Software Options for Custodial Programs
November 9, 2020

Introducing W4Sight

Independent software consulting firm specializing in non-profit solutions

Fundraising
Case management
Client management
Financial systems
Reporting and analysis

Founded in 2009, Chicago-based

We do not take money from vendors to represent or recommend their software.

W4SIGHT
PEOPLE ◆ PROCESS ◆ TECHNOLOGY

Introducing W4Sight

Debbie McCann, W4Sight Co-Founder, Partner
- 15+ years experience in nonprofit CRM software selection and implementation
- Parent of teenage horsewoman, been a "barn mom" for 8 years.

Karen Diener, W4Sight Consultant
- Over 20 years of experience as a nonprofit fundraiser and data administrator – knows how systems work IN REAL LIFE
- Drive a team of Percheron draft horses as a volunteer
- Parent of a teenage horsewoman, been a "barn mom" for 11 years

Custodial Organizations

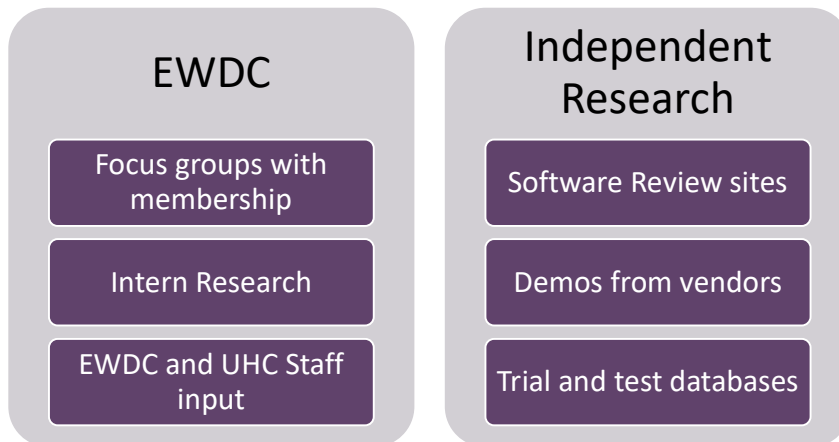| Equine Intake	Equine profile	Equine Services	Equine Outcomes	People and Organizations
• Date • Origin • Reason • Health • Temperament	• Name • Breed • Color • Height / Weight • Gender	• Farrier visit • Vet visit • Medication • Training • Other assessment	• Date • Outcome type • Contact person • Follow up	• Service providers (Veterinarians, Trainers, Farriers) • Donors • Volunteers • Adopters

The requirement areas that we considered necessary for Custodial Organizations are highlighted here – this is NOT the comprehensive list. But these are the primary requirement categories that we identified, and some of the types of information that fell into each category.

The People and Organization Record Management column will apply to different organizations and at different levels.

All of the software we reference in this presentation covers all five of these categories to varied extent. Some are more configurable than others, and while some do a great job in one category, they may lack in another.

Our Research Approach

EWDC	Independent Research
Focus groups with membership	Software Review sites
Intern Research	Demos from vendors
EWDC and UHC Staff input	Trial and test databases

The software possibilities seem endless, so how did we focus our research?
- We did some focus group discussions with EWDC members in June and July to talk about requirements for the data collection survey and other information you need to keep track of. This helped us fine tune the most important data that custodial organizations need.
- The EWDC provided a list of 77 (!) software options that an intern put together in May 2020

- From there, we searched for basic information online. Did the software name come up in search results, and could we learn anything about it within 5 minutes? Did it appear on websites that specifically focus on software review? What were highlighted features, pros, cons, user reviews, etc.
- We did demos with vendors if the software looked intriguing and if we could get them to call us back!
- A few systems offered 14 day trials, or fully functioning free test databases, so we spent time reviewing those.

Software Selection is a Balancing Act
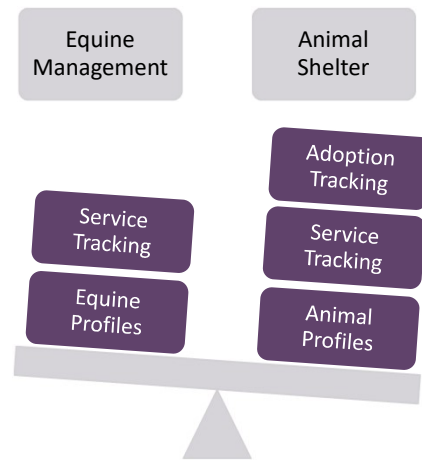
The two types of software areas we studied were those devoted to equine management, and those designed for animal adoption.

Equine management software easily handles the information about the equine with no customization, but doesn't always have features specifically for intake or outcomes, or adoptions. If your intake and adoption volume is low, an equine management system still may work for you.

Animal Adoption or Shelter software is very heavy on adoption information and animal profiles, but cannot always be customized for equine. You may have to give up some of the "nice to have" equine-specific information because you really need adoption software,

There is no perfect solution – you have to evaluate pros and cons, and find the right balance for your organization based on
- Volume of activity
- The cost of the software and your annual budget to implement and maintain the software
- Staff / volunteer time – it takes concentrated effort from everyone, and coordination from everyone to make sure procedures are followed
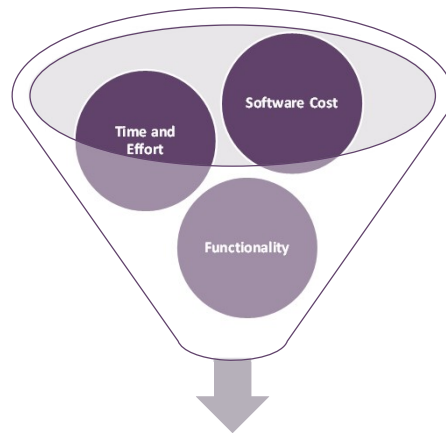
These tend to be the three primary factors in determining software, and the value of each is different for every organization. Annual software cost might be the top priority for organization, while another organization needs very specific functionality and the cost is the second priority. You need to weigh all of these things – and possibly others – in order to make the right decision.

Two software systems rose to the top

Shelter Manager

Barn Manager

- Two software systems were at the top of our list for Custodial organizations for various reasons. This does not mean that another software on the list won't work for you, but these two seemed to be well suited for a broad variety of organizations.

- iShelters, Petstablished, and Rescue Connection are three other possible candidates, and we are including some comparative information on them in the remaining slides.

- Other software systems that are possibilities include Horse Farm Management System, Pet Point, and RescueGroups.org Those did not make the final cut for this presentation, but information we learned about them will be made available to everyone.

- Research on all software systems – even those that we are not including as viable options – will be made available to everyone.

Advantages and Disadvantages

Shelter Manager

Low cost, highly configurable

Needs careful planning for effective configuration, and will require test runs

Barn Manager

Low cost, friendly interface, equine-focused

Lacks adopter capability and petfinder integration

Annual Subscription

Shelter Manager	Barn Manager
$340	**$0**
Flat fee, regardless of number of users or volume of animals	Free to 501(c)(3) rescue organizations

FYI that Shelter Manager is headquartered in England, and Paypal is currently the only option for overseas clients.

Other considerations:
- Do you have a computer available for staff or volunteer access?
- Do you have a good internet connection, or might you need an upgrade to your service?
- Does your staff have mobile phones and are you willing to allow them to access your data?
- Do you need to pay someone to enter data from your existing paper files?

Key differences

	Shelter Manager	Barn Manager	iShelters	Petstablished	Rescue Connection
Cost	🟢	🟢	🟡	🟡	🔴
Intake Volume	🟢	🟡	🟢	🟢	🟢
Staff Needs	🟡	🟢	🟡	🟡	🟡❓
PetFinder integration	🟡	🔴	🟡	🟢	🔴
Adoption Activity	🟢	🟡	🟡	🟢	🟢
Law Enforcement Engagement	🟡	🔴	🟡	🔴	🟢

- We are going to come back to this slide at the end. But I wanted to show you the five systems we're going to review.

11

Look and Feel

Main Screen

Menu / Navigation

Animal Profile

Person Profile

Activities –Treatments, Vaccinations, farrier visits, trainer evaluation, etc.
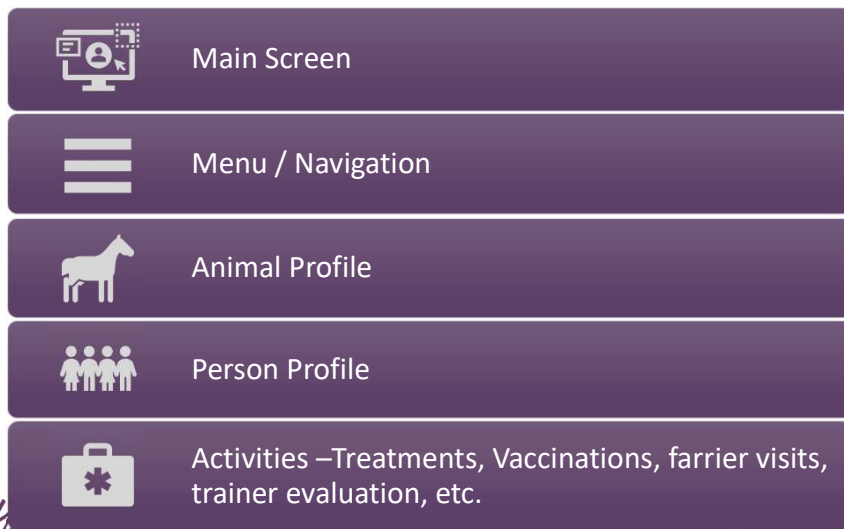
The next few slides are our attempt to show you the basic "look and feel" of each software system. It can be difficult, especially on smaller screens, but at least you get a general idea. We did try to show the same type of screen for each system as well so that we can do a better comparison – an animal profile screen, person screen, medical / treatment / activity screen.

We did really try to get a lot of representation from each software system, but we were often left with what the vendor sent to us if we could not access the software ourselves. You'll also see many slides in some situations, because they scroll down so far online.

Shelter Manager

Shelter Manager → Main Screen

System-wide navigation is at the very top, and then there are quicklinks in the blue area. It does animals with recently changed information, and you can click on a profile to open that animal's record. It also displays recent diary, timeline, alert and message board activity, and everything is a clickable link.
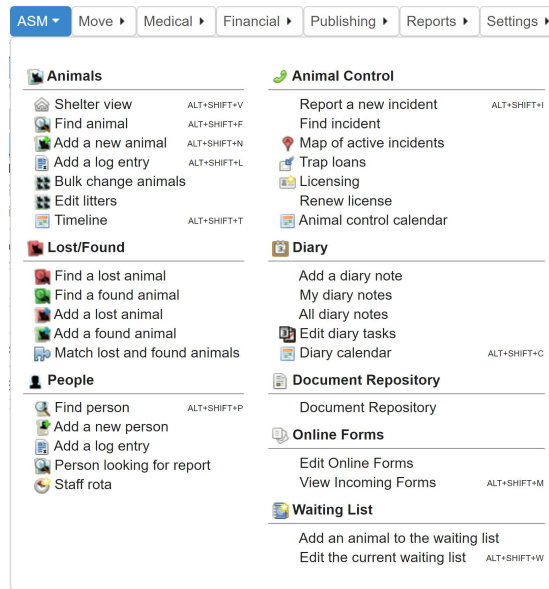
This view helps to see the overall categories. I have clicked on ASM (Animal Shelter Management) to see these broad categories that have to do with shelter management.

This is the short form for a new animal. I highlighted the "Registered Name" field here because it is a field that I was able to add to the system AND make it appear on the short form. Notice that the buttons about the bottom allow me to create and further edit the record, or simply to create a record based on the fields I have entered

The Entry Category could be used as the Intake Reason, for those of you who are collecting that data.

Shelter Manager → Animal Profile

- This is a screen shot from Shelter Manager. The fields that are highlighted in yellow indicate what I was able to customize, such as an equine-specific color rather than "brown and white", the species, breed, and location. The Registered Name field is a completely new field that I was able to set up.

- Note that there are additional navigation buttons for this particular animal – vaccinations, tests, medical, clinic, etc.

Shelter Manager → Person Profile

Person screen, where you can set up People or Organizations. You can add flags, such as Vet, which then allow the person to be linked to a medical activity.

The person could be someone who provides a service to your organization, such as a veterinarian, farrier, trainer, etc., but could also be an adopter or foster family.

Vaccinations log. This is where the software becomes just a little bit more clunky. I added Farrier Visit here, primarily because these types of activities can be set to expire after a specific number of weeks or years. This allows me to keep better track of all visits in one location.

Barn Manager

Barn Manager → Main Screen
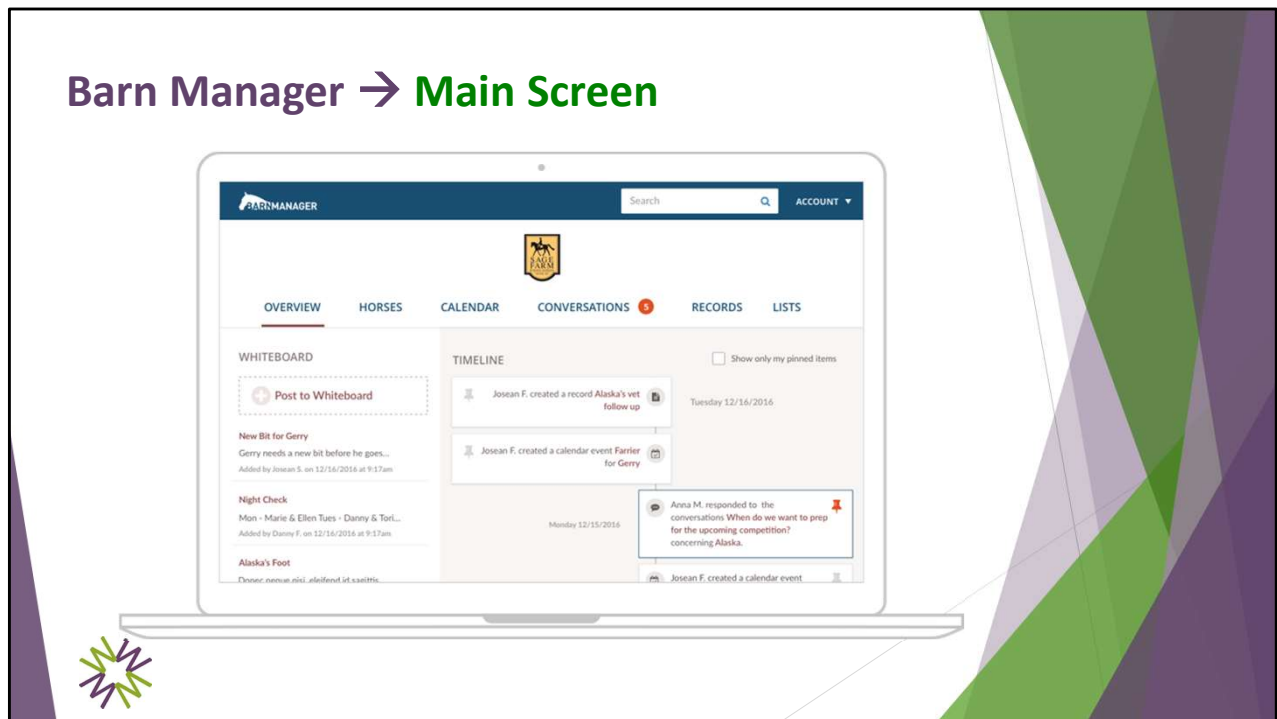
Barn Manager has one of the cleaner and more user-friendly interfaces out of all the software. This is a fairly generic screen shot of the main login screen that was available on their website. But it give you an idea of how clean the interface is, showing a whiteboard on the left – common to any barn I've been in – and a timeline of activity on the right.

Barn Manager → Menu / Navigation
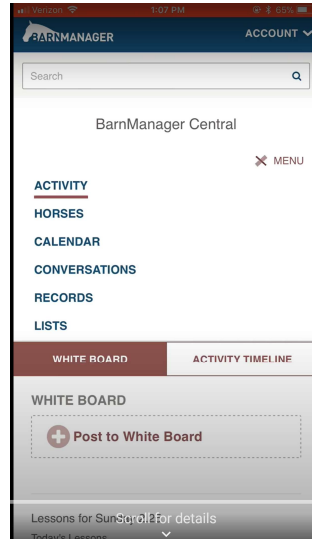
The navigation on Barn Manager is much cleaner than a lot of other products. This is a screen shot from one of the videos (linked later in this presentation) that shows the main menu and navigation.

Because Barn Manager is designed for equine, the "basic info" section does include equine-related fields and language

Specifically a medical treatment screen

Barn Manager → Videos

▶ **YouTube Channel with how-to videos**

▶ **User-submitted "How I Use Barn Manager" videos**

Barn Manager only sent two screenshots, but they did direct me to their YouTube channel with videos which are very helpful.

iShelters

iShelter → Main Screen
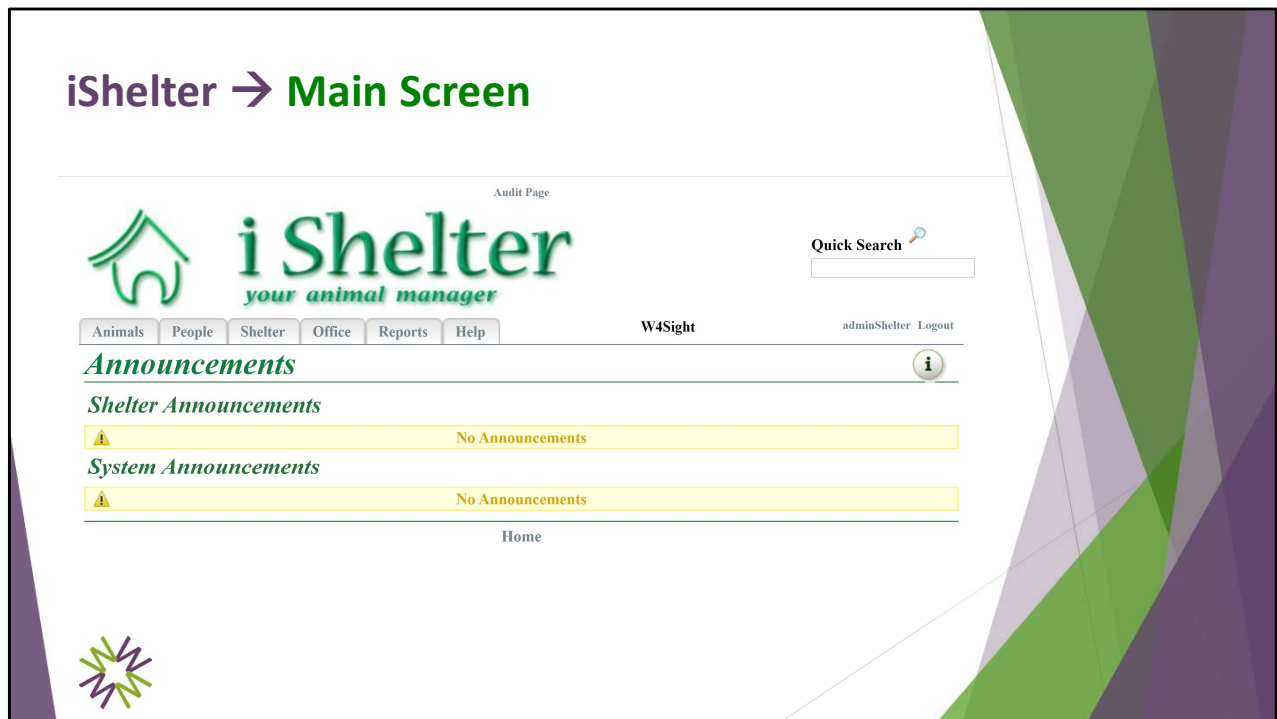
This is the first screen you see when you log in to iShelter. Notice the adminShelter link over on the right – this is where you log in to add table entries and additional fields. You can stay logged in to both, and toggle back and forth.

iShelter → Menu / Navigation

When you click on the Animals Tab, this is the screen you will see. This look is replicated if you click on People, Shelter, Office, or Reports.

iShelter → Menu / Navigation

This is the screen when you click on "Office", which I am displaying because it is a nice way to roll up the activity that I am specifically responsible for.

iShelter → Animal Profile

Once you open an animal profile, you stay on this one page and access different areas of the animal's care through the small pictures at the top. Note that I was able to add options for Species and Breed.

Note that there are shortcut links to some profile information along the left. Some of these will result in a summary, such as a click on "Medical History" under "Reports"

iShelter → Medical History

Medical History - IZ Heaven   Printer Friendly Version

Code: 7693801361 DOB: 2015-05-08

Vaccinations

#	Given	Needed	Vaccine	Comments
1		2021-03-07	Rhino Trachitis/Feline Calicivirus	
2		2021-04-07	6 in 1	
3		2021-04-07	West Nile	

Medications

⚠ No Medication Prescriptions

Medical Procedures

#	Performed	Needed	Procedure	Comments
1	2020-10-28	2020-10-28	Farrier	
2		2020-12-16	Farrier	

Check-Ups

#	Given	Needed	Weight	Temp	Comments	Recommendations
1		2020-12-16				

Diagnostic Tests

⚠ No Diagnostic Tests

Treatments

⚠ No Treatment Prescriptions

Diet History

⚠ No Diet Records

Medical Conditions

⚠ No Medical Conditions

Home

I can also click Medical History (slide 27) on the animal's profile page, and this screen shows that consolidates all types of activity for the animal.

This is the same screen – I have scrolled down to the next section. Highlights on this page are that I was able to add Tobiano to the Primary Color table, as well as add microchip or another tag number. It also continues some important display information along the left.

The large Comments fields, and the Behaviors and Attributes fields, are the final two sections on an animal's profile. I was able to add the behaviors of "Poor ground manners" and "Very spooky". I was unable to delete "Fearful" but it could be because that was already selected on a profile.

I have added our same Norwegian farrier as a person. Note that I was able to add specific person types of Farrier and Veterinarian. In order to attach the person to a medical procedure however, he or she needs to be set up as a user in the system with a specific permission checkbox marked. Without that, you cannot link the person performing the procedure to the animal or procedure itself.

iShelter → Person Profile

Home Phone :	
Work Phone :	
Cell Phone :	
Primary Email :	
Secondary Email :	
Address :	
:	
City :	
Region :	
Postal Code :	
Country :	-- Please Select --
Banned :	
Birthday :	
Anniversary :	

General Comments :

Hidden Comments :

Housing Comments :

Banned Comments :

Again, these are two side-by-side screen shots but they actually appear as you scroll through the person profile.

35

iShelter → Medical Treatment

Update/View Animal -- Lists --

Profile Forms

Close this Box/Frame to return to editing the profile ✕

Audit Page

✔ Record(s) successfully added

#	Date Given	Date Needed	Overdue	Comments	Vaccine
1		2021-03-07			Rhino Trachitis/Feline Calicivirus
2		2021-04-07			6 in 1
3		2021-04-07			West Nile

Current/Last Location
Cattle run

Current/Last Health Stats
Weight :

Name : IZ Heaven

Aliases : Milo

Species : Equine

Petstablished

Petstablished → Animal Profile

- This is a screen shot that I grabbed during the demo. I don't have a main login screen, but you can see a lot of the navigation on the left, and along the top.

Petstablished → Animal Profile

Additional Information

Internal ID ❓

[Internal ID]

Animal Control ID ❓

[   ]

Adoption Fee * will show on pet's public page

[choose or create option ▾]

❓ Add/Remove Auto-Complete Dropdown Options Please make sure to hit the ENTER key or click on Add option to save the value as a drop down menu item for this field

Events Attendance ❓

[choose or create option ▾]

❓ Add/Remove Auto-Complete Dropdown Options Please make sure to hit the ENTER key or click on Add option to save the value as a drop down menu item for this field

Internal Notes ❓

[   ]

Behavioral Tracking Notes

[Behavioral Tracking Notes]

Coordinators ❓

[Coordinators]

- This is a screen shot sent to me by the vendor of an animal profile.

Petstablished → Animal Profile

Microchips

You are able to assign a microchip number to the pet by clicking Add Microchip below. Please make sure the chip is 9, 10, or 15 digits. The pet's microchip number will be searchable in the search bar at the top of the Manage Pet Data section of your account. You can also update the pet's assigned to each chip by going to the Microchips Registry section of your account.

[Add Microchip]

Internal Pet Documents

Any document uploaded here will be visible within this pet's edit page and in the Documents section of your account. When you assign and adopter or foster for this pet, you will be able to choose whether or not you want these files to show up in the owner's account (if they choose to create a Petstablished account).

Drop files to upload

or [Browse]

- Not much to say here but it is nice that documents can be uploaded

40

- Custom Fields are where you – or the company – would be able to add equine-specific information. Some can be done by users, but some would need to be created by the vendor. Even so, it sounded as if not all fields could be created. Since I was on the phone with a sales rep and not a software developer, she did not always know for sure if a specific field could be created or not.

- I feel fairly confident saying that drop-down values were not an issue, so you could add the many shades of "brown" to a color field. But you may not always be able to add a completely new field.

- Important Intake information.

- This does give you a little bit better overview of what the user interface looks like. You can see navigation along the top and the left, for example.

Petstablished → Medical History

Rescue Connection

Rescue Connection → Animal Profile

- I have somewhat limited information on Rescue Connection because most of our work was done via email. My contact – Coral – very thoroughly reviewed our requirements list and sent some annotated screen shots. Remember that these slides will be sent to you as PDF so you will be able to zoom in and see this better.

Rescue Connection → Person Profile

Any expiring items will show here. You can also add your own warnings for a particular person (e.g., "hostile to law enforcement") to be shown.

Current contact info is listed, as are all recent correspondence (mail or email) and open or pending items: unpaid balances, pending adoptions, and so on. You can also see a list of animals at this location.

Like the animals area, all data for a person or company is contained in these tabbed areas, and the tabs can be customized by user or by access class.

All of this data and hundreds of other criteria are included in our SUPER SEARCH program - you can even look people up based on activities within a date range.

Attributes and roles/contact types are user-definable, searchable, and unlimited. You can even create mail or email distribution lists using attributes or roles.

Rescue Connection → Vaccinations

Key differences

	Shelter Manager	Barn Manager	iShelters	Petstablished	Rescue Connection
Cost	🟢	🟢	🟡	🟡	🔴
Intake Volume	🟢	🟡	🟢	🟢	🟢
Staff Needs	🟡	🟢	🟡	🟡	🟡 (?)
PetFinder integration	🟡	🔴	🟡	🟢	🟡
Adoption Activity	🟢	🟡	🟡	🟢	🟢
Law Enforcement Engagement	🟡	🔴	🟡	🔴	🟢

- Again – here are our key differences. Now that we have quickly reviewed them all, how should you assess this slide?

- Cost – My general rule was:
    - $0 - $499 is green
    - $500 - $999 is yellow
    - $1000+ is red

- If intake volume is low AND/OR the software seemed as if it would easily handle intake information, it has a green dot. The only reason that Barn Manager's is yellow is that it is designed to manage barns, and may lack the ability to record all of the intake information you will need as a rescue operation.

- Staff needs refers to the amount of time staff may need to spend setting up and configuring the system, learning how to use it, and doing ongoing maintenance. If something allows for a lot of configuration, that does mean someone needs to be strategic about setting up processes. It was difficult to evaluate Rescue Connection because I was never able to see a demo.

- If the software integrates with a lot of pet finder services, they are green. If they are

yellow, it just means that they automatically integrate with a few very specific services. Red means there is no integration.

- If the software will handle adoption activity relatively efficiently, they are green. Those that require some workarounds or seemed to require a lot of clicking and moving around received a yellow.

- If you are heavily involved in law enforcement work, Rescue Connection is the best option out of the systems we reviewed. Shelter Manager and iShelters do have the ability to track this, but it is more limited. Petstablished may technically fall in to the yellow category instead of red, but I was unable to evaluate this fully.

Customer Support

Shelter Manager
- Online manual, training videos, and FAQs all online
- Specific requests are handled via email, Keep in mind that Shelter Manager is based in England so getting immediate support may be difficult

Barn Manager
- Product documentation and how-to videos
- Online customer support 8am – 8pm EST, Tuesday - Saturday

iShelter
- "Full phone and email support." Specific response time and hours are unclear.
- PDF User Manuals are available for download for both iShelter and adminShelter

Petstablished
- Tutorials and FAQs available online, as well as lots of tooltips and contextual help.
- Developers seem very accessible and willing to add custom fields where needed.

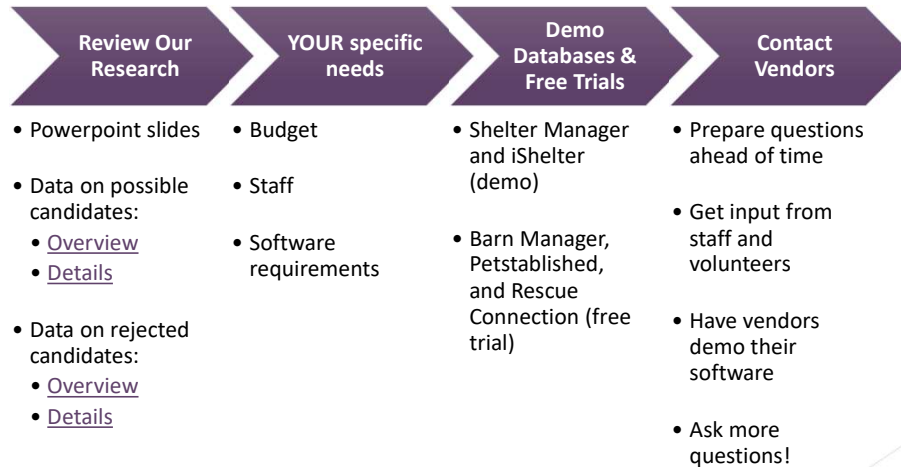**Rescue Connection**
- User manual and program index are provided. Website also lists "unlimited support" but unclear if it is phone / email / chat / etc.

The customer support listed above is included for all systems at no additional cost. I don't believe there were higher levels of support available for a fee.

Note that all offer a free online test system, or free trials that vary in length.

What's Next?

Review Our Research	YOUR specific needs	Demo Databases & Free Trials	Contact Vendors

• Powerpoint slides
 	
• Data on possible candidates:
  • Overview
  • Details
 	
• Data on rejected candidates:
  • Overview
  • Details
	• Budget
	
	• Staff
	
	• Software requirements
		• Shelter Manager and iShelter (demo)
		
		• Barn Manager, Petstablished, and Rescue Connection (free trial)
			• Prepare questions ahead of time
			
			• Get input from staff and volunteers
			
			• Have vendors demo their software
			
			• Ask more questions!

Powerpoint slides will be made available in a PDF version after the webinar. All of the links have been tested and should work.

As we reviewed and evaluated software, we documented key points in Airtable which is a cloud-based collaboration application. The Overview link will take you to a read-only summary view of possible candidates comparing key features. Some are candidates that we did not include in this presentation, so definitely see if one of those might meet your needs. We have also provided the full set of information in the "details" link.

Software that we considered did not find to be a suitable fit can be found in the "rejected candidates" links.

Vendor Contact Info

Software	Contact Person	Email	Website
Shelter Manager	Rob	info@sheltermanager.com	www.sheltermanager.com
Barn Manager	Nicole Larkin	Nicole@barnmanager.com	www.barnmanager.com
iShelter	Carrie Gerendasy	carriedasy@comcast.net	www.ishelters.com
Petstablished	Tricia Wagga	tricia@petstablished.com	www.petstablished.com
Rescue Connection	Coral Amende	rescueconnectionsoftware@gmail.com	www.rescueconnectionsoftware.com

- Note I barely spoke with Rob at Shelter Manager. I only asked a couple of clarifying questions, since the demo database was so functional
- I also interacted very little to Carrie with iShelter, again because of the online demo database that allowed me to test anything.
- I did demos with Nicole (Barn Manager) and Tricia (Petstablished).
- Coral took the entire list of requirements and annotated it very thoroughly! We never did manage to talk directly, but she has always been responsive.

Questions?