

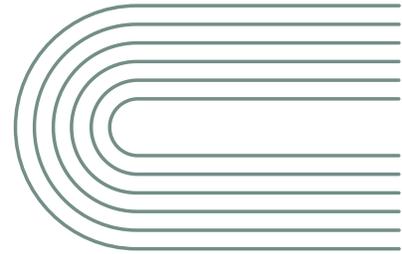
# Mission, Values & Voice Exploration Exercises

How to Make a Fantastic First Impression  
on Managed Care Plans & Your Community



A Guide & Mini Workbook by **Spring Barnickle**  
for the **CHW/P Workforce Capacity Building Collaborative**

## ★ ✨ **What is the Purpose of This Guide?**



Whether you are a member of regional leadership presenting to a Managed Care Plan or a CHW/P explaining your organization to a community member, your success will be defined by how well you explain who you are and what you have to offer.

By identifying your mission, values, and voice, you create a set of words and ideas that help you communicate more clearly and effectively. And that clarity is key!

Within the first seven seconds of meeting, people develop a solid impression of who they think you are. And some research suggests it only takes a tenth of a second to start determining if someone is trustworthy.

That's right. In the time it took you to read the first word of this sentence, your target audience has already started making critical decisions about whether you can be trusted. Given how important trust is to committing to a business relationship or accepting help with healthcare, that's a powerful statistic...

Together, we'll explore a few easy exercises to help you identify your mission, values, and voice, so you're as prepared as possible to make an excellent first impression.



## ★ Part One: Finding Your Voice & Values

Let's start by identifying the voice you'll use to represent yourself, your organization, or your region. This includes exploring what you value most.

When we talk about "voice" from a branding or marketing perspective, we mean the way you interact with others and how it makes them feel.

Think about the last TV commercial you saw for an expensive car. What kind of music was playing? What language did they use? Maybe words like "powerful," "seductive," or "luxurious."

Now think about the last commercial you saw for laundry detergent. Different, right?

What about ads for energy drinks or prescription medicine?

The language and tone each of those ads use is the **voice** of that brand, and it is designed to make their target audience feel a specific way about what they offer.

In the same way, the language and tone you use to talk about your own mission and values will change how a Managed Care Plan, organization, or community member feels about what you have to say. And research proves that those feelings are incredibly important when humans make decisions.

By identifying your values and setting some intentions for your voice, you can be sure you choose the right words and information to share. So let's get to work!



1.



First things first: Who are you talking to? Please write 2 to 3 sentences describing each of your target audiences. What's important to them? What do you know about their needs or background?

If you're part of a regional leadership team, you might write 2 descriptions to sum up both your member organizations and the funders with whom you communicate. If you're part of an individual organization, you might need to describe 3 audiences: Managed Care Plan stakeholders, the community you serve, as well as your CHW/P population.





2.

What does your target audience value? When you meet with them or send a message or proposal, what are you usually offering? Again, write 2 to 3 sentences about how you serve or partner with each audience.



Okay, we know who you're talking to and why. Now let's move on to how you want to communicate with them...



- 3.** Please choose 3 to 5 adjectives from the list below that best describe your region or organization and the CHW/P services you provide. (Adjectives = Describing words)

If you don't see a word you want in this list, feel free to write it in! You can also expand on a word; for instance, turn "sensitive" into "culturally sensitive."

reliable supportive smart responsible compassionate sincere thriving  
helpful open aware friendly thoughtful modern safe clean sensitive  
mature trustworthy informed innovative stable energetic wise inclusive  
caring diverse strong thorough authoritative honest accomplished  
accessible responsive dedicated well-trained comprehensive experienced  
professional empathetic effective collaborative proactive vibrant committed



- 4.** Let's dive a bit deeper: Which word resonates with you most? What experiences have you had personally that helped you pick those words?



5.

How do you want your target audience to feel? This is an essential part of finding your voice and values. Please choose 3 to 5 adjectives from the list below that describe the most important feelings.

If you have more than one audience – say, both Managed Care Plans and member organizations – then please select a set of words for each audience.

confident safe supported happy heard healthy united

warm serious loved brave certain optimistic content

secure shielded respected joyful satisfied fulfilled grateful

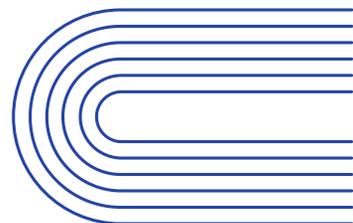
empowered informed valued included engaged welcomed

impressed convinced excited motivated assured enthusiastic

courageous inspired determined committed connected educated

6.

What do you notice about the words you picked for each audience? Do they have any in common? Which word do you think you, your organization, or your region needs to work on the most?





**7.** Last part: How do you or your group work? Choose 3 to 5 verbs from the list below that match the intention and tone of the adjectives you just selected. (Verbs = Action words) Again, feel free to add a word to the list if you don't see what you want.

educate inspire advocate support empower collaborate guide  
connect counsel facilitate mobilize monitor outreach expand  
refer coordinate train document promote navigate identify  
implement mediate encourage translate motivate accompany  
assist evaluate communicate develop scale mirror build  
enhance grow pilot assess engage strengthen share uplift

**8.** Look at all of the words you circled on the previous pages and this one. What do they have in common? How do they make you feel?





## Congratulations!

You just identified your voice and values. Let's sum it all up by transferring some snippets of your answers above to the summary statements below.

**When we write or speak, our organization or region is most often talking to:**

(page 3 for reference)



**When we contact them, we are usually offering:**

(page 4 for reference)

**When I describe my organization or region, I use these words:**

(page 5 for reference)

**When we work, I want people to feel:**

(page 6 for reference)

**When we work, this is how we take action:**

(page 7 for reference)

**(The next page has an example of a completed version for my own Community Based Organization, so you can see this exercise in action.)**

# Hananiah House

## Voice & Values Example



### When we write or speak, our organization is most often talking to:

Hananiah House serves women who have been incarcerated for at least 3 years. We focus on inmates who are repeat offenders, have served time in maximum security facilities, and who are at the greatest disadvantage statistically and socially. We prioritize Black and Brown women, as well as inmates who are transitioning their gender and are not welcome in other transitional homes as a result.

### When we contact them, we are usually offering:

We offer safe, stable housing, as well as extensive programming to transform the lives of women who have spent significant time in prison. This includes job training, counseling, and daily support that empowers our residents to heal, grow, and build a positive future for themselves and their families.

### When I describe my organization or region, I use these words:

We believe that the only remedy for the traumatic, often tragic outcomes of the prison system is to offer our residents unconditional love, respectful accountability, and practical answers to the many challenges associated with incarceration. Together, we can achieve positive, lasting change in the lives of Hananiah House residents, their families, and their communities.

### When we work, I want people to feel:

Hananiah means “grace for all” in Hebrew. We chose our name because we serve those who need it most. Life in Hananiah House is intentionally dependable and emotionally safe, with a reliable team, clear expectations, and healthy boundaries. Hananiah House residents are not defined by their previous actions or experiences, and forgiveness and support are available to everyone willing to do the hard work of moving forward.

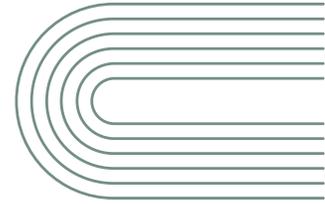
### When we work, this is how we take action:

Hananiah House was developed to address the five most significant roadblocks faced by women after arrest and conviction: Recovery from trauma and abuse; adjustment to modern living; need for community integration; access to meaningful career opportunities; and protection from contagious illness. Our mission is to create a realistic, sustainable model for post-incarceration housing and employment that breaks the current cycle of trauma and recidivism and brings about true generational change. We teach our residents how to heal from past abuses, face new challenges, and acquire the real-world skills needed to take responsibility for a successful, independent life.





Before we move on to Part Two of the exercise, let's take a quick break to talk about one of the most fascinating elements of branding: Color Psychology.



## Did You Know?

Research reveals that between 60% and 92% of the subconscious decisions people make about their environment or a business are based solely on the colors used in their graphic or interior design.

That means your target Managed Care Plan, organization, or community member has already developed many of their initial opinions about you based purely on the design colors of your website, proposal, or brochure – before they read a single word!

There's an easy way to make that work in your favor: Color Psychology.

Color Psychology is the study of how the colors used in marketing and the environment can affect human behavior, emotions, and mood.

Ever notice the most common colors for fast food company logos are red and yellow? That's color psychology at work! It's also the same reason that the most common color among corporate logos is blue.



While effects vary across different age groups and cultures, the following rules are most common...



# Color Psychology Basics

## Red: Passion, Eagerness, Excitement

Red is commonly used to evoke strong emotions, create a sense of urgency, and stimulate the appetite. Too much red in your design can feel aggressive.

## Orange: Happiness, Energy, Enthusiasm

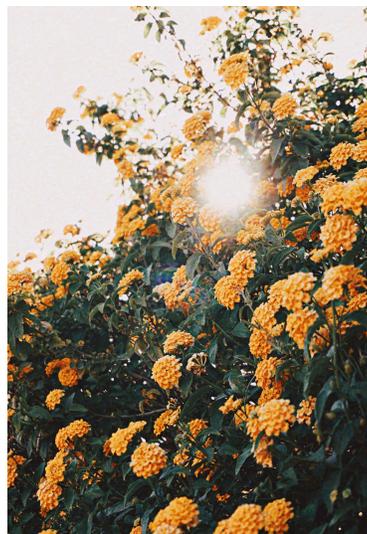
Orange is a stimulating color that typically creates a sense of warmth and comfort. Too much orange in your design can make people feel restless or anxious.

## Yellow: Cheer, Creativity, Optimism

Yellow is often associated with happiness and can help stimulate innovation. Too much yellow in your design can be overwhelming or cause frustration.

## Green: Growth, Balance, Wellness

Green feels natural and can promote a sense of good health and relaxation. Too much green in your design can be boring or unstimulating.





## Blue: Calm, Trust, Security

Blue creates a sense of serenity and helps reduce stress. Too much blue in your design can feel cold or detached.

## Purple: Luxury, Spirituality, Sophistication

Purple feels elegant and can communicate a sense of maturity or refinement. Too much purple in your design can make people feel moody or distracted.

## Black: Style, Power, Mystery



Black evokes a sense of authority and professionalism. Too much black in your design can feel austere or too formal.

The lighter the shade of color you use, the more simple and minimal it feels. The darker or brighter the color, the more powerful and emphatic it is.

Think about the colors you're using in your website, brochures, or proposals. What are they communicating?





Okay, after that little mental breather, let's turn our attention to crafting a mission that uses your voice and values!



## Part Two: Voicing Your Mission

Now that you have some language ready that describes your voice and values, let's take a look at your mission.

As a CHW/P, community-based organization, or CBC region, your mission statement describes your fundamental purpose. It provides a clear focus and can help guide decision-making and how you allocate resources, as well as define meaningful common goals for your team, the population you serve, and other stakeholders.

Being able to speak to your mission clearly and convincingly is absolutely essential to making a strong, positive impact on potential funding partners, member organizations, and your community.

Stuck with how to start your proposal or presentation? Lead with your mission statement. 

Trying to communicate the value of CHW/Ps to care partners? Explain your mission statement.

Concerned that a new initiative might not be a good fit for your group? Check with your mission statement.

It's a handy resource to have around!



## But wait, there's more...

While your region or organization might have one primary mission statement, you don't have to stop there!

Why not have a set of mission statements, not only for your organization or region as a whole, but for each type of work you do, each population you serve, or the CHW/Ps on your team?

The purpose of a mission statement is to clarify your goals and serve as a guiding light for planning, decision-making, and communication.

Remember that the most effective work you do will include impactful, goal-driven measurables. A set of mission statements for each area of focus will help you communicate and stay accountable to those measures of success.

The clearer you get around the language you use to speak about your goals and needs, the easier it will be to get the support you need to scale and achieve financial sustainability.

As a bonus, knowing your mission for each focus area means your next email, presentation, or proposal will basically write itself!





# A Note About Managed Care Plans



While your mission may be local or personal, our end goal is to ensure a growing, thriving, diverse workforce of CHW/Ps and the financial sustainability needed to support their work.

That means everyone involved needs to understand how to appeal to Managed Care Plans. Other Collaborative Technical Assistance will focus on the details of proposals and logistics; this exercise is to give you consistent language to market your region, organization, or CHW/Ps effectively.

Before you start writing your mission statements, let's do a quick review of the top 10 elements Managed Care Plans are looking for in your communication:

- 1. Clear objectives:** Outline specific, measurable, and achievable goals that will result from the integration of CHW/Ps in care teams. This might include improving health outcomes, reducing health disparities, or increasing access to care for Medi-Cal beneficiaries.
- 2. Program value:** Detail how you are helping the MCP solve a specific problem in a way that creates immediate value. The issues involved may include network adequacy, geographic presence, or program/initiative compliance.
- 3. Evidence-based approach:** Demonstrate that the proposed intervention or approach is grounded in evidence and best practices. This could include citing relevant research, successful case studies, or proven models of CHW/P integration.
- 4. Comprehensive program description:** Provide a detailed description of the CHW/P program, including the roles and responsibilities of CHW/Ps, their scope of practice, and a summary of the outcomes.
- 5. Operational efficiency:** Show that you are operationally ready with details that may include the longevity of your organization, financial sustainability, hiring and management processes for CHW/Ps, and data infrastructure.

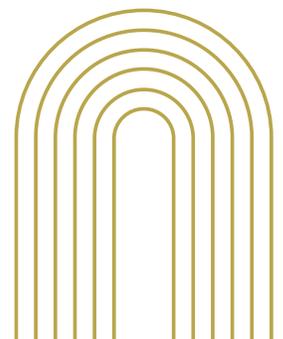


6. **Cultural competency and diversity:** Confirm the cultural competency and diversity of CHW/Ps and knowledge of the needs of the target population. This might include providing demand data and further evidence of the CHW/P workforce's collective qualifications, linguistic and cultural knowledge, and lived experience.
7. **Population health management:** Outline the plan for CHW/Ps to deliver on population health goals, focusing on the capacity of the CHW/P workforce to execute contracted services effectively and in a timely manner.
8. **Integration with community:** Share how CHW/Ps are well-situated to support MCP efforts around whole person care through collaboration with local entities. This could include a review of relevant community partnerships, as well as physical infrastructure. 
9. **Integration with existing services:** Illustrate how CHW/P services can be integrated into the MCP's existing delivery model. This may include outlining the process and technology for care coordination, communication, and collaboration between CHW/Ps and other care team members.
10. **Evaluation and performance measurement:** Explain the standards used to evaluate CHW/P success and measure their impact with Key Performance Indicators. This might include specific metrics related to individual CHW/P performance, health outcomes, patient satisfaction, and service utilization.

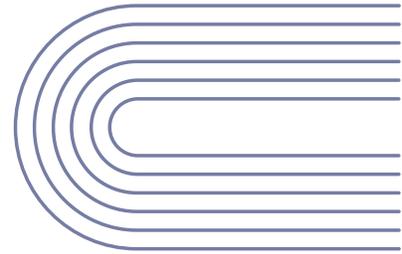
Obviously you will need a lengthy proposal to address all of these topics! However, a strong mission statement will introduce these same elements.

In fact, think about how much easier your next proposal or conversation with a Managed Care Plan might be if you had a set of mission statements ready that covered each of the ten items above... 

Think of your mission statements as conversation starters that set the tone for the communication ahead.



# ✦ How to Use This Exercise



## Ready to jump in?

If your region, organization, or CHW/Ps don't have a formal, inspiring mission statement (or that statement doesn't match the voice and values you just identified), you can apply the following exercise to that effort.

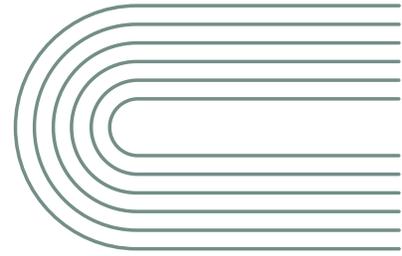
If your region or organization already has a mission statement you're happy with, let's work on a new one that gets more specific. You could write a mission statement around:

- Meeting the emerging needs of your county or region's Medicaid population
- How your CHW/Ps work
- How you support your CHW/Ps
- Even just for you personally!

This exercise can bring a lot of clarity and connection between your voice and how you talk about your mission.



# Anatomy of a Mission Statement



We're going to use some easy prompts to help create mission statements quickly and painlessly. However, it's still important to know what makes a mission statement effective!

A strong mission statement is typically 2-3 sentences and includes these main components:

**Purpose:** Clearly explain the primary purpose of your group or initiative

**Values:** Identify your guiding principles

★ **Target Audience:** Define who this mission serves and their needs

**Services & Solutions:** Outline the form your key contributions take

**Impact:** Describe the measurable change your mission will bring

(You'll notice that the work you already did in the Voice & Values exercise fills in a lot of these blanks...)



Using your Voice & Values summary from page 7, choose a focus area and try creating at least one mission statement now.

- 1.** Below are some prompts and to help inspire your mission statement creation. Some involve filling in the blanks with the language you selected earlier. You might choose a single prompt, or you could complete all of them, then combine the best of your results to create your mission.

Feel free to alter the prompt to fit your role. For instance, "Our mission is..." could become "As a CHW/P, my mission is..." Page 21 has additional blank space to brainstorm and take notes.

**Helpful hint:** If you're having trouble getting started, try creating a mission statement that has nothing to do with work! What's your mission as a parent, partner, or neighbor? What's your mission for a social event you're attending or hosting? What's your mission for your next grocery shopping trip? Keep it simple and personal until you get the hang of it...

## Mission Statement Prompts

Our mission is...

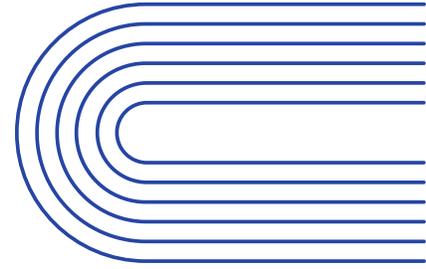
We aim to...

Our goal is to...

We are guided by...



We believe that...



We recognize that...

We serve...

We strive to...

We are dedicated to...



By \_\_\_\_\_, we \_\_\_\_\_ ...  
(how you work and who you serve) (how you make people feel and the results)

Guided by \_\_\_\_\_, we \_\_\_\_\_  
(your values and goals)

\_\_\_\_\_  
(services you offer and the results)





## Examples of Mission Statements



### Example 1:

Our mission is to empower and uplift minority populations by providing culturally sensitive, motivating healthcare services through the deployment of dedicated Community Health Workers/Promotores. We aim to bridge the gap in healthcare access and education while fostering a healthier, more equitable community for all.

### Example 2:

Guided by the principles of social justice and inclusion, our mission is to engage, support, and serve minority populations by employing Community Health Workers/Promotores who understand the unique needs and values of our community. We strive to provide comprehensive healthcare solutions that foster resilience, self-sufficiency, and a brighter, healthier future for everyone."

### Example 3:

We believe that everyone deserves access to high-quality healthcare that is tailored to their unique needs and preferences. Our goal is to bridge the gap in healthcare access and education by leveraging the expertise of our CHW/Ps to empower underserved communities to take charge of their health and well-being. Our ultimate aim is to foster a healthier, more equitable community for all Californians.

### Example 4:

As a Community Health Worker/Promotora, my mission is to elevate and support Black and Brown members of my community by delivering culturally sensitive, community-led healthcare services. I strongly believe that equitable access to high-quality healthcare is a fundamental right for all individuals, and I am dedicated to advocating for health equity and social justice by addressing the root causes of health disparities and working towards systemic change.



### Example 5:

As a Community Health Worker/Promotora, I am dedicated to serving pregnant individuals and families in our community with holistic, comprehensive doula, prenatal, and neonatal support that emphasizes empowerment and education. By ensuring compassionate, culturally responsive care, I help improve maternal and infant health outcomes and foster healthy, thriving families.



# Space to Work



**Beautifully done!**



**Spring Barnickle** has over twenty years experience as Chief Almost Everything, including CEO, COO, and CMO.

She uses her decades of experience as a successful Founder and C-Suite leader to help organizations get clear on their goals and reach them, so they can build businesses and lives they love. ✨ ✨



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