add a message on the form highlighting the basics of this process. Consider adding a message to your form such as:

*By completing this general pet interest form, your information will be added to our [adopter/foster] on-deck list. We will connect you with a pet that aligns with your interests as soon as we have a potential match! While we cannot guarantee the length of time it may take to match you with a pet, your information will remain in our system until we can. If for any reason you need to be removed from this list, or would like to change any previous responses, let us know.*

### Internal vs. External Lists

Your organization may choose to have your on-deck system be **internal-facing only**. This process requires you to provide specific instructions on the initial interest form stating that any changes in home setup, when they may be able to take a pet home, pet qualities they're looking for, or other must be sent directly to a contact so that the form may be updated by a staff member or volunteer to ensure the form stays current.

If you are interested in your adopter or foster on-deck form being **external-facing, or available to be edited directly by potential adopters and fosters**, consider the following precautions. Creating an external-facing list is an effective way to ensure a potential adopter or foster can update their information directly if something changes, reducing staff time for correspondence, but does require additional proactive steps to ensure the list is maintained appropriately and privacy is secured.

- Remove any personal information outside of name and email address from the primary interest form.
- Integrate on-deck list rules into your interest form or as a standalone resource highlighting how to make edits.
- Ensure the interest form or standalone resource has, at minimum, a checkbox or yes/no drop-down that states that anyone given access to the on-deck list will not share the personal information they have access to. **If available, have a legal representative review the language and confirm what, if any, further action is needed or additional forms signed.**

- Ensure the list is only shared with a closed group, such as individuals who have filled out the form and are on the list, or ensure it is locked by a password that is only provided to those on the list.
- Regularly monitor the list (and edit history, if able) to ensure accuracy. If the list is ever corrupted, revert to the most recent version. Consider implementing automated updates via a live spreadsheet or response tracking tool to ease this process.
- Consider regularly updating the password or removing all users and only re-sharing with individuals currently on the list.

## Adopter-On-Deck Recruitment

When sharing calls to action for adoption, consider adding an additional highlight for your available adopter-on-deck process. This may include a statement such as, “Not ready to adopt yet? Join our adopter-on-deck list and we can match you with a pet when you’re ready!” and a link to the appropriate form.

## Supporting Resources

- [Foster On Deck - It Really Works!](#) - American Pets Alive!
- [Million Cat Challenge: Foster Care On-Deck: Strategies to Get Kittens into Foster Homes Quickly](#) - Maddie’s Fund®
- [How to Cut Foster Home Wait Times With On-Deck System](#) - ASPCA Pro
- [They Did It: Tips For a Thriving On-Deck Foster System](#) - ASPCA Pro

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## HASS Playbook: Intake-to-Placement Foster Programming

### Foster-Centric Sheltering Overview

Historically, foster care was considered a niche program, serving primarily orphaned kittens and puppies or pets with medical needs that could not be adequately cared for in the shelter. Foster programs were managed almost entirely by the foster coordinator, including everything from foster placement, foster support, and pets' medical and behavioral needs.

Before the internet and social media were used widely by shelters and rescues, prospective adopters' main avenue for meeting adoptable pets was visiting them in person at the shelter. Most fostered pets were required to return to the shelter as soon as they became available for adoption to be matched with prospective adopters on the adoption floor.

[Foster-centric sheltering](#) makes foster care the standard for almost every pet in the shelter and aims to place 50% or more of animals in foster homes within hours or days of their arrival. Foster care is just as important as adoption in a foster-centric organization. Recruiting foster caregivers, placing pets in foster care, and supporting their fosters are the responsibilities of the whole shelter. A comprehensive, year-round [foster recruitment plan](#) is in place, utilizing multiple strategies, including local news, social media, and word-of-mouth. A foster-centric shelter posts adoptable pets on its website and social media, and most adopters find their new pets online or via word of mouth. There are efficient processes to market pets and complete the adoption process directly from foster homes.

In a [foster-centric](#) organization, most pets who enter the shelter system are placed in foster homes within hours or days of arrival, and most foster pets are adopted directly from foster homes. In the foster-centric model, foster care is prioritized as much as adoption, and its success is the entire organization's responsibility.

### Troubleshooting Common Challenges

#### Difficulty Recruiting Fosters

Due to the small number of pets placed in foster homes, the seasonal nature of pets' births, and lack of time, most organizations have only recruited fosters when absolutely necessary. Placing the majority of an organization's pets in foster homes requires a much more comprehensive approach to foster recruitment. Creating a year-round foster [recruitment plan](#) with diverse strategies to reach the entire community can improve the recruitment of fosters for an organization.

#### Length of Stay in Foster is Too Long

Since foster pets have traditionally come back to the shelter's adoption floor for adoption, many organizations haven't needed to create an efficient system for getting marketing materials and information from foster caregivers. Foster-centric organizations need to create a [foster marketing system](#) that works for them. Since foster caregivers will get to know pets better in homes, the possibilities for great marketing are endless.

## The Foster Coordinator is Overworked

One of the most common challenges to building a foster-centric shelter is getting the entire organization and its staff on board. Traditionally, foster care has been managed by the foster coordinator, who is responsible for every foster-related task, which isn't feasible with the goal of having half of a shelter's intake in foster homes. A foster-centric shelter requires the *entire* organization to see foster care as a priority and a part of their job, just like with adoptions. Creating an organizational culture that values fostering is essential.

## Difficulty Allocating Sufficient Staff to Foster Care

Once the foster-centric model is fully in place, the decrease in pets at the shelter will decrease the number of staff needed to care for them. Some of these staff can be reallocated to foster care as the needs of the organization slowly shift. It can take time to begin placing more pets in foster, so shelters and rescues may need volunteer support or temporary staffing for program management until some animal care staff can be shifted into foster roles.

## Personnel Options for Foster Care Management

### One Full-Time Staff Member

Many shelters and rescues have one or more full-time, paid staff members, making them more accessible during work hours and emergencies without competing job responsibilities.

### Multiple Full-Time Staff Members

Often, organizations with high-volume foster care have multiple full-time staff devoted to it. Each staff member usually specializes in one species or at-risk population, but this isn't required. For example:

- Organization A has a dog foster coordinator and a cat foster coordinator.
- Organization B has four foster coordinators in total. Each specializes in one of the following areas: kittens, adult cats, general dog foster, and behavioral foster for dogs.
- [SAMPLE Dog Foster Placement Coordinator Job Description](#)

### Part-Time Staff

Part-time staff can be used as additional support for foster care or as managers for other staff or volunteers.

### Volunteers

While having paid staff to manage foster care can be beneficial, shelters and rescues should not let a lack of funding for foster staff prevent them from starting or growing their foster programs. Some high-volume foster programs are managed entirely by volunteers, and many others have built-in volunteer support for foster care management.

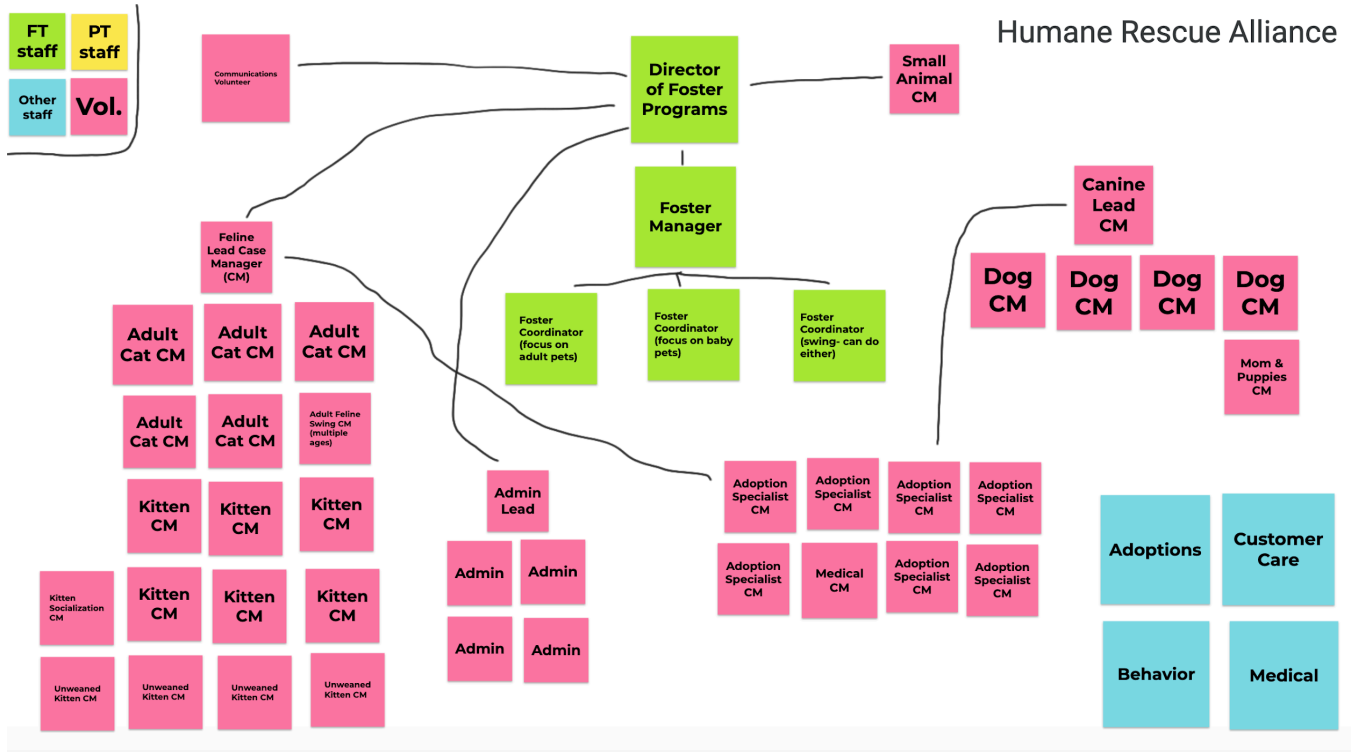
### Repurposed Existing Staff

Foster-related tasks such as checking fosters out in the shelter or rescue's software system can be made the responsibility of other staff members. For example:

- Adoption counselors can counsel foster caregivers, place pets in homes, and/or check foster pets out to caregivers.
- Behavioral foster support can be provided by behavior staff.
- Medical staff can provide veterinary care or counseling.

## Sample Organizational Chart

- Foster organizational chart [video overview](#) from Humane Rescue Alliance
- Foster organizational chart [video overview](#) for DeKalb County Animal Shelter, part of LifeLine Animal Project



## Foster Application Template

This [foster care application template](#) may be used as a base to create a resource that fits your organization's unique setup and needs.

## Emergency Foster Plea Templates

These [emergency foster plea templates](#) include language to help more pets be connected to foster parents, and that can be adjusted to fit the needs of your organization's emergency situation. These sample templates include natural disasters and population crises.

## Data Collection for Foster Care

Using a data-driven approach helps organizations identify gaps in service and look for ways to build and improve. Set measurable goals for foster care and track data associated with these goals. The following data can be beneficial:

1. Pets placed in foster
  - a. Total number of individual pets fostered (monthly and yearly)
    - i. Break down by species, age, condition, reason for foster care, and length of stay
  - b. Total number of pet placements into foster (monthly and yearly)
    - i. One pet may be placed in several foster homes over time
    - ii. Break down by species, age, condition, reason for foster care, and length of stay

2. Pets' outcomes and the type of pet
  - a. Total outcomes of all pets the shelter takes in (monthly and yearly)
  - b. Total outcomes of pets fostered (monthly and yearly)
    - i. Break down by species, age, condition, and reason for foster care
      1. If one group has an especially low save rate, what can you do to change it?  
Send to foster sooner? Give fosters more training?
3. Foster recruitment and retention
  - a. Number of new fosters who sign up (monthly and yearly)
  - b. Where are new fosters finding out about your need for foster caregivers?
    - i. Make this a required question on your foster sign-up form, and use this data to fine-tune your foster recruitment efforts.
  - c. What parts of your community do your fosters live in, and how diverse is your foster base? How can you reach those you're not currently reaching so your foster base is as diverse as your community?
  - d. Number of active foster caregivers (yearly)
  - e. Number of fosters who leave the organization (yearly)
  - f. Feedback from foster caregivers (yearly)
    - i. Consider using [FAST 15](#), a free assessment tool
4. See the [Foster Data Collection Spreadsheet Template](#) for more!

## Behavior Foster Programming

### Overview

A behavior foster program is an extension of your general foster care program. Pets who exhibit behavioral challenges in the shelter or other settings often benefit from foster care placement. Animals may exhibit challenging behaviors that can be resolved by placing the animal into a foster home; however, some challenging behaviors persist. It is often difficult to distinguish between these prior to placement.

A candidate for behavior fostering presents a behavioral or training challenge but, to the best of the organization's knowledge, is not a public safety concern. Foster caregivers are expected to actively manage and/or train their behavior foster. Foster caregiver compliance and objective (unbiased) feedback about the animal are important so that more specific pathway planning can be completed for the animal. It's equally important that the organization has behavior instructions that are easy to access and understand, as well as adhere to [least intrusive minimally aversive \(LIMA\)](#) principles.

### What Problem Is Behavior Foster Programming Trying to Solve?

Even in the best circumstances, animal shelters are stressful, making pets susceptible to behavioral decline. Experience and research show that some stress-associated behaviors may resolve in a home environment. On the flip side, because a shelter is not a setting that replicates real life, some behaviors don't present until the pet is in a home environment. Animals with behavior concerns are at a higher risk for longer lengths of stay and euthanasia. A longer length of in-shelter stay increases the likelihood of animals experiencing [fear, anxiety, stress, or frustration \(behavioral deterioration\)](#) and/or new behavior concerns, and the cycle continues.

### Benefits of Behavior Foster Programming

Caring for animals with behavioral issues in foster homes may lower the overall length of stay, as behavioral decline from longer shelter stays would be all but eliminated. Overall well-being may increase



as most animals who would be stressed in the shelter are now awaiting adoption in foster homes. Shelters will have much more comprehensive information on animals' behaviors in different contexts, which can lead to more individualized care and better-informed decision-making.

## Getting Started

Your organization should have clear standard operating procedures (SOPs) and guidelines about pathway planning, risk assessment, and outcome and decision-making before starting a behavior foster program. The following is a list of the basic steps for expanding an existing foster program to include behavior fosters. For more detailed guidance on how to start a general foster care program, check out [Realistic Job Preview: Starting a Foster Program](#).

- Create or update your budget for behavior foster care and decide what you need the most.
  - Example from [Alley Cat Allies Foster Toolkit](#) to help you budget, pages 21-22.
- Use this document to obtain buy-in from your leadership team about creating a behavior foster program.
- Set goals for the behavior foster program:
  - Set overarching programmatic vision, objectives, and goals.
  - Create a system to identify metrics to collect data to measure progress toward goals, with a timeline for achieving those goals.
    - Example: The number of foster caregivers and animals in the program
- Create SOPs for the behavior foster program:
  - Decide who will oversee the behavior foster program, the reporting structure, and cross-departmental allocation of work.
  - Identify the behavior concerns your organization is comfortable sending to foster care and can support. Consider creating “levels” or “stages” to help you plan for future behavior placements.
    - Beginner: Mild behavior concerns such as dogs experiencing shelter deterioration, cats with litter box issues, mild fearful behavior, jumpy/mouthy dogs
    - Intermediate: Mild to moderate reactivity/resource guarding, territorial, moderate to high flight risk/scared, species restrictions with existing in-home pets/setup
    - Advanced: Requires training from behavior team staff prior to the pet being able to be placed in a home, bite history (non-puppy), advanced guarding/reactivity, etc.
  - A pet's needs should inform where to place them. For example, a highly dog-social pup who is fearful of new people but has no other behavioral issues may benefit from being fostered by someone with a confident, friendly dog who can show them the ropes.
  - Create a job description(s) for behavior foster caregivers and various roles.
  - Update or create documents, such as a [behavioral addendum](#) for your foster care agreement, to ensure increased liability coverage.
  - Review your process for foster caregivers to contact the appropriate persons during a behavioral [emergency, including when and how](#).
- Create or revise your [comprehensive foster recruitment plan](#).
  - Create profiles for animals with behavior concerns who need foster caregivers. Marketing pets who are in behavioral foster homes can greatly help decrease the length of stay, as well as help recruit others to get involved. It shows that behavior foster animals are just regular animals and are also fun. Also, if you can move these pets through your foster homes more quickly, they can foster another (but do avoid burnout by giving them breaks, as needed).



- Train foster caregivers, staff, and volunteers (organization-wide) on the program:
  - Ensure that barriers to becoming a behavioral foster are low and not arbitrary. For example, a foster for a dog who displays jumpy/mouthy behavior in the shelter may need to learn how to support the dog as they settle into a home. Still, they don't necessarily need training in supporting fearful dogs. Staff need to learn that while the foster home for this dog might need more training skills, they don't necessarily need to go to a foster home that doesn't have other dogs.
  - Upgrade your online [foster caregiver orientation](#).
  - Collect, develop, and widely share training resources (including video) that are easily accessible to foster caregivers and other people in your organization who may not have extensive or evidence-based behavior knowledge.
    - a. Example: Behavior modification, in-home training, safe handling.
    - b. Check out these specific behavior plans from the Center for Shelter Dogs for [fear of people, jumpy/mouthy behavior, and food aggression](#).
  - Educate foster caregivers about expectations/procedures for being a behavior foster.
    - a. Example: Public safety protocols, local ordinances, and guidance for foster caregivers on marketing pets, meeting with potential adopters, and completing adoptions from home.
- Develop a system to support foster caregivers.
  - Caregivers can receive support from behavior staff, foster coordinator and team, volunteer foster mentors, other foster caregivers, volunteers, local trainers, the community (GoFundMe), etc. Think about the full scope of support.
  - Create [Foster Teams](#), a group of people who coordinate and implement all aspects of the care, training, marketing, etc. In addition to the link above, you can check out this [foster teams YouTube video](#).
  - Develop a hierarchy of support, such as behavior foster mentors.
- Create a plan and processes to retrieve behavior information and observations about behavior animals in foster care.
  - Example: [Animal Return Google Form](#): used to gather pet behavior info from foster caregivers.
  - Explore new programs like [FIT Camp](#), modeled off of doggie daycare. Foster caregivers drop dogs off at the shelter for the day to receive enrichment, training, and adoption opportunities. The dogs will then continue to spend the nights and any other day they are not scheduled for FIT Camp in the foster home. Potential adopters get to see them in action, the shelter learns more about the behaviors, and the foster pet is tired at the end of the day.
- Develop a recognition and retention plan for your behavior fosters to celebrate their successes and provide emotional support.
- Start small, solicit feedback, assess, and expand the program over time. The [Fast 15 is a free foster program assessment tool](#) created by the University of North Carolina at Charlotte.

## Technology Uses

The following are some tools other organizations have found helpful in automating tasks and workflow. More general guidance can be found in the [Realistic Job Preview: Starting a Foster Program](#) and the beginning sections of this resource.

- Use your animal management software, Excel, or Google Sheets to track foster program data on placements, new behavior fosters, foster turnover, etc.
- Provide online orientation, training, and continuing education in pet behavior.
  - Example: [Pima Animal Care Center's Online Dog Foster Orientation](#)
  - Example: [Maddie's® University](#) course catalog
  - Example: [GoodPup](#) or other apps that provide support and training
- Create an online location where your foster caregivers can find the information they need, such as a foster manual, education on specific topics, and information on the adoption process. Ideally, this could live on your organization's website or social media page/groups.
  - Example: [Austin Pets Alive! Dog Foster Resources Webpage](#)
  - Example: [Pima County Foster Resources Webpage](#)
- Consider using a [Google Voice number](#) or texting to connect about lower-level emergencies.
- Utilize [Zoom](#) and other teleconference and live video options for anything and everything (e.g., remote learning, consultations, connecting with trainers, first-round adoption intros, etc.).

## Personnel Uses

While it can be advantageous to hire one or more full-time staff to manage the behavior foster care placements at your organization, it's possible to manage the program with volunteers and/or part-time staff. Consider the following:

- Estimate the number of work hours needed. The number of weekly work hours required to implement and manage the behavior foster program will depend on the size and types of intake, community support, resource availability, and ultimately, the number of behavior fosters your organization aims to place.
- Develop a comprehensive foster organizational (and management) chart that involves staff and personnel at all levels:
  - Full-time, paid staff
  - Part-time, paid staff
  - Reallocated staff who assist with specific activities
  - Volunteers, trained and committed
  - Volunteers, new or relatively untrained
- Create [job descriptions](#) for staff and/or volunteers.
  - Most organizations use the same role description for general foster caregivers as those who foster pets with behavioral issues, with specific tweaks and behavior directives.

Since most pets will be cared for in foster homes as they await adoption, the focus of behavioral staff will shift from strictly working with pets in the shelter to supporting and training foster caregivers and providing community-based behavior support.

## Supporting Resources

### Sample Documents for Behavior Foster Programs:

- [Managing Big Dogs: The New Horizon](#) (conference recording)
- [Innovative Fostering: Saving More Dogs with Behavioral Challenges](#) (webcast)
- [Behavioral Foster at LifeLine from Michelle Harmon](#)
- [Utilizing Foster Rounds to Improve Animal Care](#)
- [Austin Animal Center: Starting a Medium/ Large Adult Dog Foster Program](#)

## List of Resources In This Document:

- [Maddie's Fund®: Super Charge Your Foster Program with These 7 Guiding Principles](#)
- [IIABC: LIMA: Hierarchy of Procedures for Humane and Effective Practice](#)
- [About Fear Free Shelters](#)
- [Realistic Job Preview: Starting a Foster Program](#)
- [Alley Cat Allies: Saving Cats and Kittens with a Foster Care Program](#)
- [Dr. Ian Dunbar's Dog Bite Scale](#)
- [Austin Pets Alive! Dog Foster Behavior Agreement Addendum](#)
- [Comprehensive Foster Recruitment Plan](#)
- [LifeLine Animal Project: Dog Return \(Google\) Form from Foster Care](#)
- [Pima Animal Care Center's Online Dog Foster Orientation](#)
- [Austin Pets Alive! Dog Foster Resources Webpage](#)
- [Pima County Foster Resources Webpage](#)
- [Austin Pets Alive! Dog Foster Program Plea Board How-To Video \(Trello\)](#)
- [Austin Pets Alive! Dogs Needing Foster Webpage](#)
- [Levels for Emergencies for Foster Caregivers FlowChart](#)

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### General Foster Interest Form Sample Information

- Full Name and preferred pronouns
- Preferred Contact Information and type of contact (email, phone, text)

- General location of residence (city, zip code)
- A few pets they are interested in from your organization's public-facing site
- General overview of pets they have in the home (species, gender)
- What they are looking for in a foster pet (species, gender, age preferences, qualities)
- When they are looking to take home a pet (today, next week, next month, any)
- If they are available for emergencies or last-minute placements
- If they are willing to take special foster cases including:
  - Neonatal or pregnant/nursing
  - Medical needs (disease, injury, crate rest, incontinence, other)
  - Behavior needs
- If they are available for "sitter stays" or short-term fostering to give pets a break from the shelter or to sit for other fosters that may be out of town
- Any existing time constraints of unavailable dates
- **Optional:** A checkbox or drop-down stating that the foster understands that they are on-deck for a foster (as stated dates allow) and if notified of a match, they are expected to pick up the pet as a foster.

If a form is not already in place, programs such as [Airtable](#), [Google Forms](#), and [Smartsheet](#) all allow for online survey creation that populates into a tracking sheet.

**Additional consideration #1:** When possible, integrate "drop-down" menus into your interest forms with pre-set answers to more easily filter responses that are collected. For example, **qualities they are looking for in a new pet** may include a drop-down menu of words such as "energetic, couch potato, affectionate" with an option for the person to write in custom text if none match their interests.

**Additional consideration #2:** If you intend to use a general adoption or foster interest form to create an "on-deck" process (see below), it is highly recommended to add a message on the form highlighting the basics of this process. Consider adding a message to your form such as:

*By completing this general pet interest form, your information will be added to our [adopter/foster] on-deck list. We will connect you with a pet that aligns with your interests as soon as we have a potential match! While we cannot guarantee the length of time it may take to match you with a pet, your information will remain in our system until we can. If for any reason you need to be removed from this list, or would like to change any previous responses, let us know.*

## **Foster Expectations**

It's important to communicate clear expectations with fosters signing up to be on-deck. This includes sharing details about the matchmaking process and being expected to foster the pet selected if matched with a pet that fits their identified criteria, potentially lengthy wait times to secure a match if there are significant foster limitations, and that availability information should be updated as soon as anything changes. This will significantly improve the overall foster placement process and ensure that individuals signing up to be on-deck are prepared to take a pet if it fits their preferences and availability. This will encourage potential fosters to fill out their information as accurately as possible, including their realistic ability to take special cases and emergency or last-minute placements.

## Internal vs. External Foster-On-Deck Lists

Your organization may choose to have your on-deck system be **internal-facing only**. This process requires you to provide specific instructions on the initial interest form stating that any changes in home setup, when they may be able to take a pet home, pet qualities they're looking for, or other must be sent directly to a contact so that the form may be updated by a staff member or volunteer to ensure the form stays current.

If you are interested in your adopter or foster on-deck form being **external-facing, or available to be edited directly by potential adopters and fosters**, consider the following precautions. Creating an external-facing list is an effective way to ensure a potential adopter or foster can update their information directly if something changes, reducing staff time for correspondence, but does require additional proactive steps to ensure the list is maintained appropriately and privacy is secured. External-facing foster lists may be shared in closed foster Facebook groups, Google Groups, or other social pages exclusive to fosters for your organization as available.

- Remove any personal information outside of name and email address from the primary interest form.
- Integrate on-deck list rules into your interest form or as a standalone resource highlighting how to make edits.
- Ensure the interest form or standalone resource has, at minimum, a checkbox or yes/no drop-down that states that anyone given access to the on-deck list will not share the personal information they have access to. **If available, have a legal representative review the language and confirm what, if any, further action is needed or additional forms signed.**
- Ensure the list is only shared with a closed group, such as individuals who have filled out the form and are on the list, or ensure it is locked by a password that is only provided to those on the list.
- Regularly monitor the list (and edit history, if able) to ensure accuracy. If the list is ever corrupted, revert to the most recent version. Consider implementing automated updates via a live spreadsheet or response tracking tool to ease this process.
- Consider regularly updating the password or removing all users and only re-sharing with individuals currently on the list.

## Foster-On-Deck Recruitment

When sharing calls to action for fostering, consider adding an additional highlight for your available foster-on-deck process. This may include a statement such as, "Not ready to foster yet? Join our foster-on-deck list and we can match you with a pet when you're ready!" and a link to the appropriate form.

## Supporting Resources

- [Example Foster Form](#) - Lifeline
- [Foster On Deck - It Really Works!](#) - American Pets Alive!
- [Million Cat Challenge: Foster Care On-Deck: Strategies to Get Kittens into Foster Homes Quickly](#) - Maddie's Fund®
- [How to Cut Foster Home Wait Times With On-Deck System](#) - ASPCApro
- [How to Use Online Orientation for More Foster Parents, Less Staff Burden](#) - ASPCApro
- [They Did It: Tips For a Thriving On-Deck Foster System](#) - ASPCApro

## Supporting Evidence

### [Intake-to-Placement: Supporting Evidence](#)

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## Intake-to-Placement Intake-to-Placement Protocol

### Creating an Intake-to-Placement Process

The goal of an intake-to-placement process is to create a seamless pathway for the immediate care for pets in crisis, reduce unnecessary intake, decrease a pet's length of shelter stay, and sooner reach positive outcomes. This process allows the focus to be on intake prevention programs, the well-being of pets in care, and the well-being of shelter personnel.

### How to Get Started

Intake-to-placement policies may vary by available programs, particular laws and ordinances that govern stray hold and placement policies, and available space and resources at your organization. Consider the following steps when building an intake-to-placement protocol:

1. Know your data! To start an [Intake-to-Placement](#) program, it helps to know the following:
  - a. Overall length of stay in the shelter by species
  - b. Length of stay in the shelter before available to the public by species
  - c. Which groups have the longest length of stay
  - d. Average "kennel inventory" or "shelter census" (number of pets housed in the shelter at any given time)
  - e. Current foster policies related to data
    - i. How many pets are allowed to go to foster care by species
    - ii. How many pets go to foster care annually
    - iii. How many pets are in foster care at one time
2. Create clear placement pathways for pets outside of the physical shelter facility.
  - a. [Build or expand upon an existing foster program](#)
  - b. Create an [adopter](#) and [foster-on-deck](#) process
  - c. [Create or expand partnerships with other shelters or rescues that may be able to accept pet transports](#)
  - d. Create a [finder-to-foster](#) or [48-hour program](#)
3. Commit to open adoption and open fostering to reduce barriers to positive pet outcomes.
  - a. Use conversation-based counseling like the [Humane Society of the United States Adopters Welcome Manual](#) to help counselors match people with pets.
4. Make pets [available, visible, and easy for the public to take them home](#).
5. [Schedule non-emergency intake appointments in advance](#) so that your organization has time to assign an appropriate pathway for the pet prior to their arrival, potentially eliminating the need for them to come on-site to the shelter facility at all.
6. When implementing a new intake-to-placement program, consider which pets will be prioritized first.
  - a. Pets with the longest lengths of stay (often big, adult dogs, and/or adult cats)
  - b. Pets with shorter lengths of stay
  - c. There are benefits to both approaches and combinations. If you move 'easy' pets faster, this will create more space and resources for more challenging-to-place pets. If you focus on 'harder' pets, you may place fewer but see immediate



- improvements in lifesaving and quality of life.
7. Create an SOP, or add to an existing protocol, that outlines which of the above steps your organization has implemented.
  8. Regularly audit your data to make strategic decisions for future placement programs and pathway planning for pets.

## Provide Training

If your organization is without an intake-to-placement process as outlined above, [provide regular training](#) to all staff and volunteers who may be responsible for pet intake, pet placements, pet marketing, partnership building, and general customer service. Ongoing training will be especially impactful as new programs are put in place. Intake-to-placement often impacts many roles at a shelter, and everyone should be trained on the organization's priorities and processes.

## Additional Resources

- [Animal Welfare Education Courses: Intake to Placement](#) - Maddie's® University
- [Intake to Placement Program](#) - PACC
- [Intake-to-Placement Script for Owner Surrender Dogs](#)
- [Intake-to-Placement Script for Owner Surrender Cats](#)
- [Compassionate Care](#)

## Supporting Evidence

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## Intake-to-Placement Emergency and Non-Emergency Intake

### Overview

Clearly defining what is considered an emergency versus non-emergency intake at your organization is a critical step in creating pathways toward care and positive outcomes. While each organization's unique definition of what constitutes an emergency may vary, here is a sample list of intake possibilities to consider when creating internal policies.

### Emergency Intake

- Life-threatening medical cases or immediate medical care is needed
  - If this is an owned pet, the owner is unable to provide care, and there are no programs or partnerships in place that could be referred.
- Pregnant/nursing or neonatal
- Owner is not able to manage pet behavior, and the pet requires intake to prevent unnecessary private euthanasia
- Owner is experiencing a sudden housing crisis and/or other personal crisis, and the pet does not have an alternative
  - Exclusive to if the organization does not have a temporary foster program in place for owned pets.
- Field services required intake (emergency, crisis)

### Non-Emergency Intake

- Surrender request for a healthy pet
  - Recommend [supported-self rehoming](#) before intake
- Found pet, when the finder is willing to hold onto the pet for a short time and help locate the owner or may commit to short-term fostering

### Additional Consideration

If you aren't sure where to start, consider copying the full list of your shelter software or current tracking process' possible intake reasons into a document or spreadsheet. Next to each intake reason, write "emergency" or "non-emergency" as a brainstorming exercise. If more than 25% of answers are "emergency", consider ongoing evaluation of responses so you can more accurately identify the top reasons for an emergency intake.

### Visibility of Policy

Once your internal policy has been decided regarding emergency intake parameters, ensure this policy is shared with all relevant staff and volunteers. This may include personnel from intake,

adoption, foster, matchmaking, customer service, pet support, marketing, and other departments that have touchpoints with potential pet intakes.

## Supporting Evidence

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## Intake-to-Placement Pet Matchmaking

### What is Pet Matchmaking?

Pet matchmaking aims to find positive outcomes for pets in care and comprehensively support community members who interact with your organization. To best match pets in care or expected to be in care soon with potential adopters and fosters, shelter personnel must be trained on best customer service and conversational interviewing practices, and follow a consistent matchmaking protocol.

### Matchmaking Protocol

A matchmaking protocol includes an organization's intake-to-placement process and lists which teams are responsible for certain tasks, such as the physical handoff of the pet, meet and greets, speaking with the public, updating files, and more. This protocol should reflect a [case management approach](#) and [training](#) to ensure every person who calls, emails, completes a form, or walks in the door of your shelter is treated as a unique case. This protocol should also integrate [scripts and sample language](#) for common terms used in matchmaking discussions such as blurbs related to behavior or medical needs, especially if your organization has public-facing labels on pet profiles.

### Sample Script and Blurb Exercise

A matchmaking protocol should also integrate scripts and sample language for common questions asked and terms that are used when having matchmaking discussions. This includes basic matchmaking in instances where an available pet is not already selected to discuss. This may also include topics related to behavior or medical needs, especially if your organization has public-facing labels on pet profiles that may be confusing or worrisome to a member of the public.

Are there specific behavior attributes or medical conditions that you regularly have in care? Are there any commonly asked questions that could benefit from implementing a consistent script among matchmakers? Complete the following exercise to brainstorm sample language you may use to describe common questions you receive during the matchmaking process. You may integrate scripts in both in-person and virtual communications. [Review this short list of recommendations to help get you started.](#)

TOPIC ( <i>Commonly asked questions</i> )	BLURB ( <i>Common response to topic</i> )
<b>Sample:</b> What is <b>Heartworm Positive+</b> ?	This pet will receive heartworm treatment for free through our shelter after adoption. This process may vary by pet but often requires a few visits to our shelter for injections and lots of rest. Heartworm treatment typically has a high right of success!
<b>Sample:</b> What is a “ <b>flight risk</b> ?” / What does “ <b>scared</b> ” mean?	<b>Option #1:</b> This pet has shown nervous, shy, or fearful behaviors while in our care and we recommend taking introductions slowly and taking extra care in new

	<p>environments to let them adjust as they may try to run or hide. [Include additional details such as “They are very sweet and cuddly once they get comfortable with a person” or “Toys really help them come out of their shell”] We will be happy to provide additional resources and support to make the transition home as easy as possible.</p> <p><b>Option #2:</b> This pet is considered a flight risk due to fear-based flighty behaviors and has a history of escaping if the opportunity presented itself, <b>but was safely caught with little or no difficulty</b>. While pets are transitioning into a new environment, there is a higher likelihood of seeing escape attempts as a result of transitional stress, lack of relationship with the people in the home, and/or learning the boundaries of their new home. We can provide you with support (supplies/instructions) on how to best help this pet transition into your home.</p>
<p>Sample: Do you have any <b>dog/cat-friendly pets?</b> / Do you have any cats/dogs that like other cats/dogs?</p>	<p><b>Option #1 - DOG SPECIFIC - Playgroup Notes</b>  <b>Available:</b> Let me tell you about a few of our dogs that have done well in our playgroups! While we do not have notes on how these pups do in a home environment with other dogs, they have had positive interactions with many other dogs in a group setting. <b>[If looking at a specific dog, highlight any particularly great playgroup notes]</b></p> <p><b>Option #2 - CAT SPECIFIC - Cat Group Room Notes</b>  <b>Available:</b> Let me tell you about a few of our cats that have done well in our group housing rooms with up to [X] number of other cats. While we do not have notes on how these kitties do in a home environment with other cats, they have had positive interactions with many other cats in a group setting. <b>[If looking at a specific cat, highlight any particularly great cat interaction notes]</b></p> <p><b>Option #3 - Previous Home Notes Available:</b> While we have not introduced this dog/cat to any other dogs /cats while here at the shelter, they have previous notes of being good with [small and large] dogs/cats in their previous home. <i>[If you have specifics, for example: Notes say that they were very respectful of other dogs' boundaries if they didn't want to play anymore as well! or Notes say this cat loved playing and cuddling with other cats in the home]</i></p>

Once you have created a list of potential script responses to common medical, behavior, or other attributes for pets in care, ensure the list is approved by department leadership, distribute the list to all team members that complete matchmaking efforts, and ensure the scripts are listed in all team protocols to ensure consistency.

**Bonus:** Connecting shelter software attributes or labels for pets with sample blurbs, as outlined above, can increase matchmaking efficiency. These blurbs may be added as a “comment” or “memo” when an attribute is added, or be a standalone note in the pet’s file. Ensuring a pet’s file is up to date with attributes and matchmaking notes can significantly increase both consistency and ease in the matchmaking process.

### Public-Facing Photos and Biographies

Consider what information is already shared with potential fosters and adopters before they contact your organization. The photos, biographies, and overall pet profiles on your organization’s website or social media pages are the first step in ensuring language is consistent and welcoming. Align the type of language in your scripts and blurbs with the public-facing information you provide about available pets to ensure consistency in messaging and improve customer interactions. [See our best practices for pet photos and bios here.](#)

## Supporting Resources

### Matchmaking Support

- [Foster Program Overview](#) - HASS
- [Increasing the Odds of a Successful Adoption | ASPCA](#)
- [To find adopters and fosters for pets who are more difficult to place, start with your language](#) - Maddie’s® University
- [Getting to Yes! Making Great Matches Between Pets and People](#) - AmPA!
- [Dog Matchmaker Job Description Sample](#) - APA!
- [Meet Your Match® Survey and Guides to Download | ASPCApro](#)
- [Matchmaking - Working with Adopters and Pets to Increase Adoptions](#) - Maddie’s® University
- [Communicating Objectively About Behavior](#) - PACC
- [Dog-Dog Intros](#) - Austin Pets Alive!
- [Dog Foster MatchMaking Guidelines](#)
  - <https://aspcameetyourmatch.org/>

### Marketing Resources

- [Ethical Standards for Marketing Shelter Pets](#)
- [Marketing FUNdamentals](#) - Maddie’s® University
- [Bio Writing, Photography, + Marketing Resources](#) - HeARTs Speak
- [Shelter Pet Marketing is Not Adoption Counseling](#) - Maddie’s Fund®
- [Refresh Your Marketing for Long-Term Shelter Animals](#) - ASPCApro

## Supporting Evidence

### [Intake-to-Placement: Supporting Evidence](#)

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## Intake-to-Placement Same-Day Placements

### Overview

Continue the growth and success of [intake-to-placement](#) efforts at your organization by creating a process that allows as many pets as possible to leave the facility the same day they arrive. For pets that have pre-identified pathways such as adoption and foster, completing a direct handoff without the pet needing to enter the shelter facility at all is preferred. If a pet needs a medical intake appointment prior to placement, consider implementing car appointments to reduce the need for kennel space! For pets that require an on-site evaluation or medical appointment without the option for car intakes, consider dedicating space on-site to short-term and temporary housing for pets that may be dropped off in the morning and leave by the afternoon.

If local legislation or policy has requirements such as pets must be vaccinated and microchipped before being placed, consider scheduling appointments for medical intake with your clinic staff in coordination with the pet's arrival. Additionally, ensure scheduled appointments are adhered to. Scheduling appointments for pet intake, medical intake, and pet pickups can significantly improve the ability for direct handoffs, car appointments, and other methods of transfer that eliminate the need to house a pet on-site. See our guide on [appointment scheduling here](#) to provide technology options.

**Do you have a state or local policy that does not allow for pets to leave your facility the same day they come in?** Begin building relationships with local legislators to advocate for the change of these policies with the help of our [Government Communications starting guide](#).

### Supporting Evidence

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## Intake-to-Placement Case Management for Eligible Adopters

### The Case for Case Management

Integrating [case management](#) into existing customer-facing interactions and pet placement creates a more holistic approach to finding the best possible solution for pet placement and general client engagement. A case management approach includes taking detailed notes in a person's file that provide objective descriptions of each engagement your organization has with the client. This may include:

- Primary reason for interaction
  - Adoption interest
  - Foster interest
  - Support request
  - General question
  - Other
- Support or recommendations provided
- Outcome of interaction
- Unique interaction details
  - Prefers a specific method of contact
  - Accepting placement for a specific age or breed of pet exclusively
  - **Objective** notes related to staff or volunteer concerns, such as a history of inappropriate behavior towards personnel or regular lack of communication after initial outreach, including relevant documentation.

This process **replaces** a “do not adopt” list, which often does not accurately reflect a complete, objective picture of prior engagement. This process does **not** reduce or remove the ability to “flag” a person's file for safety or other objective concerns. The case management approach more accurately reflects context and establishes timeframes of engagement with the public. All content in these case files may be used to determine the best action for a client through [compassionate care](#). [DEI training protocols](#) should be utilized throughout the case management process.

### Supporting Evidence

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## Intake-to-Placement Creating Case Files for Incoming Pets

### Planning for Incoming Pets

To best support pathway planning for incoming pets, create a proactive case file for pets that are the **most likely** to come into the care of your organization at the first point of contact with the person currently housing them. This process may include creating a basic file with name, species, age, gender, and the potential reason they may be surrendered to your organization.

By creating a file in advance where the pet can remain in a “pending” or “unavailable” status, staff responsible for intake-to-placement tasks, matchmaking, or general pet placement may be able to identify a **potential** pathway in advance so the pet will not be required to be housed on-site unless absolutely necessary for any amount of time. The pathway may include foster, adoption, transport, evaluation needed, or other. The moment the organization **confirms** the pet to be incoming, actions can be taken to confirm the pathway plan.

Looking for information on how to get started tracking basic data? [See our complete guide here.](#)

### Supporting Evidence

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## Intake-to-Placement Intake-to-Placement Management

### Intake-to-Placement Management Overview

The Intake-to-Placement Manager acts as a facilitator and connector for proactive intake interventions and planning, in-person admissions, foster and adoption pathway planning, transport partnerships, and collaborates with other departments to identify potential outcomes or placement for most pets prior to, or at the time of, intake. Proactive intake interventions include, but are not limited to, pet support, supported self-rehoming, and lost pet reunification.

This role should complete ongoing audits of shelter data to create strategic plans focusing on decreasing the length of stay in the shelter for various pet groups, improving triage for pet placement, and ensuring consistency across offered pet support and intake diversion programs.

### Sample Job Descriptions

- [Intake to Placement Manager Sample Job Description](#)
- [Fredericksburg SPCA Intake-to-Placement Manager](#)
- [KC Pet Project Intake to Placement Manager](#)

### Supporting Evidence

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## HASS Playbook: Intake-to-Placement Foster Personnel

### Overview

Personnel responsible for foster-related tasks may vary on organization size, foster base size, average foster placements, average overall intakes, and other variables. The following sections outline personnel options for a foster program depending on your organization's needs.

### One Full-Time Staff Member

Many shelters and rescues have one or more full-time, paid staff members, making them more accessible during work hours and emergencies without competing job responsibilities.

### Multiple Full-Time Staff Members

Often, organizations with high-volume foster care have multiple full-time staff devoted to it. Each staff member usually specializes in one species or at-risk population, but this isn't required. For example:

- Organization A has a dog foster coordinator and a cat foster coordinator.
- Organization B has four foster coordinators in total. Each specializes in one of the following areas: kittens, adult cats, general dog foster, and behavioral foster for dogs.
- [SAMPLE Dog Foster Placement Coordinator Job Description](#)

### Part-Time Staff

Part-time staff can be used as additional support for foster care or as managers for other staff or volunteers.

### Volunteers

While having paid staff to manage foster care can be beneficial, shelters and rescues should not let a lack of funding for foster staff prevent them from starting or growing their foster programs. Some high-volume foster programs are managed entirely by volunteers, and many others have built-in volunteer support for foster care management.

### Repurposed Existing Staff

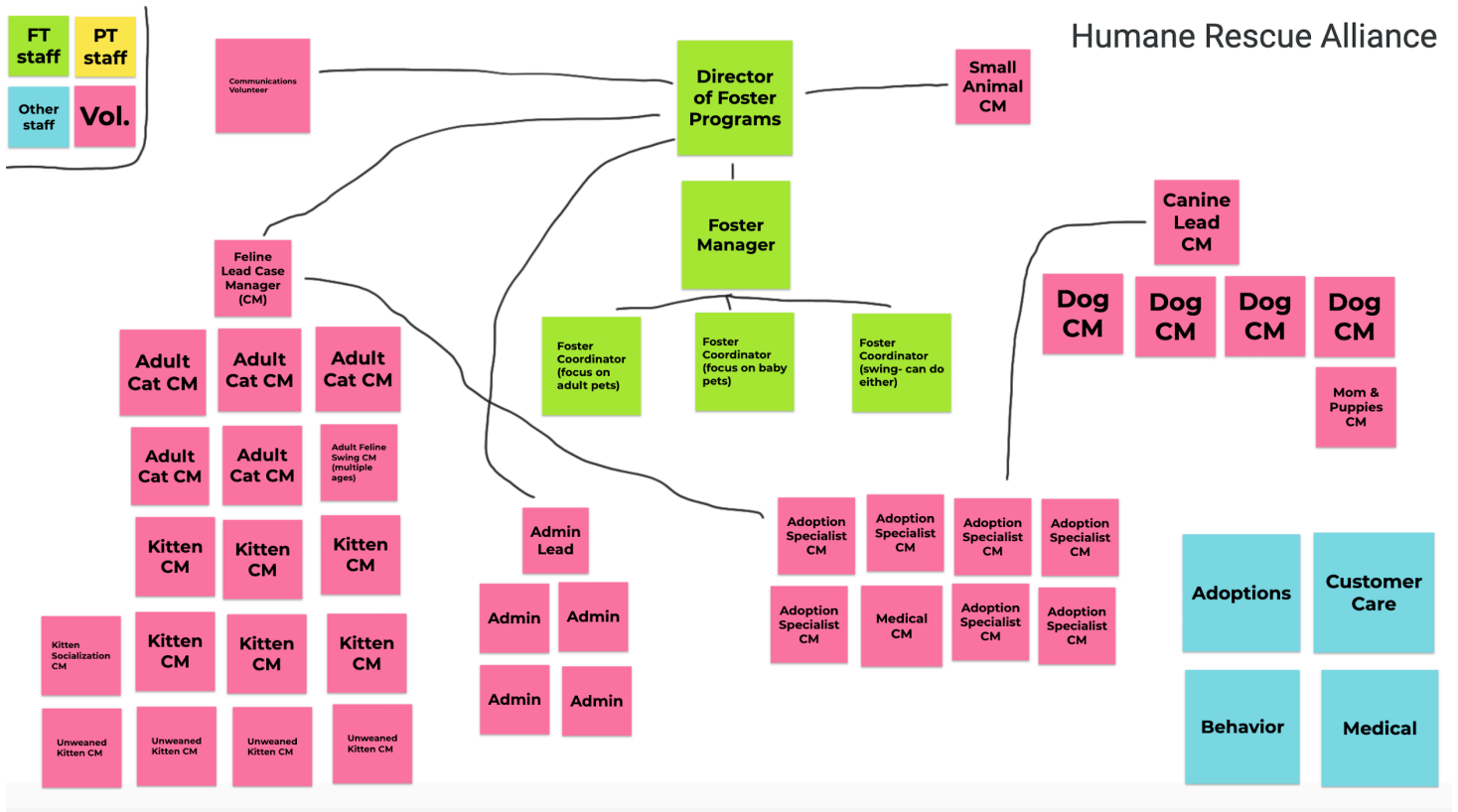
Foster-related tasks such as checking fosters out in the shelter or rescue's software system can be made the responsibility of other staff members. For example:

- Adoption counselors can counsel foster caregivers, place pets in homes, and/or check foster pets out to caregivers.
- Behavioral foster support can be provided by behavior staff.
- Medical staff can provide veterinary care or counseling.

### Sample Organizational Chart

- Foster organizational chart [video overview](#) from Humane Rescue Alliance

- Foster organizational chart [video overview](#) for DeKalb County Animal Shelter, part of LifeLine Animal Project



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## Intake-to-Placement Case Management Personnel

### Case Management Overview

When trained as case managers, animal services personnel take a holistic, person-centered, and compassionate approach to meeting the needs of pets and people. Case managers provide resources and support to struggling pet owners, assist owners who need to rehome their pets, help people find missing or lost pets, and support path pathway planning for the organization. Case management means every person and pet is treated as an individual and asked questions to help find the best possible solution.

Personnel responsible for case management tasks may be involved in multiple departments or focus areas including customer service, pet support, supported self-rehoming, lost pet reunification, pet intake, care, behavior, medical, and more. A dedicated case manager or case worker for intake-to-placement tasks may focus efforts on the following tasks, as appropriate.

- Processing incoming support requests from the public
- Triaging support or intake requests from the community to relevant departments, including suggested solutions when appropriate
- Providing customized solutions and recommendations for incoming requests including intake diversion programs and pet pathway planning for pets expected to enter the care of the shelter
- Assisting in pathway planning for incoming pets to include foster, adoption, transport, or other recommendations
- Hosting appointments for community members seeking support
- Conducting matchmaking conversations for foster or adoption
- Assisting in strategic planning for on-site pets including pathway planning and visibility improvements

This list may be expanded and adjusted based on available programs, department structure, and personnel at your organization. See our complete guides on [implementing case management](#) and [training for case management](#) here.

### Sample Job Descriptions

- [Denver Animal Protection Community Navigator Job Description](#)
- [Gateway Pet Guardians Community Pet Support Manager Job Description](#)
- [LifeLine Animal Project Case Worker Job Description](#)



## Additional Resources

- [Webinar: Make Case Management Your Animal Shelter's Superpower](#)
- [Case Management FAQs](#)

## Supporting Evidence

### [Intake-to-Placement: Supporting Evidence](#)

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# HUMAN ANIMAL SUPPORT SERVICES

## Intake-to-Placement Case Management Training

### Case Management Overview

When trained as case managers, animal services personnel take a holistic, person-centered, and compassionate approach to meeting the needs of pets and people. Case managers provide resources and support to struggling pet owners, assist owners who need to rehome their pets, help people find missing or lost pets, and support path pathway planning for the organization. [Case management](#) means every person and pet is treated as an individual and asked questions to help find the best possible solution.

Historically, shelters manage 'intake' departments that treat all animals and people the same, with intake being the main or only way to provide service. In this traditional approach, people who seek help with their pets, find a lost pet, or need to rehome their pet, are offered two options: to surrender the pet or handle the issue with little to no support. By integrating case management in [pet support services, lost pet reunification, supported self-rehoming, and intake-to-placement](#) processes your organization can more holistically support the pets and people in your community.

### Integrating Case Management Processes

1. Gather and organize human and animal resources that are available in your community.
  - a. Complete an [Ecosystem Map for your community](#).
  - b. For pet and human services, check out [pets.findhelp.com](https://pets.findhelp.com) and [findhelp.org](https://findhelp.org) for a robust list of services available in your community.
2. Create [resource request forms](#) that collect key information about people and pets connecting with your shelter.
3. Learn about [case management](#) and see how case management can help you provide better service to pets and people.
4. Start big or small, but use this [How to Pilot a Program template](#) to ensure [success](#).
  - a. Assess current operations.
    - i. Where could a case management approach make the biggest difference for your organization?
    - ii. Meet with those in intake and customer service roles and learn about their biggest challenges. Assess and ask the following questions.
      1. Do you lack resources to help people?
      2. Do you only have time to do basic tasks due to current workload?
      3. Do you lack information or handouts to share with the public?
      4. Do you lack awareness of shelter policies or programs like supported self-rehoming or pet support that can keep pets out of the shelter?
    - iii. What barriers does the organization face when it comes to taking a case management approach? Examples of common barriers include:

1. Volunteers are not empowered or trained to help people and support intake operations.
  2. No pet support or pet resource services are available, in-person or remotely.
  3. Resistance by staff to adopt a case management approach; this resistance may be due to time, workplace culture, or the belief that intake is always the best solution for every animal.
  4. External ordinances and regulations require impoundment.
  5. Lack of resources on the website, on flyers, or in the lobby to provide help for people facing pet-related challenges.
  6. Lack of knowledge on the part of staff about partner organizations who provide human services that may include pets.
- b. Consider how many staff or volunteer hours you need, what you want your case managers to accomplish, and how you'll provide alternatives to intake. Some organizations train their entire intake staff team on case management, whereas others identify one or two positions on each shift to focus on case management.
  - c. Check out the [HASS Community Request Tracking White Paper](#). This document provides information on different tools that can be used for tracking.
  - d. Use the [HASS Technology Catalog](#) for Case Management technology options.
5. Train staff and volunteers on how to use a case management versus a transactional approach. Keep it simple. Case management just means we treat every person and animal as an individual and ask questions so we can help find the best possible solution. This may require a [culture shift](#) in your organization.
  6. Communicate with staff, volunteers, foster caregivers, rescue partners, community partners, and the public about your shift to providing more individualized service to pet owners and finders. A great example of this is [LifeLine Animal Project's Facebook announcement](#).
  7. Monitor progress.
    - a. Complete regular progress checks with relevant staff, especially in the first few months of implementation, to ensure case management processes are followed as outlined by your organization.
    - b. Consider friendly competition among personnel to keep excitement up for this new approach. For example: "Who can help the most people keep their pets this month using a case management approach?"

## Tracking Training Efforts

Tracking assignments and completion status allows for easier follow-up or continued training, as well as progress-tracking for organizational goals, especially when providing training to various personnel. If your organization has an established employee and volunteer training protocol, connect with the relevant personnel to integrate new training efforts into the existing process.

## Creating a tracking process for staff and volunteer training

- Before the creation of a new training tracking process, discuss options with leadership and Human Resources at your organization. If available, this may be an opportunity for collaboration within an existing employee management or project management software.

Confirm whether volunteers may also be able to use this software if volunteer training is also required.

- If an existing software solution is not available, consider who may need access to the tracking information and how the organization currently tracks training progress such as spreadsheets, documents, forms, etc.
- Identify the person(s) responsible for the management and distribution of training. How do they currently track training efforts? Is this process working, or should it be updated?
  - Who needs access to monitor training progress files? How do they currently monitor progress? Is this process working, or should it be updated?
  - Should the training progress files be digital or physical documents?
  - Is there a budget to purchase a Learning Management System (LMS) for the organization to track training progress? *Note: An LMS can both distribute training materials and track progress.*
- Consider if there are different processes in place for employee versus volunteer training efforts. Is there an opportunity to combine the processes? If not, ensure both are updated when changes are made.
- If creating a new tracking system, consider including the following items:
  - First and last name (Trainee)
  - Email (Trainee)
  - Title/Role (Trainee)
  - Direct supervisor
  - Type of training assigned
  - Training required? Y/N
  - Date assigned
  - Assigned by or required by (Ex: Supervisor assignment, HR requirement, Grant fulfillment requirement)
  - Due date
  - Scheduled check-in date
  - Responsible for check-in (Person)
  - Date of completion
  - Notes
- If there is an interest in tracking not only the status and progress of training, but also time spent, consider adding a metric for the length of time the training will take. You may later use this in reports to calculate time spent as an organization, or individuals, to complete assigned training assignments.
- Consider adding training to the onboarding process for all new personnel
- Consider integrating collection of training process feedback for continuous improvement.

### Sample Solutions (Spreadsheet Based)

- [Simplified Tracking Sheet for Training Assignments](#) - Suitable for any size group or training assignments, but does not elaborate on details or follow-up procedure.
- [Tracking Sheet for Training Assignments I](#) - Suitable for small personnel groups and limited training assignments.
- [Tracking Sheet for Training Assignments II](#) - Suitable for larger groups and training assignments if software is not available. As resources allow, it may be beneficial to consider non-spreadsheet tracking options for ease.

## Learning Management Systems (LMS)

Learning management systems vary greatly when it comes to cost, capacity, simplicity of use, and best fit for organizational goals. We highly recommend your organization take the time to complete individual research on the solution that makes the most sense for your organizational needs. To get you started, here is a short list of existing LMS systems you may consider:

- Cypher Learning LMS
- TalentLMS
- Absorb
- iSpring
- Docebo
- D2L Brightspace LMS
- Blackboard Learn LMS
- Canvas LMS
- Moodle LMS
- Adobe Learning Manager

## Sample Documents

- **Sample SOPs**
  - [Denver Animal Protection Community Navigator Program Description](#)
  - [Denver Animal Protection Outreach Standard Operating Procedure](#)
- **Sample Intake Questionnaires**
  - [PACC Owner Surrender Intake Questionnaire](#)
  - [LifeLine's Case Management Intake Questions](#)
- **Intake needs assessments used in human health**
  - [Brief Intake Assessment for the NY State Dept of Health](#)
  - [Homeless Management Information System Universal Intake Form](#)
- **Sample Position Descriptions**
  - [Denver Animal Protection Community Navigator Job Description](#)
  - [Gateway Pet Guardians Community Pet Support Manager Job Description](#)
  - [LifeLine Animal Project Case Worker Job Description](#)
- **Additional Resources**
  - [Guideline to Writing Case Notes](#)
  - [How to Use Chameleon for Case Management](#)

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## Intake-to-Placement Case Management for Eligible Fosters

### The Case for Case Management

Integrating a [case management](#) approach into existing customer-facing interactions and pet placement creates a more detailed and holistic approach to finding the best possible solution for pet placement and general client engagement. A case management approach includes taking detailed notes in a person's file that provide objective descriptions of each engagement your organization has with the client. Notes may include:

- Primary reason for interaction
  - Adoption interest
  - Foster interest
  - Support request
  - General question
  - Other
- Support or recommendations provided
- Outcome of interaction
- Unique interaction details
  - Prefers a specific method of contact
  - Accepting placement for a specific age or breed of pet exclusively
  - **Objective** notes related to staff or volunteer concerns, such as a history of inappropriate behavior towards personnel or regular lack of communication after initial outreach, including documentation.

This process **replaces** a “do not foster” list, which often does not accurately reflect a complete, objective picture of prior engagement. This process does **not** reduce or remove the ability to “flag” a person's file for safety or other objective concerns. The case management approach more accurately reflects context and establishes timeframes of engagement with the public. All content in these case files may be used to determine the best action related to a person's interactions with the shelter.

See our guide to [implementing case management](#) here.

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## Intake-to-Placement Setting Intake-to-Placement Goals

### Basic Data Collection

It is critical to ensure basic animal-level data tracking is in place prior to setting goals related to intakes, outcomes, and overall intake-to-placement practices. See our [best practices and data tracking recommendations guide here](#).

### Intakes, Outcomes, and Animal Counts

Every animal should be counted regardless of the reason for intake, outcome, or service. Basic data tracking for pets in care and pets receiving services should include all of the following metrics on a monthly and yearly basis, at minimum, with daily inventory (“animal counts”) reconciled in the software daily.

Intake Types	Cat	Dog	Other	Total (All Species)
Stray/At Large				
Relinquished by Owner				
Returned to Shelter				
Transfer-In				
Seized/Confiscated				
Owner Requested Euthanasia (ORE)*				
Clinic/Service In**				
<b>Total Live Intake:</b>				
Live Outcomes	Cat	Dog	Other	Total (All Species)
Adoption				
Return to Owner (RTO)				
Transfer-Out				
SNR (differs from TNR***)				
Other Live Outcomes				
<b>Total Live Outcomes:</b>				
Other Outcome Types	Cat	Dog	Other	Total (All Species)
Died in Care*				
Euthanized*				

Missing/Lost/Stolen				
Clinic/Service Out**				
<b>Total Other Outcomes:</b>				
	<b>Total Cats</b>	<b>Total Dogs</b>	<b>Total Other</b>	<b>Grand Total</b>
<b>Animal Counts</b>	<b>Total in Care Onsite</b>	<b>Total In Foster Care</b>	<b>Grand Total</b>	
Beginning Count				
Ending Count				
<p>*Every animal is counted regardless of the reason for intake, outcome, or service.</p> <p>**Clinic/Service In and Out data is often tracked in conjunction with data points in the Pet Support Services category and may not contribute to live intake/outcome totals.</p> <p>***TNR recommendations can be found in the Pet Support Services Operations section.</p>				

## KPI Overview

A Key Performance Indicator, or KPI, is a quantifiable measure used to evaluate the success of an organization, employee, or department. Identifying KPIs for an organization, department, or individual establishes clear goals or targets for current and future activities. The organization can more easily measure progress and success by aligning strategic goals with data-driven KPIs. In the following section, you will find highlights to assessing and developing KPIs. For a deep dive into KPI creation, see our [complete guide on what informs KPI creation here](#).

## Identifying KPIs

### Assessing Current KPIs

Whether you are creating KPIs for the first time or looking to enhance existing ones, consider the **current organizational requirements and goals** in place at your organization – *these are often KPIs!* These may include requirements set by leadership, grant fulfillment, strategic planning, and/or other mandatory KPIs used to evaluate the organization's success.

Current Requirements & Goals	Examples
Budget Requirements	<ul style="list-style-type: none"> <li>Receive funding from 25% of grant proposals.</li> </ul>
Grant Requirements	<ul style="list-style-type: none"> <li>Place 100 senior dogs in December.</li> </ul>
Legal Requirements	<ul style="list-style-type: none"> <li>Conduct and document 5 safety inspections.</li> </ul>
Organizational Goals	<ul style="list-style-type: none"> <li>Achieve a Live Release Rate of 90% or higher for the current year.</li> </ul>

Current Requirements & Goals	Examples
Department Goals	<ul style="list-style-type: none"> <li>Send 50% of pets in care to foster homes.</li> </ul>

### Assessing Data for Decision-Making

You may have KPIs you are regularly utilizing to assess your progress or report to stakeholders. If you have been tracking a few data points for a long period, you may be able to use this data to reevaluate KPIs or consider new additions that reflect organizational priorities. You may also use existing organizational KPIs as a starting place to develop KPIs for specific departments or programs. Start by stating what it would mean for your organization to do well. Some broad examples may include:

- Fewer animals are being euthanized
- More animals have live outcomes (i.e., not getting stuck at the shelter)
- The speed by which animals have live outcomes increases
- More families receive support to keep their animals with them and out of the shelter

**Exercise:** Consider the first example, “fewer animals are being euthanized.” This statement relates closely to Live Release Rate, which may already be part of organizational goals. Look at existing data to identify specific KPIs that correlate with this goal. For example, examine what kinds of animals are euthanized and for which reasons, and then identify a goal specifically aimed to reduce one of the largest categories.

### Developing New KPIs

With your data assessment and current KPIs compiled, identify potential KPIs the organization, department, or you as an individual are interested in focusing efforts on to measure progress. For best results, consider the following:

- What results (*measurable outcomes, metrics*) is your organization trying to achieve?
- Are tracking methods in place to measure those results?
- When are you trying to reach those results?
- What do you want to accomplish **this year**, and by when (within the year)?
- Are all current initiatives and recommendations supported by data/evidence?
- Sample topics:
  - Intakes/Outcomes (overall)
  - Movement and outcomes for specific groups
    - Example:** Adult, medium to large dogs
  - Expected Live Release Rates
  - In-Shelter Length of Stay
  - Foster Placements and/or Movements

New KPIs	Workspace
Organizational level	<ul style="list-style-type: none"> <li></li> <li></li> </ul>

Department level	<ul style="list-style-type: none"> <li>•</li> <li>•</li> </ul>
Individual level	<ul style="list-style-type: none"> <li>•</li> <li>•</li> </ul>

Evaluating each potential KPI set above, ask the following questions and make adjustments to clarify the goal's intent:

1. **Is this KPI measurable?** Whenever possible, measure outcomes over efforts.
  - a. **Example:** Instead of setting a KPI of hosting four adoption events by the end of the year, consider the expected result from these events. Instead of focusing on the number of events, is the primary goal to have 200 pets adopted from the events?
2. **Do you have the resources to complete this KPI?** Consider staffing and volunteer needs, existing and future funds, data capabilities, and other resource-based factors that may impact your ability to meet a goal.
3. **Does the KPI support your organization's overall mission and vision?** Does the KPI have a strong "WHY" for its selection?
4. **Can one KPI be split into smaller KPIs** to support intended outcomes?

### "Stretch Goals" as KPIs

Stretch goals are not easy to achieve with your organization's current setup and resources but are not outright impossible. Identifying goals beyond what you are positive your organization can accomplish comes with pros and cons to consider if inclusion is right for you. Consider if each stretch goal may inspire additional funding, staff buy-in, or other positive collaboration with your organization. You may also want to consider the goal's visibility to external stakeholders and make certain stretch goals internal if you are not actively seeking additional funding or support from an external party. If a stretch goal is something you are concerned may negatively affect stakeholder relationships, staff, or existing resources, consider how to break the goal into smaller parts over time.

### Additional Consideration: SMART Goals

A [SMART](#) goal is "Specific, Measurable, Achievable, Relevant, and Time-bound." We have highlighted elements of SMART goals in the above sections, and outlining each piece can further clarify your overall idea and objectives and utilize your time and resources wisely.

- **Specific:** What needs to be accomplished? What steps are required?
- **Measurable:** What data will measure the goal?
- **Achievable:** Can you reasonably accomplish the goal? Are the necessary skills and resources available?
- **Relevant:** How does the goal align with broader goals, strategy, or mission?
- **Time-bound:** What is the time frame to accomplish the goal?

## Auditing Animal-Level Data

The primary goal of auditing animal-level data is to ensure quality data entry is aligned with best practices and standard operating procedures (SOPs). This process supports data accuracy, integrity, and reliability. See our [complete guide on auditing animal-level data here](#).

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## Intake-to-Placement Marketing Pet Placement Topics

### Why Focus Marketing Efforts on Pet Placement Topics?

In many shelters, highlighting pets that are available for adoption or at-risk in the shelter environment takes up most of the marketing efforts. Expanding that marketing to include foster initiatives, adopter or foster-on-deck recruitment, transport partner details, and success stories from all of these placement avenues will show your community the amazing work you do, as well as expand your placement potential by growing your audience and increasing your engagement. Additionally, adding variety to your marketing channels ensures that pleas for adoption or at-risk pets do not become so similar that they are disregarded.

### Intake-to-Placement Marketing

The following are just a few topics and methods your organization can use to support pet placement efforts.

- Share pets available for adoption and fostering on social media or through local news and media partnerships
- [Share your adopter or foster-on-deck process](#) and its purpose
- Highlight existing transport partnerships and ask to partner with more
- Encourage fosters to share success stories of their foster pets that have been adopted, and share via marketing and communications channels where possible
- Encourage adopters to [share stories about their adopted pets](#), and share via marketing and communications channels where possible
- Highlight positive pet placement stories from your organization
  - [Lifeline Story Part 1 \(Background\)](#)
  - [Lifeline Story Part 2 \(Outcome\)](#)
- Highlight new programs or initiatives that may increase pet placements
  - [Dog N' Dash: An Innovative Approach to Fostering Big Dogs](#) - AmPA!
  - [El Paso Animal Services saw immediate success when they first started their Finder to Foster program!](#)

### Frequency and Strategic Planning

The following toolkit was created in collaboration between Human Animal Support Services (HASS) and HeARTs Speak.

- [Community-Focused Communications Strategy](#)
  - In this kit, you will find a list of general marketing and communication strategic considerations, a detailed planning document, and a sample editorial content calendar for you to download and customize.

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## Intake-to-Placement Utilizing Media to Highlight Pet Placement Topics

### Getting Started With Pet Placement Communications

To identify potential pet placement topics to share with local media connections, consider:

- Pet placement needs
  - Which pets are in the highest need of placement at this time?
  - Are there any special groups of pets that need a standalone highlight, such as pregnant/nursing moms or bottle babies?
  - What is the status of space at the physical shelter facility, and if it is over capacity, how many placements are needed to be under capacity?
  - Does your organization have an adopter or foster-on-deck process to share?
  - Are you able to participate in transport partnerships? Send out a call-to-action for transport partners.
  - What is the most common pet support ask at this time?
  - Are there community-wide crises occurring that may impact pet placement needs?
  - Are there any new legislative changes going into effect that may impact pet placement?
- Upcoming placement-focused events
  - Are there upcoming adoption or foster events scheduled that need to be advertised?
- Fundraising potential
  - Is there a new program or service becoming available soon that needs to be advertised and can be used for fundraising?
  - Does the organization have a new or upcoming pet placement partnership, such as a new transport partner, that should be highlighted?

### Media Connections

When considering potential media connections, identify the primary print, television, and online media organizations you may want to begin building partnerships with first, such as a morning news show or an online-only local news site. Media connections that reach the widest audience are ideal to prioritize first, followed by specialty media that may focus exclusively on community news, events, and highlights.

### How to get started when contacting local media outlets:



- Identify the local print, broadcast, and multi-media outlets located in your city through simple Google searches or using media relations tools like [MuckRack](#) or Cision
  - Most local outlets list their editorial staff on their websites
  - Twitter and Instagram are great resources for finding freelance local reporters
  - Focus on reporters and journalists that cover animal welfare, local organizations, politics and philanthropy, human interest pieces, as well as professionals with “Editor” in their title
  - Broadcast outlets have “news desks” departments dedicated to receiving news in bulk. The contact information for news desks can be found using the resources mentioned above or simply calling the outlet directly and asking for the email
- Once your potential media list and contacts have been developed, you can send your first “pitch” or “story idea.” [Here are some best practices](#) to consider when drafting your pitch to increase your chances of not only getting seen by your target reporter, but ultimately used in upcoming news coverage!
  - It is best to follow up with the reporter 48 hours after sending the initial pitch. Keep in mind, reporters receive on average 500 pitches a day, so a follow-up is just as important as your initial outreach.
- You are on the deadline of the reporter.
  - Typically, print publications have deadlines on Wednesdays and Fridays, whereas broadcast deadlines are more often within 24 hours. Please keep this in mind if you are hoping to schedule interviews or obtain assets for your story.
  - Broadcast segments only get assigned in the outlet's daily “pitch meeting” which usually takes place between 8 a.m.-9:30 a.m. Ensure your pitch hits the news desks in time accordingly.
- To build the strongest relationships with local media, ensure every interaction with them is NOT only transactional.
  - Remember: There is always a person on the receiving end of your email, so meet them with timeliness, respect, gratitude, and a willingness to collaborate on the story together.
  - If/when your story is covered, go out of your way to thank the reporter with a thank you note!

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