



Standard Operating Procedure

Case Management Meetings: Dogs

Last Updated: February 9th, 2023

Statement of Purpose:

To ensure our long stay and behaviorally challenged dogs have their needs met in a timely fashion; to encourage staff and volunteer participation in the marketing and enrichment efforts for these dogs; and to collaboratively determine how best to approach behaviors that may pose a handling risk.

Summary:

Every week, both shelter supervisors co-host two meetings over Microsoft Teams or Zoom to brainstorm solutions for SBCAS dogs in-need. One meeting is targeted at helping dogs in significant behavioral decline or who may require a very specific outcome. The second meeting is to ensure our long stay dogs are being thoroughly marketed and putting their best foot forward via online presence.

Scope and Responsibilities:

1. Urgent dog meeting attendees (Tuesdays 1-2pm):
 - a. Dog Flow Specialist
 - b. Santa Maria Shelter Supervisor (co-host)
 - c. Santa Barbara Shelter Supervisor (co-host)
 - d. SBCAS Operations Manager
 - e. SBCAS Director
 - f. Any volunteer or staff member who handles dogs
2. Long stay dog meeting attendees (Fridays 12-2pm):
 - a. Dog Flow Specialist
 - b. Santa Maria Shelter Supervisor (co-host)
 - c. Santa Barbara Shelter Supervisor (co-host)
 - d. Any volunteer or staff member who handles dogs

Definitions/Resources:

1. **Urgent Dog:** Dog exhibiting signs of significant kennel stress, posing a safety handling risk or with a history of behavior that may make them difficult to place.
 - a. Meeting link: <https://us06web.zoom.us/j/84794206134#success>
 - b. Password: sbcas
2. **Long Stay Dog:** Dog who has been "available" in the shelter for 30+ days.
 - a. Meeting link: <https://us06web.zoom.us/j/83497116668#success>
 - b. Password: sbcas
3. **Spreadsheet Manager:** The meeting attendee responsible for screen-sharing and taking notes in the *case management spreadsheet*. This will often fall to one of the two shelter supervisors. They must have or be granted editing access to the spreadsheet by the hosting gmail account.
4. **Case Management Spreadsheet:** The shared spreadsheet where progress and notes are tracked and viewable by all parties interested in helping these dogs.

Standard Operating Procedure

Case Management Meetings: Dogs

Last Updated: February 9th, 2023

- a. **Spreadsheet Dropdown Options:** These dropdowns may be altered by shelter leadership to meet the current dog population's needs. As of this SOP's most recent update, they exist as follows:

**In Process
(checklist
section)**

> 90 days

> 30 days

> 60 days

> 90 days

Action Plan

"In Process" Column

These color-coded dropdown options available in the "In-Process" column serve to inform the viewer of a dog's current marketing progress or behavioral standing in the shelter.

Each dropdown option here pairs with color-coded dropdown options in the neighboring "Priority" columns.

The "30 - 60 - 90 day" labels are geared toward marketing tasks.

The "Action Plan" label is geared toward urgent behavioral support and outcome pathways.

"Priority" Columns

These columns are limited to 4 tasks per dog to keep staff and volunteers focused on specific goals.

Needs		
Priority 1	Priority 2	Priority 3
Sleepover/Daytrip	Social Media Post	-
New Photo	Social Media Post	-
Web Bio	-	-
Notes	-	-
Video	Rescue Plea	Social Media Post
Marketing Form	New Photo	-
Profile Icons	Marketing Form	Social Media Post
Advocate	-	-
Social Media Post	-	-
Sleepover/Daytrip	SB Transfer	Advocate
Develop TEAM	SB Transfer	-
Move Kennel	Sleepover/Daytrip	-
Move South	Web Bio	Notes
SB Transfer	Social Media Post	-

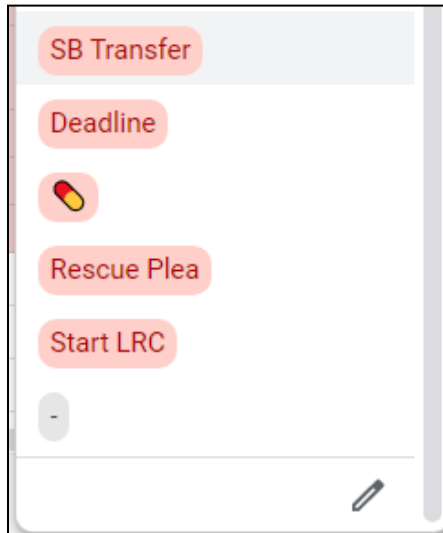
Definitions:

- New Photo** - If this dog's current web profile photo is lackluster or an original intake photo, take and upload a new one.
- Web Bio** - Ensure this dog has something written in their web bio that may pique a potential adopter's interest.
- Notes** - Ensure we have behavior information about the dog from either staff or volunteers to help us better counsel potential adopters.
- Video** - Embed a video of this dog in their web profile; either through Chameleon or [AdoptMeApp](#).
- Marketing Form** - Staff, volunteers and fosters can submit marketing information about a dog directly to their Chameleon profile by completing this form available via the [volunteer linktree](#).
- Profile Icons** - Add animal profile icons to a dog's Chameleon profile for better matchmaking opportunities. Instructions available via the [Chameleon linktree](#).
- Advocate** - Add a staff or volunteer's contact information to this dog's profile who is willing to counsel interested parties on their behalf.

Standard Operating Procedure

Case Management Meetings: Dogs

Last Updated: February 9th, 2023



8. **Social Media Post** - Schedule or publish a marketing post on SBCAS Facebook and Instagram accounts on this dog's behalf.
9. **Sleepover/Daytrip** - Ask staff or volunteers to take this dog on a day trip to collect marketing material and information.
10. **Develop TEAM** - Create a team of staff or volunteers willing to commit to outings, trainings, marketing tasks and other outlined items in this meeting to find this dog this safest outcome.
11. **Move Kennel/Move South/SB Transfer** - Find a different location for this dog within the available facilities to minimize shelter stress.
12. **Deadline** - Set a date for this dog to leave the shelter or show significant behavioral improvement by. If neither option is met by the deadline date, the dog may face behavioral euthanasia.
13.  - Request anti-anxiety medication from the clinic on this dog's behalf.
14. **Rescue Plea** - Reach out to partnered rescues and/or post on SBCAS social media seeking viable rescue placement for this dog.
15. **Start LRC** - Begin completing the "[Live Release Checklist](#)" on behalf of this dog.

Delegator (usually supervisor):	Delegating to (staff/volunteer carrying out listed tasks):
Elaine ▼	Dustin
Elaine ▼	
Elaine ▼	DeAnn
Elaine ▼	Sally
Elaine ▼	
Elaine ▼	
Esme ▼	Zee

"Delegator" Columns

The "Delegator" is responsible for seeking out individuals to fill the "delegated to" role and checking in with them about the status of their assigned tasks.

The "Delegator" will be the shelter supervisor at the location the dog is being kenneled at unless otherwise determined at the meeting.

The individual listed in the "Delegating to" column will be someone who has volunteered to complete the tasks listed in the "Priority" columns.



Standard Operating Procedure

Case Management Meetings: Dogs

Last Updated: February 9th, 2023

Process:

Both meetings are conducted in a similar fashion though their goals vary slightly.

1. Pre-Meeting:

- Urgent Dogs:** Shelter supervisors will add any dogs at their respective shelters to the spreadsheet who may be in significant behavioral decline or who may pose a handling risk to staff/volunteers. It is during the meeting that action items will be decided, so the row may simply be populated as follows beforehand:

AID	Name	Initial Intake Date	LOS (since initial intake)	In Process (checklist section)	Needs				Delegator (usually supervisor):	Delegating to (staff/volunteer carrying out listed tasks):	Status
					Priority 1	Priority 2	Priority 3	Other			
A507720	Saint	11/4/2022	97	Action Plan ▼	▼	▼	▼		▼		Urgent - B... ▼
A511379	Powder	01/25/23	15	Action Plan ▼	▼	▼	▼		▼		Urgent - B... ▼
A476843	Stoney	10/17/2022	115	Action Plan ▼	▼	▼	▼		▼		Urgent - B... ▼

- Long Stay Dogs:** One or both shelter supervisors will add any new dogs to the case management spreadsheet who have been available in-shelter for 30+ days and complete their individual row as follows:

4	AID	Name	Initial Intake Date	LOS (since initial intake)	In Process (checklist section)	Needs				Delegator (usually supervisor):	Delegating to (staff/volunteer carrying out listed tasks):	Status
						Priority 1	Priority 2	Priority 3	Other			
46	A509308	Hank	12/15/22	56	> 30 days ▼	New Photo ▼	Web Bio ▼	Notes ▼		▼		▼
47	A509309	Stella	12/15/22	56	> 30 days ▼	New Photo ▼	Web Bio ▼	Notes ▼		▼		▼
48	A509444	Pebbles	12/19/22	52	> 30 days ▼	New Photo ▼	Web Bio ▼	Notes ▼		▼		▼

2. Meeting Start:

- Join the appropriate Zoom meeting link.
- Determine who will act as the **spreadsheet manager**.
- The **spreadsheet manager** will open the case management spreadsheet (must have editing access), share their screen with the attending party and take notes during the meeting.

3. Meeting Discussion:

- The **shelter supervisors** will lead discussions surrounding the dogs at their respective shelter locations.
- Any additional **attending staff** and **volunteers** will be expected to offer observational insight, solutions and support on behalf of the discussed dogs.
- Urgent Dog Meetings:** All in attendance will discuss each listed urgent dog (or propose new ones if relevant), their progress, their challenges, what can be done to help them, what safe placement would look like for them (if possible) and who will accomplish what by the following meeting to ensure progress is being made. The **spreadsheet manager** will update the **case management spreadsheet** accordingly.

Standard Operating Procedure

Case Management Meetings: Dogs

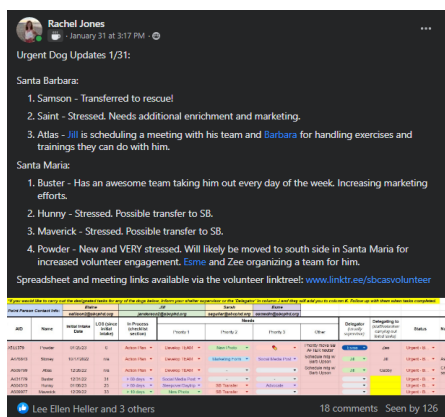
Last Updated: February 9th, 2023

- d. **Long Stay Dog Meetings:** This meeting often moves slower than the urgent dog meeting as there is much cross-referencing between spreadsheet tasks and Chameleon profile updates.
 - i. The spreadsheet can be sorted by *Delegators* or by *LOS* - whichever works most efficiently for the meeting's co-hosts.
 - ii. The **shelter supervisors** will start the meeting at the top of the spreadsheet and work down.

AID	Name	Initial Intake Date	LOS (since initial intake)	In Process (checklist section)	Needs				Delegator (usually supervisor):	Delegating to (staff/volunteer carrying out listed tasks):
					Priority 1	Priority 2	Priority 3	Other		
A497798	Santiago	6/18/2022	236	> 90 days	Sleepover/Daytrip	Social Media Post	-		Elaine	Dustin
A500650	Mega	6/18/2022	236	> 90 days	Sleepover/Daytrip	Social Media Post	-		Elaine	
A502191	Molly	7/23/2022	n/a	> 60 days	Video				Elaine	DeAnn

- iii. The "Priority" column labels will match the color of the "In-Process" column label. Once all tasks of a color are completed, the **spreadsheet manager** will upgrade the "In-Process" column label to the next color and populate the "Priority" columns accordingly.
- iv. The **shelter supervisors** or **spreadsheet manager** will check which of the preceding week's priority tasks have been accomplished by checking the listed dog's Chameleon profile for updates.
 1. If a task has been *completed*, the **spreadsheet manager** will remove that task from the spreadsheet.
 2. If a task has *not* been completed but would only take a few moments to do so (ex. Add a web bio), **any individual in attendance** can use the meeting time to complete that task.
 3. If a task has *not* been completed and *cannot* be completed during the meeting, the "Delegator" for that task is responsible for either reminding the "delegated to" individual or finding a new one to carry it out for next week.

4. After the Meeting:



One of the **shelter supervisors** will post an updated screenshot of the spreadsheet to the [SBCAS Team Facebook Group](#) along with the link to the [volunteer linktree](#) where anyone can view the **case management spreadsheet** tasks and find **meeting links**.

Interested staff and volunteers will email the "Delegators" if they would like to be listed in the "delegated to" column to carry out the listed tasks.



Standard Operating Procedure

Case Management Meetings: Dogs

Last Updated: February 9th, 2023

Revision History

Date	Version	Description	Approved
2/9/23	1.0.0	Initial document created	