

A Spotlight on Episcopal Relief & Development

About the Client

Episcopal Relief & Development is an international relief and development agency representing The Episcopal Church's compassionate response to human suffering. The agency rebuilds communities after disasters and empowers people to create long-term strategies to fight poverty, hunger and disease. Working in almost 40 countries, the nonprofit's programs impact the lives of approximately 3 million people around the world.



Photo courtesy of Harvey Wang for Episcopal Relief & Development

Background/Situation

Before partnering with Merkle RMG in 2008, Episcopal Relief & Development had an extremely lean staff to handle gift processing from its New York headquarters and struggled to accommodate growth in donations and supporters – particularly during peak periods or in the wake of a disaster. After the large donor response to the Indian Ocean tsunami and Hurricane Katrina, leadership sought a service partner that had the expertise, systems and capacity to handle these surges in volume.

“We were growing beyond our capacity,” said Xerxes Eclipse, Director of Donor Services at Episcopal Relief & Development. “After that incredible response, a move to outsource made the best sense.”

Episcopal Relief & Development initially chose another caging vendor prior to partnering Merkle RMG. When the nonprofit didn't receive the level of care and reliability it required, a consultant recommended that the organization call Merkle RMG.

“That couldn't have come soon enough,” Eclipse said. “As a much more reliable partner, Merkle RMG helped us evolve and grow and become even better stewards of donations.”

The Merkle RMG Solution

Right away, Eclipse saw that the difference in service quality was clear. “It was an eye-opening experience when we realized how much more thought Merkle RMG gave to our needs,” he said.

Eclipse was impressed from the very start through his experience with Merkle RMG's implementation process. He describes it as a “systematic, seemingly fool-proof way of making sure Merkle RMG's teams have all they need to do the necessary work for the client.”

“When you set it up right,” he noted, “the work can get done efficiently and any future adjustments will be easier.”

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Eclipse also appreciates Merkle RMG's flexibility and scalability that brought major benefits to gift processing. The service levels are maintained, he notes, regardless of volumes or unforeseen events.

"The donor response ebbs and flows, and Merkle RMG is able to ramp up and down to ensure capacity to handle donations," Eclipse said. "This can often be due to circumstances like weather or different kinds of disasters. So that flexibility to be able to staff properly without much warning is very important."

Additionally, Merkle RMG's high-tech methods help Episcopal Relief & Development achieve higher levels of accuracy, efficiency and security in all processes.

"Merkle RMG has the highest security controls available," Eclipse said. "They maintain a strict audit process, making sure they don't send or receive data that's not encrypted. With their standards in place, I don't have any worries."

Meanwhile, Merkle RMG's scanning and imaging technology supports efficient data capture and easy access to response documents via a web-based image viewer and archive application called Arch-e. This helps Episcopal Relief & Development with its donor service support and makes handling their yearly audit easier.

"We can access images of checks and correspondence to all the processed donations with just a few clicks of the mouse," Eclipse commented.

Account management is especially critical to delivering a superior response management solution. Eclipse noted that transparency, open communication, and innovative problem solving through sharing of best practices are key to Merkle RMG's high-quality client service.

"The account management we enjoy with Merkle RMG is top notch and helps us achieve our goals," he said. "Questions are answered, issues are dealt with, solutions are offered, and progress is made."

Results

Eclipse says that Episcopal Relief & Development has seen significant success since the partnership began. Merkle RMG now processes over 50,000 gifts a year – about 40 percent of which arrive during the last three months of the year.

"This is more than we could ever do on our own," Eclipse said. He added that Merkle RMG processes these gifts in a consistently timely manner, which supports positive donor relations and improved donor retention.

"The ability to handle that volume of mail, to capture all the data and send timely acknowledgements is key to retaining loyal donors," Eclipse said. "They get a sense that they're taken care of, and it's a tremendous benefit."

Merkle RMG's services have supported Episcopal Relief & Development's "Gifts for Life," which allows donors to buy symbolic gifts and give them as presents during the holiday season. This campaign would not have been successful, Eclipse noted, without Merkle RMG's fulfillment teams generating, sorting and mailing *Gifts for Life* greeting cards to donors who requested them.

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He added that Merkle RMG also supports easy interaction over the phone with donors who have questions about these gifts.

Quality account management has also made a huge difference to the overall effectiveness of Episcopal Relief & Development's direct mail fundraising program. Eclipse notes that having a long-term, consistent point-of-contact has contributed to a strong business relationship, and that he's impressed with Merkle RMG's ability to devise innovative solutions to any issues that arise. He added that his Merkle RMG account manager always keeps Eclipse's team informed, and issues are dealt with proactively so his team is never surprised.

"Merkle RMG has been there supporting and guiding us the entire way," he said. "Having that level of service is the difference between a happy client and donor and a frustrated client and donor."

The nonprofit has seen clear benefits from Merkle RMG's serious approach to security, including Level 1 PCI compliance. Drawing from Merkle RMG's security best practices, Episcopal Relief & Development has been able to improve its own security protocols.

"Merkle RMG has provided an excellent example of how data security should be handled," Eclipse said. "As a result, we've tried to emulate that in our own in-house processes as much as possible."

Overall, he noted, Merkle RMG has helped Episcopal Relief & Development stay on target with its goals and perform at a higher standard.

Having Merkle RMG by our side is one of the reasons for our success over the last eight and a half years," Eclipse said.

A Relationship With a Future

Eclipse shared that he looks forward to working with Merkle RMG to further streamline processes and develop ever more innovative solutions to meet changing business demands. He noted that Merkle RMG's account management has evolved to accommodate Episcopal Relief & Development's needs over time, and he expects that to continue.

"We want to evolve. We want new technologies. We want to be able to engage with our donors more deeply as time goes on," he said. "If that means creating new systems, starting new conversations, and finding ways to be more efficient, our Merkle RMG account management team works with us to offer solutions and make that happen."

Eclipse acknowledged that as a result of this ongoing relationship, his team has come to view Merkle RMG as a true extension of their organization.

"The high level of care Merkle RMG brings to handling donations from our generous donors reflects the care we bring to our work in healing a hurting world," he said. "We're grateful to call Merkle RMG our partner."

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