Animal Case Management: Putting It into Action, Using the 4 Functions

Strengthen Your BONDING Function (Relationships, Connections)

GENERAL TIPS	EXAMPLE FORM	EXAMPLE FORM	EXAMPLE FORM
Make animal caseloads as small as possible for people and teams, by grouping "like-activities" (*Visual aid here*!)	Kennel tech cares for ½ of their normal number of dogs, and with this reduced caseload, they perform activities outside of their typical role but still related to care for those dogs (enrichment, training, bathing)	Intake tech has daily "cap" of 5-7 intakes, and once cap is reached, they circle back to check their internal records, print new kennel cards, and attend to any medical documentation or admin needs	New volunteers are given just 1 assigned shelter pet to practice several case management skills with, such as one-on-one time, personality logging, leash skills, photography, etc.
Turn what's randomized in daily/weekly routines into something more deliberate for relationships	A care technician covers the same wings or rooms each day for 1-2 weeks, to give them more touchpoints with the same animals	A volunteer decides to work with the same set of cats until placed (once 1 cat is placed, 1 new cat is added to the volunteer's "caseload")	A new dog or cat is "fostered" in the main office each week, and each office member is encouraged to spend 15 minutes with them one-on-one
Ensure the person, or people, with the most "touchpoints" with animals, follow those animals	Kennel technician who has worked with certain dogs or cats the longest shows those pets to potential adopters/attends adoption events	Office workers are asked to spend their last 15 or 30 minutes of the day with their pet of choice, and workers who spend time with same pets on repeat are asked to provide input	Foster parents are encouraged to attend meet-and-greets with adopters and general pet networking events, not just do drop offs
Pursue depth of interaction and connection, not breadth	Staff limit themselves to 1-2 animals during a 30-minute case management assignment	Volunteers limit themselves to walking and spending time with just 3 dogs each shift	Social media posts focus on 1-3 pets at a time, to really hone in on individuals

Strengthen Your REMEMBERING Function (Information, Data)

GENERAL TIPS	EXAMPLE FORM	EXAMPLE FORM	EXAMPLE FORM
Prioritize routine, real-time information-sharing for teams with the same animal caseloads	Weekly or bi-weekly team huddles or briefings on animal caseloads and strategies, with documented agendas ("Charlie has hit 30 days. Who has ideas?")	G-chatrooms, Facebook chatrooms, text chatrooms for animal caseworker teams ("Charlie has a potential adopter coming today at 5! Can anyone meet with them at the shelter?")	Once pet finds placement, team holds debriefing session, with documented agenda, and surveys foster/adopter on what inspired final decision and what could be improved
Create traditional print or virtual "memory bank" forms and tools	"My Pet's Story" form for owner surrenders, "What I Learned" form for staff/volunteers after working with individual shelter pets	Digital memory bank submission form anyone can quickly fill out on their phone after working with a shelter pet	"Look Books" for lobbies or "Look Boards" for online viewing (large shelters can start with 10 pets or only do 10 pets at a time, as a rule)
Turn lessons or common go-to resources into easy-to-remember checklists or spreadsheets	With long-stay pets, keep a list of people on their "team" (people with the most touchpoints, like a volunteer, temp foster, or care tech), or a list of people who have come forward saying they want to join a team	Basic information checklist for dog profiles and accompanying word variations sheet for biographies that limit on-the-spot pressure	QR code reminders of ways to help pets by participating in the info-gathering processes throughout the shelter and in hotspot areas
Treat pet information needs of remote/online customers just as seriously as those of in-person customers	Shelter residents are quickly made visible on online platforms, with fluid process enabled through automation or dedicated human team	Shelter regularly publishes electronic reminders of helpful information and has digitized important processes, such as foster/adoption applications	Have ready-made statements in pet software records on health status and individual needs that can be copied and pasted or recited easily

Strengthen Your PLANNING Function (Policy, Strategy)

GENERAL TIPS	EXAMPLE FORM	EXAMPLE FORM	EXAMPLE FORM
Map out baseline case management plans for your "model" shelter population to serve as a foundation for more complex work	Intake SOPs that address baseline medical needs (e.g., vaccines) with deadlines, record entry expectations with deadlines, screening instructions for serious conditions	Policy on when and how a caseworker may be assigned or recruited to a pet's team, how they assign pathways, and what their responsibilities, goals, and contacts are	Policies branching out from "model" populations are drafted to respond to the changing needs of individual pets and situations over time, to prep system for "flexible coping"
Pet statuses and transitions have built-in follow-up mechanisms	If your intake form has a "medical alert" checkbox signifying a need for medical attention, also have a person who serves as a "gatekeeper" daily to ensure vulnerable pets receive that attention	Pet caseworker transitions (e.g., referral to behavior team) and additions are monitored and feature written notifications, some even requesting confirmation	Foster appointments and hand-offs feature reminder texts and/or follow-up phone calls
Find ways to welcome all staff member and "informal caseworkers" (volunteers, including remote volunteers) to your mission table	Segment caseworkers according to "orientation, working, and resolution" pet care phases, who have different privileges and duties, ranked from easy to hard	Virtual fosters, business fosters	Post lost pets online same-day and ask online viewers to help you reunite them with their families
Create teams around levels of care and expertise that excel as safety nets	"Neonatal Leads" and neonatal pet caseworkers, "Cat Team," "Fraidy Cat Team"	Working groups are created among staff and volunteers with special backgrounds or track record of success with cases	Specified channels for urgent pet cases and non-urgent pet cases ("urgentpets@ animalshelter.org")

Strengthen Your ADVANCING Function (Momentum, Efficiency)

GENERAL TIPS	EXAMPLE FORM	EXAMPLE FORM	EXAMPLE FORM
Establish urgent placement or treatment targets for vulnerable populations and invest resources to make them happen	Rule to place neonates 0-4wks within 3 hours, that will borrow and temporarily re-assign staff or volunteers if necessary	Rule that badly injured pets are driven to emergency vet immediately, that will borrow and temporarily re-assign staff or volunteers if necessary	Rule to place kittens and puppies 4-8 weeks within 24 hours, that will borrow and temporarily re-assign staff or volunteers if necessary
Target known bottlenecks with model and specialized populations	Immediate make-ready opportunities for stray hold and unsterilized pets that, when embraced, shorten length of stay by 10% (or more)	Introduce 30, 60, 90-day long stay dog mandated interventions	Rule that all pets must have quality photo, short bio online and on kennel card by 3rd day on-site, with online audits performed daily by caseworker/manager
Align responsibility with authority	Experienced pet caseworkers, regardless of official title, are allowed to share decision-making on interventions	Allow fosters to finalize adoptions themselves, off-site	Shelter provides case management training opportunities to help individuals develop the skills and expertise needed to take on greater authority and responsibility
Budget for the unexpected and emergencies before they become devastating	Never require appointments for outcomes, regardless of your capacity	Primary and secondary case managers are assigned to pets who fall outside of "model" population, to maximize effort	Cultivate a strong front-end intake-to-placement program that helps manage intake

Sample Questions to Ask with the 4 Functions

FUNCTION	QUESTION	QUESTION	QUESTION
Bonding	*How can we tweak daily routines to encourage more quality interactions with individual pets and to help us see their true personalities?*	*What do our people, perhaps unofficially, do regularly that fosters trust and strong connections with pets?*	*How can we better utilize our human team's talents in the realms of imagination and empathy?*
Remembering	*What things have we learned about our pets since they have been with us?*	*Can a new person, with the help of the descriptions we collect and thread together of pets, imagine them and their stories properly?*	*Do staff and volunteers have access to baseline needs information about pets, and what about customers?*
Planning	*What special populations currently confuse our system and make us feel under-prepared that a policy could fix?*	*What's the process chain in our system for updating pet records and printing new kennel cards?*	*How should we redesign our workflows to make them more intuitive?*
Advancing	*What can we modify about our existing case management structure that will fast-track customer decision-making?*	*What's our most inefficient area when it comes to pet outcomes?*	*Do staff and volunteers have the resources and authority to make meaningful decisions in plans and routines on behalf of pets?*