



## Case Management

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### Introduction

Traditionally, animal shelters maintain a transactional relationship with members of the community. Community members are usually treated as customers at animal shelters and can adopt an animal out of the shelter/rescue (usually for a fee) or surrender an animal (sometimes for a fee) and be on their way. This varies if a shelter is municipal, open admission, or private.

The traditional transactional model involves “handling the immediate problem” of owner surrender and solving the immediate needs of the person or offering one option by intaking the animal. Our client service models tend to be conditionally motivated: using owner surrender requirements, adoption requirements, and requirements for helping an owner such as proof of government assistance, proof of spay/neuter, and mandatory income assessments, etc. This conditional motivation exists within short interactions with clients/pet owners. Typically, shelter employees talk with folks looking to surrender a pet once, intake the animal, and never see the human again. This is of particular concern when we know that most surrendered pets are loved and considered part of the family. Unfortunately, this short term focus maintains the status quo, and does nothing to help owners in crisis or struggling with an immediate need. Animal shelter success is normally determined by a live release rate, the number of animals that leave the shelter versus the number of animals that enter it.

Holistic, scaffolded support for the human-animal unit is tragically missing from much of the animal welfare sector, which means we leave our human community members to survive poverty, illness, disasters, and other social challenges alone and do not serve companion animals to the greatest amount possible. We must transform this traditional, transactional relationship between animal shelters and members of the community to a transformational/ relational approach; the hallmark of which is case management.

**Case management may sound intimidating, but animal welfare workers already do case management for animals in shelters and rescues when finding ways to meet behavioral, medical, social, emotional needs of animals in their care and match them with new homes! We suggest that animal shelters transition animal case management to include the human guardian, as well.**



There is no standard definition for case management, but it's most recent definition established by the Commission for Case Management Certification (2019) (<https://ccmcertification.org/>) reads as follows:

“Case management is a collaborative process that manages client wellness and autonomy through advocacy, communication, education, and the identification and facilitation of services”

Every individual and every family is unique. There is no one-size-fits-all approach for every case, and no standardized approach to case-management that fits all settings. Case management is found in a variety of professional settings (social work, healthcare, etc) and within each setting, you will find some differences within their best practices. As an organization, you will have to identify what is the best approach that works for your team and your community. However, at its core, all settings agree on the following best practices for case management:

## Best Practices for Case Management

<b>Holistic approach</b>	<ul style="list-style-type: none"><li>➤ Think about the whole family, including pets, and the many factors that could be impacting the overall wellbeing of the whole family.</li><li>➤ The more services provided, the more likely the family can stay together.</li></ul>
<b>Person-centered (client-focused) individualized care</b>	<ul style="list-style-type: none"><li>➤ Assess the many barriers clients are facing</li><li>➤ Identify the individuals' unique strengths and assets that can support them in addressing their own needs</li><li>➤ Provide them with referrals to additional resources</li></ul>
<b>Disciplined Compassion</b>	<ul style="list-style-type: none"><li>➤ The shift towards a case management approach encourages both the use of compassion and professionalism.</li></ul>

1. **Holistic approach:** As case managers, it's important to recognize that humans are impacted by the interconnectedness of mental, physical, and emotional health. The human-animal bond has shown to play a huge role in that impact. Please see resources in your downloads. All humans and animals, regardless of socio-economic status, race, and geographic location should be able to experience the joys and benefits of the



human-animal bond. Therefore, case managers should always be thinking about the whole family, including pets, and the many factors that could be impacting their overall health and wellbeing. The more services that could be provided, the more likely it is that the family can stay together.

2. **Person-centered (client-focused) individualized care:** In order to best serve the needs of community members and their pets, it's crucial to acknowledge, first and foremost, that each individual case is unique.
  - a. Case managers must take the time necessary to listen to an individual and/or a family's needs, especially when it comes to the risk of surrendering their pets.
  - b. Case managers must meet individuals and families where they are, and de-center their own beliefs on what "responsible pet ownership" looks like.
  - c. CMs work on identifying their own personal biases and setting them aside in order to prevent those biases from influencing the decisions they make when providing case management to an individual or a family.

There are numerous factors that can complicate a situation and force an individual or a family to surrender their pet (lack of access to affordable vet care, housing insecurities, behavioral challenges, etc). Effective case management involves assessing the many barriers a person is facing. CMs should identify the individuals' unique strengths and assets that can support them in addressing their own needs, and provide them with referrals to additional resources, as needed. By facilitating them through the process of meeting their needs, individuals may achieve self-sufficiency, resulting in a longer lasting impact and more positive outcomes.

3. **Disciplined compassion:** The shift towards a case management approach encourages both the use of compassion and professionalism.
  - **Compassion-** Being compassionate can truly make a difference when connecting with an individual or family and their pet(s). As a case manager, it shows that you care and are open to understanding their story and the barriers they may be facing instead of jumping to conclusions and passing judgment. However, it is also important to set boundaries. Becoming over-involved, as well as over-promising and over-delivering of services can become counterproductive for yourself and the individual or family you are serving. As a case manager in an animal welfare setting, your role is to connect community members with the resources they need. Understanding those boundaries will clearly identify where your role ends and the role of the human service provider begins.
  - **Professionalism** - As any staff member working in a professional setting, it's important to maintain professionalism. This involves being respectful with all



community members and managing your personal biases. If there is a community member that you are experiencing difficulty communicating with, assess the situation. If you don't feel that you are connecting well with them, you can consider transferring them to another case manager within your team. If they do not seem receptive to any services or support provided and your team has done everything they possibly can, then it is ok to respectfully refer them out to another agency or service provider.

- **Documentation-** Keeping detailed notes on the individual or family's needs, the services provided, and any communication/follow up conversations can help keep track of their outcomes. If the software used at your organization does not allow for documentation that can be found in one place for staff to access, we encourage you to reach out to the developers of your software to see how they can work towards building that feature. In the meantime, identify a system that works for your team in order to document an individual or family's journey in working toward keeping their pets. In addition, knowing what language is appropriate and inappropriate when referring to community members in documentation is crucial, check out the guideline to writing case notes in your downloads.

#### **Example Questionnaires in your downloads:**

- PIMA Owner Surrender Intake Questionnaire
- BARCS Intake Questionnaire

## **Tracking Within Case Management**

With the eviction crisis showing no sign of letting up, tracking your organization's Community Programs is important now more than ever. Check out the HASS Community Request Tracking White paper

(<https://drive.google.com/file/d/1ekJrLPF7OhVmUw724fV5gRx47q0Vetaw/view?usp=sharing>)

developed by the HASS Tech & Tools Working Group. This document provides information on different tools that can be used for tracking.

In addition, Shelterluv has a new software feature that makes it possible to document, track, and report all Community Programs and Points of Care shelter teams provide to pets and people, whether it's a volunteer distributing a bag of critically needed pet food/supplies, temporary boarding, or a staff member visiting a family to assess need. No more spreadsheets. No more notebooks. All the information is now available at your fingertips within our fully mobile software.

You do not have to be a Shelterluv customer to use this **free** part of the software. Ready to get started with an account? Fill out this account activation form: <https://bit.ly/38NH0OB>

- Here is a link to a recording of our webinar - Tracking Your Points of Care and Community Programs: <https://bit.ly/380SEGI>
- Article on - Tracking your Community Programs with Field Services: <https://bit.ly/3n11sk3>
- Shelterluv Field Services and Community Programs User Guide: <https://bit.ly/3o2jzre>
- Using Shelterluv Field Services and Community Programs for TNR - <https://bit.ly/380fqj4>

If your organization uses Chameleon, please see an example in your downloads of how **Pima Animal Care Center** used this software for case management.

## Collaborating with Social Workers & Social Service Agencies

We can all agree that shelter staff cannot simply become social workers without going through the appropriate training. Therefore, it is important to highlight that in addition to adopting a case management approach, animal welfare organizations must continue to partner with social service agencies and hire more social workers to work within the field. Social workers are trained in the human service field and can be licensed to provide more complex services such as mental health counseling; duties that would not be appropriate for shelter staff to manage. So although we discuss the importance of shifting responsibilities to better partner community members with the resources they need, it is crucial that shelter staff are not taking on responsibilities that social workers are fully equipped to handle. Case managers can connect community members to resources within their organization and across the community, whereas social workers can provide community members with the actual human services. Collaboration between the two fields must be prioritized in order to successfully make a change within the community, better support every member of the family, and prevent shelter staff from experiencing compassion fatigue, which can greatly impact interactions with community members.

## Factors to Consider in Case Management

With every case, it is important to assess how the following factors might be impacting the individual or family, and then connect individuals and families with resources that can support them in overcoming these factors:

Finances	➤ The pandemic has caused millions of people to lose employment, lose hours, and have their wages reduced.
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	<ul style="list-style-type: none"><li>➤ Families may not be able to afford veterinary care, boarding, training, pet food, pet supplies, etc.</li></ul>
Current Housing Situation	<ul style="list-style-type: none"><li>➤ The eviction crisis may become the largest reason for surrender.</li><li>➤ Case managers must have plentiful resources available to offer individuals and families in order to find alternative housing for their pets.</li></ul>
Cultural Humility	<ul style="list-style-type: none"><li>➤ Case managers must work towards remaining open-minded and ready to continue learning about different cultures, their histories, and the systemic inequalities that have and continue to impact their families and their pets the most.</li></ul>
Language	<ul style="list-style-type: none"><li>➤ No one should be denied services due to their limitations with the English language.</li></ul>
Substance Use and Dependency	<ul style="list-style-type: none"><li>➤ Case managers can connect clients with social service agencies that provide support for substance misuse.</li></ul>
Domestic Violence	<ul style="list-style-type: none"><li>➤ When an individual or family flees domestic violence, it is important to offer resources that provide safety for both the family and their pets.</li></ul>

- **Finances-** Twenty-five percent of US adults, report that they or someone in their household has lost their job due to the pandemic. As of September 2020, about half of those adults remained unemployed. With such financial losses, understanding what families can and cannot afford in terms of services (veterinary care, boarding, behavior support) for their pets.
  - For resources on assisting community members with access to free or low-cost medical care, learning more about incremental care, providing pet food and supply packages, assisting with pet deposit/fees, and much more, check our support services page:  
<https://www.humananimalsupportservices.org/resources/support-services/>
  - **Success Story:** Pilari's dog Grayson was vomiting, not eating, and lethargic. Pilari was seeking transitional housing and couldn't afford vet care. With donations to the LifeLine[tag] Stay Together Fund, Grayson was treated for a case of hookworms and was reunited with Pilari when she found transitional housing.



Community help can look like donations that give pets the care they need at little to no cost while knowing they have a family to go back to. [Link to post](#)

- **Current housing situation-** Prior to the pandemic, nearly half of U.S. households were classified as severely cost-burdened, meaning they spend more than half of their income on housing. Housing-related issues have also been cited in multiple research studies as the most common reason for surrender. Approximately, 16% of adults in the US report having problems paying their rent and mortgage due to the pandemic. With this eviction crisis potentially becoming the largest reason for surrender, case managers must have plentiful resources available to offer individuals and families in order to find alternative housing for their pets.
  - For resources on temporary boarding and foster care, adapting existing emergency boarding programs to fit the needs of human-animal families experiencing evictions, and additional support please check out our Temporary Placement page: <https://www.humananimalsupportservices.org/resources/temporary-placement/>
- **Cultural humility-** When working with diverse populations, culture can play a huge role in a family's decision making for their pets. Therefore, case managers must work towards remaining open-minded and ready to continue learning about different cultures, their histories in the US, and the systemic inequalities that have and continue to impact their families and their pets the most. Case managers need to constantly self-evaluate and eliminate the power dynamic between themselves and their clients so that they can work towards achieving the client's goals as a team. It's important to note that families from the same culture can still have different lived-experiences and different perspectives on many issues, so case managers must avoid making assumptions and standardized decisions for families that share similar cultural backgrounds.
- **Language-** When an individual or a family speaks a different language than the case manager, there must be a protocol in place that allows the case manager to either redirect the community member to someone that speaks their language. No one should be denied services due to their limitations with the English language.
  - For more information on how to better connect, engage, and communicate with community members that speak different languages, please check out our How to Translate Materials page: <https://www.humananimalsupportservices.org/resources/offering-services-in-other-languages/>
- **Substance use and dependency-** Pet owners may be experiencing substance dependencies. Providing them with the most appropriate resources can greatly impact their ability to keep their pets.



- For more information on how to better connect community members with social service agencies, including those that provide support for substance use, please check out our Support Services and Temporary Placement pages :  
<https://www.humananimalsupportservices.org/resources/support-services/>  
<https://www.humananimalsupportservices.org/resources/temporary-placement/>
- **Domestic violence-** Fifty-two percent of domestic violence survivors who seek temporary shelter report that they left their pet with an abuser due to the absence of co-sheltering policies and other alternative housing options that would make it easier for pets to be brought along. When an individual or family flees domestic violence, it is important to offer resources that provide safety for both the family and their pets. In particular, developing policies that prevent the abuser from reclaiming the pet, if the pet has to be temporarily boarded at the shelter. It's very important to identify if domestic violence is a contributor to why the individual is seeking shelter for themselves and/or their pets in order to connect the individual with the best confidential support and services.
  - For more information on how to provide more resources for domestic violence survivors and their pets, please check out our support services and temporary housing pages:  
<https://www.humananimalsupportservices.org/resources/support-services/>  
<https://www.humananimalsupportservices.org/resources/temporary-placement/>  
We also invite you to visit Red Rover's domestic violence and pets website:  
<https://redrover.org/resource/domestic-violence-and-pets/>

## Examples of Organizations Implementing Case Management Approaches

**Denver Animal Protection** has developed their own case management program called Community Navigators. Please find their program description, as well as their Standard Operating Procedure in your downloads. In addition, check out Denver Animal Protection's Community Navigator job description in your downloads. While you may not have funding yet to hire a person solely dedicated to case management, you can use this job description to help shift current intake roles towards a case management approach within your organization.





## Resources

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