

# Software Options for Non-Custodial Programs

*November 11, 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.



## 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





Non-Custodial Organizations		
<b>Requestor Profile</b> <ul style="list-style-type: none"> <li>• Name</li> <li>• Address</li> <li>• Contact Information</li> </ul>	<b>Request</b> <ul style="list-style-type: none"> <li>• Date</li> <li>• Specific request type</li> <li>• Reason for request</li> <li>• Referral</li> <li>• Request fulfilled?</li> </ul>	<b>Service Provider Profile</b> <ul style="list-style-type: none"> <li>• Service specialty</li> <li>• Contact information</li> </ul>

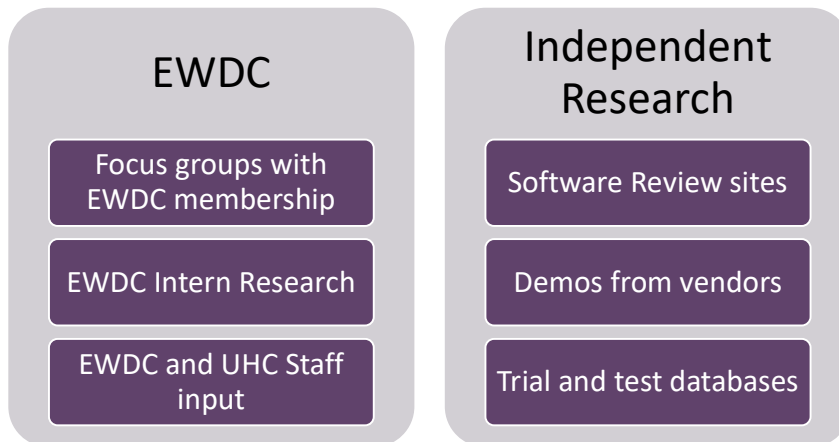


The requirement areas that we considered necessary for Direct Service, or non-custodial organizations, are highlighted here.

This is not a comprehensive list, but it highlights the main categories of data you would need to keep track of:

- Who is requesting service?
- What are the details and reason for the request (mostly tied to EWDC survey) and were you able to fulfill it?
- To which service provider did you connect the requestor?

## Our Research Approach



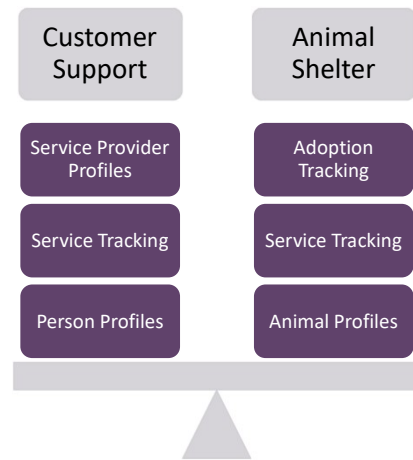
The software possibilities seem endless, so how did we focus our research?

This slide applies a little bit more to organizations doing custodial work. Most the software referred to us involved intake and adoption. The focus groups helped us to really understand the needs for organizations that provide service referrals only, which lead us in a different direction.

- 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 they need to keep track of. This helped us fine tune the most important data that they needed, and some members offered some suggestions.
- 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



We kept our custodial software in the mix, but also started looking at customer support tracking systems.

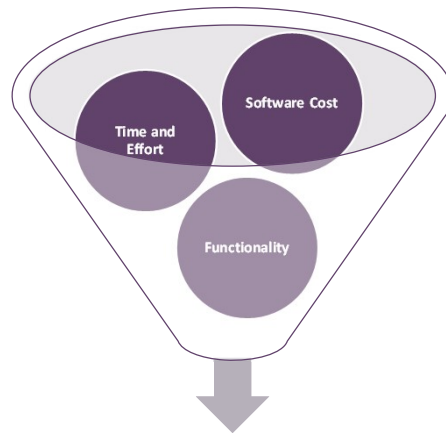
Customer support software handles the brokering of services quite well. You are essentially a help desk, and need to provide resources to people who contact you. You would want to keep track of the service providers that you know – which ones have specialties in certain disciplines, and which are available in certain geographic areas. You need to track the request, and you need to track the person from whom it comes.

Animal Adoption or Shelter software is very heavy on adoption information and animal profiles, but does not always track requests for service very well.

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

## Which software should I pick?



**The right software for you!**

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.



**For Direct Service only, we have a favorite**

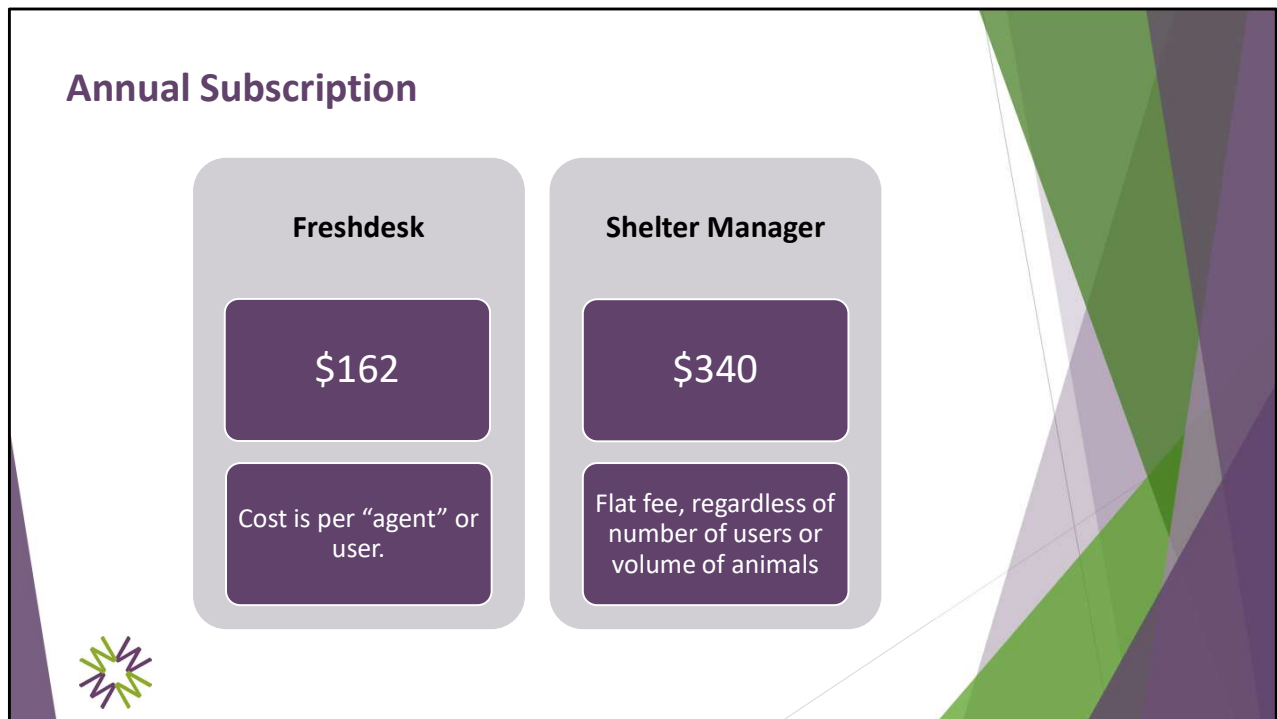


- If all you do is provide service referrals, our favorite option is Freshdesk, which is designed for customer support.

**If you provide service referrals in addition to taking custody of equine, we have one other option:**



- If direct service is part of what you do, in addition to taking custody of equine, we recommend that you consider Shelter Manager. You may also want to consider Rescue Connection, which does appear in our research. It is fairly expensive even for custodial organizations, but appears to offer a lot of features without having to repurpose the software as designed.



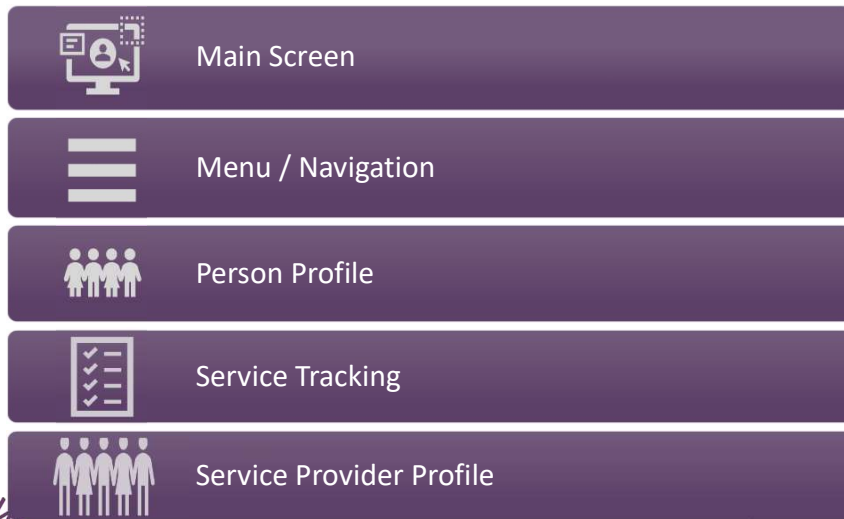
**Freshdesk:** The normal fee is \$15 per agent per month, or \$180 per year. Keep in mind that if you have multiple staff or volunteers fielding service requests, you might want each one to have their own account. The company was willing to offer a discounted price of \$13.50 per agent per month, for up to 9 agents, and that is the yearly cost shown here. So if you only have one agent, \$162 is the year cost. If you had two agents, your cost would be \$324.

**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?

## Look and Feel

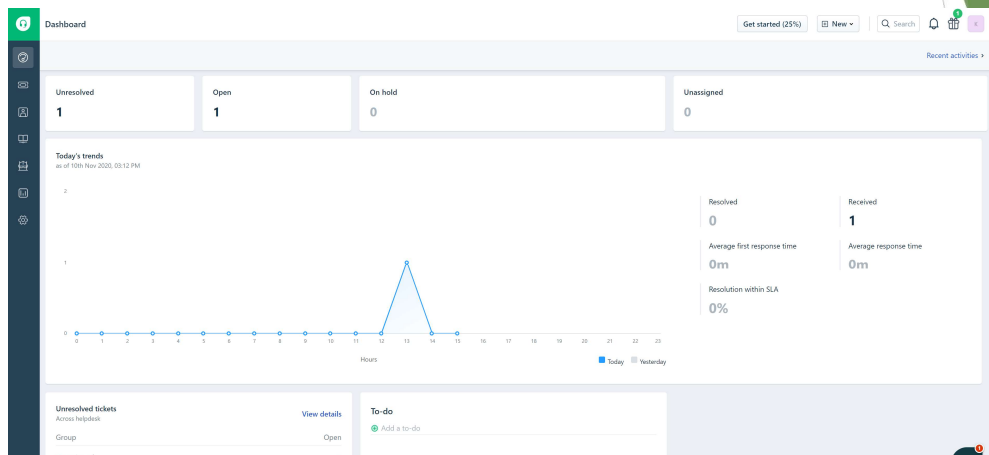


The next few slides are our attempt to show you the basic “look and feel” of the two systems. It can be difficult, especially on smaller screens, but at least you get a general idea. We did try to show the same type of screen for each system as well so that we can do a better comparison.

**Freshdesk**



## Freshdesk → Main Screen



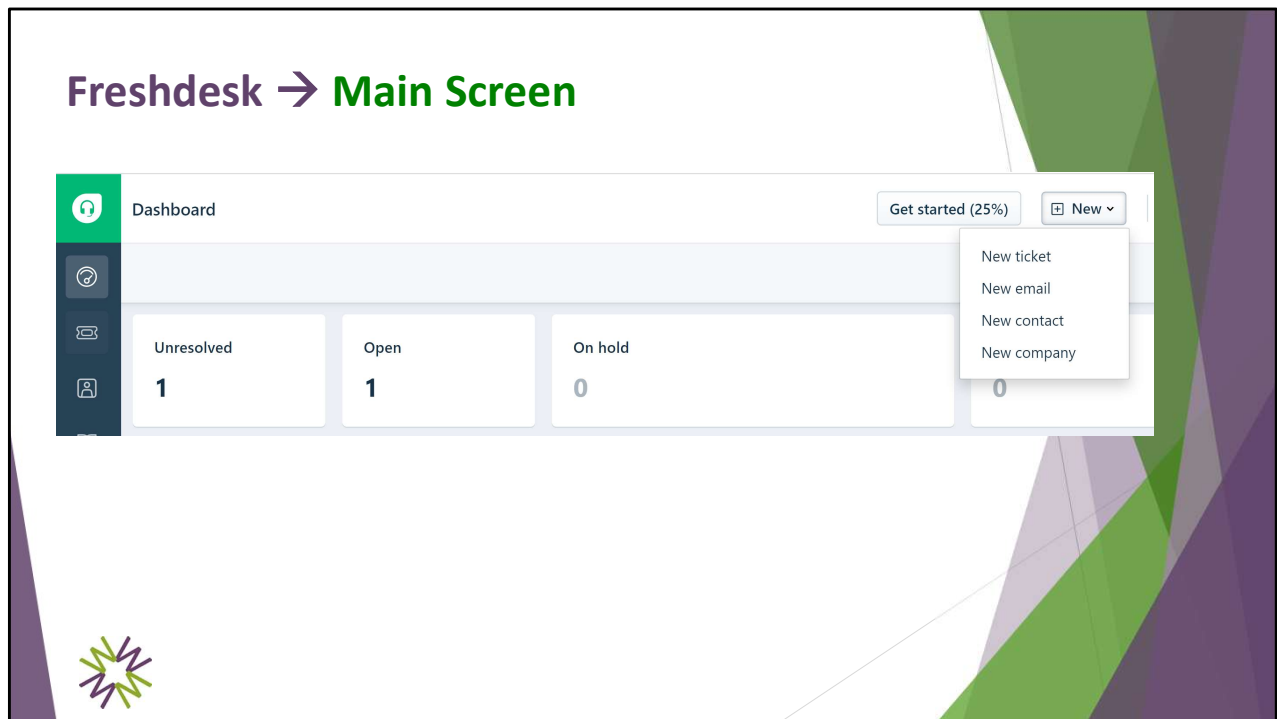
The first screen you see after logging in is a dashboard. My apologies that it is pretty hard to see, but I reset the view on my computer before grabbing this screenshot. The dashboard itself seems pretty standard and not able to be changed, but the summaries are clickable.

The boxes along the top show Unresolved, Open, On hold, and Unassigned support tickets. If you click on any of the numbers, you will be shown a list of the tickets that meet that criteria.

The middle band just shows an activity trend. The bottom two boxes show Unresolved tickets by group, and To Do items.

Menu items to navigate are along the dark bar on the left of the screen.

## Freshdesk → Main Screen



The main ways you interact with the system are to add tickets, send emails, work with contacts or work with companies. If you need to add any of those as New items, you can do that at the top of the screen. If you need to look up an existing ticket, contact, or company, you would access from the left navigation.

## Freshdesk → New Ticket Screen

The screenshot shows the 'New ticket' form in Freshdesk. The form is titled 'New ticket' and has a progress indicator 'Get started (25%)'. The form fields are as follows:

- Date of Request \***: A date picker field.
- Contact \***: A dropdown menu with a link to 'Add new contact' and 'Add Cc'.
- Subject \***: A text input field with a placeholder icon.
- Type \***: A dropdown menu.
- Status \***: A dropdown menu with 'Open' selected.
- Date Request Fulfilled**: A date picker field.

At the bottom left, there is a checkbox labeled 'Create another'. At the bottom right, there are 'Cancel' and 'Create' buttons.

This is the ticket form that I set up to record a request for service. I could make them required if I wanted. Note that some fields are required by the system, though they might not make sense in your organization.

I was able to add Date of Request, add specific options in “Type” and “Status” tables, and add the field “Date Request Fulfilled”.



## Freshdesk → New Ticket Screen

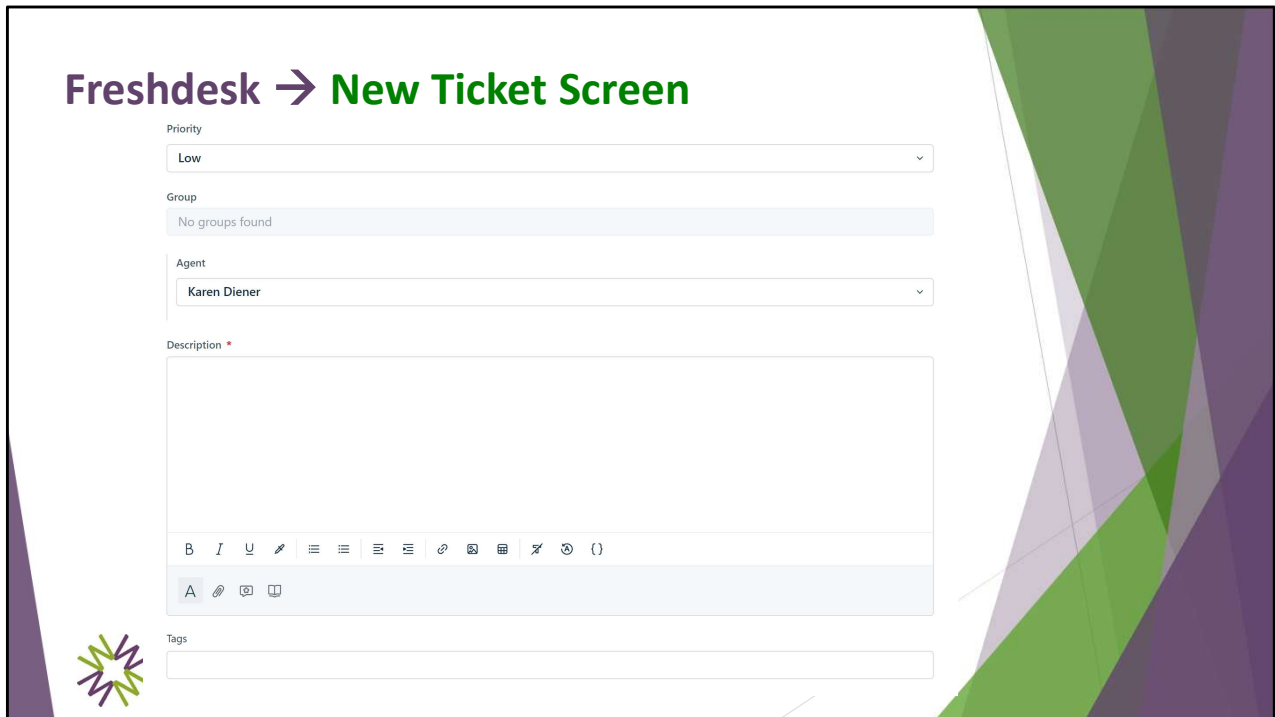
Priority  
Low

Group  
No groups found

Agent  
Karen Diener

Description \*

Tags



This is the second half of the new ticket screen, as you scroll down the page.

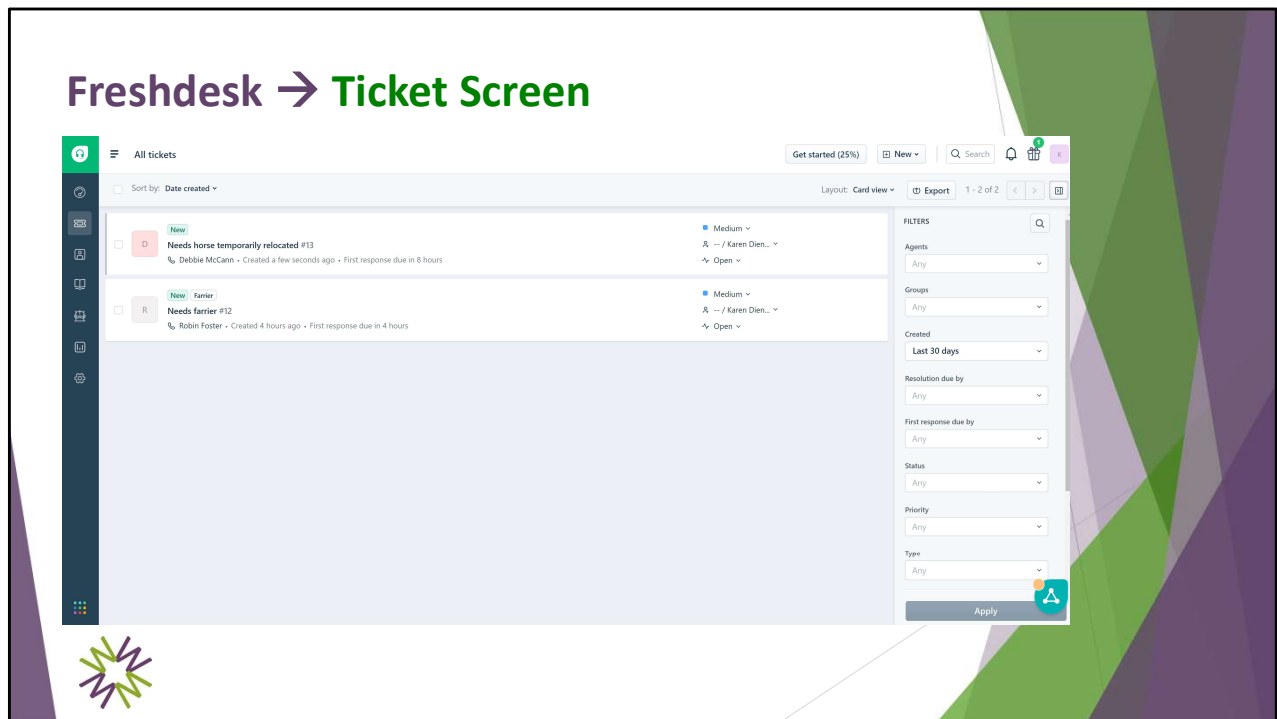
Group is one of the fields that is required. Because this is a customer support system, the idea behind this field is to be able to flag a particular team for troubleshooting. When you set up a group, you can assign specific agents to it. While this could be helpful for some larger organizations, it might not be for small ones. Keep in mind that you can add whatever groups you want though, so you may be able to repurpose it for something else.

The system auto-populated my name as the Agent, but you could assign another agent to this ticket. Remember that you pay per agent.

Then you have an option to fill out a description of the request.

At the bottom of the page, there are tags, which can help you in searching and filtering.

## Freshdesk → Ticket Screen

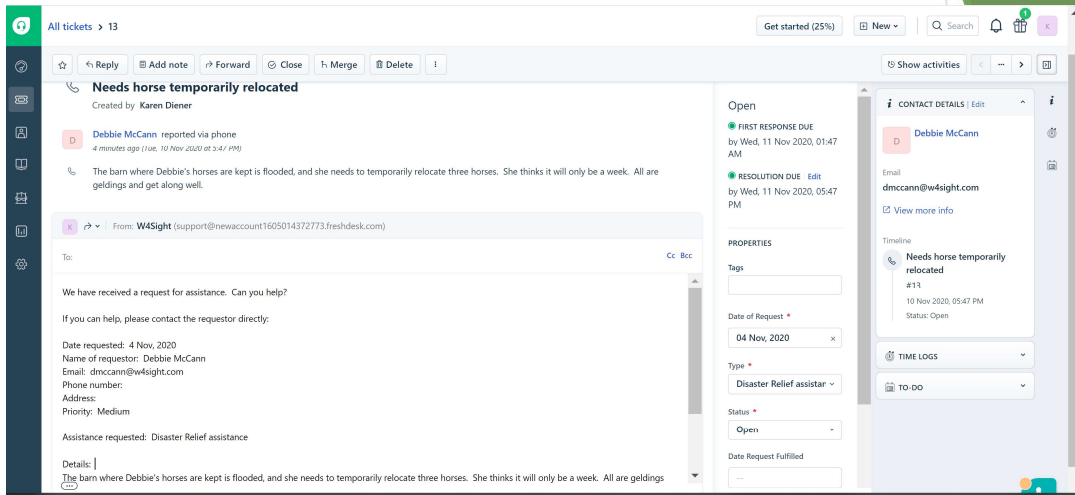


After I add a ticket, I received an email with all of the ticket information I had entered.

If I click on Tickets on the dark colored bar on the left, I can see a list of all tickets sorted by date created. I can sort by other fields as well. Over the left you can see that the screen is set at Card View, but there is also a Table view that allows you to select the columns you would like to see.

On the right, you can filter the cards in various ways, which can be really helpful from an audit perspective.

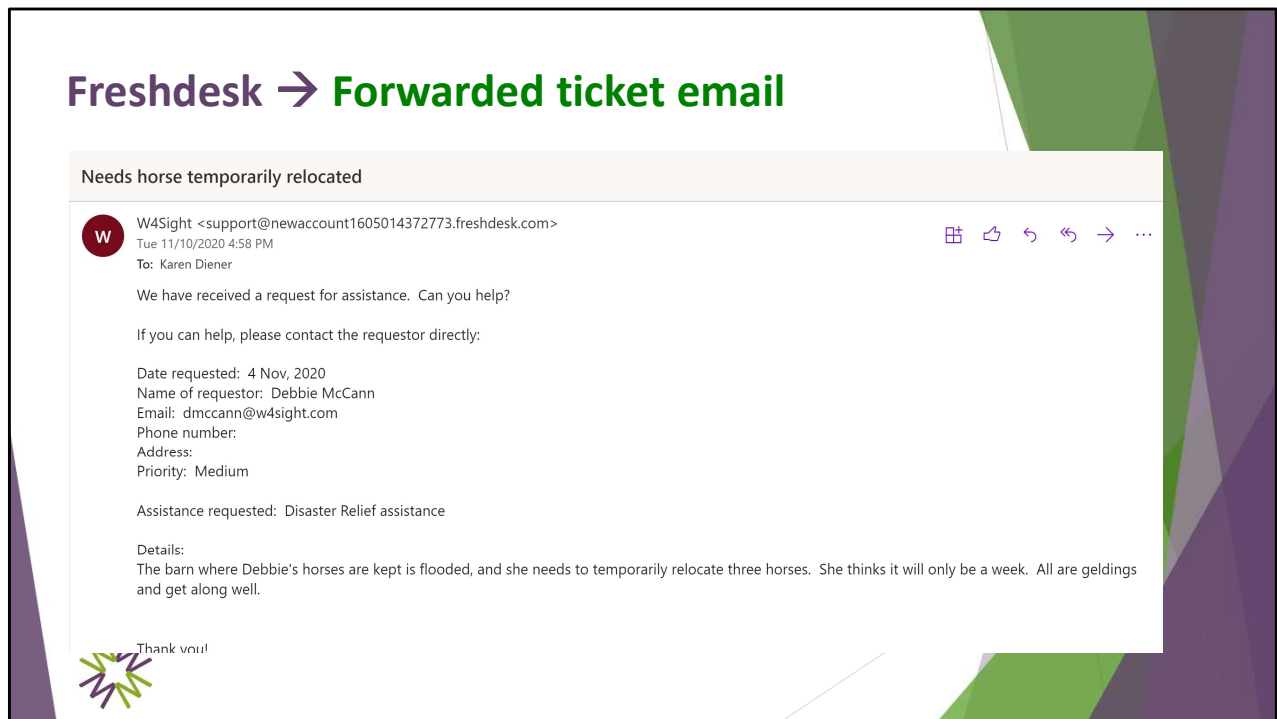
## Freshdesk → Ticket Screen



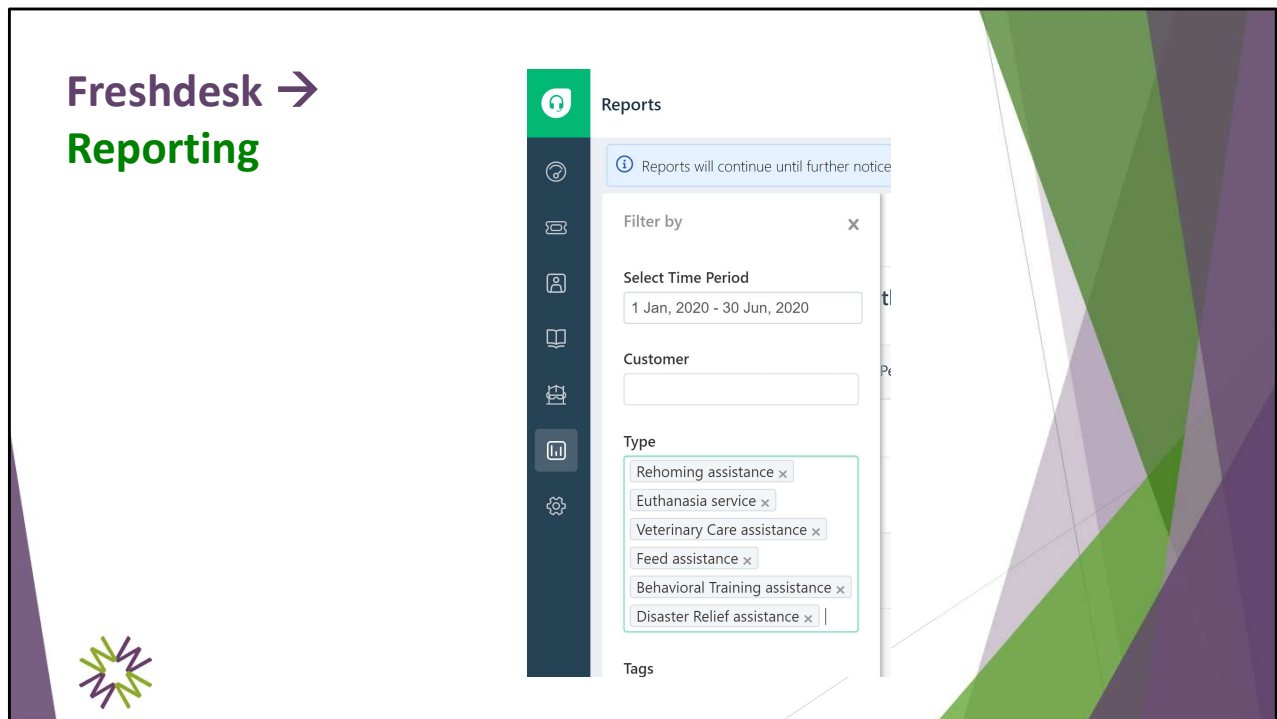
When I click on a ticket, it opens up more details so that I can edit or act on it. One of my favorite features is that you can click on “Forward” and the email pops up that I have customized with my own text, and merged fields from the ticket request in to it. I can then send this directly to a service provider that I have set up in my system as a Contact.

If you compose the email completely enough, they should not even need to log in to Freshdesk to get what they need. Note that contacts who receive emails such as this do not count as “Agents” and therefore do not impact your monthly fee.

## Freshdesk → Forwarded ticket email

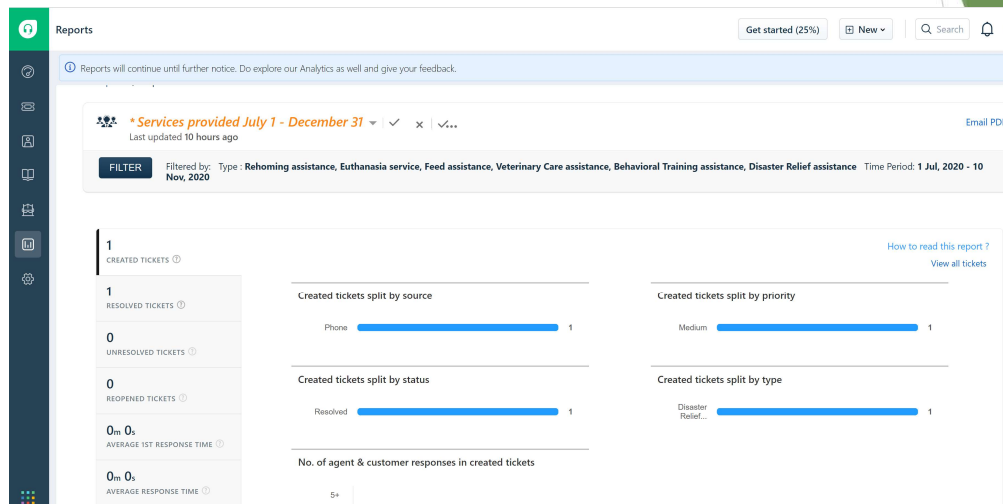


This is the email I received



There is some accessible reporting where you can filter by time period and by request type to show you the open requests and the filled requests. Freshdesk is beta testing some new analysis functionality that should allow for even more flexible reporting.

## Freshdesk → Reporting



Once you generate the report – and you can save the parameters – you will see a screen like this. Note that you might need a report for each Type to see how many were open vs. resolved.

## Freshdesk → Reporting

A screenshot of the Freshdesk reporting interface showing two identical filter panels. Each panel contains the following filters: Groups (Any), Created (Select time period), Time period (01 Jul, 2020 - 31 Dec, 2020), Resolution due by (Any), First response due by (Any), Status (Resolved), Priority (Any), and Type (Disaster Relief assistance). The first panel has a red box around the Time period, Resolution due by, and First response due by filters. The second panel has red boxes around the Time period, Resolution due by, and Priority filters.

Alternatively, you could go back to your main Ticket screen and use the filters along the right side of the screen to see exactly how many tickets were entered during a specific time frame, that were resolved, for a specific request.

## Shelter Manager



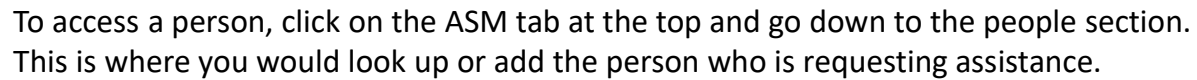


## Shelter Manager → Main Screen

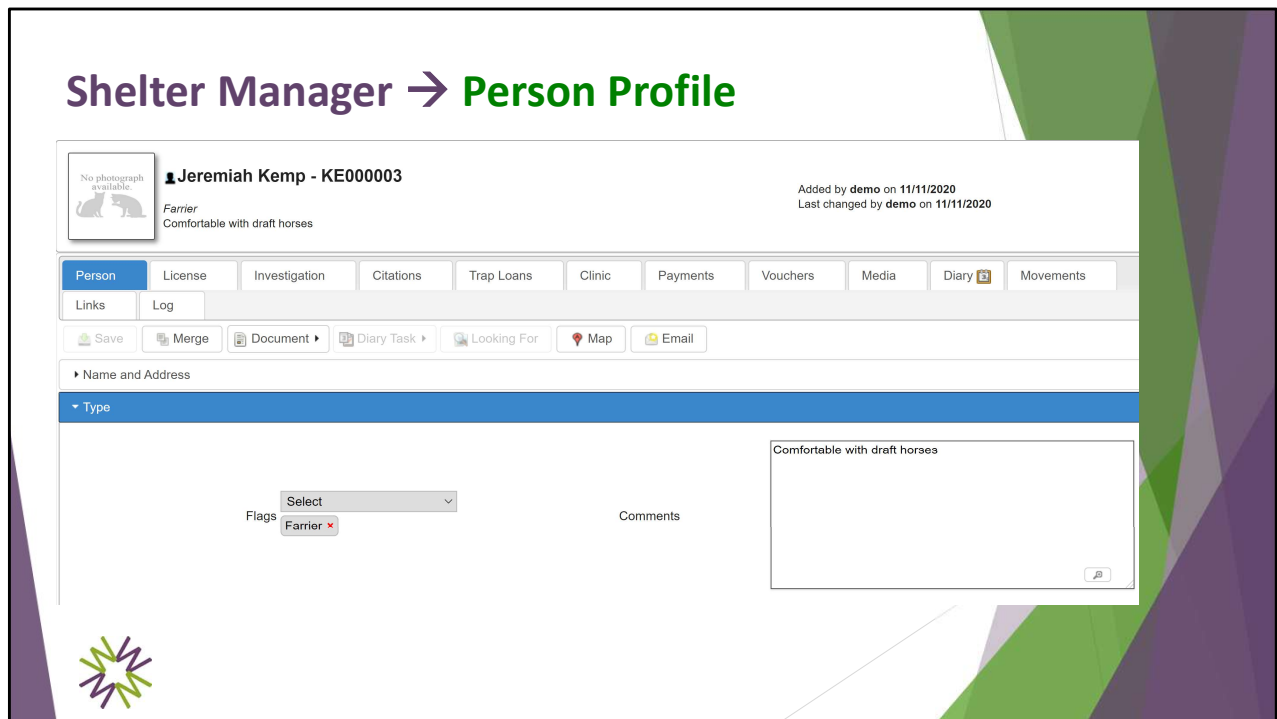
The screenshot displays the main interface of the Shelter Manager software. At the top, there is a navigation bar with tabs for ASM, Move, Medical, Financial, Publishing, Reports, and Settings, along with a search bar and a user profile dropdown labeled 'demo'. Below this is a 'Quick Links' section with buttons for Shelter view, Foster book, Recently deceased, Up for adoption, Not for adoption, Foster an animal, and Adopt an animal. A 'Did you know?' message states: 'When you use Move > Adopt an animal, ASM will automatically return any open foster or retailer movement before creating the adoption.'

The 'Recently Changed' section features a grid of animal cards. Each card shows a placeholder image with the text 'No photograph available.' and the animal's name: Gordon, Bear, Murdoch, Boo, Romeo, Snoop, and Lynx. Below the grid is a 'Diary for demo' section with a calendar view showing dates from 11/04/2020 to 11/04/2020. The 'Timeline (10)' section lists recent events, such as 'U2014002 Boo: quarantined (demo)' and 'D2014001 Snoop: entered the shelter (demo)'. The 'Alerts (17)' section lists various notifications, including '2 vaccinations need to be administered today' and '1 animal is not available for adoption'. A 'Message Board' button is located at the bottom right.

This is the main screen that you will see upon login. Again, this software is primarily designed for organizations that take custody of equine, but if you make service referrals in addition, we'll look at how you might use Shelter Manager to do that.




25



I have added a farrier named Jeremiah. I was able to set up a few additional Person Flags, and I added the Farrier flag to Jeremiah's record. This is a helpful way to tag different service providers so you can quickly find them.

## Shelter Manager → Person Profile

**Debbie McCann - MC000005**

Added by demo on 11/11/2020  
Last changed by demo on 11/11/2020

PersonLicenseInvestigationCitationsTrap LoansClinicPaymentsVouchersMediaDiaryMovements

LinksLog

SaveMergeDocumentDiary TaskLooking ForMapEmail

Name and Address

CodeMC000005

ClassIndividual/Couple

Title

Initials

First name(s)Debbie

Last nameMcCann

Home Phone

Work Phone

Cell Phone

Email

JurisdictionLocal

Address

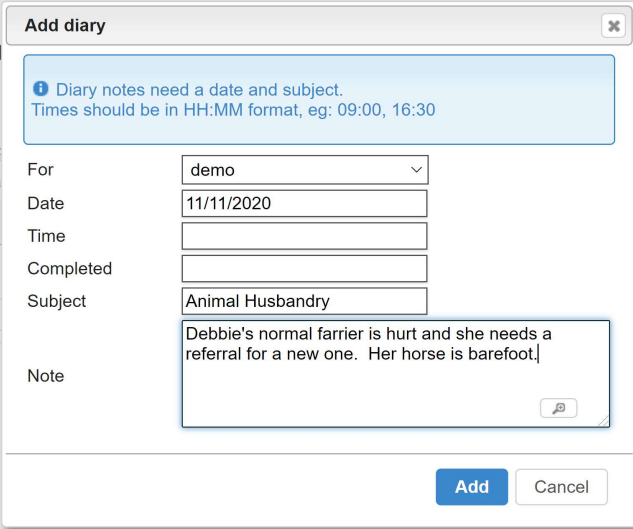
City

State

Zipcode

I have added Debbie as a person in the system. My next step will be to click on Diary to add her request for service.

## Shelter Manager → Diary Entry



**Add diary**

*Diary notes need a date and subject.  
Times should be in HH:MM format, eg: 09:00, 16:30*

For: demo

Date: 11/11/2020

Time:

Completed:

Subject: Animal Husbandry

Note: Debbie's normal farrier is hurt and she needs a referral for a new one. Her horse is barefoot.

**Add** **Cancel**

The “For” entry at the top is a little confusing for a demo database. It is meant to indicate the person responsible for the task, and the list contains all user account names as well as any flags that you have set up on a person record.

In this case, the diary entry is assigned to me, because my username is demo. This will show up on the main screen as an assignment for me to complete.

Another option is to add user accounts for all of the farriers I refer to, for instance. If you add a flag on their record of Farrier (which I was able to create) and then select “Farrier” in the “For” field, this diary entry would then be visible as an assignment to all Farriers.

Diary entries can be emailed to users as well, as long as you have configured a system email account.

The Diary Entry was the only type of record that I found – outside of medical procedures - that allowed me to have two dates: One for the request and one for a completion date.

## Shelter Manager → Diary Entries

[ASM](#) ▶ [Move](#) ▶ [Medical](#) ▶ [Financial](#) ▶ [Publishing](#) ▶ [Reports](#) ▶ [Settings](#) ▶  [demo](#) ▶

Edit diary notes

[New Diary](#) [Complete](#) Incomplete notes upto toda ▾

For	Date ▾	Completed	Link	Subject	Note	By
<input type="checkbox"/> demo	11/11/2020 00:00:00			Starve	Starve Murdoch prior to neutering	demo
<input type="checkbox"/> demo	11/11/2020 00:00:00		<b>Debbie McCann</b>	Animal Husbandry	Debbie's normal farrier is hurt and she needs a referral for a new one. Her horse is barefoot.	demo
<input type="checkbox"/> demo	11/01/2020 00:00:00		<b>Jeremiah Kemp</b>	Disaster Assistance	Debbie needs to temporarily relocate 3 horses due to flooding issues and necessary repair at her barn. She thinks it should only be three weeks.	demo

If I go back to the ASM button and click on that, I can go to Diary Entries

This is, somewhat unfortunately, the best option for reporting. It cannot be exported to Excel. You can add new reports to shelter manager but they require SQL and HTML coding, so probably not a great option for many organizations, you may find a very excited volunteer to help with this. It would be worth contacting the company to see if they will offer to build reports.

## Shelter Manager → Diary Calendar

ASM ▸ Move ▸ Medical ▸ Financial ▸ Publishing ▸ Reports ▸ Settings ▸  demo ▸

Calendar View

☒ Diary ☐ Vaccination ☐ Medical ☐ Test ☐ Clinic ☐ Payment ☐ Incident followup ☐ Transport ☐ Trap loan

< > Today November 2020 Month Week Day List

Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	31	1 Disaster Assistance
2	3	4	5	6	7	8
9	10	11 Animal Husbandry Starve	12	13	14	15
16	17	18	19	20	21	22

Also from the ASM | Diary Navigation, you can select Diary Calendar to see a calendar view of activity.

## Customer Support

### Freshdesk

- Chat support directly within software
- Very thorough knowledgebase and FAQs
- Sales support has been very responsive

### 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

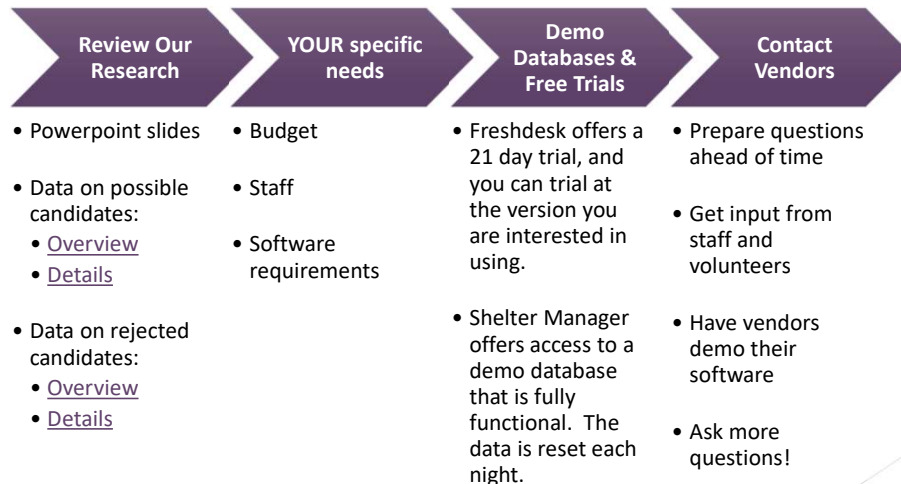


The customer support listed above is included for all systems at no additional cost. I don't believe there were higher levels of support available for a fee.

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



## What's Next?



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

### Freshdesk

- Brandon
- [Brandon.Raymond@freshworks.com](mailto:Brandon.Raymond@freshworks.com)
- [www.Freshdesk.com](http://www.Freshdesk.com)

### Shelter Manager

- Rob
- [info@sheltermanager.com](mailto:info@sheltermanager.com)
- [www.sheltermanager.com](http://www.sheltermanager.com)



- Brandon – or someone else with Freshdesk, will likely reach out to you within a couple of days of starting a trial. He was very responsive and helpful without being pushy.
- Note I barely spoke with Rob at Shelter Manager. I only asked a couple of clarifying questions, since the demo database was so functional



Questions?