THE IAABC JOURNAL
An IAABC Foundation Publication

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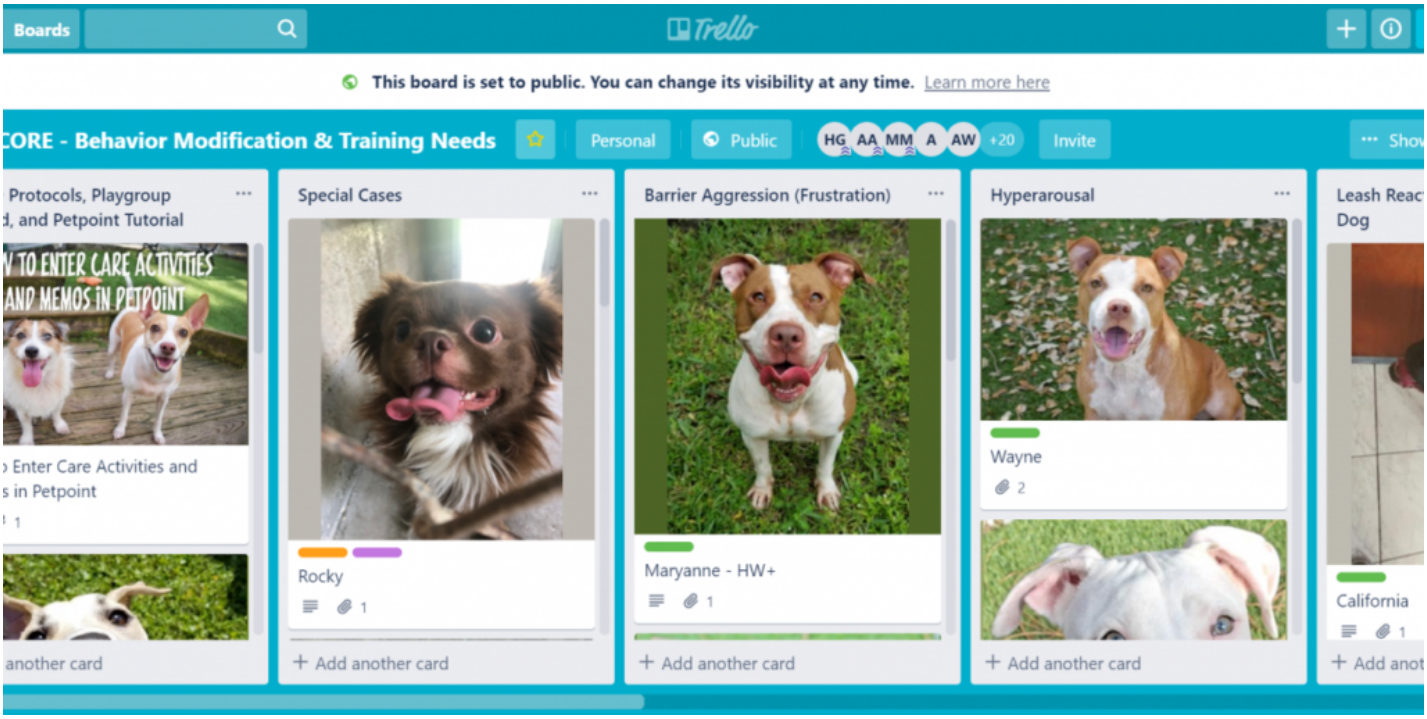
Communication and Documentation in an Animal Shelter

Written by Heather Gibbs, SBA



It is the responsibility of the Behavior and Training Department at our animal shelter, the Humane Society of Pinellas (HSP), to create, communicate, and implement behavior modification and training plans for the animals in our shelter's care. Staff and volunteers are trained in animal behavior and the implementation of these plans.

The communication methods detailed in this article allow us to track how the Behavior

and Training Department is reaching our shelter's population, where there are needs for improvement, and exactly what needs to occur for each animal to keep them at their healthiest while in our care.

Purpose of communication methods

This article details a large amount of information and a variety of programs – it is not my intention to overwhelm! Here is an overview of why we use these different communication methods, before we dive into the *how*:

1. Petpoint: Stores primary documentation and data entry. Trained volunteers are also granted access, though this platform is primarily used by staff. If your organization does not utilize Petpoint, you may find features in your management software that can allow you to accomplish the same functions. The purpose of Petpoint data entry of training and behavior modification:

- Quantify training and behavior modification provided
- Collect detailed descriptions of training and behavior modification provided
- Store information in a central location
- Communicate recommendations to staff for adoption counseling purposes

2. Color identification and signage: Provides immediate communication to handlers looking at a kennel.
3. Trello: Provides a summary of most urgent and long-stay animals in need of training and behavior modification. Can be accessed by computer or on the smartphone app. Staff and volunteers generally review Trello prior to starting their shift.
4. Facebook groups: Provide a platform for team-building and staff and volunteer engagement in behavior modification and training. Staff and volunteers generally contribute with posts following the end of their shift. This is not a required form of communication but tends to be popular!
5. G Suite: Provides a platform to organize and share large files, training information, documents, spreadsheets, and surveys. Generally created by Behavior and Training Department staff and shared with other staff and volunteers.

Petpoint

Primary documentation and communication at our shelter takes place in the animal shelter data management software Petpoint. This article is not intended to be an

extensive Petpoint tutorial, but rather an overview of how we use Petpoint's functions to track behavior modification and training data. Petpoint data entry occurs either during or at the end of a shift. It is strongly encouraged that data is entered the same day that the session was held, or when the behavior observation occurred.

This section reviews the use of these specific functions in Petpoint:

- Care activities
- Behavior tests
- Memos
- Pet ID
- Placement recommendations

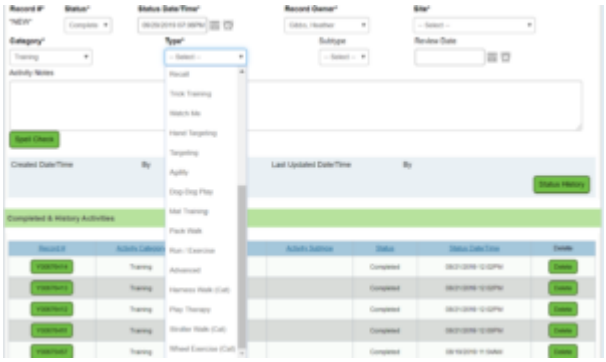
You may find similarities in these documentation methods that could also be applied to your own organization's software. The Petpoint functions detailed in this article are similar to functions listed below from these alternate programs:

- Shelterluv
  - Behavioral>Activity (Similar to Care Activity)
  - Behavioral>Behavior Check (Similar to Care Activity)
  - Memo (Same Feature)

- Animal Shelter Manager
  - Diary (Similar to Memo)
  - Log (Similar to Care Activity)

The Care Activity function is used to track how often an animal participates in a certain behavior modification or training exercise, or how often they engage in a playgroup. In the cat program, Care Activity is used to document the frequency of harness and stroller walks. It also identifies which staff member or volunteer provided the session, in addition to a timestamp.

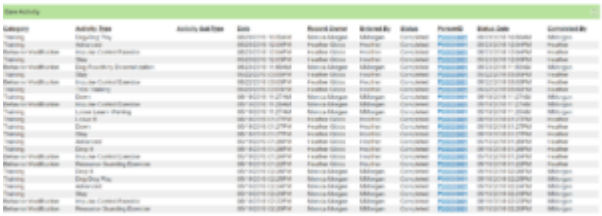
Examples of Care Activity categories and types that we customized to suit our needs (click the images to expand):

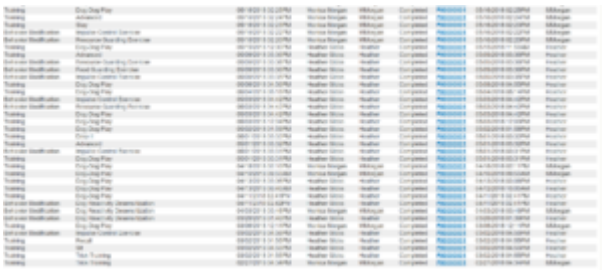


Care Activity data can be generated through Petpoint Reports, which allow a user to calculate how the Behavior and Training Department is functioning and how many animals are being affected by the program.

Care Activity entries also provide a quick overview of an animal's progress (or deterioration). Here, you can see that Talli was initially demonstrating aggressive behavior toward other dogs on intake, but participated in regular dog reactivity

desensitization exercises, and was ultimately participating in off-leash playgroups. Success!





The Behavior Test function is used to document behavior observations collected through low-stress handling assessments by Behavior and Training Department staff.

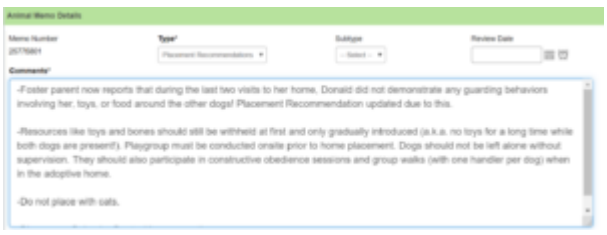
We developed our behavior assessment, *Shelter D.O.G.G.* (Shelter Dog Observations

We developed our behavior assessment, *Shelter D.O.G.S.* (Shelter Dog Observations Gathered Gently) to provide qualitative data on a dog's behavior in the shelter. The assessment does *not* include any invasive handling, pinching, squeezing, etc. Rather, we observe the dog in the kennel, take them for a leash walk, and pet and play with them in a relaxed manner. This information is used to determine a dog's handling level (more on this later), in adoption counseling, and to indicate if any immediate behavior modification and training are necessary.

It is important to note that we do not use behavior assessments alone to determine an animal's outcome. For more information on the unreliability of using behavior assessments to determine outcomes, see the ASPCA's Position Statement on Shelter Dog Behavior Assessments (2018).

The Memo function is used to detail objective information about an animal's behavior or training session. Staff and volunteers are trained to document information objectively to provide consistency and clear communication.

Special Memos, called Placement Recommendation Memos, are used to communicate placement suggestions to adoption counselors. This Memo type is used as a summary of behavior and training information entered into a pet's file. If information is not yet collected on a pet, that pet may not have Placement Recommendations. This allows Adoption Counselors to quickly identify relevant behavior information, which is then shared during the counseling process.



The Pet ID function details what handling level and walking equipment an animal

requires. This process is detailed below in *Color Identification & Signage*.

After a dog's participation in playgroup or training, a staff member or volunteer will enter both a Care Activity and Memo detailing what occurred. Behavior Tests are generally only entered once, following the initial behavior assessment. A Pet ID is also entered following the animal's behavior assessment but may be updated during the animal's shelter stay. Placement Recommendation Memos are added as information is collected that may help adoption counselors best advocate for that pet. These are often entered on intake and updated as needed.

Color identification and signage

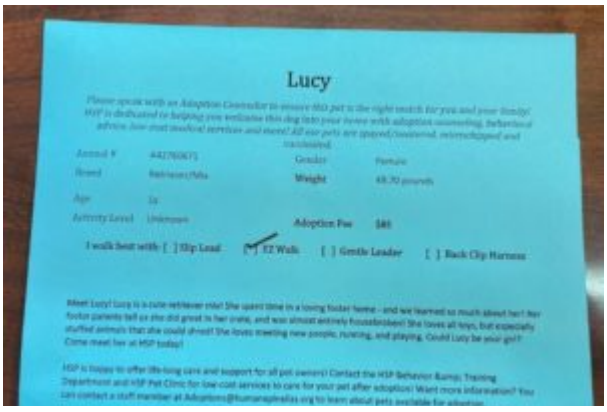
Dogs and cats are categorized by a three-color system that indicates which staff and volunteers are permitted to handle them. This information is posted directly on the animal's kennel and must be reviewed prior to handling an animal.

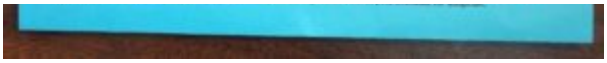
Blue: May demonstrate no or mild behavior problems in the shelter. All staff and volunteers are permitted to handle.

Green: May demonstrate moderate behavior problems in the shelter. Staff and volunteers must have completed intermediate-level training to handle.

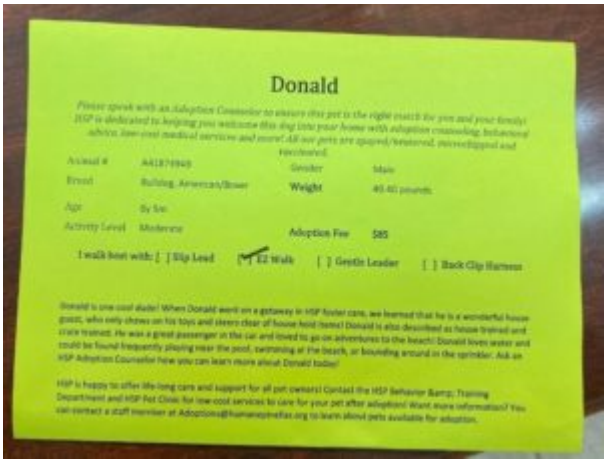
Purple: May demonstrate more complex or serious behavior problems in the shelter. Staff and volunteers must have completed advanced-level training to handle.

Behavior and training staff determine an animal's identification color and print the entire kennel card on paper that color. An animal's color is also identified in Petpoint as a Pet ID and in Trello as a Label.





A blue kennel card



A purple cat kennel card

Mabel is a blue-level dog and her designated walking equipment is an Easy Walk no-pull harness: *This is the Pet ID field in Petpoint.*

During his initial evaluation, Tundra was issued blue identification. After observing changes in Tundra's behavior, he was issued a higher-level identification as a green:

Trello

In this article, Maddie's Fund shares how one shelter uses the free task management software Trello to organize and promote their foster dogs in need of placement. After reading the article, I was inspired to use Trello to communicate behavior and training needs at our shelter. Trello is easily accessed online or through their smartphone app. Trello is generally reviewed prior to the start of a shift, so that staff members and volunteers can have a greater understanding of the animals' needs for that day.

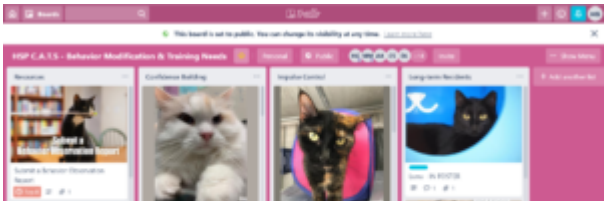
In our program, Trello is utilized to highlight the urgent animals in need of behavior modification. Only urgent animals or long-term animals are listed here, because Trello

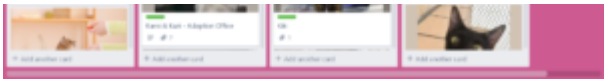
does not automatically sync with Petpoint and requires additional manual entry. Trello is updated once weekly, or as needed with more urgent animals, by Behavior and Training Department staff.

You can view live links of our Trello communication boards here:

Dog Board on Trello – The board was given the same name as our Dog Volunteer Facebook Group page. Dog Volunteer C.O.R.E. stands for the *Dog Volunteer Correspondence for Organized Rehabilitation and Enrichment.*

Cat Board on Trello – The board was given the same name as our Cat Volunteer Facebook Group page. "HSP C.A.T.S." stands for the *Correspondence and Training in Shelter* cats.

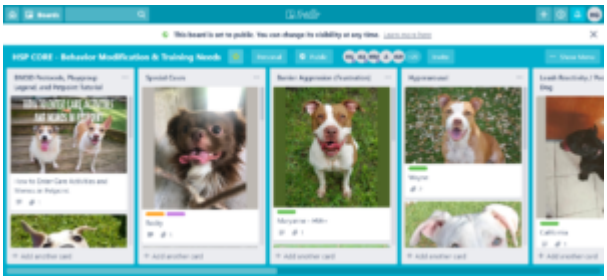




Trello allows for customization to suit your needs. In Trello, columns are called “lists” and each item in each column is called a “card”. We have detailed our most common behavior problems as titles in each list. Under each list, you can find a card for each animal that is currently in need of that behavior modification protocol.

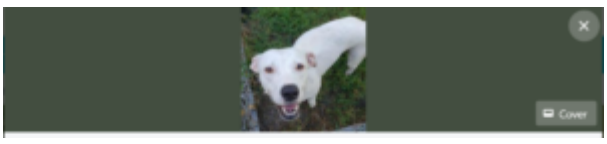
In the first list on the far left of the Dog Trello Board, cards are posted with the following information:

- Standard behavior modification protocols: These are tailored to each pet as needed.
- Shorthand codes for playgroup play styles: This ensures everyone is using the same terminology to summarize a dog-to-dog interaction style.
- A video tutorial: How to document training information in Petpoint
- Playgroup schedule: This is a link to a Google Sheet that shows playgroup coverage for the week.



Trello allows for staff and volunteers to quickly reference behavior and training needs on one screen, in one location. Individualized comments are also detailed under a card, as needed, and we have used the color “labels” to coordinate with the colors used in our dog and cat volunteer programs.

Precious is located under the “Leash Reactivity/Poor Dog-to-Dog” list and is a green-level dog. In her description, you can see that her behavior is improving! This quickly communicates what phase Precious is in with her behavior modification.



Rocky is under the “Special Cases” list. He is in bite quarantine and is a purple-level dog. We have indicated here that Rocky should participate in behavior modification for resource guarding.

Facebook Groups

Facebook Groups are moderated by Behavior and Training staff and are provided for both the dog and cat volunteer programs. Staff and volunteers generally post to the Facebook Group at the end of their shift, if they have content to share. Facebook Group communication provides a platform for the following:

- Video: Demonstration of behavior modification and training exercises, progress reports, and playgroup pairings
- Pictures: Highlight animals in need or collect content for social media
- Organization: Collection of saved video/photo demonstrations, educational articles, guidelines, and success stories
- Engagement: Hold contests and schedule training events to further promote volunteer engagement and to accomplish behavior modification and training goals

Video

Posting educational videos, and encouraging staff and volunteers to do the same, can provide engaging content. By posting progress reports, everyone can learn together and

discover what works best for an animal. Handlers can also receive constructive feedback on a training or management method as they learn. Videos can be posted directly to Facebook or to Facebook from a YouTube link.

In this post, a video illustrates how to provide an engaging, focused walk exercise for the shelter dogs offsite. Video available to watch here.

Pictures

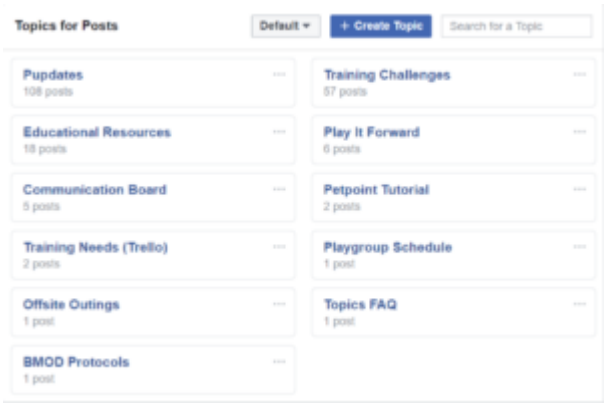
Cleo the cat required regular mental stimulation and training to manage her overstimulation during petting. Due to her extended length of stay, trick training helped her stand out to potential adopters! Below, volunteers post about training Cleo to jump through a hoop:

Facebook Groups offer multiple options for organizing information:

Topics

Topics can be used to flag a post in a category. This allows users to select the Topic button they wish to see (e.g., Training Challenges) and view all posts that have been flagged under that category. Topics are not automatically generated and must be added manually to each post. Group administrators can determine the titles of Topics used.

Topics currently used in our Dog Volunteer Facebook Group (the feature is unavailable in our Cat Volunteer Group):



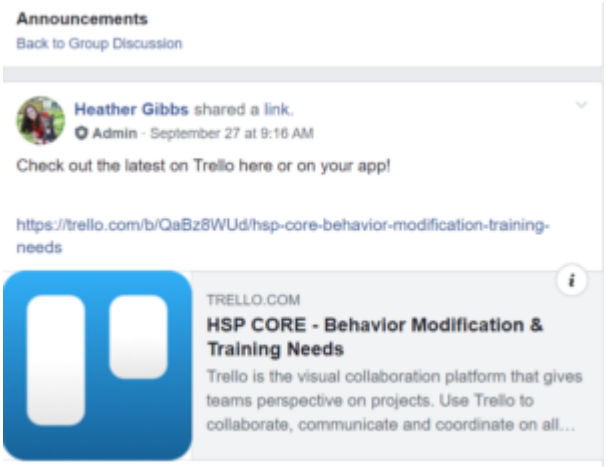
- *Pupdates* – Post-adoption updates, including pictures and video.
- *Educational Resources* – Educational articles, posters, and videos.
- *Communication Board* –- Weekly photos and text updates of our Behavior & Training Department white board, which is used to track how many behavior dogs received training and behavior modification that week.
- *Training Needs (Trello)* – A link to the Trello page,
- *Offsite Outings* – A link to a Google Doc containing guidelines for taking dogs on offsite outings.
- *BMOD Protocols* – A link to a Google Doc containing standard behavior modification protocols.
- *Training Challenges* – Posts containing training challenges for staff and volunteers to complete with the shelter dogs. Participants are encouraged to submit photos and videos of the challenge. A favorite challenge we had was “Behavior Mod & Training BINGO!”
- *Play It Forward* – Posts containing information about which dogs volunteers would like to donate toward to cover their adoption fees.
- *Petpoint Tutorial* – A link to a video tutorial of how to enter behavior and training information in Petpoint.
- *Playgroup Schedule* – A link to a Google Sheet containing the playgroup coverage for

the week.
- *Topics FAQ* – A post containing steps for how to access information through the Topic feature.

Don't have Topics available in your Group? Not to worry! There are several other organization methods available in Facebook Groups.

Announcements

Announcements can be used to pin a post to the top of the Group's page to highlight important information. We utilize Announcements to highlight new training challenges, the Trello page, and urgent pets in need of extra attention.



Albums

Albums can be used to sort and label photo and video content.

Hashtags and keywords

Hashtags can also be used to sort information in your Group. You may choose to determine which hashtags your group will use, then add them after each relevant post. By clicking on the hashtag, you can find a collection of every post in your group with that

By clicking on the hashtag, you can find a collection of every post in your group with that hashtag. You can also use the Search feature to search for keywords of text. This is particularly helpful when looking for content on a specific animal.

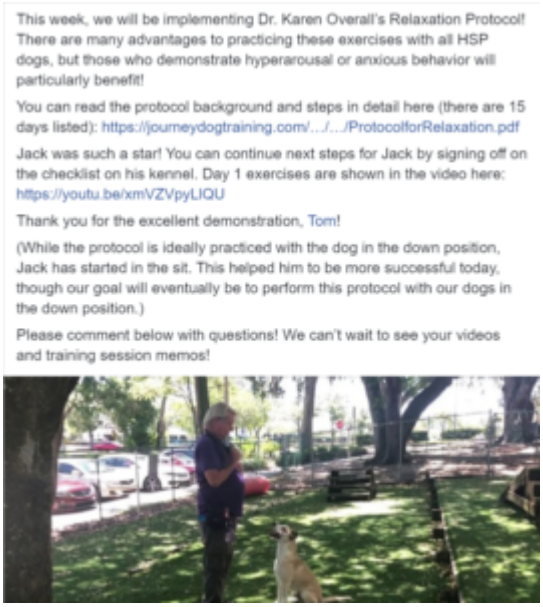
Engagement

Posting regular training challenges, training events, and educational material can keep your staff and volunteers engaged with behavior and training! By posting videos of exercise demonstrations, we can encourage staff and volunteers to do the same. Training challenges also allow for discussion of important shelter behavior topics and can offer a constructive outlet to coach handlers on their training techniques.

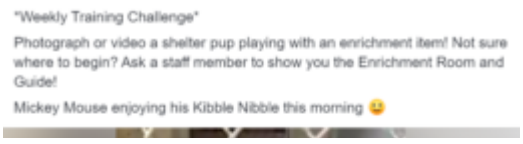
Here are some of the most successful challenges we have had:

BINGO – Participants were given a printed BINGO sheet and earned prizes for completion.

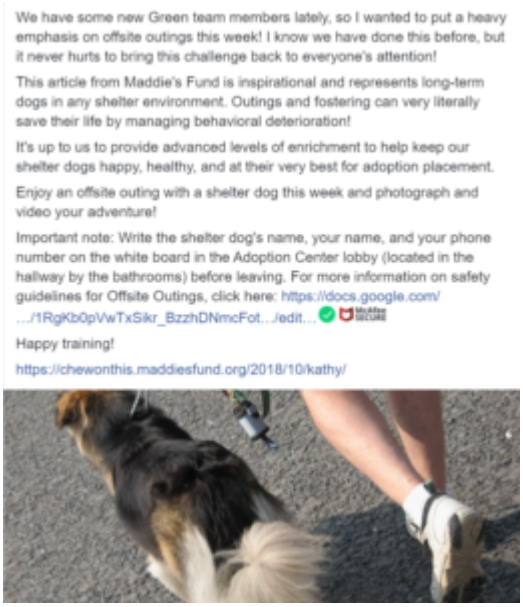
Dr. Karen Overall's Protocol for Relaxation (1997) – Participants were encouraged to complete the Protocol for Relaxation with shelter dogs and to build on each other's progress by posting videos of completion. Video of volunteer's submission can be seen here.



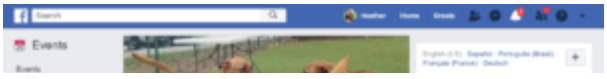
Enrichment – Participants were encouraged to participate in the enrichment program by issuing an interactive toy.

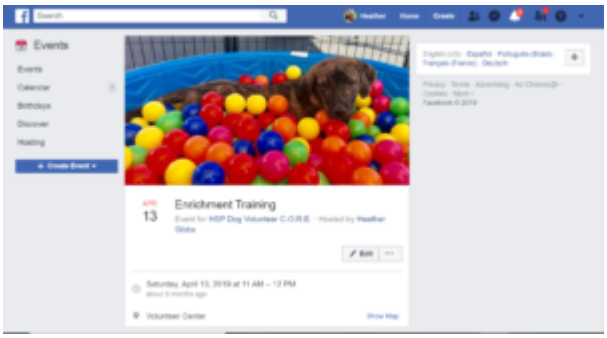


Offsite outing – Participants were encouraged to take a shelter dog offsite for training and decompression. This article from Maddie's Fund (2018) was posted as inspiration.



Additionally, Facebook Group events allow you to easily schedule staff and volunteer training sessions. Automatic reminders are sent as notifications to participants who indicate they would like to attend.





Google Suite (G Suite)

Google Suite (G Suite) allows for easy sharing of live documents, spreadsheets, presentations, and surveys. Behavior and Training Department staff members generally create the content in these mediums and share them with staff and volunteers.

My favorite aspect is that shared links can be sent to staff and volunteers and updated at any time by the content creators. For example, I can easily add or modify information provided in training program material or on the weekly playgroup schedule without needing to reshare the original link. You can also expire the link if you no longer wish to share that information with the original audience.

All these programs are available to view and edit in their respective smartphone apps as well, readily accessible while on the go at the shelter.

Here are some ways we use G Suite programs:

Google Docs

Contains behavior modification protocols, educational information, and program guidelines (e.g., Offsite Outing Guidelines, Standard Behavior Modification Protocols, etc.).

Google Sheets

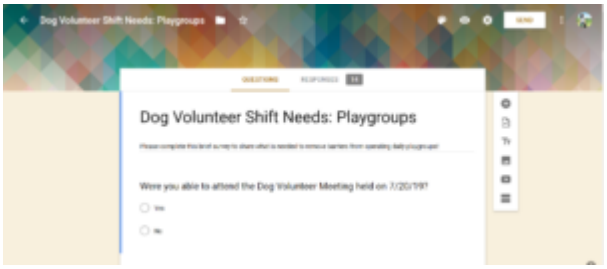
Displays shift needs for operating playgroups.

Google Slides

Contains large files, videos, and training materials.

Google Forms

Platform for survey administration; used to receive feedback from staff and volunteers regarding training and shift coverage needs.



Volunteer feedback

When surveyed in a Facebook Group poll about their favorite communication methods, volunteers indicated that they checked Trello first, followed by Petpoint, then the Facebook Group itself. The informal survey was posted in an effort to streamline communication and to determine if volunteers felt there were too many communication methods. Following the poll, we decided to keep all communication methods, as they served different functions.

Conclusion

Collecting behavior modification and training data in shelters can allow staff to better lead their behavior departments and implement changes necessary for growth and improvement. Information can be shared with the public to promote donations and foster support. Trends can be analyzed to ensure the protocols in place are effective.

Most importantly, the animals in our care benefit. By tracking a pet's behavior modification needs, preferred walking equipment, favorite reinforcement, or trained cues in the shelter environment, we may be able to provide a stronger level of support post-adoption in an effort to reduce return rates and ease transition.

In sharing this information, I hope to inspire animal shelter staff and volunteers to find methods of effective communication and documentation that will best serve their shelter's populations and allow them to further the incredible, life-saving work that they do!

Do you have questions about implementing these communication methods at your shelter? Please feel free to contact the author, Heather Gibbs, at HGibbs@humanepinellas.org for additional support.

Heather Gibbs holds credentials as a Certified Professional Dog Trainer – Knowledge Assessed through the CCPDT and a Shelter Behavior Affiliate designation through the IAABC. She currently manages the Behavior and Training Department at the Humane Society of Pinellas in Clearwater, Florida where she exercises reward-based training methods for shelter dogs and cats supported by the latest in scientific research. In her spare time, she enjoys frequenting theme parks with her fiancé, relaxing with her four dogs (Mitch, Eli, Eva, and Tori), and clicker training with her horse, Mike.

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