

Your Purpose and Path

A Worksheet for Mission, Vision, and Values

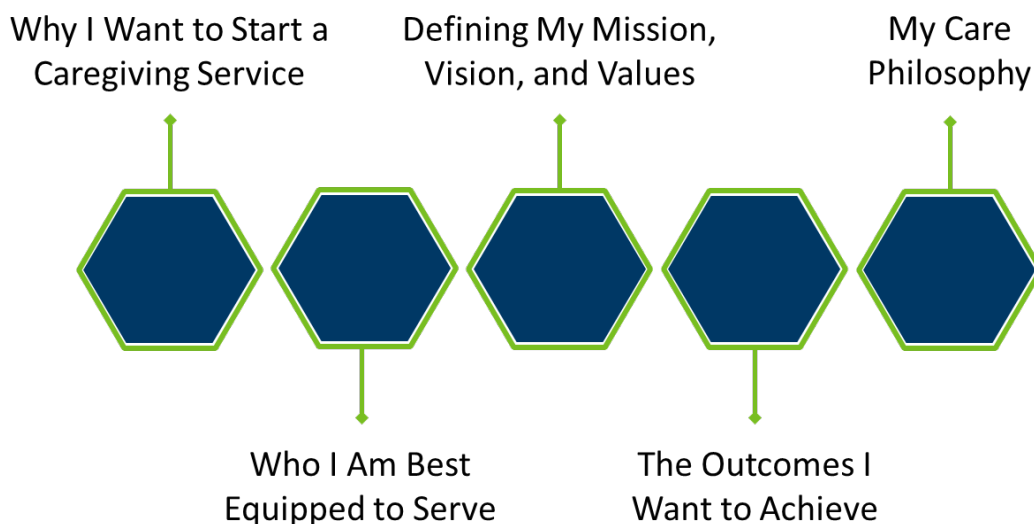
This material was prepared by Stratis Health under contract with The Minnesota Department of Health (MDH). Use of this tool is not mandated by MDH, nor does its completion ensure regulatory compliance.

This worksheet will help you clarify your reasons for starting a caregiving service, identify the population you intend to serve, and draft your mission and vision. You will also define the outcomes you want to achieve and describe your care philosophy. Each section connects directly to business planning, license selection, and operational decisions required to start and sustain an Assisted Living or Home Care organization.

Assisted Living and Home Care services are businesses that must be financially sustainable *and* are caregiving services centered on the well-being of the individuals served. Long-term success requires balancing both.

For each section, enter your responses to the provided reflection questions. Use honest, quick answers. Your answers can be short phrases or bullet points. You can revise them later.

Sections:



Why I Want to Start a Caregiving Service

Starting a caregiving service is both a personal and business decision. Understanding why you want to do this work helps guide the choices you will make as a leader, employer, and service provider. Your motivation influences the type of care you offer, the population you serve, how you respond to challenges, and how you define success over time.

This section is designed to help you reflect on what led you here and encourages you to think realistically about what success looks like for you. Being clear about these factors early can help you make decisions that are aligned with your values, capacity, and long-term goals.

Reflection Questions	Answers
Why do I want to start a caregiving service? What experiences or needs led me here?	
What will make my caregiving service different from others?	
What gaps in care do I want to address?	
What would success look like for me (personally and financially)?	
Reflect on your answers and finish this sentence: <i>I want to start a caregiving service because...</i>	

Who I Am Best Equipped to Serve

Identifying who you are best equipped to serve and what their needs are is a key decision that influences your license type, service model, staffing, training, policies, and financial plan. This clarity helps ensure your services, business planning, and licensing decisions are well aligned and realistic.

Reflection Questions	Answers
Who do I want to take care of? (e.g., older adults, individuals with disabilities, individuals with dementia, culturally specific communities)	
Whose needs am I best equipped to meet, and who may <i>not</i> be a good fit for my services?	
What kinds of health needs or conditions do I expect the people I serve to have?	

Reflection Questions	Answers
What is the geographic area I want to serve? (e.g., urban, rural, specific communities)	

Defining My Mission, Vision, and Values

Use your answers from the sections above to draft your mission, vision, and values. Think of this section as turning your earlier reflections into a clear, public statement of purpose.

My Mission

A mission statement is a short, clear sentence or paragraph that explains why your organization exists, what it does, and who it serves. It builds directly on who you are best equipped to serve and helps guide licensing decisions, daily operations, and how you communicate with others. Your mission should clearly communicate your purpose to regulators, partners, staff, and the people you serve.

Reflection Questions	Answers
Who will I serve? (e.g., older adults, people with disabilities, individuals needing memory care)	
Whose needs am I best equipped to meet, and who may <i>not</i> be a good fit for my services?	
What services will I provide?	
Where will I provide these services? (e.g., city, county, community, region)	
What is your approach to providing services? (e.g., person-centered, culturally responsive, safety-focused, community-based, balancing)	
Why does my caregiving service exist? (Your core purpose. e.g., to support independence, to ensure safety, to improve quality of life)	

Fill in the blanks with your answers above to write your mission statement.

Our mission is to serve:

(who you serve)

by providing:

(what services you offer)

in:

(where you operate)

We deliver care that is:

(how you provide services — your approach or philosophy)

so that:

(why your caregiving service exists)

My Vision

A vision statement is one or two short, inspiring sentences that describe where your organization is headed and help guide future growth, investments, and long-term planning. Your vision provides a clear picture of what you want your caregiving service to become in the next few years.

Reflection Questions	Answers
What do I hope this caregiving service becomes in 3-5 years?	
What difference will it make for the individuals served, families, caregivers, staff, or the community?	

Use the answers above to write your vision statement.

Our vision is to:

(what you want to do in the future)

so that:

(what difference you will make – what will happen because of you)

My Values

A values statement is a short summary of the values that guide how your organization operates and makes decisions. Your values shape how you make decisions, interact with the people you serve, and build your organization's culture.

Select 3 to 5 values from the list below that best represent what matters most to you and your organization. These values should guide how you provide services and work with individuals served, families, and staff and reflect how you want your organization to operate every day.

Access	Dignity	Reliability
Accountability	Equity	Respect
Collaboration	Ethical Practices	Responsiveness
Compassion	Integrity	Safety
Consistency	Person-Centered Care	Transparency
Continuous Improvement	Professionalism	Trust
Cultural Humility	Quality	Well-Being

Reflection Questions	Answers
Which values did I select?	
How will these values show up in my work?	

Use your answers to write your values statement.

Our organization is guided by values of:

(list values selected)

which shape how we provide services, make decisions, and work with the people we support.

These values are reflected in our daily practices by:

(how these values show up)

The Outcomes I Want to Achieve

Outcomes are the results of your care and services. They may relate to the experience of the individuals you serve, such as comfort, dignity, independence, safety, as well as family or caregiver confidence, staff satisfaction and retention, community impact, and financial stability.

Defining outcomes helps you understand what success looks like for your organization and determination whether your services, operations, and business practices are making the difference you intend.

Reflection Questions	Answers
What changes do I want to see for people because of our care?	
How will I know we are doing this well?	

Reflect on your answers and finish this sentence:

The outcomes I would like our caregiving service to achieve are:

My Care Philosophy

A care philosophy describes how your mission and values are put into practice each day. It explains what good care looks like in real situations, including how staff interact with people, make decisions, and balance quality, safety, and individual choice.

Your care philosophy sets clear expectations for individuals receiving care, families, and staff and helps guide consistent decision-making across your organization.

Reflection Questions	Answers
What does “good care” look like in day-to-day practice?	
How will care be personalized?	
How will the voice of the individuals served and their family/caregivers be included?	
How will staff be supported to deliver this care?	
How will I balance costs and quality of care?	
How will I balance individual choice with the responsibility to keep the individuals being served safe?	
How will I create a safe and respectful workplace?	

Reflect on your answers and finish this sentence:

We provide care that is ...

Using Your Answers

You do not need perfect or final answers. This worksheet is meant to support early thinking and help you make informed, realistic decisions. Use your responses to guide next steps such as selecting a license, designing services, planning staffing, developing policies, and clarifying your business direction.

The next step is to complete the [Business Planning and Self-Assessment Worksheet](#), which builds on this work by helping you assess readiness, identify gaps, and determine what must be in place before moving forward with licensure.

You can return to and update this worksheet as your organization grows, plans change, or new decisions are made.