

Three-Part Blog Series: Rebranding Case Study
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Written by AgeSpan staff

Part 1: What's in a Name? – Rebranding to Create a Welcoming and Accessible Area Agency on Aging

For more than 45 years, Elder Services of the Merrimack Valley and North Shore was a respected, trusted and innovative community resource serving older adults throughout northeastern Massachusetts. In this three-part blog, staff there share the story of how their Area Agency on Aging decided to risk its brand awareness, rethink its visual identity and successfully transition to AgeSpan, a more welcoming and accessible agency for consumers, community partners and other stakeholders.

Under its previous name, Elder Services of the Merrimack Valley and North Shore (ESMV-NS) had been known as one of the largest Area Agencies on Aging (AAAs) in New England, serving 28 cities and towns in northeastern Massachusetts. ESMV-NS served all segments of its community, including some of the poorest communities in the state (such as Lawrence, the agency's home base) and some of the state's more affluent communities (including towns like Andover). With a staff of approximately 500 and more than 300 volunteers, ESMV-NS provided traditional AAA home and community-based services and contracted with managed care, accountable care, and other health care entities to address the social determinants of health.

When the agency merged with a neighboring AAA, North Shore Elder Services, its geographic footprint grew, leading to an internal conversation about how this new agency should market itself not only to its new service area but to its current clients as well as to those the agency hoped to serve in the future. Thus began the challenging, yet fruitful process of organizational rebranding.

Rebranding occurs when an agency or organization rethinks its “marketing strategy with a new name, logo or design, with the intention of developing a new, differentiated identity in the minds of customers and other stakeholders.” ([*The Ultimate Guide to Successfully Rebranding in 2020 \(hubspot.com\)*](#)). Many non-profits have found value in exploring rebranding by first conducting a self-assessment, which might include the following as developed by Terri Harel ([*Is Nonprofit Rebranding Right for Your Organization? | Classy*](#)):

1. Has the mission of your organization changed? Are the changes fundamental to your organizational values?
2. Has something about your community changed? Do you now serve a different group on of people that you did before? Are you trying to attract new donors or partners?
3. Is your organization at some kind of inflection point? Do you want to grow?
4. Are you trying to distinguish yourself from your competitors in a new way?
5. Have you had some bad press that you want to move away from?

The second part of this blog post series will explore our answers to these questions—and the steps we took to become AgeSpan.

Part 2: What's in a Name?

For the second post in our blog series, we will look at what convinced leaders of Elder Services of the Merrimack Valley and North Shore (ESMV-NS) that it was time for the agency to rebrand. Did you miss the first post in our series? [Check it out.](#)

For ESMV-NS, rebranding wasn't the result of wanting to move away from a bad reputation or bad press. In fact, the existing reputation of the agency as a trusted resource in the community for more than 40 years made rebranding a potentially challenging and risky move. Would the agency be perceived as moving away from a mission of supporting older adults in the community? Would this be seen as a culture change for our staff, partners and consumers? Might stakeholders see this as a move to be more "corporate" and less community and mission minded?

We heavily weighed and debated all of these concerns when thinking about how a rebrand might impact our organization. In assessing whether a rebrand was right for our agency and the communities we serve, the following factors contributed to our decision to move forward with a new brand:

1. **Our mission wasn't changing but the way we achieved that mission was expanding.** ESMV-NS desired to continue moving forward with a mission of helping allowing older adults to remain independent in their communities of choice and to make a wide range of choices available to them as they continued to age. What was clear, however, was that that path to retained independence didn't start at age 60, or 65 or later in life.

By taking a more upstream approach and focusing on aging as a process as opposed to a destination, ESMV-NS could start influencing healthy aging with younger populations. We had experience in delivering evidence-based programs to younger populations with chronic conditions, providing navigation and care management services to people with disabilities and younger, vulnerable, low-income populations, and offering food access and nutrition services to individuals under age 60.

All of this taught us that helping people live healthier lives likely resulted in them having greater ability to remain independent as they aged, and that the expertise Aging Network providers developed in providing case management and care coordination for older adults could be expanded and augmented to provide those same services for other populations.

2. **The communities we serve were certainly changing.** While in some circles, the term "elderly" is revered as one of honor and respect, many other people saw the term as unattractive or dated. Consumers and stakeholders shared that didn't feel "elderly" so the services we provided weren't appropriate for them, even though they might benefit from home and community-based services. Others reported they wouldn't think of seeing assistance from "elder services" because they were a family caregiver, not an older person.

In addition, the communities ESMV-NS served were changing. As a result of our 2019 merger with North Shore Elder Services, we added new communities to our service area. But members of these new communities didn't identify with the "Merrimack Valley" and were often unsure if services offered by ESMV-NS were available to them. In addition, staff in our newly merged organization struggled with the agency's identity. Rebranding as one new agency, absent the geographic histories that segmented staff, might offer a "fresh start" as one unified group, with a singular mission, vision and identity.

3. **ESMV-NS was at an inflection point, seeking new innovative work to both support existing crucial services and to support its efforts to address aging across the lifespan.** We needed a name and identity that kept aging at the forefront but also reflected our efforts to support aging at all stages of life. Creating a brand that would appropriately reflect this approach would help agency efforts in welcoming new consumers, community partners, and potential health care collaborators. The 50-year-old patient with diabetes at the local community health center, our research showed, did not feel welcomed or attracted to receiving services from an "elder" agency. Nor did health care providers understand that such an agency could serve younger populations.

So, what happened next? Read the next blog post in the series to learn the steps Elder Services of the Merrimack Valley-Eastern Shore took to become AgeSpan.

This blog post was written by AgeSpan staff.

Part 3: What's in a Name?

For the final post in this series, we take a look at the steps Elder Services of the Merrimack Valley took to become AgeSpan. Did you miss the first two posts in this series? Read them [here](#) and [here](#).

After making the initial decision to rebrand, ESMV-NS launched a Request for Proposals (RFP) process to procure the services of a brand consultant with experience working with nonprofit organizations, a knowledge of the geographic area, and proven expertise in helping established organizations rebrand while maintaining vital components of its trusted identity. ESMV-NS selected [Cleveland Design](#), a Boston-based graphic design and marketing agency. In partnership with Cleveland Design, ESMV-NS began the process of creating a more flexible, adaptive and inclusive identity, appropriately capturing the work we did without losing our mission, values or culture.

The process started first with creating awareness and gathering input from agency staff and stakeholders, including a kickoff meeting, surveys, focus groups and interviews. Key audiences in this discovery process included staff, consumers, family caregivers, councils on aging and other community-based organizations, the State Unit on Aging, our provider network, health care partners and other key community collaborators. We were able to identify four key characteristics that defined our agency:

1. **Our mission had expanded.** We were no longer focused just on elder services. Our agency had evolved to address healthy aging with younger populations. **The agency advanced healthy aging across the lifespan.**

2. **Our service area had expanded.** The 2019 merger brought in five new communities, adding to the diversity of the service area. Many of the agency's programs were statewide, expanding outside of the Merrimack Valley. The agency further sought to better serve diverse communities within the region by advancing health equity. **Agency services spanned multiple diverse communities.**
3. **We collaborate with a variety of partners.** To best serve aging adults, the agency needed to continue to partner with CBOs, health systems and others. **The agency creates connections spanning the community to address social determinants of health.**
4. **We are innovative.** Innovation is not an end in itself – it is driven by consumer needs and is evidence-based. **The agency is forward thinking, implementing services our communities need today and tomorrow.**

With these key characteristics in mind, balanced with the desire to address the evolution of the work while not fully losing our identity, AgeSpan was born. To stay connected to the history of ESMV-NS, AgeSpan retained a similar tagline: Choices for life's journey and a familiar color scheme.

To successfully launch the new brand, AgeSpan convened multiple "preview" sessions with key community partners, staff, and other stakeholders. This included identifying staff "brand ambassadors" to create energy around the new name, answer questions about how the rebranding impacts the work and collect feedback.

Where are we today? After officially launch our rebrand in December 2021, the feedback and response, from both internal and external stakeholders have been overwhelmingly positive. Stakeholders and consumers alike report that their experience with AgeSpan honors the history of ESMV-NS while being now increasingly welcoming and accessible to the broad constituencies engaged in healthy aging across the "agespan." In sum, the work supporting older adults and others aging in the community continues uninterrupted and the new identity appropriately reflects the work, the mission and the future of the agency.

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