California Board of
PSYCHOLOGY

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MEMORANDUM

DATE	October 13, 2016
TO	Board Members
FROM	Antonette Sorrick Executive Officer
SUBJECT	**Strategic Plan Update: Agenda Item 9(a)**

Background:
The attached Strategic Plan Update identifies the action steps that were created to meet the Board's identified goals and objectives in its Strategic Plan. This document will be updated and provided to the Outreach and Education Committee, and to the Board, at each quarterly meeting.

Action Requested:
No action required.

Attachment 1: Board of Psychology Strategic Plan Update as of October, 2016

Goal 1: Licensing

The Board of Psychology provides applicants, licensees, and registrants a method for providing psychological services in California.

1.1 Perform a process analysis (to include an analysis of staff time, resources, and equipment) to ensure the Board is using and/or asking for resources that are needed to identify methods to reduce licensing processing times.	Responsibility	Timeframe	Status
Enter into contract with CPS to review licensing function.	CCC	Q3 2014	Completed
Begin CPS review.	CCC/CPS	Q4 2014	Completed
CPS finalizes review and provides findings to EO.	EO/CPS	Q3 2015	Completed
EO share findings with staff and Board.	EO	Q3 2015	Completed
Implement findings from CPS review.	AEO/LM/LC	Q4 2015	Move to Q3 2017
Incorporate CPS changes on website (if needed).	CCC	Q1 2016	Completed
Update desk procedure manuals based on CPS findings.	LC	Q4 2015	Completed
Incorporate CPS changes in BreEZe (if needed).	E&BC	Q4 2015	Completed

1.2 Establish and implement a plan to address current and future licensing backlogs.	Responsibility	Timeframe	Status
Provide weekly updates to EO and AEO regarding licensing processing time statistics.	LC	Ongoing	Completed
Present licensing statistics to Board Members at quarterly Board meetings.	LM	Ongoing	Completed
Update documents/forms if needed.	LC/LM	Ongoing	Completed
Create and update desk procedure manuals.	LC	Q1 2015	Completed

Allow online submission of applications through BreEZe.	E&BC/LC	Q3 2015	Completed

1.3 Submit a budget change proposal to establish a full time licensing manager position and/or additional full-time licensing positions, if needed, as determined by the licensing process analysis. (objective 1.1).	Responsibility	Timeframe	Status
Conduct job analysis and compile justification data to support BCP (CPS report).	LC/CCC	Q2 2015	Completed
Obtain Board approval of BCP concept.	EO/Board	Q3 2015	Completed
Submit BCP concept paper to DCA Budget Office.	CCC/LC	Q3 2015	Completed
Draft and submit BCP to DCA Budget Office.	ASC/LC	Q3 2015	Completed
Obtain DCA Budget Office approval of BCP.	ASC/Budget Office	Q2 2016	Completed
Obtain Agency approval of BCP.	EO/Agency	Q3 2016	Completed
Submit BCP to Department of Finance.	EO	Q3 2016	Completed
Obtain BCP approval from Department of Finance.	EO/DOF?AEO	Q4 2016	Move to Q3 2017

1.4 Establish communication tools to facilitate the licensing process for applicants.	Responsibility	Timeframe	Status
Identify areas where clarification is needed to facilitate licensing process.	LC/EO	Q2 2014	Completed
Create YouTube video outlining the licensing application process.	LC/DCA Public Affairs	Q2 2014	Completed
Create a YouTube video providing an overview of licensure as a psychologist.	LC/DCA Public Affairs	Q2 2014	Completed
Create YouTube video outlining the psychological assistant application process.	LC/DCA Public Affairs	Q4 2014	Completed
Create a YouTube video providing an overview of registration as a psychological assistant.	LC/DCA Public Affairs	Q4 2014	Completed
Create a YouTube video providing an overview of the registered psychologist registration process.	LC/DCA Public Affairs	Q2 2015	Completed
Create a YouTube video outlining the registered psychologist application process.	LC/DCA Public Affairs	Q2 2015	Completed
Create a YouTube video outlining the continuing education process and requirements.	CEC/CSM/DCA Public Affairs	Q4 2016	Pending Regulatory Change

Post videos on website as they are developed.	CCC	Ongoing	Completed
Promote videos in newsletter and social media to licensees.	EO	Ongoing	Completed
Ongoing visits to schools to educate students and trainees on licensing process.	LC/AEO/EO	Ongoing	Move to Q4 2017

1.5 Evaluate the effectiveness of the BreEZe system, and work with DCA to identify and implement system improvements to the licensing process.	Responsibility	Timeframe	Status
Identify functionality that is currently not working properly or unavailable in BreEZe.	E&BC	Ongoing as issues arise	Completed
Submit a request to change or add functionality in BreEZe.	E&BC	Ongoing as issues arise	Completed
Work with BreEZe team to identify which release change or added functionality will occur.	E&BC	Ongoing as issues arise	Completed
Submit change or added functionality to Change Control Board (if required).	E&BC	Ongoing as issues arise	Completed
Attend Licensing Users Group to collaborate with other R1 boards to identify global changes and other problem areas and functionalities.	E&BC/LC/CEC	Monthly	Completed
Educate staff on BreEZe changes.	E&BC	Ongoing as issues arise	Completed

1.6 Provide customer service training to licensing staff to enhance service to stakeholders	Responsibility	Timeframe	Status
Identify deficiencies in customer service.	LM	Ongoing	Completed
Identify training needs.	AEO/LM	Ongoing	Completed
Schedule training for staff.	LC/LM	Ongoing	Completed
Establish customer service performance measures.	AEO/LC	Q3 2015	Completed

1.7 Review statutes and regulations regarding psychological assistant, supervised professional experience, and exempt settings and make changes to clarify the initial intent of the law.	Responsibility	Timeframe	Status
Review and amend statutes and regulations to facilitate a more efficient application process to become a licensed psychologist.	CSM/LM	Q1 2017	Move to Q4 2017

Review and amend statutes and regulations regarding requirements to become a supervisor of a psychological assistant.	CSM/LM	Q1 2018	Move to Q4 2017
Review and amend statutes regarding exempt settings.	LC/CCC	Q1 2017	Completed
Educate staff on any changes to statutes and/or regulations.	LM	Q1 2018	On Schedule
Educate licensees on any changes to statutes and/or regulations.	EO/AEO/CCM	Q1 2018	On Schedule

1.8 Provide "hard-card" pocket licenses for licensed psychologists and registered psychological assistants.	Responsibility	Timeframe	Status
Work with DCA to identify a vendor and determine process to produce card.	CCC	Q1 2017	Completed
Work with BreEZe team to modify BreEZe to produce a hard card with the vendor.	E&BCCSM	Q2 2017	On Schedule
Publicize the availability of the hard card license to licensees.	CSM/EO	Q4 2017	On Schedule

1.9 Create "Retired" status for licensed psychologists.	Responsibility	Timeframe	Status
Identify statutory and regulatory changes necessary to establish a "Retired" status for licensed psychologists.	AEO/CCC	Q3 2015	Completed
Board ratifies suggested changes.	EO/Board	Q4 2015	Completed
Draft legislation.	EO/AEO/CCC	Q4 2015	Completed
Coordinate meetings with affected stakeholders to solicit input on regulation development.	EO/ AEO/CSM	Q1 2016	Move to Q1 2017
Draft new regulatory language to establish "Retired" status requirements and guidelines and obtain Board Approval.	CSM/Board/DCA	Q2 2016	Move to Q1 2017
Create rulemaking packet including initial statement of reason, proposed text and notice.	CCC	Q3 2016	Move to Q2 2017
Submit regulation package to the Office of Administrative Law.	CCC	Q4 2016	Move to Q2 2017
Conduct regulation hearing.	Board President	Q1 2017	Move to Q2 2017
Obtain regulation approval by Office of Administrative Law.	CCC/OAL	Q2 2017	Move to Q4 2017
Work with BreEZe team to configure "Retired" status.	E&BC/CSM	Q1 2017	Move to Q4 2017

Educate staff on "Retired" status.	LM/AEO	Q4 2017	On Schedule
Inform stakeholders via various communication methods.	CSM/EO	Q4 2017	On Schedule

Goal 2: Continuing Education

The Board works to ensure qualified and competent individuals are licensed to provide psychological services in the State of California.

2.1 Promulgate continuing education/continuing professional development (CE/CPD) regulations and ensure Board staff and licensees are educated on the new requirements.	Responsibility	Timeframe	Status
Draft new regulatory language to establish CE/CPD requirements and guidelines and obtain Board Approval.	EO/CCM	Q3 2014	Move to Q4 2017
Create rulemaking packet including initial statement of reason, proposed text and notice.	CCC	Q3 2014	Move to Q1 2017
Submit regulation package to the Office of Administrative Law.	CCC	Q3 2014	Move to Q3 2017
Conduct regulation hearing.	Board President	Q4 2014	Move to Q2 2017
Obtain regulation approval by Office of Administrative Law.	CCC	Q4 2015	Move to Q4 2017
Incorporate CE/CPD changes in BreEZe.	E&BC/CSM	Q4 2016	Move to Q4 2017
Educate staff and licensees on new regulation.	AEO/CSM/CEC	Q3 2015	Move to Q4 2017
Update forms and information on website	CCC	Q3 2017	Move to Q4 2017

Goal 3: Laws and Regulations

The Board works to establish and maintain fair and just statutes and regulations that provide for the protection of consumer health and safety and reflect current and emerging, efficient and cost-effective practices.

3.1 Create a greater presence in the legislative arena to more proactively address issues affecting the Board and the practice of psychology.	Responsibility	Timeframe	Status
Continue to develop relationships with professional associations.	AEO/CSM	Ongoing	Completed
Establish stronger relationships with consumer groups.	AEO/CSM	Ongoing	Q2 2017
Provide legislative updates to staff and Board Members.	CCC	Weekly	Completed
Solicit legislative and regulatory input from impacted stakeholders.	EO/AEO/CSM	Ongoing	Completed
Provide advocacy letters to the legislature and testifying on bills the Board has taken an official position on.	CSM/EO/AEO	Ongoing	Completed

3.2 Adopt regulations to clarify and strengthen the Board's position on the practice of telepsychology.	Responsibility	Timeframe	Status
Examine research and guidelines from other state entities on the emerging field of telehealth.	CCC	Q1 2014	Completed
Establish a BOP telehealth committee.	Board President	Q4 2014	Completed
Coordinate meetings with affected stakeholders to solicit input on regulation development.	EO/CCC	Q1 2016	Completed
Draft new regulatory language to establish telehealth requirements and guidelines and obtain Board Approval.	AEO/CSM	Q1 2016	Move to Q1 2017
Create rulemaking packet including initial statement of reasons, proposed text and notice.	CCC	Q2 2016	Move to Q3 2017
Conduct regulation hearing.	Board President	Q3 2016	Move to Q22017
Submit regulation package to the Office of Administrative Law.	CCC	Q3 2016	Move to Q4 2017
Obtain regulation approval by Office of Administrative Law.	CCC/OAL	Q4 2016	Move to Q4 2017
Educate staff and licensees on new regulation.	AEO/CSM	Q4 2016	Move to Q4 2017

Goal 4: Enforcement

The Board protects the health and safety of consumers of psychological services through the active enforcement of the statutes and regulations governing the safe practice of psychology in California.

4.1 Educate consumers and licensees by providing transparent information about enforcement processes and outcomes.	Responsibility	Timeframe	Status
Provide newsletter article about Board overview and functionality to increase transparency for stakeholders about the role of the Board.	EPM/EO	Q3 2014	Completed
Create an overview (flowchart) of the enforcement process (complaint, cite and fine and formal disciplinary process) and post on the Board website.	EPM/EO/CCC	Q4 2014	Completed

Have Enforcement Program Manager present at a Board meeting detailing enforcement process and answering questions from the public, and work with OPA, archive video and have placed on the Board website.	EPM/EO/CCC	Q3 2015	Completed
Create an FAQ page for consumers and licensees about enforcement process and place on Board website.	EPM/EO/CCC	Q3 2015	Completed

4.2 Identify and seek clarification to strengthen statutory and regulatory language regarding Statement of Issues and public reprimands.	Responsibility	Timeframe	Status
Determine whether the Board has legal authority to issue public reprimands and investigate other board processes for such authority.	EPM	Q4 2014	Completed
If legal authority does not exist, develop a model for the Board.	EPM	Q1 2015	Determined Unnecessary
If legal authority exists, present model to Board for approval.	EPM	Q2 2015	Determined Unnecessary
Determine whether the Board has legal authority to issue a probationary license through a statement of issues and investigate other board processes for such authority.	EPM	Q3 2015	Completed
If legal authority exists, develop a model for the Board.	EPM/Legal	Q4 2015	Move to Q2 2017
If legal authority exists, present model to Board for approval.	EPM	Q1 2016	Move to Q2 2017

4.3 Modify the Board's website to include dedicated information and resources on license probation to include probationer forms.	Responsibility	Timeframe	Status
Create a probation section on the Board website including quarterly reports and probationer forms.	PC	Q2 2014	Completed

4.4 Establish standardized training and educational resources for Expert Reviewers to improve effectiveness and consistency.	Responsibility	Timeframe	Status
Establish an annual training schedule for expert reviewers.	EPM/EO	Q4 2014	Completed
Provide all experts with any changes to the Board's disciplinary guidelines and laws and regulations.	EPM/EO	Q1 2015	Completed
Solicit subject matter expert presenters on relevant topics for annual training.	EPM/EO	Q1 2015	Completed
Conduct annual training for expert reviewers.	EPM/EO	Q4 2015	Completed
Archive annual training presentations to use as a training tool for onboarding new Expert Reviewers.	EPM/EO	Q1 2016	Completed

4.5 Improve probation monitoring by using HIPAA-compliant technology.	Responsibility	Timeframe	Status
Investigate HIPAA-compliant technology for use by the probation monitor.	EPM/PC	Q4 2014	Completed
Obtain necessary software/hardware.	EPM/PC/ASC	Q2 2015	Determined Unnecessary
Train staff on the use of new software/hardware.	EPM	Q2 2015	Determined Unnecessary
Implement new software/hardware.	EPM/PC	Q3 2015	Determined Unnecessary
Educate probationers about new probation monitoring procedure.	EPM/PC	Q3 2015	Determined Unnecessary

4.6 Evaluate the effectiveness of the BreEZe system, and work with DCA to identify and implement improvements for the enforcement process.	Responsibility	Timeframe	Status
Identify functionality that is currently not working properly or unavailable in BreEZe.	EPM/E&BC	Ongoing as issues arise	Completed
Submit a request to change or add functionality in BreEZe.	E&BC/PC	Ongoing as issues arise	Completed
Work with BreEZe team to identify which release change or added functionality will occur.	EPM/E&BC	Ongoing as issues arise	Completed
Submit change or added functionality to Change Control Board (if required).	PC/E&BC	Ongoing as issues arise	Completed
Attend Enforcement Users Group to collaborate with other R1 boards to identify global changes and other problem areas and functionalities.	EPM/PC	Monthly	Completed

Educate staff on BreEZe changes.	EPM	Ongoing as issues arise	Completed

4.7 Perform a comprehensive process analysis of the Board's enforcement program to identify and implement improvements that will decrease processing times.	Responsibility	Timeframe	Status
Enter into contract with CPS to review enforcement function.	ASC	Q3 2014	Completed
Begin CPS review.	ASC/CPS	Q4 2014	Completed
CPS finalizes review and provides findings to EO.	EO/CPS	Q3 2015	Completed
EO share findings with staff and Board.	EO	Q3 2015	Completed
Implement findings from CPS review.	EPM	Q4 2015	Completed
Incorporate CPS changes on website (if needed).	ASC	Q1 2016	Completed
Update desk procedure manuals based on CPS findings.	EPM	Q4 2015	Completed
Incorporate CPS changes in BreEZe (if needed)	E&BC/PC	Q4 2015	Completed

4.8 Submit a Budget Change Proposal to establish additional full-time enforcement positions, if needed, as determined by the enforcement process analysis. (objective 4.7).	Responsibility	Timeframe	Status
Conduct job analysis and compile justification data to support BCP (CPS report).	EPM/ASC	Q4 2015	Completed
Obtain Board approval of BCP concept.	EO/Board	Q3 2015	Determined Unnecessary
Submit BCP concept paper to DCA Budget Office.	ASC/EPM	Q3 2015	Determined Unnecessary
Draft and submit BCP to DCA Budget Office.	ASC/EPM	Q3 2015	Determined Unnecessary
Obtain DCA Budget Office approval of BCP.	ASC/Budget Office	Q4 2015	Determined Unnecessary
Obtain Agency approval of BCP.	EO/Agency	Q4 2015	Determined Unnecessary
Submit BCP to Department of Finance.	EO	Q4 2015	Determined Unnecessary

Obtain BCP approval from Department of Finance.	EO/DOF	Q4 2015	Determined Unnecessary
Obtain legislative approval for BCP.	EO	Q2 2016	Determined Unnecessary

Goal 5: Outreach

The Board proactively educates, informs, and engages consumers, licensees, students and other stakeholders on the practice of Psychology and the laws which govern it.

5.1 Develop and implement a communication plan identifying stakeholders, messages to communicate, and message communication methods.	Responsibility	Timeframe	Status
Develop a communications plan.	EO	Q2 2014	Completed
Present to Board for Board ratification.	EO	Q2 2014	Completed
Implementation of plan.	EO	Ongoing	Completed

5.2. Increase Board visibility at schools, professional conferences, public events, etc. to better educate consumers and licensees about the Board.	Responsibility	Timeframe	Status
Identify outreach opportunities.	EO/AEO/LC/ EPM	Ongoing	Completed
Work with DCA to approve travel by providing DCA with mission-critical benefits for stakeholders.	EO	Ongoing	Completed
Attend outreach events.	EO	Ongoing	Completed
Explore methods to expand visibility of Board.	EO/ASC	Ongoing	Completed

Goal 6: Organizational Effectiveness

The Board works to develop and maintain an efficient and effective team of professional and public leaders and staff with sufficient resources to improve the Board's provision of programs and services.

6.1 Cross train staff to ensure Board-wide understanding of all intra-departmental functions to improve Board effectiveness.	Responsibility	Timeframe	Status
Conduct unit overview at staff meetings to educate staff on different business processes of the Board.	EO	Q1 2014	Completed
Create an annotated organization chart to educate staff on individual staff expertise/focus.	AEO	Q4 2014	Completed
Develop schedule for manager/lead presentation at unit bi-weekly meetings to disseminate overview to unit staff.	EO/Each unit Manager/Lead	Q4 2015	Move to Q4 2017
Establish meeting for presentation for all staff about each unit, and providing opportunity for staff to ask questions of each unit to be compiled in an internal office resource book for Board staff.	EO	Q4 2015	Move to Q4 2017

6.2 Provide professional development for staff to facilitate opportunities for advancement and professional growth.	Responsibility	Timeframe	Status
Work with SOLID on Customer Service training to enhance professional courtesy to Board stakeholders.	EO	Q1 2014	Completed
Ensure probationary reports and employees have IDPs on file.	EO	Q4 2014	Completed
Work with Managers/Leads to identify further training needs for staff.	EO	Ongoing	Completed

6.3 Perform a program analysis of the Board's operational procedures to streamline Board staff functions and processes.	Responsibility	Timeframe	Status
Submit vendor contract to conduct analysis on Board function.	ASC	Q3 2014	Completed
Obtain DCA approval on contract to perform CPS program analysis.	ASC/DCA	Q3 2014	Completed

Work with contracted vendor to conduct analysis of Board function.	EO/AEO	Q2 2015	Completed
Review CPS analysis with all staff to address recommendations.	EO/AEO	Q4 2015	Completed
Develop appropriate process improvements based on recommended changes provided by analysis.	EO/AEO/EPM	Q1 2016	Completed

6.4 Develop procedure manuals for Board and DCA policies and make available for all Board staff in a centralized location.	Responsibility	Timeframe	Status
Review any existing procedure manuals and determine what is currently in place.	AEO/EPM	Q3 2014	Completed
Assign staff to compile desk manual in conjunction with program analysis.	AEO/EPM	Q3 2014	Completed
Unit managers and leads compile division procedure manuals in conjunction with program analysis.	AEO/EPM	Q2 2015	Completed
Pending recommendations from program analysis review and update existing desk and procedure manuals.	AEO/EPM	Q3 2015	Completed
Store updated Board process manual in centralized location at the Board.	AEO/EO	Q4 2015	Completed

6.5 Identify and implement tools and communication methods to improve Board member understanding of Board staff activities between meetings	Responsibility	Timeframe	Status
For example, weekly legislative updates.	ASC /EO	Q2 2014	Completed
Develop quarterly EO report to Board to report Licensing and Enforcement stats.	EO/EPM/AEO	Q2 2015	Not available report in BreEZe – EO/Annual Report Data In Lieu of Monthly Report
Survey Board Members on Board Member updates/materials and training to determine satisfaction with frequency of information.	EO/EPM	Q1 2016	Completed
Develop Board of Psychology Board Member Orientation Training.	EO/AEO/EPM	Q4 2016	Completed