

Patuxent Riverkeeper chooses Legal Files for complaint tracking, discovers many more advantages

Background

From his office in a three-story barn on a working rural farm near the Patuxent River, Fred Tutman is using some very powerful technology to help him in his role as the Patuxent Riverkeeper.

Tutman, along with a small number of staff members, works to protect and restore clean water for the Patuxent River. A nonprofit, privately funded organization, the Patuxent Riverkeeper is an advocate for the river and its connected ecosystem. The Patuxent River covers 930 square miles overall, runs north to south for 110 linear miles and terminates at the Chesapeake Bay. The Patuxent is the longest and deepest intrastate river in Maryland.

“Running a watershed organization that spans seven counties is a huge job. It is made possible by the dedicated work of volunteers, in addition to our tiny staff,” Tutman said. Plus, they have something else on their side. A software system normally not encountered outside of the legal industry, and certainly not in such a rustic setting. A legal case management system called Legal Files.

A Great Equalizer

“Legal Files is a great equalizer,” Tutman said. “It provides us with tools that were once only accessible to the bigger boys. We’re a true grassroots organization. We believe in small staff and big results. People ask how us all the time, how do you accomplish all that you do? I tell them it’s the quality of the tools you have to do the work. It’s like Batman. Sure, it helps that he can fly, but that real advantage is the Batman tool belt. That’s what Legal Files is to us, our tool belt.”

The software is a customizable complaint tracking and file management system which allows multiple users to share contact files, link related records, e-mails, correspondence and other pertinent record keeping. Legal Files makes it easier to share data and work “tag team” for the resolution of issues and projects.

Tutman acknowledges a strong fascination with the system’s telephone log. “I like to see how many phone calls I can handle in a day. It’s a way of reviewing my stats, my effectiveness, a way of determining if I’m organizing my workflow properly.”

(more...)

“The appeal of Legal Files is much broader, going beyond the traditional legal niche.”

Fred Tutman,
Patuxent Riverkeeper

Customer Profile

Patuxent Riverkeeper

- Nonprofit organization, privately funded and affiliated with the Waterkeeper Alliance
- Advocate for the Patuxent River and its ecosystem
- 3 users

Challenge:

- Tiny staff, big responsibilities
- Extremely meticulous work
- Manually recording, tracking data

Solution:

- Implement Legal Files Software to track complaints
- Create relational database using Legal Files to determine connections
- Customize menus and fields for its own needs

Results:

- Manage complaints to closure
- Discover previously unknown links, relationships
- Work more efficiently
- Safeguard contacts and resources as organizational assets

At the end of every day, Tutman likes to review the listing of all his open files in the system's File Selection Window. "I just browse through it. It helps me remember in case I've forgotten anything. In this business, you're either a hero or a bum and with Legal Files' help, I can make sure I'm not neglecting any part of my service area."

Connecting the Threads

Tutman stumbled across the Legal Files web site while searching for a complaint tracking system. "As the eyes and ears of the river, we are on the lookout for its mistreatment by polluters or overeager developers," he explained. "We also want to protect the health and safety of people who use the river." Although Legal Files software naturally lends itself to such tracking and, if needed, litigation functions as well, it is the system's ability to determine relationships between and among what could seem like disparate threads of information that is truly amazing, Tutman said.

Legal Files helps the Patuxent Riverkeeper track and manage the types of complaints and the geographic area of the complaint. Recently the organization uncovered an inspector who was "not diligent in his enforcement," Tutman said. Because of the system's file correlation ability, the organization learned that the same inspector had been involved in several complaints. "You don't always draw those connections, unless you have a relational database like Legal Files in place."

The work of the Patuxent Riverkeeper is "enormously meticulous," Tutman said. "You have all these threads of information. Plus you work on something for a day, it gets put aside for two, and then you need to reconnect the threads; or you hand off work to someone else; or multiple people are working on the same project and it's too easy to forget a piece of thread. Legal Files manages that for us. You not only know what has transpired but in the actual sequence it occurred. It's remarkably versatile when it comes to linking information."

Tutman said, "Legal Files does a great job of helping us track incoming complaints and issues from citizens, advocates, whistleblowers. It manages a complaint all the way to closure. But it's also a relationship database and a contact management system. Legal Files is a friend."

Since the software is "not only legal specific," the Riverkeeper can customize menus and fields for their own needs, Tutman said. "It also helps us be more disciplined with our information gathering, because now we have pre-set fields for entry."

A Smarter Way to Work

Before Legal Files was implemented, the operation was anything but high-tech. Tutman used an incredible array of legal pads, going back five or six years, with dog-eared pages filled with cryptic handwritten notes. "Even if I remembered to write everything down, I couldn't connect contacts to workflow; it was more difficult to work as a team. Legal Files is a much

smarter way to work. You have to be diligent about putting information in, but you don't have to keep it all in your head. We even use it for our Christmas card list."

Legal Files staff members were "enormously patient and very tolerant" during the implementation, Tutman said, and continue to be. "It's a pleasure working with them. Their attitude, I think, is a reflection of their interest and commitment to nonprofits and all their customers."

The Bottom Line

Tutman would like to see more organizations like his use tools like Legal Files. "It makes for a more efficient and effective organization, and if I'm struck by lightning tomorrow, the least I have done is arranged to replace myself," explaining "the information we collect is part of the wealth or resource bank of the organization. We think of our contacts and information resources as genuine assets. Safeguarding the minutiae of the information, relationships and details of our work is protecting an incredibly labor intensive resource. If something were to happen to me, or if I moved to another job, the information contained in Legal Files makes it easier for someone else in my place to assume the reigns of the organization and its true capacity can flourish even without my presence—because the data is safely a part of the Legal Files database. We retain greater value from our information and we are able to collect more of it. Thus our work and our results are much richer."

