



FROM INTAKE TO OUTCOMES



**MANAGING SUMMER SPACE CRISES
WITH CASE MANAGEMENT**

FIRST, WHAT LED ME HERE?

Switched to animal welfare in 2019 from the education field, where case management was built into all of my former roles. I was a bridge between the individual and the system and needed to understand BOTH to do my job well!

Achieved 90%+ live release rates by the end of my first month as a shelter director and kept those rates consistent for 3.5 years. Our shelter's success was built on the shared value system that every animal is an individual.

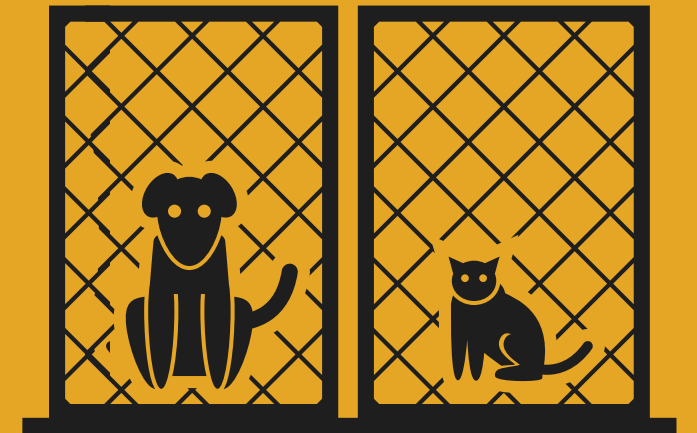
Learned that seeing animals as individuals is easy and natural for people, but hard for default shelter "work systems." Most of what we did to get pets out, and what gave our work purpose, wasn't officially mandated or recognized, despite its importance.

Observed the same patterns in work systems as a consultant working with shelters across Texas that didn't know each other. Systems need to catch up with people and honor the work they do that infuses systems with meaning AND boosts their performance.

I WENT
FROM THIS:



TO THIS:



A PROBLEM

**Intakes are outpacing
outcomes in shelters**

THE REAL PROBLEM

**Shelter work systems
were broken to begin
with, and recent
events have made this
all the more obvious**

A SOLUTION

**We reframe our
systems from within,
with tools, talents,
and answers we
already possess**

WHY ANIMAL CASE MANAGEMENT?

100

Case management is a trusted tool almost every care profession uses to organize and meet needs, prevent crises, and build resilience



Case management advocates for balanced animal agency resources, which historically have underestimated labor that goes into outcomes



Case management affirms what our hearts know to be true, helps us align with our sense of purpose, and gives everyone in the system dignity and belonging (no one "only cleans kennels")



Case management follows business logic AND human reason – we limit our productivity and ourselves by not fully applying our gifts of compassion and creativity to animals who need it

ANIMAL CASE MANAGEMENT NOTES TO START WITH

You and your team are already doing it!

Our next step is making case management structural in our shelter work systems

Case management isn't "extra," it's a necessary practice for achieving outcomes

Case management looks a little different for everyone, but uses similar key functions



Henry,
today's
guest

IF WE'RE ALREADY DOING IT, WHY ISN'T IT WORKING??



A care tech may interact with Henry daily, but what's learned about him and what makes him special isn't documented or shared



A manager has a great person in mind to adopt Henry, but that person needs to know if he likes other dogs, and dog-dog intros have been on the backburner for 30 days



A volunteer may take beautiful photos of Henry and write a good bio, but can't publish them online or convince staff to do it either

TODAY, OUR SYSTEMS DON'T CONNECT OUR EFFORTS OR GIVE US PERMISSION TO PRIORITIZE CASE MANAGEMENT TASKS

4 KEY FUNCTIONS OF ANIMAL CASE MANAGEMENT



BONDING

(Getting to know Henry)



REMEMBERING

(Taking notes about Henry)



PLANNING

(Figuring out how a dog like Henry is handled by the system)



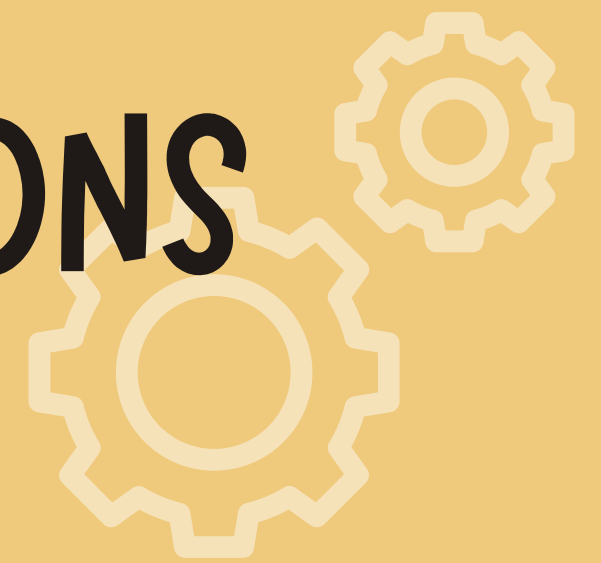
ADVANCING

(Managing Henry's progress and length of stay)



BONDING AND REMEMBERING FUNCTIONS

EXAMPLES OF CONTINUITY



BONDING

Asking staff to spend their last 15-30 minutes of their shift with 1 pet

Recruiting "teams" for shy, sensitive, or just long-term pets (staff and/or volunteers)

Picking 1-3 pets at random each week to focus your attention on

REMEMBERING

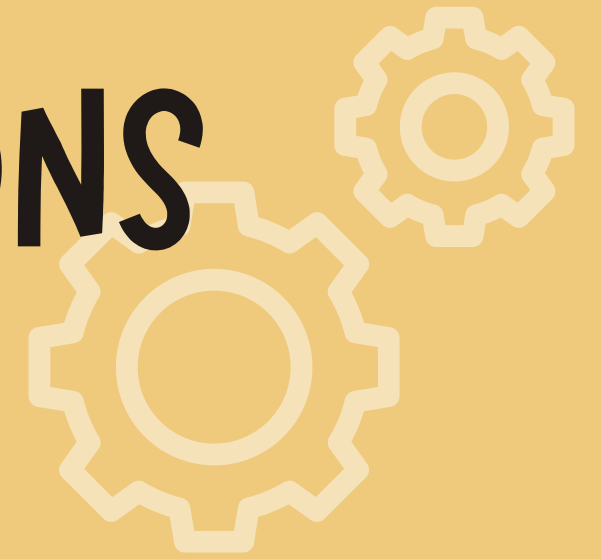
Having staff fill out a quick, 2-minute form about them that has a list of personality traits ready to select

Keeping team contact info in a spreadsheet used to delegate interested customers to those teams

Making notes or organizing short meetings about those pets, sharing what you know about them

PLANNING AND ADVANCING FUNCTIONS

EXAMPLES OF CONTINUITY



PLANNING

Mapping/revising a protocol for how to use the data collected by your personality form(s) with purpose

Coming up with an actionable "length of stay (LOS) strategy" for teams to practice, with specific LOS checkpoints

Creating checklists or pathways for classes of pets that you can assign to your 1-3 individual features weekly

ADVANCING

Asking someone to oversee how thoroughly the protocol is being applied and what could be improved

Running a report daily, or setting reminders, to ensure LOS checkpoints (30, 60, 90) are being met on time

Assigning extra case manager(s) (anyone) to apply and tailor general plans to your 1-3 individual features



PRACTICAL BENEFITS OF CASE MANAGEMENT



HENRY

**SOFT-HEARTED,
QUIET, DEVOTED
COMPANION**



**Puts a face to a number for staff,
volunteers, and the public**



**Helps you work smarter and more in
sync with others**



**Offers deep vs. shallow understanding of
pets under your care, helping you and the
public share knowledge AND make decisions**



**Reconnects everyone with the reason
they joined the team to begin with
(+ likely helps with morale)!**



A256

**UNKNOWN
PERSONALITY**

HENRY'S CASE IN THE BIG PICTURE

Personality data is stored and woven into a colorful, memorable story about who Henry is and shared by those who have empathy for him

Mindful processes help Henry stay on the minds of staff/volunteers and visible to the public through compelling marketing

Henry's personality is experienced as fully as possible by one or more person shortly after intake

Checkpoints are honored and revisions made to Henry's plan until he finds his right match, and lessons from his case are used to further optimize the system



LESSONS FROM THE REAL HENRY



Everyone, including those who never meet a pet, can and will perform case management tasks – you just need to invite them to your "mission table"



To get more people on board, tell a story that appeals to emotions AND instills hope. Most found Henry online, "felt like they knew him," and could immediately do something to help him (donate, share his post, or more)



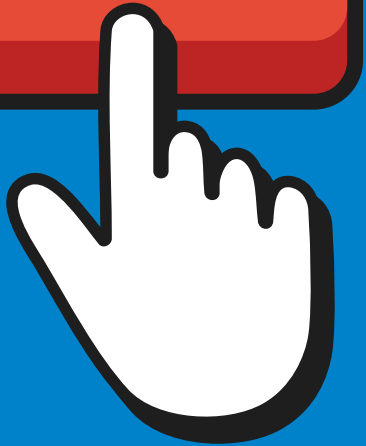
Volunteers are sometimes your most intuitive case workers because they can reserve more bandwidth for networking and see beyond the confines of the system



APPLYING CASE MANAGEMENT PRINCIPLES TO YOUR AUDIENCE

Let's say you've been making social media posts daily about being overcapacity, but you aren't seeing results. Is it because there aren't people out there who want to help animals?

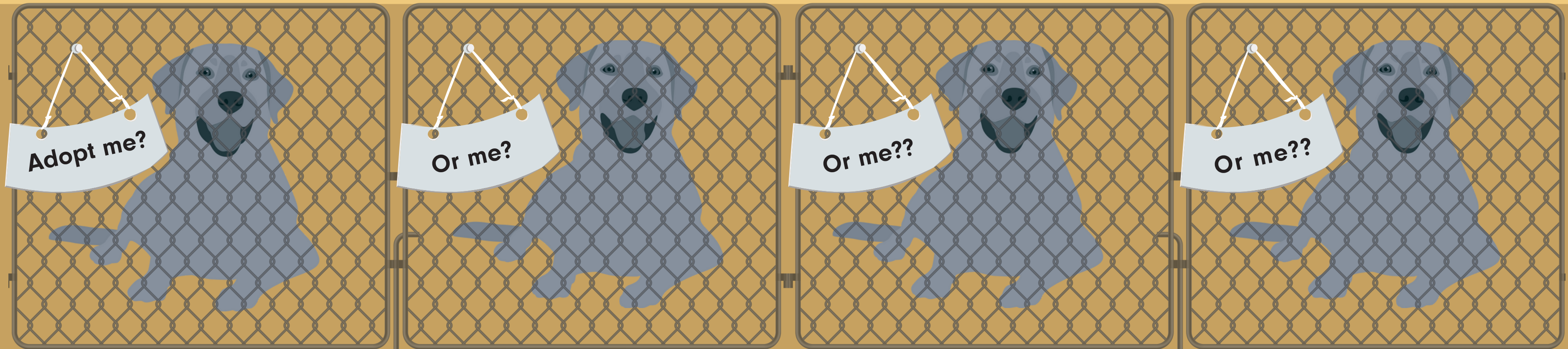
PANIC!



No! Much like we get overwhelmed with the sheer number of pets in front of us, so does the public. We can adapt lessons from case management to our audience, too — like how it's best to start conversations with 1 or just a few pets at a time.



**IT'S HARD FOR FAMILIES TO SEE 20, 30,
100 INDIVIDUALS AT ONCE...**



THEY NEED YOU TO **GUIDE THEIR
IMAGINATIONS AND **NARROW THEIR FOCUS****

IF IT'S NOT WORKING, IT COULD BE THAT...



You may have beautiful photos of pets, but no personality information that "connects" (try assigning 3 personality traits to each pet, using a template)

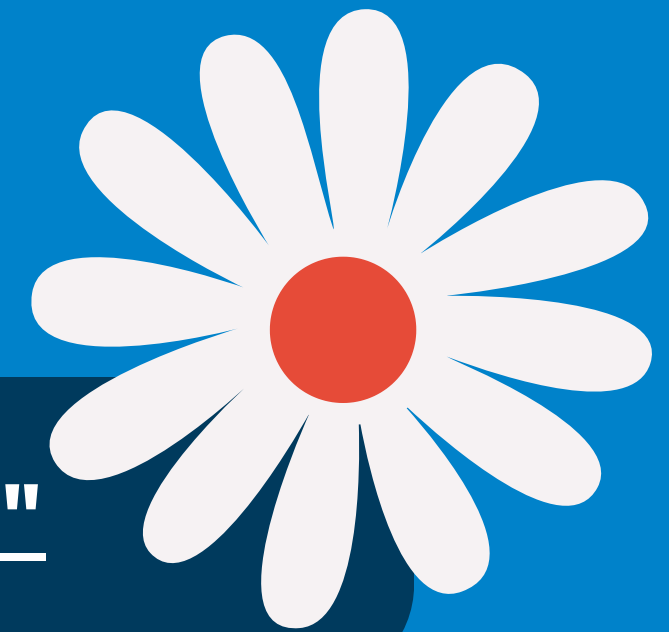


You may need to simplify decision-making for your customers, especially if you're a large shelter (start with a handful of "3 dogs rated 'cuddly'" or "5 pets of the week" and go from there)



Your process isn't "sticky" in the sense that a customer's motivation fizzles out before they have an opportunity to bond with or commit to a pet (eliminate all appointment-based outcomes, embrace "immediate make-ready" policies, make it easy to find basic info, and respond same-day)

THINGS TO REMEMBER AS YOU GO



"Start where you are, use what you can, do what you can."

Case management may SOUND hard to do right now because we haven't yet witnessed what's possible when our systems have automatic processes, good continuity, and built-in values that make sense to us

The state of our systems isn't your fault, but you DO have the power to make a difference, simply by showing up to do this important work!

Let things flow organically – your sudden creativity will help you stand out, feel good, and get more pets noticed, and you will improve over time. Let form follow function!



**ANIMAL CASE MANAGEMENT:
LET'S DISCUSS!**





THANK YOU!



EMAIL ME WITH FEEDBACK AND IDEAS:
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