

Aligning your brand and your story for a stronger RDO



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About Formation PR & Brand

Formation PR & Brand is a strategic communications agency for mission-driven organizations.

We help our clients navigate moments that matter and we do it with sector depth and fluency.

**Strategic
communications**

**Branding and
creative design**

Public relations

**Marketing
campaigns**

Today's working session

By the end of this session, you will walk away with:

01. BRAND & STORY ALIGNMENT

A clearer view of where your brand and story align

02. ASSET ASSESSMENT

A practical assessment of your organization's strongest assets and most important gaps

03. STRATEGIC DIRECTION

A better sense of whether you need a messaging update, visual refresh, brand repositioning or implementation reset

04. 90-DAY ACTION PLAN

One priority to advance during the next 90 days

What is a brand?

What is a brand?

The core perception and emotional connection people hold toward an entity:

Perception

How the public sees, understands, and interprets your presence.

Reputation

The trust, credibility, and track record established over time.

Connection

The emotional bond and affinity that creates long-term loyalty.

Applies universally to a **company**, **product**, or **person**.

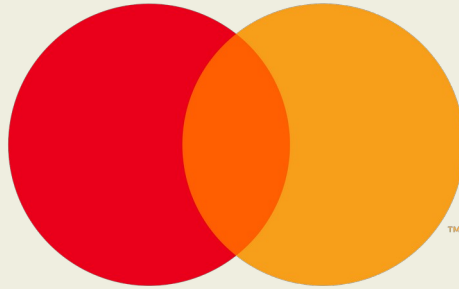
What is a brand **northwest** ^{Mountain West NC} **partnership**

GEORGIA
REGIONAL COMMISSION



formation PR & BRAND

What is a brand?



What is a brand?

Kleenex



Tupperware®

BAND-AID®



formation PR & BRAND

Brand exists between intention and perception

01. Intention

Intended brand

What the organization wants to mean to its audiences

02. Expression

Brand expression

What the organization communicates and demonstrates through its words, visuals and actions

03. Perception

Brand perception

What audiences actually believe and expect based on those signals and their experiences

Brand Alignment: Brand alignment occurs when the intended meaning and audience perception closely match.

How an organization expresses its brand

Organizations express their brand through four connected elements:

Strategy and positioning

Who you serve, the function you perform in the regional system and why that contribution matters

Story

Why the organization exists and what it makes possible

Messaging

The language used to communicate that story

Visual identity

How the organization becomes recognizable

Audiences combine these elements with their experiences to form their perception of your brand.

**Where does your
organization feel
the most
misaligned?**



Why alignment matters

RDOs must communicate through changing conditions:

Shifting federal and state priorities

Increased scrutiny of public funding

Growing or shifting program portfolios

New leadership and board members

Audiences with different needs and levels of understanding

Greater competition for funding, attention and trust

Periods of change expose gaps between what an organization does, what it says and what people understand.

The alignment test

Can your priority audiences answer these questions?

01

What role does your RDO play?

02

What becomes possible because the RDO exists?

03

Why should this audience care, participate or provide support?

The wording may vary, but the core answer should remain consistent. If staff and board members describe different roles or different sources of value, the messaging is not aligned.

Common signs of misalignment

Key indicators that your organization's story and messaging are disconnected:

Your website describes programs but does not explain their collective value

Staff members give different answers to “What does your organization do?”

Partners know one service but overlook the broader regional role

Your strongest story requires a lengthy explanation

The visual identity feels disconnected from the organization’s current work

New initiatives appear unrelated because the brand lacks a clear organizing idea

Communications respond to immediate needs without reinforcing a larger narrative

Where misalignment creates friction

SIGNAL

Known primarily for one program

Different explanations from staff or board members

Outdated or inconsistent identity

Communications focused on announcements

Weak connection between programs

ORGANIZATIONAL CONSEQUENCE

The full value of the RDO goes unrecognized

Understanding depends on who delivers the message

The organization may appear less capable than it is

Audiences remember individual activities rather than regional value

New work can look fragmented or outside the mission

Different issues require different responses

WHAT YOU ARE EXPERIENCING

People do not understand what you do

Programs describe the organization differently

The identity feels dated or difficult to use

Strong work receives little attention

External sources contain inconsistent information

Several of these problems occur together

WHAT MAY NEED ATTENTION

| Positioning and messaging

| Governance and internal adoption

| Visual identity

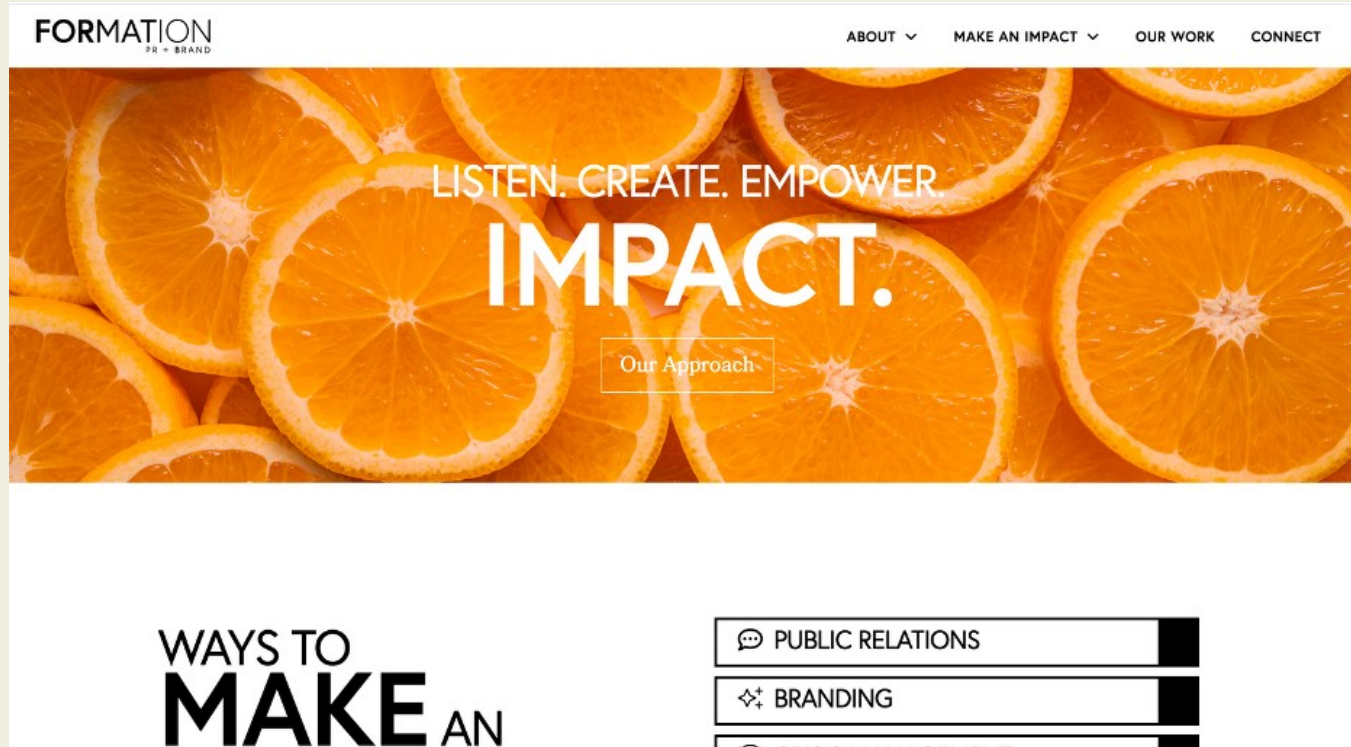
| Story development and distribution

| Source accuracy and external visibility

| Broader brand alignment

Our own misalignment

Where we felt the friction



Where we felt the friction

Our work had evolved, but our brand continued to describe an earlier version of the agency.

Core Realization

The quality of the work had outpaced the clarity of the brand.

Our work had become more strategic and closely integrated with client leadership

The website still presented a broad collection of PR and creative services

We hesitated to send some prospects to the website because it did not represent our strongest work

Our story depended too heavily on the founder explaining the firm in conversation

The website, proposals and social content did not reinforce one clear position

How we diagnosed the misalignment

The Outcome

That work led to sharper positioning, clearer audience priorities and a brand identity that better represents who we are now.

How clients described the relationship

Why clients returned or expanded the work

Where prospects misunderstood our role

Which engagements represented the firm's future

Whether staff could explain the firm consistently

Whether our materials conveyed our brand position

GROWING YOUR REACH.

[About Us](#)

FORMATION PR + BRAND IS A STRATEGIC COMMUNICATIONS AGENCY SPECIALIZING IN PUBLIC RELATIONS AND BRANDING.

The Formation team is guided by a simple mission: Listen. Create. Empower. Impact.

USING ALL THE TOOLS.

[Our Work](#)

CLIENT WORK

WE GO THE DISTANCE.

[Our Services](#)

MAKE AN IMPACT

[PUBLIC RELATIONS](#)[BRANDING](#)[CRISIS MANAGEMENT](#)

formation PR &
BRAND

STRATEGIC COMMUNICATIONS THAT MOVE ORGANIZATIONS FORWARD.

Your mission only travels as far as your message.

Formation PR & Brand is a strategic communications agency for mission-driven organizations — in philanthropy, healthcare, higher education and economic development — navigating the moments that shape what comes next.

 Let's Connect

 Explore Our Work

Before communication creates movement, *it needs formation.*

Before we start with messaging, we begin with understanding — your organization, the people you need to reach and the change you're trying to create.



Formation is where understanding becomes movement. Where strategic communications becomes a multiplier for missions that matter.



NADO's strong reputation needed a sharper expression of its value.

With a national network of more than 500 regional development organizations, NADO's brand needed to resonate with the members at the center of that network while strengthening the association's relevance with policymakers.

NADO wanted its identity to reflect more than longevity. It needed to communicate the organization's value today and its momentum for the future. While those qualities were evident in the work, they were not always clear in the brand.

Before determining how the organization should look and sound, Formation helped NADO examine why its work mattered, what members valued most and how the association's distinct role could be communicated more clearly.

What we learned

01 Friction often appears in conversations before it becomes visible in the design

02 Brand strategy requires choices about what the organization will emphasize

03 A visual refresh succeeds when it follows clarity about role, audience and value

04 Staff need language and tools they can use naturally

05 Internal adoption must be part of the brand process

06 The organization should be understandable even when its most familiar leader is not present

TABLE DISCUSSION

Which lesson feels most familiar in your organization?

Clarifying NADO's value

Clarifying NADO's value

INITIAL ASSETS

NADO had strong programs, long standing relationships and an important national role.

THE CHALLENGE

Connecting those assets within one clear story for members, partners and policymakers.

WE ASKED ONE CENTRAL QUESTION:

“What would not have happened if NADO had not been there to help make it happen?”

THE SHIFT

That question shifted the conversation from what NADO provided to what it made possible.

What the rebrand changed

THE REBRAND PRODUCED

A clearer explanation of NADO's role and value

Messaging that connected individual programs to the larger mission

A cohesive identity across organizational materials

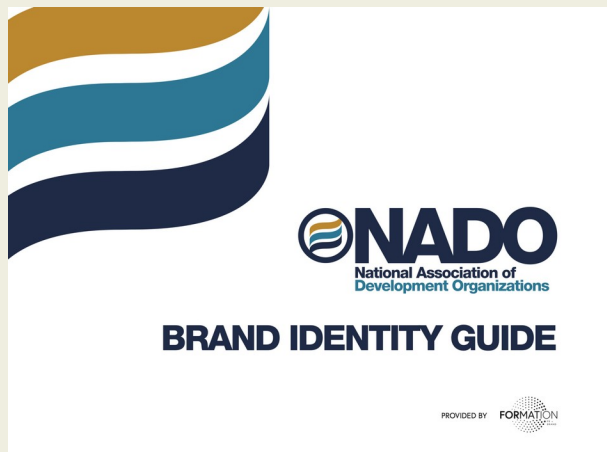
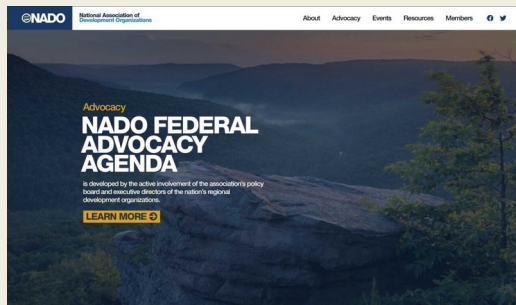
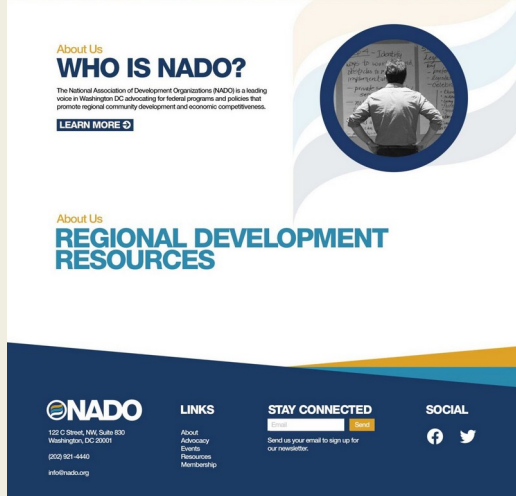
Practical tools that staff and members could use

Training to support consistent implementation

CORE OUTCOME

The strongest story centered on the value created by NADO rather than a catalog of services.

What the rebrand changed





STRONGER DISTRICTS
STRONGER REGIONS
A Professional Development Program for EDD Staff

PEER KNOWLEDGE EXCHANGE SERIES

LAURA LEWIS MARCHINO

REGION 9
Economic Development District of SW Colorado
(970) 247-0621



Executive Director, 2016 - present
Program Manager, 2005 - 2016

KEY TAKEAWAYS:

- Take the time to build trust with your Board Members and Community Leaders
- Always highlight the impact of your District to stakeholders
- Focus on your personal and professional development—there will always be competing priorities
- Tailor succession plans to the organization and individual
- The job of the Executive Director is to make everyone else successful

When Laura Lewis Marchino was hired as a Program Manager in 2005, she was under the direct supervision of Region 9's executive director, Ed Morlan. From the onset, he encouraged her to pursue professional development training and become engaged in national economic development organizations. His commitment to her professional growth and development included Region 9 paying for and encouraging her training as she successfully became a Certified Economic Development (CED) through the International Economic Development Council's (IEDC) Certified Economic Development program.

In 2007, Laura was elected to the NADO Board of Directors, a position she continues to hold today. "Being part of NADO was great for making connections to rural regions with similar programs, which was especially important when I became the Executive Director," Laura mentioned during a recent conversation about her transition to Executive Director. Laura spoke of the importance of always trying to meet someone new at each NADO event she attended, as well as at other organizations' events.

Laura was named the Executive Director in 2016, after nearly a decade of mentoring and support from Ed. When Ed retired, he was intending to stay on as a consultant and Laura was relying on having access to his experience and expertise. Unfortunately, Ed passed away soon after leaving Region 9, which was a personal and professional challenge for Laura and the organization's staff. "I'd say it was about three years before I felt I had fully learned the position, while understanding the responsibilities of each position and department at Region 9," reflected Laura.

Since becoming the Executive Director, funding for the organization has increased from \$3 to \$9 million and the staff has grown from five to twelve. Previously, Region 9 was the only area of Colorado with a separate EDD and Council of Government. The EDD is absorbing the Southwest Colorado

Applying the lessons to your RDO

A common challenge

As an organization evolves, brand alignment becomes urgent when perception no longer reflects its role.

01

Existing language and visuals remain in place

02

Different programs begin telling separate stories

03

Audiences rely on the narrowest or most familiar description

04

Perception falls behind reality

Brand perceptions can be shifted through compelling storytelling.

An RDO story framework

A compelling RDO story answers six questions:

01

Regional challenge

What shared issue or opportunity requires attention?

02

RDO role

What does the organization contribute?

03

People and places

Who benefits from the work?

04

Change

What becomes different or possible?

05

Evidence

What supports the claim?

06

Audience action

What should this audience understand or do?

From activity to regional value

ACTIVITY

RDO CONTRIBUTION

REGIONAL VALUE

Write and administer grants

→ Help local governments compete for funding and manage complex requirements

→ Community priorities can move toward implementation

Maintain the CEDS

→ Bring jurisdictions and sectors together around shared priorities

→ The region gains a coordinated basis for investment decisions

Operate business lending programs

→ Expand access to capital for eligible businesses

→ Businesses can invest, retain jobs or grow when financing is a barrier

Convene regional partners

→ Create a structure for collaboration across boundaries

→ Communities can address issues that no single jurisdiction can resolve alone

Table discussion

Reflect on your story and how you articulate regional value

01

Story boundaries

Where does your current story stop?

Do you usually stop at the activity, the RDO's contribution or the resulting regional value?

02

Meaningful change

Which part of your work is hardest to connect to a meaningful change for the region?

03

Clarifying value

What result, example or partner perspective could make that value easier to understand?

Where does your current story stop?



Credible proof

A strong story distinguishes among:

Outputs

What the organization delivered

Outcomes

What changed for communities, partners or participants

Regional value

Why that change matters beyond one project

Independent evidence

Data, partner validation or lived experience that supports the claim

Claim the contribution you can support with proof and when a partner shares a project outcome, reshare it and say specifically how you contributed to its success.

One story, different audience priorities

Member governments & board members

LIKELY EMPHASIS

Return on participation, regional leverage and accountability

Elected officials & public agencies

LIKELY EMPHASIS

Local implementation capacity, regional coordination and policy implications

Funders & partners

LIKELY EMPHASIS

Reach, readiness, stewardship and ability to coordinate

Businesses, residents & media

LIKELY EMPHASIS

Tangible outcomes, access to resources and local relevance

The core story remains consistent. The emphasis changes according to the audience's role and interests.

Where your story travels

Your brand story appears through:

Website and search results

Board presentations

Plans and annual reports

Grant announcements

Proposals and funding requests

Partner descriptions

News coverage

AI-generated summaries of the organization

Would someone receive the same essential story in each place?

Brand health assessment

How to complete the assessment

You will score six areas of brand health on a scale from 1-5.

1

Absent,
outdated or
contradictory

2

Emerging but
mostly informal

3

Defined but
inconsistently
applied

4

Clear and used
in most
situations

5

Clear,
consistent and
supported by
evidence

Core Principle

Score the organization you have today, not the organization you intend to become.

Requirement

Note one example for each of the six brand health area.

Assessment areas (score 1-5)

1

Strategic clarity

We can explain our role, priorities and distinct regional value in plain language.

2

Audience understanding

We understand what our priority audiences value, need and commonly misunderstand about us.

3

Story alignment

Our messaging connects programs and activities to meaningful regional outcomes.

Assessment areas (score 1-5)

4

Visual consistency

Our identity reflects the organization today and appears consistently across major materials.

5

Internal adoption

Staff and board members use shared language and have the tools needed to represent the organization.

6

External credibility

Our website, reports, proposals, partner descriptions and search presence support the value we claim.

Priority areas to address (Review your scores and identify)

1

Lowest-scoring areas

Your two lowest-scoring areas

2

Strongest asset

Your strongest asset to build upon

3

Critical touchpoint

The touchpoint where misalignment creates the most friction

4

Recent gap situation

A recent situation where the gap caused confusion, inconsistency, extra work or lost visibility

What is your top priority area to address?



Pair discussion (Reflect & share)

Organizational risk

Which gap creates the greatest organizational risk?

Immediate gains

What could improve without undertaking a complete rebrand?

Deep strategy

What requires deeper strategic work?

What kind of update do you need?

Foundational Layer

Appropriate When

Strategy and positioning

You lack clarity about whom you serve, the role you play, your priorities or why your contribution matters

Story and messaging

The strategy remains relevant, but people explain the organization differently or focus on programs without communicating the larger value

Visual identity

The strategy and story are clear, but the organization looks dated, inconsistent or disconnected from its current role

Implementation & adoption

The strategy, messaging and identity exist, but staff, board members, partners or communications channels do not use them consistently

You may need to address more than one issue. Begin with the most foundational layer that remains unresolved. Subsequent work should build on that foundation.

Your next 90 days

Complete the sentence

Within the next 90 days, we will clarify **[priority brand or story issue]** for **[priority audience]**, beginning with **[first concrete action or deliverable]**.

Then identify:

01 The person responsible

02 The first decision that needs to be made

03 The evidence you will use

04 How you will know the work improved understanding

The question your brand should answer

**What can your region accomplish
because your RDO is there?**

Thank you!

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