



Oregon Humane Society: Managing Intake



Compiled by ASPCA® and PetSmart Charities® and distributed to the field, September 2007. Visit the ASPCA® National Outreach website for animal welfare professionals: www.ASPCApro.org.

Oregon Humane Society

Managing intake by scheduling admission appointments

Oregon Humane Society's shelter handles over 13,000 animals a year. To avoid being overwhelmed by an unpredictable flow of surrendered pets and strays, OHS has developed a more structured approach requiring appointments for admissions that benefits animals, people, and shelter operations.



Stats

Since implementing the policy of requiring appointments for admissions, OHS has noticed several key improvements:

- The shelter is better prepared to meet the needs of individual animals when the animals arrive.
- Turnaround time for the admission process is much shorter, which pleases both the customer and the staff. People bringing in an animal are better prepared and know what to expect.
- OHS makes money from the receiving fee: people are more willing to pay the fee because they've been told about it in advance.
- Admissions staff and animal-care staff work together more cooperatively. Both groups feel they have a say in the process.
- Their approach has caught the attention of other shelters in the region who are now investigating whether they too can introduce this strategy.

How Cool is That?

We admire Oregon Humane Society's ingenuity in defining a new approach to admissions that doesn't limit the animals their shelter accepts. Rather, OHS changed only how they accepted animals, not who they accepted. They are able to limit the disruptive effects of processing surrenders and strays without limiting admissions.

Adopt or Adapt

Oregon Humane Society's admission-by-appointment strategy requires time to obtain buy-in from staff and to plan and implement. But it doesn't require new funding. Their approach to intake is an excellent complement to open adoption programs.

Oregon Humane Society: The Whole Story

Oregon Humane Society's shelter handles over 13,000 animals a year. To avoid being overwhelmed by an unpredictable flow of surrendered pets and strays, OHS has developed a more structured approach requiring appointments for admissions that benefits animals, people, and shelter operations.

[Who They Are and What They Do](#)
[Ingredients and Prep Work](#)
[Step by Step](#)
[Results](#)
[Some Words of Wisdom](#)



Who They Are and What They Do

Susan Mentley, Operations Director

Founded in 1868, the Oregon Humane Society (OHS) is one of the oldest in the nation. OHS now serves the needs of over 13,000 animals each year. With a staff of 80 and a volunteer force of over 1,000, the Oregon Humane Society is dedicated to adopting out 100 percent of the animals turned into the shelter.

Before 2002, OHS accepted animals as they came in the door any time during business hours. This policy made every day unpredictable, resulting in the following problems:

- Employee and public stress
- Stretched resources
- Staff overtime expenses
- Overcrowded kennels and cages, stressing the animals and leading to euthanasia for space
- The goal of the admission appointments is to control the flow of incoming animals so that OHS could meet the animals' individual needs on a daily basis. In addition, OHS wanted to educate the animal's human family before they came into the shelter. Now, in a pre-appointment phone call, OHS staff present resources, options, and coaching on the phone so that the family is aware of the admission process before they arrive at the shelter.

In developing this initiative, OHS consulted with two organizations that were already using admission appointments: PAWS of Lynnwood, WA, and Wisconsin Humane Society of Milwaukee, WI. OHS determined that they too could implement this approach.

Ingredients and Prep Work

Prerequisites

All the activities of a startup spay/neuter program proceed from two critical prerequisite tasks:

- An efficient phone system that allows clear outgoing messages and taking messages from the public. "Full mailboxes are not acceptable," says Susan Mentley of OHS.
- Good animal-tracking software. "Relying on paper for important messaging is too risky unless the shelter is very small." OHS uses Shelter Buddy.
- A good way to communicate quickly with staff in other areas of the shelter, which allows immediate answers and critical efficiency. OHS uses short-wave radios, but a good phone system may suffice.
- A daily appointment calendar and pencils
- Empty kennels and cages to accommodate incoming animals

People

According to OHS, staffing levels and staff training are critical to the success of this admission process:

- Enough staff or volunteers to take phone messages and return calls expediently within 24 hours. The number of people needed depends on the volume of incoming animals typically received.
- Enough staff and volunteers so that a staffer/volunteer can go through all instructions on the phone. OHS reviews the following information on the phone with someone who wants to surrender a pet or a stray:
 - Animal information
 - Reason for surrender > Options to surrendering
 - Receiving fee (\$45, vital to covering costs)
 - Appointment times available and the time needed for the appointment itself
 - Frank discussion of the low likelihood of placement for very old or very aggressive animals

OHS has found that the more they can discuss in advance, the fewer unpleasant surprises for both parties during the admissions appointment. Their website contains detailed information about surrendering a pet to OHS. They've also posted the animal profile forms so that people can print them from the site and complete the forms in advance.

- Staff who are trained to handle some common challenges:
 - Walk-in surrenders
 - Frustrated members of the public
 - People with unrealistic expectations of the shelter

Up-front Costs and Startup Funding

If a facility already has a good phone system (as described in Prerequisites, above) and animal tracking software, implementation costs are minimal. Expenditures to produce updated forms and other paperwork for the new process (if needed) might be the only up-front cost.

Time Line

The complete transition from the old admissions process to the fully implemented new process took OHS about two years. Key milestones included:

- Obtaining staff input and board, staff, and volunteer buy-in
- Creating OHS messages to the public about the new process
- Transitioning from all walk-ins to a mix of walk-ins and appointments to mostly appointments

Step by Step

1. Consult with staff, board, and volunteers to get input and obtain buy-in.

OHS advises addressing these important issues early on:

- Reassure everyone that the public does not invariably choose to harm or abandon their animal if they are not immediately accommodated at the shelter.
- The admissions staff will need to spend more time up-front with people, in the initial phone call. However, this contact and control over the scheduling of appointments will enable the actual admission of the animal to go more smoothly.

- Commit to providing admissions staff with appropriate training on customer-service issues and using paperwork/computers appropriately.
- If appropriate, you may need to adjust staffing levels to accommodate the shift in effort.

2. Define the organization message to the public about the change in policy.

Some points to cover:

- After admission, the animal will be part of an excellent adoption program.
- Appointments make sense for people and animals.

OHS finds that most people truly want to do what is best for the animals. For this reason it's important to explain clearly how the change benefits the animals (more is known about each animal's history/behavior, the shelter will have room for the animal, the shelter will be prepared to address special needs, etc.).

3. Train staff in all aspects of the new policy, and if needed, prepare new admission forms and other materials associated with the admissions policy.

These materials might include:

- Update intake forms for each species, perhaps in HTML or PDF so that they can be printed or downloaded from the shelter's website
- Materials, such as handouts or FAQs on the shelter's website, that explain the new policy to the public; be sure to cover why the policy is needed and what someone should expect if they want to surrender an animal
- Internal documents for staff and volunteers who will be involved in admissions, such as:
 - Policy of commitment to good customer service
 - Procedures for taking messages, returning calls and conveying pre-appointment instructions, scheduling appointments, handling the admission appointment, coordinating admissions with other shelter staff, using animal tracking software, following up on no-shows
 - Suggested responses to common concerns and objections from the public
 - Training materials so that future staff receive thorough training, too

4. If appropriate, work with shelters and other organizations who send animals to set up regular appointments for their admissions.

OHS does a large interagency transfer program. These other agencies needed to understand OHS's limits and adhere to their specifications.

5. Begin implementation of appointments while still accepting walk-ins.

For approximately a year, OHS continued to accept walk-ins but told people that in the future they could call to schedule an appointment. The second year, OHS staff strongly encouraged walk-ins to schedule an appointment and bring the animal back at that time. (Even today, if a walk-in customer is adamant about leaving an animal immediately, OHS will receive the animal.)

6. Monitor your admissions.

OHS keeps track of the number of animals admitted through appointments vs. those who are walk-ins. They also follow up with people who do not show up for their scheduled appointment. OHS tracks the reasons people give for not coming and what they have decided to do about their animal.

7. Plan to change your plan.

Especially in the early stages of implementation, OHS recommends accepting that the process is "fluid." Susan Mentley says, "Exceptions happen all the time. Staff should be trained to the extent that they can make independent decisions with total support. As we learn about challenges, procedures are modified. A clear, fair expectation that the public is a partner in helping the animal is important."

Results

The Numbers

Since implementing the policy of requiring appointments for admissions, OHS has noticed several key improvements:

- The shelter is better prepared to meet the needs of individual animals when the animals arrive. Susan Mentley says, "For example, if we anticipate a dog arriving needing a specific treatment, we can begin to pre-arrange for care. We can anticipate litters of puppies and kittens. We stop receiving an hour before closing so staff can close the shelter in a timely manner."
- Turnaround time for the admissions process is much shorter, which pleases both the customers and the staff. People bringing in an animal are better prepared and know what to expect.
- OHS makes money from the receiving fee: people are more willing to pay the \$45 fee because they've been told about it in advance. (However, OHS will accept less if a person can't pay the full fee, and will still take the animal if the person refuses to pay at all.)
- Admissions staff and animal-care staff work together more cooperatively. Both groups feel they have a say in the process.
- Their approach has caught the attention of other shelters in the region who are now investigating whether they too can introduce this strategy.

Critical Factors

- An experienced, well-trained staff with "a pleasant, patient, caring demeanor"
- A good computer system
- A good phone system
- Good shelter communications
- Enough staff to accommodate the public who have followed through with admission instructions
- Scheduling a manageable number of animals in a day so that staff have enough time with each animal

Thinking Outside the Box

Oregon Humane Society makes excellent use of its website for communicating about all its activities, including admissions. The site provides detailed information not only about the admission process but also about alternatives to giving up an animal to the shelter. Visitors to the site can download or print animal profile forms. These are detailed questionnaires that help the shelter learn as much as possible about the animal in order to place it successfully.

Some Words of Wisdom

What Worked

According to OHS, staff training and input are essential: "If [staff] gives feedback, it needs to be carefully considered. ... Upbeat, 'can do' staff are the program's backbone. Do not try anything unless you will have 'champions' who will make it work."

Getting the message out is also vital: "Have all the principals (public, volunteers, vets, staff, board) understand what you are trying to do and why." These people can help correct any misperceptions in the community about "limiting" admissions.

Be Prepared For

Susan Mentley cites several challenges to implementing admissions by appointment:

- Explaining to the public why they need an appointment after they've driven to the shelter with an animal in hand can be stressful. (If a customer insists, OHS will receive the animal.)
- Some people do not see the service as valuable and object to waiting for an appointment.
- Some people do not, will not, or cannot pay the receiving fee. OHS encourages people to pay what they can.
- Some people may assume that the shelter "won't take" animals. OHS's policy is to accept any domestic companion animal with an appointment but they continue to encounter this misperception.
- OHS cannot place animals that are aggressive, extremely old, or have severe behavior problems. OHS will take the animals but not for adoption. Such animals are signed in as euthanasia requests. While this is addressed in the initial phone call, some people are unhappy to learn this.

Tell Us What You Think

With the information we've provided, can you start a program like this one in your organization? [Click here](#) to send an email to ASPCA® National Outreach with your feedback and questions.

Oregon Humane Society: Thumbnail Sketch

Oregon Humane Society
PO Box 11364
Portland, OR 97211-0364

(503) 285-7722

<http://www.oregonhumane.org>



Founded in 1868, the Oregon Humane Society (OHS) is one of the oldest in the nation. OHS now serves the needs of over 13,000 animals each year. With over 80 staffers and a volunteer force of over 1,000, the Oregon Humane Society is dedicated to adopting out 100 percent of the animals turned into the shelter.

Their goal is to "build a community of compassion" through adoption of homeless pets, animal welfare legislation, humane education, abuse investigation, and community outreach and leadership.

Staff

83 paid staff, including:

- 6 admissions
- 10 adoptions
- 15 kennel
- 15 cattery
- 6 foster/outreach/behavior
- 3 cruelty investigators
- 3 behavior
- 25 administrative

Operating Budget

\$5.4 million annual operating budget.

Business Type

501(c)(3) non profit organization