



Biennial Operations Survey Executive Summary, August 2018

INTRODUCTION AND INSIGHTS

The fields of animal welfare and animal care & control are constantly and rapidly evolving resulting in major changes for animals and people in communities everywhere. For that reason, The Association for Animal Welfare Advancement (*The Association*) felt compelled to begin collecting data from as many organizations as possible. These data will be used to benchmark the evolution of the industry and the treatment of key issues impacting animals and will enable us to track the momentum of our work in our communities.

Beginning in 2018, *The Association* fielded an extensive survey to capture operational information useful to humane organizations and municipal animal care & control agencies. A similar, less involved survey has been fielded every other year for approximately 20 years, and has become integral in benchmarking our successes, growth, and increased or changing services to the animals and communities we serve. A group of subject matter experts spanning the breadth of the industry spent a great deal of time overhauling *The Association* 2018 Biennial Operations Survey to reflect the current climate of our ever-evolving industry. All data was reported for calendar year 2017 or last completed fiscal year.

Member and nonmember staff from 287 organizations participated in the reported results. The majority of participants were from an animal shelter without a government contract (33%); animal shelter with a government contract (32%); and government animal services (23%). 95% were from the US; 5% from Canada. 38% (largest budget group reporting) were from organizations with an operational budget of \$1 – 2.9 million.

The Association plans to field this Operations Survey every two years. And, please note that *The Association* has, for many years, conducted and published a biennial Compensation & Benefits Survey. That will not change with the next Compensation & Benefits survey scheduled for production in early 2019.

It will be well worth the investment of time to review the entire summary report; however, below are a few notable findings from this important survey:

- While organizations use a variety of data collection methodologies for tracking their success (or “lifesaving rates”), the majority (58%) continue to use some version of Asilomar data tracking. The majority of organizations who participated are also collecting data consistent with the Shelter Animals Count National Database Matrix.
- A substantial percentage (45%) of those organizations responding to the survey continue to struggle with recruitment of veterinarians. Interestingly, 73% of respondents reported that they offer veterinary services to the public. And, of those, 24% offer spay/neuter services only, 57% offer wellness services and only 19% offer full veterinary services. This information will be particularly helpful to *The Association* as we continue to work on collaboration with the veterinary industry. Shelter medicine has become increasingly important as a viable career option for aspiring veterinarians.
- A high percentage of respondents offer diversionary services as alternatives to intake including referrals to other organizations, food banks, free or low cost spay/neuter services, behavior consultation and return-to-field. It will be interesting to track this trend in the next survey to help determine which services are

proving to be most impactful on either keeping pets and their people together or ensuring they are safe beyond the walls of the shelter.

- For the first time we inquired as to the types and levels of services provided to horses. We found that currently only 22% of respondents provide some level of care to equines ranging from hay/food relief to intake and sheltering. The vast majority of respondents, however, find themselves involved in investigating horse neglect and cruelty.
- Transport of companion animals from places of high supply/low demand to places of low supply and high demand has emerged as a major tool for saving lives. 80% of respondents participate in transport at some level (source, destination or both, or as a hub for distribution). This practice is expected to continue to be expanded.
- When it comes to free-roaming or “community” cats, the majority of respondents indicated that they participate in some level of programming. Most respondents reported that their local ordinances either support or remain neutral indicating a wave of public support for programs supporting community cats.
- Formal community coalitions now exist in 31% of our communities, and of those, 50% have aligned data tracking definitions with their community.
- Emergency preparedness and emergency services are on the rise. 87% of respondents are recognized formally as a player in the “*Comprehensive Emergency Management Plan*” in their community; 17% have a dedicated disaster response budget; and 100% have employees with emergency management training and credentials.

These are just a few high-level findings from a review of the survey responses. **The Association** encourages animal welfare professionals representing all aspects of the industry to continue to use this survey to make the best, most informed decisions to positively impact animals and people in their communities.

An overview of each data collection point follows. Members can gain a copy of the full survey results including regional and budgetary differences at this link: **The Association** 2018 Biennial Operations Survey (https://cdn.ymaws.com/theaawa.org/resource/resmgr/files/2018_files/2018_Biennial_Ops_Survey_Res.pdf).

DATA COLLECTION & DEFINITIONS

Most (42%) of the respondents use Shelter Animals Count and its Basic Data Matrix; 37% use both Shelter Animals Count and Asilomar Accords. Animal Tracking Software is used by about 90% (10% use an in-house or internal assessment), with the top software cited as PetPoint (45%) or Chameleon (19%); however, 50% of those shelters in the \$8 Million or more annual budget group use Chameleon.

Lifesaving rate averages for dogs and cats combined were 85% for all regions (95% for Great Plains US; 90% for Mid-Atlantic US; 89% for Midwest US; 91% for Mountain West US; 96% for Northeast US; 88% for Pacific US; 85% for South Central US; 86% for Southeast US; and 88% for Canada). Formulas used for tracking intake and outcome were as follows:

Asilomar Live Release Rate : (Live Outcomes / All Outcomes) – Unhealthy/Untreatable	44%
ASPCA Live Release Rate: Live Outcomes / Intake	15%
Other	15%
Asilomar “LITE” Live Release Rate: Live Outcomes / All Outcomes	14%
Save Rate: Intake Euthanasia (Euth) Outcomes / Intake	12%

SOCIAL MEDIA / MARKETING / FUNDRAISING

- Top social media platforms to post animals for adoption were the organization website (95%); Facebook (94%); Petfinder (77%); Instagram (70%); Twitter (56%); and Adopt-a-Pet (53%); organization website deemed the most effective

- 2017 revenue sources: #1 - donations (non-board or staff); #2 - animal control contracts; #3 – adoptions
- 31% had capital campaigns within the last five years; most had a goal of \$1 – 5 million; Facebook deemed most effective

Annual Giving All Sources

Corporate Donations	6%	Major Gifts	13%	Special Events	26%
Direct Mail	16%	Monthly Giving	6%	Unsolicited gifts	23%
Grants	13%	On-line giving	11%	Other (no info available)	22%

DISASTER SERVICES AND PREPAREDNESS

- 35% have "The Authority with Jurisdiction" for disasters/emergencies in their area
- 87% are recognized formally as a player in the "Comprehensive Emergency Management Plan" in their community
- 78% distribute materials throughout their communities on their website; 65% in printed materials
- 17% have a dedicated disaster response budget (46% of those with a budget have a budget of greater than \$20,000/year)
- 100% have employees with (US) Federal Emergency Management Agency or (Canadian) Public Safety & Emergency Preparedness emergency management training and credentials

SHELTER MEDICINE STAFFING AND SERVICES

The average number of veterinary staff/organization reported was 2.54 full time veterinarians; .91 part-time veterinarians; 3.36 certified veterinary technicians; and 1.63 contract veterinarians. 45% reported difficulty recruiting veterinarians, whereas 0% reported an issue retaining veterinarians. The level of veterinary care offered to shelter animals was reported as follows (average / organization):

	Only pain medications and/or "first aid" care	Humane euthanasia	Basic wellness (vaccines, parasite prevention, separate microchipping)	Diagnosis and treatment of common illness and injuries	Emergency / trauma care
All Respondents	20%	63%	65%	65%	51%

SERVICES AND POPULATIONS (AVERAGE / ORGANIZATION)

Services

- 31% operate a separate spay/neuter facility
- 13% operate a wildlife rehabilitation facility
- 55% provide field services
- 73% offer veterinary services to the public

Size

- 11,942 square miles served per organization; serving a population of 1,340,248
- Operate 1.5 shelters; own .2 spay/neuter vehicles, and 34,017 square feet of shelter space on 42 acres
- Employees included 52 fulltime; 14 part time; 620 volunteers; all adding up to 45,325 hours per year

Veterinary Care

- Public: 24% spay/neuter only; 57% wellness; 19% full veterinary clinic
- Total of 351,842 shelter cat/kitten and dog/puppy spay/neuter surgeries; average 2,361/organization
- Total of 230,238 owned (by public) cat/kitten and dog/puppy spay/neuter surgeries; average 1,758 / organization
- Total of 92,697 spay/neuter surgeries for community cats; average 702 / organization

Intake / Year

- Cats average intake (not including transferred in): 1,764; 206 transferred in

- Kittens average intake (not including transferred in): 1,127; 286 transferred in
- Dogs average intake (not including transferred in): 2,241; 464 transferred in
- Puppies average intake (not including transferred in): 403; 351 transferred in
- Horses average intake (not including transferred in): 5; 90 transferred in
- Rabbits average intake (not including transferred in): 95; 24 transferred in
- Livestock/other domestic animals average intake (not including transferred in): 227; 33 transferred in

Outcome / Year

- Cats average/organization adopted 1,014; transferred out 199; returned to owner 122; returned to field 135; euthanized (cat and kittens) 676
- Kittens average/organization adopted 842; transferred out 90
- Dogs average/organization adopted 1,235; transferred out 317; returned to owner 122; euthanized (dogs and puppies) 431
- Puppies average/organization adopted 452; transferred out 81
- Horses average/organization adopted 3; transferred out 2; returned to owner 2; euthanized 1
- Rabbits average/organization adopted 69; transferred out 14; returned to owner 3; euthanized 9
- Livestock/other domestic animals average/organization adopted 127; transferred out 35; returned to owner none; euthanized 445

Live Release Rate (ASPCA Lite)

- Cats and kittens: 78%
- Dogs and puppies: 86%
- Horses: 94%
- Rabbits: 93%
- Livestock/other domestic animals: 89%

Alternatives to shelter intake

85% provide referrals to other organizations; 71% provide food banks; 70% offer low cost spay/neuter; 54% offer free spay/neuter; 48% provide behavior services / hotline; 47% provide return to field

Equine Care

22% provide care for horses. Of those that do provide care for horses:

- 33% provide hay/feed or other relief to community members in need
- 23% provide euthanasia services for owned equines
- 34% operate under an open admission policy; 66% limited admission
- 93% have staff expertise in handling horses; of those: 100% handle trained horses, over 80% handle untrained or young horses; and about 50% handle fractious or feral horses
- 95% are involved in cruelty investigations

Transport

- 20% do not participate in transport; 18% are a source agency; 36% are a destination agency; 24% are both a source and destination agency; 2% are a hub
- 69% of those involved in transport are paid staff; very few are "dedicated" to this sole program
- 57% remove animals from the transport and walk/exercise during transport stops
- 47% of source agencies send nine or fewer animals/month; 39% of destination agencies accept 60 or more animals/month

How often do you transport	Responses	Average Distance Transported	Responses	Stop for Breaks	Responses
Less than once per month	17%	< 240 miles	48%	Not at all	18%
1-2 times per month	30%	240-360 miles	15%	Every 4-6 hours	72%
3-4 times per month	24%	361-660 miles	11%	Every 8 hours	7%
> 4 times per month	29%	> 661 miles	25%	> 8 hours	3%

COLLABORATION

5% have merged with other organizations within the past 5 years. 90% of those that went through mergers were sheltering organizations; 10% wildlife rescue/rehabilitation.

31.4% of all respondents have a formal coalition of community organizations working together for the common good. Of those with a formal coalition:

- 85.5% said the majority of relevant organizations participate actively in their coalition
- 54.4% follow Shelter Animals Count and its basic data matrix for data collection
- 50% have aligned data tracking definitions with their community

COMMUNITY / FREE - ROAMING CATS

- 28% have staff dedicated to Trap / Neuter / Return or Shelter / Neuter / Return services
- 48% provide low cost spay/neuter in-house; 47% provide free low cost spay/neuter in-house
- 26% provide spay/neuter vouchers
- 59% provide live-trap rentals
- 49% provide a food bank
- 53% provide return to field / shelter/neuter/return
- 7% offer winter shelters
- 46% offer caretaker / trapper guidelines / resources
- 73% said trap/neuter/return or working/barn cat programs proved most successful
- 75% said their free-roaming cat programs were funded by the operating budget (50% restricted grants)
- 37% said local ordinances support trap/neuter/return; 16% prohibit; 47% neutral
- 33% said local ordinances support return to field / shelter/neuter/return; 19% prohibit; 48% neutral
- 26% said local ordinances support free roaming cats; 15% prohibit; 59% neutral
- 54% said they do NOT trap cats for purposes of trap/neuter/return
- 70% measure success by animals served; 69% by increase in live release rate; 69% by decrease in intake; 54% by increase in adoptions