

CHECKLIST

High Priority	Date	Task	Assigned to:	Status
<input checked="" type="checkbox"/>		14.1 Establish medical record keeping SOP		
<input checked="" type="checkbox"/>		14.1 Train staff of Chameleon usage		
<input checked="" type="checkbox"/>		14.1 Transfer to electronic records from paper system		
<input checked="" type="checkbox"/>		14.1 Use Chameleon to create daily task lists		
<input checked="" type="checkbox"/>		14.1 Fund tablet purchase		
<input checked="" type="checkbox"/>		14.2 Identify benchmarks to measure base on Strategic Plan initiatives		
<input checked="" type="checkbox"/>		14.2 Post benchmark data for all employees to see on monthly basis		
<input checked="" type="checkbox"/>		14.2 Post metrics in Assilomar Accord format on website		
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

SANTA BARBARA COUNTY ANIMAL SERVICES

PROGRAM ASSESSMENT

American Humane Association

*14. Data,
Statistics & Record
Keeping*

14. Data, Statistics & Record Keeping

General Overview:

The animal management software system used by SBCAS is Chameleon. This is a widely utilized, web-based software system that is designed for shelter and rescue use. It features a myriad of options to increase efficiency and productivity while at the same time providing tools needed to increase adoptions and lower euthanasia rates. Some of the functions of Chameleon are:

- Critical Report compilations
- Licensing
- Field Service Activities
- Inventory Management
- Donation Management
- Mass Mailing tools
- On-line training
- Touch screen kiosks
- Kennel information
- Medical/Veterinary/Behavior documentation
- To Do Lists and Task Management which can be used with a PDA
- Bite Citations
- National Statistics

And it is a powerful public access tool that allows the shelter to get adoptable/lost/found/licensing data to the public thru PetHarbor, WebLicensing, email blasts and kiosks. SBCAS uses some of these features through posting adoptable animals to PetHarbor and using the web license feature to renew dog licenses. Public access also allows customers to reach you. Online they can file nuisance reports and make Field Service requests, inquire about lost animals, and veterinarians can submit vaccination histories.

The team observed that the version of Chameleon was not the most updated version. It was also widely felt that this software system was not being utilized to its full potential. Furthermore, the County utilizes Crystal Reports to aggregate data. It is not clear at this time if this is beneficial or restricting the full use of Chameleon for reporting purposes.

One employee bears the majority of the responsibility of Chameleon usage. This person just recently attended a Chameleon seminar with the hopes of becoming familiar with all the potential uses and training and implementation within SBCAS. The team was told that staff was cross trained on using Chameleon and that everyone has the basics, but some have more. The team observed that to be accurate, as several staff members appeared to be quite proficient and others were not aware what Chameleon was capable of or how to find out.

14.1 Record Keeping

Observations:

There were various SOPs pertaining to animal record-keeping.



SBCAS Policy and Procedure Manual, Chapter 3, Office Procedures, 3.20, 3.21 and 3.22 required data entry immediately during a transaction, rather than creating and maintaining paper records to then transfer to the database. SBCAS Policy and Procedure Manual, Chapter 3, Office Procedures, 3.22 “Chameleon Activities – Guidelines for Data Consistency,” provided detailed information on the use of Chameleon for records accuracy for ACOs. Many SOPs referenced Chameleon as it pertained to the particular shelter function or process. However, paper records were still used to record medical information, medical treatments and to do lists. Medical records from off-site veterinary care were not integrated into the animal’s shelter history. Behavior/Medical records were not consistently recorded in the software. The records with medical and behavioral information were not as in-depth as they should be, not all veterinarians followed the same medical record keeping and not all of the records were legible. The SOAP (Subjective/Objective/Assessment/Plan) Method of medical record keeping was not uniform.

Not all records were kept as part of the animal’s permanent medical record. For instance, treatment sheets were included in records in SB and thrown away in SM. Daily observation on animals’ appetite, elimination habits, and activity level were not recorded, only noted if there was an abnormality.

As previously mentioned, animals were observed by the team at each facility who did not appear on the animal inventory. The Policy and Procedures Manual included Chapter 4, 4.15, “Animal Inventory,” which stated that the inventory was to be performed once per week, and also that it “should be informally done each day on an ongoing informal basis.” Procedure 4.06 “Kennel Duty Assignments” also included “U. Animal census as assigned.” In 2014 ten animals were deemed “missing” from the inventory.

Upon adoption, the adopter received a photo copy of the complete paper medical record. I process that takes time and resources.

Animal Control Officers also use Chameleon to write reports, log activity and record calls. The record keeping in this department appears acceptable.

Recommendations:

- Convert from paper records to electronic. Maintain all animal data in Chameleon. This includes medical records, behavior evaluations, medical treatments, vaccine and deworming schedules, medical rechecks.
- Establish SOP for consistent documentation of medical and behavioral information
- Ensure adequate staff training on data entry
- Utilize medical “to do” lists which automatically update treatments into medical record
- Purchase PDA’s or tablets for in kennel use for medical staff
- Create daily EDAPP (Eating, Drinking, Activity, Peeing, Pooping) forms and SOP. This information is useful to the medical staff to detect problems.
- Make sure SBCAS is using the most updated version of Chameleon.
- Ensure that the animal inventory matches the actual animals in care on a daily basis. Do this by conducting a daily walk through, cross checking each animal with each animal listed on the inventory. Ensure that this is a formal, daily process so that animals are always accounted for and discrepancies can be corrected immediately.

Discussion:

SBCAS is commended on keeping individual records on all animals sheltered. However, the process of paper records needs to be streamlined to enhance worker productivity. The Chameleon system was designed specifically to increase efficiencies and eliminate redundancies. Managing manual animal records while simultaneously utilizing robust animal management software can create redundancies and inaccuracies and be time-consuming if not managed well. If the paperwork and the electronic record do not match, vital information can be lost. Utilizing animal management software to its full potential increases productivity and provides consistent information for employees, adopters, transfer partners and statistical reporting.

Record-keeping accuracy greatly improves when animal inventory information is part of a software program designed to track animals. Like most businesses, animal services agencies are expected to maintain accurate records regarding their activities. This includes, but is not limited to, the accurate accounting of all animals received and their corresponding dispositions.

Medical records are legal documents, and must be kept in a manner consistent with the State Veterinary Boards requirements. The recording of controlled substances on the record is a DEA mandates as well.

Data entry is only as good as the person's ability to enter it. Training will be required to ensure full usage by all employees.

14.2 BENCHMARKS & REPORTS

Observations:

Statistics from 2009 to the present that indicated intake and outcome information and live release rates were provided to the team, by request, prior to the site visit. The AHA team requested several reports during the site visit and each was delivered promptly, which included spay/neuter statistics, animal inventory, census tracking, and animal intake and length of stay data. However, it was mentioned that these reports are not run on a regular basis as there is no procedure for monthly data collection.

During the subsequent visit, additional report details were requested that could not be readily provided. The challenges were with Crystal report limitations, IT issues, and not enough people knowing how to run the reports.

Because there is no official Strategic Plan, data collection and benchmark analysis is not being done routinely. Data was not collected in an effort to drive decision making, manage populations, establish new programs, record volunteer hours, track efficiency or productivity. Data and statistics were not used to assess employee performance, identify problems, assess status of organizational goals and objectives, or integrated into the strategic planning process.

Shelter statistics were not found to be reported on the County website, and made available for public transparency.



Recommendations:

- Create SOP for organizational benchmarks and establish frequency of collection and report generation. Data to measure may included:
 - Daily Census
 - Animal disease rates
 - Intake by location, breed, age, zip code and relinquishment reason, if spayed/neutered, strays
 - Outcome by type
 - Live release rate
 - Length of Stay per species, age, location in shelter
 - Field calls by type and zip code
 - Field Call response time
 - Customer Service Ratings
 - Employee turnover
 - Number of bites, employee and volunteer
 - Number of accident reports
 - Absenteeism
 - Overtime
 - Extra help hours
 - Volunteer hours and numbers
 - Foster care hours and numbers
 - Number of Vet checks scheduled, Number of Tech checks (identifies medical work load).
 - Free S/N procedures for community
 - License Procurement rates
 - Community Bites
- Follow the guidelines and format of the Asilomar Accords for calculating live release rate.¹ If your current version of Chameleon does not allow entry of Asilomar statuses of animals at intake and outcome, strongly consider adding those fields to your Chameleon database.
- Place SBCAS statistics and data on the county website² in Asilomar Accord format
- Use benchmarks to drive strategic planning objectives.

Discussion:

An accurate and easy-to-use data collection and analysis system is essential for reporting such information to local government, donors, and the community. In addition, such reporting is essential for assessing the

¹ http://www.asilomaraccords.org/statistics_and_formulas/annual_animal_statistics_table_template_2-07.pdf

² <https://multcopets.org/reports-and-agency-statistics>, www.nycacc.org/Statistics.htm

organization's performance, formulating strategic plans, and setting goals. Chameleon allows for the collection of important statistics and actually has a feature that enables you to compare your agency to others.

It is important to remember that computers can only be as helpful as the actual information placed within, and the accurate gathering and analysis of statistical information are fundamental components of a modern animal services organization. Animal care agencies now have the ability to produce an inordinate amount of data on a daily, monthly, and yearly basis. Prior to the advent of robust animal management software, there had been little guidance regarding the importance of record-keeping, and the method of trial and error was all too common. Clear and concise reports and reliable data are necessary, not only for supporting budgetary issues, but also to ensure accountability, effectively monitor operations, plan strategies and evaluate programs.³

A lack of clarity and/or errors in record-keeping or data presentation can give the appearance of carelessness, apathy or even impropriety. On the other hand, clear and easy-to-follow animal statistics can be a valuable tool in defining the scope of the many complex variables which make up the homeless animal problem. SBCAS should put the numbers it has to work for it in ways that will improve the quality of work. Shelters of all sizes benefit from keeping accurate statistics on every aspect of their work. Numbers tell people who an organization is and what challenges it faces. Presented below are reasons to keep an accurate count of the animals an agency handles.

Accountability: Numbers explain a shelter's existence to government entities and the general public. An agency knows it is productive and accountable, but others must know this as well.

Liability: Proper recording of numbers will show that each animal was kept the legally required amount of time.

Public Image: Numbers increase public awareness about the magnitude of a shelter's mission. Numbers help convey the results of an agency's efforts and also help convey the public's role in generating stray and homeless animals.

Budgeting/Fundraising: A good budgeting process requires statistics in order to identify needs. Numbers assist in planning for the future and paint pictures that generate donations.

Program Evaluation/Planning: Strengths and weaknesses are exposed through statistics. Analysis of a shelter's numbers identifies successful as well as ineffective programs. Statistical analysis can assist in the design of future programs. Comparison of statistics may expose animal population trends (local, regional, and national).

It is important to recognize that collection of statistics is only one aspect, this data needs to be used to drive decision making on all levels. The data collected can be used to:

- Determine employee staffing needs
- Identify target areas in the community where there is the greatest stray population, and implement programs for reduction.

³ <http://aspcapro.org/webinar/2013-12-12/how-shelters-can-use-data-save-lives>

- Identify susceptible communities with high owner relinquishment rates
- Identify high risk animal populations
- Disease trends
- Employee productivity and work load
- Assess the fee for service charged to each city
- License compliance
- Report Live Release Rate

You can never recognize a problem or document a trend without data collection.

A sample benchmark template was created specifically for SBCAS use and can be customized based on objectives set in the strategic plan.

Appendix 14.A - SBCAS Benchmark Template

Appendix 14.B - Magical Metrics and Dazzling Data PPT PDF

Appendix 14.C - Monitoring and Population Management in Shelters PPT

Appendix 14.D - A matter of Measurement

Appendix 14.E - What is your Rate?

Appendix 14.F - Arlington Animal Services Benchmarks

Additional resources

<http://www.maddiesfund.org/using-shelter-metrics-to-measure-and-set-goals.htm>

<http://www.maddiesfund.org/magical-metrics-and-dazzling-data.htm>

SANTA BARBARA COUNTY ANIMAL SERVICES

PROGRAM ASSESSMENT

American Humane Association

*15. Finance and
Budgeting*

15. Finance and Budgeting

General Overview

The county operates on a fiscal cycle from July through June. Each year, the budgeting cycle begins in the preceding January. The Animal Services budget is a collaborative effort between the Animal Services Director, the PHD Deputy Director, and Fiscal Services. The budget is approved by the Board of Supervisors. The County operates within a balance budget.

Animal Services contributes 2 revenue streams, one from the sale of dog licenses and the other is a fee for service charged to 7 of 8 cities within the county for Animal Control and Sheltering. The revenue received contributes to cover approximately 70% of the Animal Services operating budget. The other 30% is funded by the County's general fund.

In FY 2015, the operating expenditures for SBCAS is \$4,324,249 (projected).

FY 2014 Budget was \$3,893,318

FY14 Per capita SBCAS government spending on Animal Services is \$8.95

In 2009, Dr Andrew Rowan, CEO Humane Society International presented a workshop at the Pegasus Foundation Seminar. He estimated, on average, communities spend \$8.00 per capita on Animal Services. (2015 value - \$8.93) They handle (there is no reference to the level of care provided, which is an important consideration) approximately 30 animals per 1,000 people. In calendar year 2014, SBCAS took in 6,868 animals in 2014 which is the equivalent to 15.8 animals per 1,000 people. (see Table 1.1, which was derived from data collected by UC Davis Koret in the Animal Services Evaluation for Yolo County in 2012-2013)

Though the annual operating budget of SBCAS is balanced, five outside organizations contribute funding for operating expenses of the SBCAS. Collectively they contributed over \$325,000 in additional funds to cover food, medical expenses and basic shelter improvements. Without this gift, life-saving care could not be afforded to the animals in SBCAS. In addition, it is estimated that over 20 FTE are provided through SBCAS volunteers, and the BUNS, ASAP, and CAPA volunteer programs. BUNS and ASAP contribute essentially 100% of care to rabbits and cats of Santa Barbara.

Despite this seemingly adequate budget as compared to other California communities, SBCAS is lacking several key positions that warrant a budget re-evaluation.

Expenses

With 71% of expenses allocated to salary and benefits and 11% going to fixed expenses and overhead, that leaves 18% in variable expenses, in theory.

If you subtract out the Public Health Department allocations in for support services (\$169,000) that leaves 14% in variable expenses to troll for cost savings. In reality, some of these variable costs are not truly

variable, thus restricting the Executive Director from making any head way toward cost savings initiatives that would be able to fund additional staff positions.

Note: Variable expenditures include veterinary services and outreach, excluded spay/neuter and general administrative expenses.

Table 1-1

FY 12-13 data from communities	Annual Budget	Population	Annual Intake	Governance	Per Capita spending	Cost per Animal impounded	Animals handled per 1000	Live Release Rate%
Yolo County	\$1,932,924	204,118	3,632	County	\$9.47	\$532	17.8	88%
City of Chico	\$606,223	87,714	3,497	City	\$6.91	\$173	39.9	82%
City of Sacramento	\$3,136,007	475,516	9,450	City	\$6.59	\$332	19.9	53%
Placer SPCA	\$2,000,298	126,000	3,714	Private with city contract	\$15.88	\$539	29.5	80%
Sacramento County animal care	\$4,301,544	756,164	10,336	County	\$5.69	\$416	13.7	56%
SLO County Animal Services	\$2,409,096	274,804	4,034	County	\$8.77	\$597	14.7	83%
Santa Cruz County Animal Shelter	\$3,532,425	254,389	5,214	JPA	\$13.89	\$677	20.5	77%
Silicon Valley Animal Control	\$1,805,565	233,324	1,407	JPA	\$7.74	\$1,283	6.0	87%
SBCAS (FY 14)	\$3,893,318	435,697	6,868	County	\$8.94	\$567	15.8	86%

Santa Barbara

Department	Expenditures	Animal Intake	Field Calls
Field Services	\$399,064	n/a	3939
Animal Services	\$556,501	2237	n/a
Cost per unit	n/a	\$249	\$101
% of Total Budget	22%	13%	9%

Santa Maria

Department	Expenditures	Animal Intake	Field Calls
Field Services	\$483,769	n/a	7678
Animal Services	\$857,449	3159	n/a
Cost per unit	n/a	\$271	\$63
% of Total Budget	31%	11%	20%

Lompoc

Department	Expenditures	Animal Intake	Field Calls
Field Services	\$312,289	n/a	4306
Animal Services	\$412,337	1389	n/a
Cost per unit	n/a	\$297	\$73
% of Total Budget	17%	7%	10%

Inventory Management could result in some cost savings initiatives. While there were consolidated storage locations not all were kept under lock and key. Pharmaceuticals were maintained in a locked cabinet in Santa Maria and medicines distributed to the other sites. Some items seem to be carried at an excessively high inventory level. High value items like flea and tick control were not monitored as closely as they should be for employee theft. It was indicated that kitten food in Santa Maria was missing and now that is kept locked in an office. Safeguards for shrinkage were not in place.

The cost of a benefits package for the county employees is approximately 50-60% of salary. A well managed private business would strive to keep benefit package expenses under 27%, most government benefits costs estimates 35%.

Revenue

SBCAS has 2 major revenue streams. Revenue from licenses contribute 18% to total revenue and revenue from city contracts contribute 52%, revenue from grants contribute about 1%. SB90 reimburses some expenses incurred.

As stated in the Field Services section, license compliance statistics based on estimated dog population is approximately 27%. This does exceed the national average of 15-20% and it is an opportunity for additional revenue.

Each city that contracts with SBCAS pays a per capita use fee of \$7.11 for full (animal control and sheltering) and \$3.74 for animal control only (plus rabies test costs).

Recommendations:

- Undertake usage fee analysis to ensure city fee assessment is appropriate for services provided.
 - Track field calls per zip code
 - Track animal intakes per zip code
- Increase licensing renewals by 20% using robust marketing programs, www.petdata.com, Chameleon, and through website. Door to door canvassing is the most cost inefficient method. See City of Calagary’s successful bid to increase license sales
- Increase budget by \$750,000 to cover additional essential positions
- Implement comprehensive inventory management system for additional cost savings
- Create additional account with MWI (Medical supply vendor) for the K9 Pals supplies and do a direct third party billing.
- Investigate additional grant funding to cover essential positions, or program development and increase funds from SB90 which may cover cost of Behavior and Training Coordinator.

Discussion

Despite seemingly adequate funding on a per capita basis and considering the enormous contributions of SBCAS internal and external partners SBCAS does not appear to be operating an efficient business model. Salary contributions exceed 70% of the budget, yet even with the volunteer hours the shelters and field services are seemingly understaffed or not working at maximum efficiency. Key positions to improve efficiency, animal care and public safety are needed, and cost savings initiatives can not be undertaken to fund these positions due to the narrow margin.

Thoughtful evaluation and assessment of fee determination should be undertaken to ensure that the cities that contract services with the county are being charged appropriately. Data available from the SBCAS

Chameleon software system can generate statistics indicating the animal relinquishment and field services call by zip code.

The variable expenses an animal shelter incur are directly related to the number of intakes. In the community of Santa Maria where the intake number is the highest, intakes could possibly be reduced by an ordinance change requiring spay/neuter. They are the only city in the county that has not adopted that resolution. Hence, one could argue that higher fees should be levied against them for non compliance resulting in an increased burden in that shelter.

Additional revenue streams should be investigated. Increasing license renewal is an ongoing effort that has resulted in only a 1.5% increase in licenses over 2011-12 despite spending over \$170,000 per year in salary and benefits to Responsible Pet ownership canvassers. The cost-benefit ratio of these positions should be evaluated. Outreach and marketing efforts could be expanded or outsourced to a third party.

<http://www.petdata.com>

Adding fee for service programs, such as low cost vaccine clinics, could be considered. However there was some indication that the County could not sell services for a profit, thus making this endeavor pointless.

The County will need to give thought to if they want, or should be, in the animal services business. Due to the high cost of labor of SBCAS there is a concern that a County operated shelter may not be the most efficient business model to serve the public and the animals in the community.

If the County is committed to providing Animal Services to the community, additional funding will likely be needed to add key positions.

Many options can be considered to provide cost effective animal services to the community:

1. Privatization of shelter services (all or part) who then engage in a city contract
2. Turning animal control over to local law enforcement
3. Joint Powers Authority with neighboring communities
4. Consolidation of services -
 - One shelter and central dispatch serving the entire county
 - Two shelters and one central dispatch serving the entire county

With the Lompoc shelter being 24 miles from Santa Maria, it is questionable whether this structure is needed. Lompoc only did 365 adoptions in FY 14, 15% of total adoptions, and 19% of annual intake.

There is an apparent expectation of the community to adequately fund SBCAS, yet with all governmental agencies, the cost of doing business is high. Alternative business models should be investigated to ascertain if County management and responsibility is the best model.

This report identifies many improvements that need to be made to correct a system that seems to be causing a great deal of distress within the community. Some of those improvements are operational and others capital and budgetary. The strategic plan should set the course for budgetary decisions.

Appendix 15.A Yolo County Animal Services Governance Study Sept 2013



SANTA BARBARA COUNTY ANIMAL SERVICES

PROGRAM ASSESSMENT

American Humane Association

*16. Marketing,
Public Relations,
Customer Service*

16. Marketing, Public Relations, Customer Service

16.1 WEBSITE, SOCIAL MEDIA, MARKETING

Observations:

The website for the Santa Barbara Animal Services is found within the infrastructure of the County website and immediately populates in search engines results.

The content of the website and its navigation is user-friendly and identifies appropriate resources for visitors including disaster planning in both English and Spanish.

The website includes the contact information, hours of operations, and other relevant information for each shelter location.

The website uses PetHarbor which is the search engine for Chameleon database which allows visitors to search found animals and potential pets. Users might easily pass over the three hyperlinks to each individual shelter that are listed immediately beneath the Lost and Found title. It is not easily understood that the user must click on each shelter to review their inventory.

The website is clean and clear and within the branding parameters of the county's website.

The website allows dog owners to renew dog licenses on line, a convenient feature that has enhanced licensing efforts. In 2014 web license sales were about 20% of overall efforts and has increased exponentially since it was launched. The animal services software system, Chameleon also allows a user interface that would enable people to file animal related complaints and post lost and found animals. This feature was not currently utilized. In addition there is no ability for volunteers to submit applications online.

A Twitter account was not found. Santa Barbara County Animal Services has a Facebook page with more than 1,300 followers. The Facebook page did demonstrate a varied content management strategy but engagement is low due to limited number of followers. The Facebook page is not listed on the County's website so there is no cross promotion of the social media tool.

The Facebook page featured photos of pets being reunited with their owners, announcements about upcoming events, stories about adoptions, and photos of pets available for adoption. The content appears to be relevant .

The trend was to post a few times a week, which is sufficient; however, with a limited following of 1,300 in a community of more than nearly half a million, the postings aren't receiving significant impressions or engagement.

Active adoption promotions were not consistent, especially with long term residents.

Recommendations:

- Full utilization of Chameleon software integration to website
- Initiate monthly adoption promotions highlighting harder to adopt animals
- Increase social media engagement by employing best practices of content creation, increasing



constituencies, and cross promotion of social media on the County’s website.

- Issue an RFP for a local marketing agency or university program to prepare a strategic social media plan at no cost to the agency. This could easily be a community service project for a graduate level marketing student. Here is a link to a social media RFP example:

<http://istrategylabs.com/2013/10/example-social-media-agency-rfp/>

Discussion:

There are several free webinars available for social media found on the internet. Specifically in the animal welfare sector, ASPCAPRO.ORG offers several free best practices blogs and webinars that offer that can help increase constituencies and engagement. Social media functionality updates often which requires constant attention to environmental changes especially in Facebook. Here are several free webinars worth reviewing:

<http://aspcapro.org/webinar/2013-03-13-000000/trail-blazing-facebook-save-more-lives>

<http://aspcapro.org/resource/shelter-management-marketing-media/using-social-media-9-donts-and-giant-do>

<http://aspcapro.org/webinar/2015-01-13/engage-your-audience-social-media>

<http://aspcapro.org/webinar/2014-08-12/maximizing-facebook-mega-match-thon-success>

<http://aspcapro.org/blog/2013/08/02/social-media-201-increase-rto-using-twitter-and-chameleon>

Appendix 16.A Adoption Promotions Guide

Appendix 16.B Animal Farm, Best Practices for Marketing & Advertising

16.2 PUBLIC RELATIONS AND MEDIA

Observations:

Animal Services follows the media inquiry policy of the Public Health department. Jan Glick serves as the primary spokesperson while Susan Klein-Rothschild is the Public Information Office for the Public Health Department. Stacy Silva drafts press releases and works with the media and oftentimes other staff is used for media depending on their expertise. Both Jan and Stacy have received media training through the county whereas the officers being interviewed are coached prior to the interview by Jan or Stacy.

This is difficult to ascertain as media clips aren’t catalogued. The Director (Jan Glick) expressed concern about the agency’s reputation in the community and she would like to improve the public’s perception of the agency and further engage the community.

Over a period of six months, there were several press releases issued from the County regarding pet related issues. The most recent animal services related news release issued by the County was in to encourage adoptions during the holiday season. Prior to that release an October 15, 2014 release was distributed related to the increase in Parvovirus in northern Santa Barbara County. In September 2014, a news release was issued about October being National Pit Bull awareness month. Earlier in September, a joint adoption promotion between BUNS and Santa Barbara animal services was issued. Another press release was issued in early September regarding the overcrowding in the Santa Barbara animal shelters calling for citizens to “Don’t Shop, Adopt” adoption. On August 27th, a public meeting was held to garner comment on the new



adoption partner program agreement policy. Earlier in August, a press release regarding the importance of spay/neuter was issued. In July, a news release about a License/Microchip/Vaccinate clinic being held in Goleta was also issued. There was a four-month gap between the March press release regarding dog bite prevention and pet safety.

Each Wednesday, a vaccination clinic is held at the Santa Maria shelter that offers vaccinations, licensing, flea treatment, worming, and microchips. This information is found on the County's website but it is unclear that you need to click on the photo which then opens up to another page explaining the vaccination clinic. This needs to be remedied as most users won't understand to click on the photo of the flyer.

Aside from the vaccination/license/microchip clinics, there didn't seem to be any additional programming. Some of this is due to the lack of resources and opportunities.

This is a collaborative effort between Jan Glick, the Director, and Stacy Silva, the community outreach coordinator.

Recommendations:

- Issue an RFP for a marketing agency to provide a pro bono integrated marketing plan. Develop an annual marketing and community outreach plan that includes an integrated mix of publicity, social media, community events, adoption promotions, and other deliverables. A comprehensive marketing plan can also be prepared by a college-level class from a community college or university as a class project that will serve as portfolio-building for the students.
- Conduct a job audit including a scope of service analysis for the Community Outreach position to determine objectives, benchmarks and priorities based that are within realistic deliverables based on the volume of animals and volunteers.

Discussion:

With multiple volunteer organizations affiliated with the department, the agency brand is stifled and confusing to the public. Upon entry into the Santa Barbara facility, there is competing signage which further exacerbates confusion for citizens. A marketing plan can establish branding parameters and graphic standards to help enhance visibility and a consistent identity.

16.3 COMMUNITY RELATIONS

GENERAL OVERVIEW

A desire and intent to work with the community through collaboration and partnership is evident through the current systems and structures in place at the agency. However, many of the structures have been implemented in reaction to complaints or concerns from citizens rather than a comprehensive strategic planning process. There has been no formal recent market research conducted to ascertain general public perceptions of the agency. There is a long history of strained relationships between various community groups and the agency. Interviews of current employees, volunteers, and community group members indicated a history of misunderstanding, unrealistic expectations, and mixed messages from various internal and external stakeholders.



Without a strategic marketing communications and community engagement plan, it becomes difficult to determine areas of priority and focus for the agency leading to reactionary efforts. The Community Relations programming is under supported and overburdened with one Community Outreach Coordinator position responsible for multiple programs including foster care, adoption partner relations, animal transfers and transport operations, volunteer program oversight, media relations, social media management, community event programs, and other deliverables that exceed the realistic scope of one position for a three campus agency. A new budget allocation for a second Community Outreach Coordinator was approved the previous fiscal year for the Santa Barbara shelter location but staffing the position has proven difficult given that at least two employees resigned their positions within months of beginning the position.

EXTERNAL RELATIONS AND STRATEGIC PARTNERS

Observations:

There are several external relationships and strategic partnerships associated with the agency specifically affiliated with the Santa Barbara and Lompoc campuses including ASAP, BUNS, K-9 Pals, DAWG, and CAPA. Each of these affiliated groups are associated with the agency in some type of operational capacity whether it be providing supplemental veterinary care to adoption of animals to volunteer support to resource assistance. Given the investment these groups have made in the agency over the years, speaking with representatives and members was prioritized during the onsite evaluation. Additional feedback was solicited via email as well through in-person interviews. Feedback from local humane societies and other humane organizations was also vital to capturing stakeholder concerns.

Stakeholder feedback revealed overall dissatisfaction with the management of animal services. Concerns expressed ranged from under-skilled staff providing poor customer service to a perception of apathy from the employees to an environment of permissible bullying from volunteers. Other issues raised included criticism of the veterinary program and how animals were receiving resources at the different shelters. There was a consensus among the stakeholders that the Lompoc shelter requires the greatest level of resources given the community served yet continues to receive limited staffing and resources. There are significant feelings of distrust between affiliated groups and the agency staff. Examples of communication breakdown, hostility, and dismissiveness from staff were shared during the stakeholder meeting. Volunteers feel unappreciated and resented in addition to feeling run-off by staff members. During the stakeholder meeting, attendees conveyed their belief that staff did not have the appropriate training or tools to do their jobs. When asked how to best rectify the situation, the overwhelming recommendation was to outsource the animal sheltering program to nonprofit groups better suited to provide animal welfare services.

Interviews with staff also revealed a significant level of distrust and conflict between the affiliated groups. Several employees felt that political influencers led policy and procedural decisions rather than having a supportive and appropriate program infrastructure. Each affiliated group provides specific assistance for a certain area which impacts operational programming differently at each campus resulting in erosion of program integrity and confusion between staff members, the public, and leadership. As differing levels of county management engage in the operational functions and decision-making – including euthanasia

approvals – a message of distrust and lack of confidence is repeatedly relayed to the staff. Having a responsive and transparent relationship with constituencies is good practice for public officials; however, when decisions are made in reactionary mode and administration is usurped from the program managers, the integrity the program is lost and becomes dysfunctional.

Feedback from other area shelters and organizations relayed a lack of trust that the agency is able to function at appropriate service capacity. It was conveyed through interviews that historically subversive actions from county administration as well as public officials has created a systemic dysfunction that has contributed to program enervation. Until the systemic issues are resolved and public policy administration is returned to the personnel responsible for delivery, the cycle will continue.

There were numerous stories citing historical and current concerns. Each person interviewed shared a personal experience they felt demonstrated their lack of confidence in the agency's ability to provide a program of quality animal care. Examples included dissatisfaction with the veterinary care administered, the communication inconsistencies between internal and external parties, the lack of responsiveness from employees and the inconsistencies in animal care and volunteer management.

Each interview resulted in complaints and significant disappointment regarding the relationship and the agency program resulting in a deduction that these relationships require major repair or severance.

It didn't appear that conflict resolution solutions have been recently employed or have been effective to resolving long-term issues, perceptions, and relationships.

The relationships between the agency and outside partner groups are at best inefficient and at worst an egregious example of dysfunctional operations leading to compromised animal care and health and mismanaged public health policy. The stated mission of Santa Barbara Animal Services is to establish and maintain a safe and healthy environment between animals and humans in Santa Barbara County. When the professionals charged with administering that public health policy are required to seek permission or approval from outside volunteer groups who have been allowed to influence euthanasia decisions, veterinary care, behavior evaluation, and other program specifics, a lack of professional accountability develops and program efficacy is compromised. When volunteers or representatives from the associated groups seek and receive policy and protocol exceptions from county management above the Animal Services Director level, the operating decisions made by the county animal services personnel are undermined. It is the opinion of the American Humane Association evaluation team that a repeated pattern of undermining the staff responsible for administering the county's policies has led to an environment of dysfunction and debilitation that should be immediately rectified.

Recommendations:

The need of a third party facilitator is highly recommended before embarking on the following suggestions.

- In order to regain program integrity and appropriate administrative oversight, the agency should evaluate all partnerships and create a standard Memorandum of Understanding or a contract that clearly outlines the roles and responsibilities of both the agency and the partner organization. These MOUs and/or contracts should be with the entire agency and not campus specific as unique deliverables to each campus leads to inconsistencies in policy administration and protocols

resulting in eroded program consistency. The MOUs and/or contracts need to be consistent and applicable to each partner to bring continuity of expectations and deliverables. The roles and responsibilities should be very clear and operational boundaries should be put in place immediately. For instance: Staff members should not have to seek outside approval from volunteers or organizations regarding the health and welfare of the animals in custody of Santa Barbara Animal Services. Volunteers or outside groups should have no decision-making authority over the health, behavior assessment, care, or final disposition of any animal in custody of Santa Barbara Animal Services.

- As a best practice for transparency and public accountability, volunteer or adoption partner organizations should have access to and receive full disclosures regarding the health and temperament of the animals available for transfer. Partnership groups should be able to make decisions within parameters of their own operational protocols as to whether or not they wish to transfer the animal into their custody. There should be no barriers to allowing adoption partners or rescue groups from transferring an animal from the custody of Santa Barbara Animal Services. This clarity of custody will enable more efficient decision making for health and behavior treatment.
- A veterinary care program should be appropriately funded by Santa Barbara County to ensure that the personnel, medicine, and necessary supplies are available to administer a minimum level of care by state standards. If Santa Barbara County cannot allocate funding for a veterinary medical team to oversee the health and care of animals at each shelter, animals exhibiting any type of medical issue, infection, or illness should be transferred out to a rescue group or partnership organization who can afford the medical care for the animal. More specific recommendations regarding an appropriate veterinary program are found within this report.
- Remove the volunteer seat from the Care and Evaluation Committee so that lifesaving pathways can be identified by staff. Once a professional assessment has been conducted, the findings can be shared with outside rescue groups who can choose to take custody of the animal and provide lifesaving resources.
- Set performance standards for each employee position, identify qualifications and criteria for hiring, provide training for the employee, give the employee tools necessary to complete the job, and provide feedback on performance that leads to a culture of accountability.

Discussion:

The adversarial relationships between volunteers, outside groups, and the staff at the agency are exacerbated by the allowance of volunteers playing a role in operational decisions. Operational decisions must be made by staff who are experienced, trained, and trusted to fulfill the mandates of public health policy in animal services. Removing the ability for staff to make decisions or placing staff in a position where their decision are continually questioned by volunteers is an unrealistic burden that leads to lack of accountability and policy and protocol inconsistencies.

16.4 CLIENT RELATIONS

HOURS OF OPERATION

Observations:

For all business services: Santa Barbara Shelter Hours were Monday through Friday 9 a.m. – 4:45 p.m.; Saturday 10 a.m. – 4 p.m. Lompac Shelter Hours were Monday through Friday 9 a.m. – 4:45p.m. (Closed for lunch 12:30 – 1:30 p.m.) and Saturday 10 a.m. – 4 p.m. Santa Maria Shelter Hours were Monday through Friday 10 a.m. – 4:45 p.m. Saturday 10 a.m. – 4 p.m. All shelters were closed on Sunday.

Note: Staff members were on site during business hours and arrived for early morning staff meetings at each facility; however, none of the three shelters have a time clock to track non-exempt employee hours which leads to discrepancies in accuracy. For example, members of the evaluation team witnessed a discussion between a supervisor and an employee regarding time actually worked.

Recommendations:

- Purchase, install, and implement appropriate employee time tracking device (time clock).
- Extend evening hours 2 days a week. Open later on those days
- Open Sundays

Discussion:

While visiting one of the shelters, the evaluation team observed an employee justifying to a supervisor time actually worked to explain a discrepancy between what the supervisor had noted and what the employee believed was correct. Without accurate time logs for clocking in and out, the burden is placed on the employee and the supervisor to prove start/end times and hours actually worked. While time clocks are not required under FSLA (Fair Standards Labor Act), accurately tracking employee time consistently throughout each shelter and will help identify trends, provide better record keeping for wage/labor concerns, maintain sick time/vacation/hours worked more accurately for payroll purposes. This will also eliminate a potentially adversarial conversation between supervisors and employees thereby increasing employee morale. This is an article from the *Small Business Chronicle* that outlines the pros and cons of using time clock:

<http://smallbusiness.chron.com/pros-cons-time-clock-workplace-11026.html>

With most citizens working traditional hours in the community, offering citizens services that are more aligned with retail such as closing at 7 p.m. rather than 4:45 allows opportunity for higher or faster reclaim and adoption rates. Weekend hours will increase adoptions. Closing for an hour at lunch at the Lompoc Shelter also places a barrier for citizens to retrieve their lost pet or view adoptable animals if they are coming on their lunch hour. Many animal shelters across the nation have at least one evening of extending hours until 7 p.m. to accommodate citizens with traditional work schedules

http://www.sbcounty.gov/dph/acc/programs/shelter_services/shelter_services_hours.asp

16.5 CUSTOMER SERVICE

Observations:

The interactions observed at all three campuses between staff and customers were appropriate and respectful. Employees were also polite and appreciative with each other during observed interactions.

Activities that increase customer perception, such as call back after adoptions, were not routinely done. No client satisfaction surveys have been conducted, though this is a function of the Chameleon Software system. In depth owner surrender counseling was not consistent.

Santa Barbara

On Monday, January 12, 2015, an employee was responsible for working the front desk and answering incoming phone calls. The observed employee was pleasant, informative, and worked to solve problems for the callers. The employee was the only one providing customer service at the front desk and on the phone which was challenging with diverted attention.

Santa Maria

On Tuesday, January 13, 2015 at 2:20 p.m. an employee returned a phone call to a person interested in adopting a border collie. His tone was pleasant, polite, and guest-centric while he left the customer a message on their voicemail. He addressed their question/interest and provided a call back phone number.

During another customer interaction, an employee spoke with an interested adopter who rented their home. He asked whether the landlord was aware of her interest in adopting. He then explained how he needed to call the landlord to make sure it was okay for her to adopt. The employee did a nice job of connecting with the customer and made his interaction with her personable. He then placed a call to the landlord. The employee explained that she was the first applicant at this point pending the landlord returning the call and issuing approval. He thanked the citizen for coming down.

Lompoc

On Wednesday, January 14, 2015, an employee was observed assisting a citizen who came to find their lost dog, a Chihuahua in kennel #22. He was extremely patient and provided her with pertinent information, counseled her about microchipping (Home Again microchip), and told her that this was the second time the dog had been brought to the shelter. He explained that it was going to cost \$83 for Return To Owner fees and explained each additional day was \$13. The employee then carried the dog out to the front lobby reunited the citizen with the dog. He also asked her how the dog was escaping and offered advice regarding how to keep the dog from escaping the fence. The employee was calm, professional, and thorough with his customer service.

Recommendations:

- Provide a comprehensive customer service training to all staff this is to include owner surrender counseling.
- Establish post-adoption call back system



- Use Chameleon software system and an online survey through the website, to survey patrons, post adoption
- Set a customer service benchmark for excellence and post results on line

Discussion:

American Humane conducted a community stakeholder and volunteer survey which overall had good things to say about the agencies customer service and employee demeanor. However, it is too easy to get overshadowed by those more outspoken nay-sayers that can unduly influence public perception. By routinely surveying your patrons you can get a more accurate reflection of the job you are doing for the community.

An excellent resource for customer service training is Animal Friendly - Customer Smart by Jan Elster and can be ordered on line at <http://www.shelterskills.com>

Appendix 16.C Adoption Counseling Guide

SANTA BARBARA COUNTY ANIMAL SERVICES

PROGRAM ASSESSMENT

American Humane Association

*17. Information
Technology*

17. Information Technology

17.1 TELEPHONE SYSTEM

Observations:

Santa Barbara

An after-hours voice mail message was recorded instructing the caller on the hours of operations and directions for the animal shelter; however, there were no instructions on how to handle an emergency veterinary situation with an owned or lost pet.

Santa Maria

An automated message offers options for the caller.

Lompoc

An outgoing message in both Spanish and English outlined hours and options for callers.

If there is a PA system, it was not in use at any of the facilities that could be heard easily. Employees used walkie-talkies to communicate throughout buildings.

Recommendations:

- Provide directions for emergency veterinary care for individuals calling about a found animal during closed hours.
- Consistency in messaging that includes Spanish at all locations.

Discussion:

Including directions for citizens when they've found a lost pet after normal business hours will help mitigate confusion and direct citizens accordingly. Providing a bilingual message is conscientious to the demographics of the county.

17.2 COMPUTER SYSTEMS AND SUPPORT

Observations:

Laptops utilized in the field are outdated. Models running Chameleon on 3G networks function poorly and often drop connection or freeze requiring a full system reboot that may take 30 minutes or longer via remote connection. In some areas, data connectivity is non-existent rendering the laptops useless for network access. One laptop was observed running on a 4G network. The ACO noted that this unit seldom failed and was able to function in many areas where other 3G units would not respond.

The Public Health department has IT support that services over 500 people. One person in the IT department is assigned to Chameleon, the shelter management software system. One of the concerns expressed from interviewed staff was the slow turn-around time for Chameleon requests being processed. For example, one employee explained that a request for Chameleon support was made over a year ago but that request has not yet been fulfilled.

Supervisors were not aware of when the server is backed up but it is located at the Public Health department. Chameleon has been in use since 2000.

Recommendations:

- Replace existing ToughBooks with updated models operating on 4G network or consider transitioning to a similar mobile platform such as a Microsoft Surface Tablet.

Determine a routine Chameleon support/helpdesk schedule that enables the staff to have the tools and updates necessary to successfully use the animal inventory database software.

Discussion:

Being able to use the software program effectively and with updates will allow for more efficient animal inventory. In case the county doesn't have a ticketing systems, there are free helpdesk management tools available for organizations and companies to use such as Spiceworks that will help manage and prioritize requests so that needs are met for employees encountering IT issues. Learn more about Spiceworks here: <http://www.spiceworks.com/>