



MEMORANDUM

DATE	October 15, 2014
TO	Psychology Board Members
FROM	Antonette Sorrick Executive Officer
SUBJECT	Strategic Plan Update 10 (a)

Background:

The attached Strategic Plan Update identifies the action steps that will be updated and provided to the Board at each Board Meeting.

Action Requested:

No action required.

Goal 1: Licensing

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

Enter into contract with CPS to review licensing function.	ASC	Q3 2014	Completed
Begin CPS review.	ASC/CPS	Q4 2014	On Schedule
CPS finalizes review and provides findings to EO.	EO/CPS	Q2 2015	On Schedule
EO share findings with staff and Board.	EO	Q2 2015	On Schedule
Implement findings from CPS review.	LC/AEO	Q3 2015	On Schedule
Incorporate CPS changes on website (if needed).	ASC	Q3 2015	On Schedule
Update desk procedure manuals based on CPS findings.	LC	Q4 2015	On Schedule
Incorporate CPS changes in BreEZe (if needed).	E&BC	Q4 2015	On Schedule

Provide weekly updates to EO and AEO regarding licensing processing time statistics.	LC	Ongoing	On Schedule
Present licensing statistics to Board Members at quarterly Board meetings.	LC	Ongoing	On Schedule
Reorganizing the application workflow (river concept).	LC	Q3 2014	Completed
Train staff on new workflow and procedures.	LC	Q3 2014	Completed
Update documents/forms if needed.	LC	Q4 2014	On Schedule
Create and update desk procedure manuals.	LC	Q4 2014	On Schedule
Allow online submission of applications through BreEZe.	E&BC/LC	Q1 2015	Q4 2014

Conduct job analysis and compile justification data to support BCP (CPS report).	LC/ASC	Q2 2015	On Schedule
Obtain Board approval of BCP concept.	EO/Board	Q3 2015	On Schedule

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Submit BCP concept paper to DCA Budget Office.	ASC/LC	Q3 2015	On Schedule
Draft and submit BCP to DCA Budget Office.	ASC/LC	Q3 2015	On Schedule
Obtain DCA Budget Office approval of BCP.	ASC/Budget Office	Q4 2015	On Schedule
Obtain Agency approval of BCP.	EO/Agency	Q4 2015	On Schedule
Submit BCP to Department of Finance.	EO	Q4 2015	On Schedule
Obtain BCP approval from Department of Finance.	EO/DOF	Q4 2015	On Schedule
Obtain legislative approval for BCP.	EO	Q2 2016	On Schedule

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	On Schedule
Create a YouTube video providing an overview of the registered psychologist registration process.	LC/DCA Public Affairs	Q2 2015	On Schedule
Create a YouTube video outlining the registered psychologist application process.	LC/DCA Public Affairs	Q2 2015	On Schedule
Create a YouTube video outlining the continuing education process and requirements.	LC/DCA Public Affairs	Q4 2014	On Schedule
Post videos on website as they are developed.	ASC	Q1 2016	On Schedule
Promote videos in newsletter and social media to licensees.	EO	Ongoing	On Schedule
Ongoing visits to schools to educate students and trainees on licensing process.	LC/AEO/EO	Ongoing	On Schedule

Identify functionality that is currently not working properly or unavailable in BreEZe.	E&BC	Ongoing as issues arise	On Schedule
Submit a request to change or add functionality in BreEZe.	E&BC	Ongoing as issues arise	On Schedule
Work with BreEZe team to identify which release change or added functionality will occur.	E&BC	Ongoing as issues arise	On Schedule
Submit change or added functionality to Change Control Board (if required).	E&BC	Ongoing as issues arise	On Schedule
Attend Licensing Users Group to collaborate with other RI boards to identify global changes and other problem areas and functionalities.	E&BC/LC/CEA	Monthly	On Schedule

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Educate staff on BreEZe changes.	E&BC	Ongoing as issues arise	On Schedule
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Identify deficiencies in customer service.	LC	Q1 2014/Ongoing	On Schedule
Identify training needs.	AEO/LC	Q1 2014/Ongoing	On Schedule
Schedule training for staff.	LC	Q1 2014/Ongoing	On Schedule
Establish customer service performance measures.	AEO/LC	Q1 2015	On Schedule

Review and amend statutes and regulations to facilitate a more efficient application process to become a licensed psychologist.	LC/ASC	Q1 2017	On Schedule
Review and amend statutes and regulations regarding requirements to become a supervisor of a psychological assistant.	LC/ASC	Q1 2018	On Schedule
Review and amend statutes regarding exempt settings.	LC/ASC	Q1 2017	On Schedule
Educate staff on any changes to statutes and/or regulations.	EO/AEO	Q1 2018	On Schedule
Educate licensees on any changes to statutes and/or regulations.	EO/AEO	Q1 2018	On Schedule

Work with DCA to identify a vendor and determine process to produce card.	ASC	Q1 2017	On Schedule
Work with BreEZe team to modify BreEZe to produce a hard card with the vendor.	E&BC	Q2 2017	On Schedule
Publicize the availability of the hard card license to licensees.	ASC/EO	Q4 2017	On Schedule

Identify statutory and regulatory changes necessary to establish a "Retired" status for licensed psychologists.	AEO/ASC	Q3 2015	On Schedule
Board ratifies suggested changes.	EO/Board	Q4 2015	On Schedule
Draft legislation.	EO/AEO/ASC	Q4 2015	On Schedule
Coordinate meetings with affected stakeholders to solicit input on regulation development.	EO/ASC	Q1 2015	On Schedule
Draft new regulatory language to establish "Retired" status requirements and guidelines and obtain Board Approval.	ASC/Board/DCA	Q3 2015	On Schedule
Create rulemaking packet including initial statement of reason, proposed text and notice.	ASC	Q1 2016	On Schedule

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Submit regulation package to the Office of Administrative Law.	ASC	Q2 2016	On Schedule
Conduct regulation hearing.	Board President	Q3 2016	On Schedule
Obtain regulation approval by Office of Administrative Law.	ASC/OAL	Q4 2016	On Schedule
Work with BreEZe team to configure "Retired" status.	E&BC	Q4 2016	On Schedule
Educate staff on "Retired" status.	LC/AEO	Q4 2016	On Schedule
Inform stakeholders via various communication methods.	ASC/EO	Q4 2016	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.

Promulgate regulatory package.	ASC	Q3 2014	Completed
Incorporate CE/CPD changes in BreEZe.	E&BC	Q3 2015	On Schedule
Draft new regulatory language to establish CE/CPD requirements and guidelines and obtain Board Approval.	EO/ASC	Q3 2014	Completed
Create rulemaking packet including initial statement of reason, proposed text and notice.	ASC	Q3 2014	Completed
Submit regulation package to the Office of Administrative Law.	ASC	Q3 2014	Completed
Conduct regulation hearing.	Board President	Q4 2014	On Schedule
Obtain regulation approval by Office of Administrative Law.	ASC	Q2 2015	On Schedule
Educate staff and licensees on new regulation.	AEO/LC	Q2 2015	On Schedule
Update forms and information on website	ASC	Q4 2015	On Schedule

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.

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Continue to develop relationships with professional associations.	EO/ASC	Ongoing	On Schedule
Establish stronger relationships with consumer groups.	EO/ASC	Ongoing	On Schedule
Provide legislative updates to staff and Board Members.	ASC	Ongoing	On Schedule
Solicit legislative and regulatory input from impacted stakeholders.	EO/ASC	Ongoing	On Schedule
Provide advocacy letters to the legislature and testifying on bills the Board has taken an official position on.	ASC/EO	Ongoing	On Schedule

Examine research and guidelines from other state entities on the emerging field of telehealth.	ASC	Q1 2014	Completed
Establish a BOP telehealth committee.	Board President	Q4 2014	On Schedule
Coordinate meetings with affected stakeholders to solicit input on regulation development.	EO/ASC	Q1 2015	On Schedule
Draft new regulatory language to establish telehealth requirements and guidelines and obtain Board Approval.	ASC/Board	Q3 2015	On Schedule
Create rulemaking packet including initial statement of reasons, proposed text and notice.	ASC	Q3 2015	On Schedule
Submit regulation package to the Office of Administrative Law.	ASC	Q3 2015	On Schedule
Conduct regulation hearing.	Board President	Q4 2015	On Schedule
Obtain regulation approval by Office of Administrative Law.	ASC/OAL	Q1 2016	On Schedule
Educate staff and licensees on new regulation.	EO/AEO	Q1 2016	On Schedule

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.

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/ASC	Q4 2014	On Schedule
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/ASC	Q3 2015	On Schedule
Create an FAQ page for consumers and licensees about enforcement process and place on Board website.	EPM/EO/ASC	Q3 2015	On Schedule

Determine whether the Board has legal authority to issue public reprimands and investigate other board processes for such authority.	EPM	Q4 2014	On Schedule

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If legal authority exists, develop a model for the Board.	EPM	Q1 2015	On Schedule
If legal authority exists, present model to Board for approval.	EPM	Q2 2015	On Schedule
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	On Schedule
If legal authority exists, develop a model for the Board.	EPM	Q4 2015	On Schedule
If legal authority exists, present model to Board for approval.	EPM	Q1 2016	On Schedule

Create a probation section on the Board website including quarterly reports and probationer forms.	PC	Q2 2014	Completed
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	On Schedule
Solicit subject matter expert presenters on relevant topics for annual training.	EPM/EO	Q1 2015	On Schedule
Conduct annual training for expert reviewers.	EPM/EO	Q4 2015	On Schedule
Archive annual training presentations to use as a training tool for onboarding new Expert Reviewers.	EPM/EO	Q1 2016	On Schedule

Investigate HIPAA-compliant technology for use by the probation monitor.	EPM/PC	Q4 2014	On Schedule
Obtain necessary software/hardware.	EPM/PC/ASC	Q2 2015	On Schedule
Train staff on the use of new software/hardware.	EPM	Q2 2015	On Schedule
Implement new software/hardware.	EPM/PC	Q2 2015	On Schedule
Educate probationers about new probation monitoring procedure.	EPM/PC	Q2 2015	On Schedule

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Identify functionality that is currently not working properly or unavailable in BreEZe.	EPM/E&BC	Ongoing as issues arise	On Schedule
Submit a request to change or add functionality in BreEZe.	E&BC/PC	Ongoing as issues arise	On Schedule
Work with BreEZe team to identify which release change or added functionality will occur.	EPM/E&BC	Ongoing as issues arise	On Schedule
Submit change or added functionality to Change Control Board (if required).	PC/E&BC	Ongoing as issues arise	On Schedule
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Educate staff on BreEZe changes.	EPM	Ongoing as issues arise	On Schedule

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Submit BCP to Department of Finance.	EO	Q4 2015	On Schedule
Obtain BCP approval from Department of Finance.	EO/DOF	Q4 2015	On Schedule
Obtain legislative approval for BCP.	EO	Q2 2016	On Schedule

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.

Develop a communications plan.	EO	Q2 2014	Completed
Present to Board for Board ratification.	EO	Q2 2014	Completed
Implementation of plan.	EO	Ongoing	On Schedule

Identify outreach opportunities.	EO/AEO/LC/ EPM	Ongoing	On Schedule
Work with DCA to approve travel by providing DCA with mission-critical benefits for stakeholders.	EO	Ongoing	On Schedule
Attend outreach events.	EO	Ongoing	On Schedule
Explore methods to expand visibility of Board.	EO/ASC	Ongoing	On Schedule

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 weekly meetings to disseminate overview to unit staff.	EO/Each unit Manager/Lead	Q1 2015	On Schedule
Establish meeting for presentation for all staff about each unit, and providing opportunity for staff to ask questions of each unit to be	EO	Q2 2015	On Schedule

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compiled in an internal office resource book for Board staff.			
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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	On Schedule
Work with Managers/Leads to identify further training needs for staff.	EO	Ongoing	On Schedule

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	On Schedule
Review CPS analysis with all staff to address recommendations.	EO/AEO	Q2 2015	On Schedule
Develop appropriate process improvements based on recommended changes provided by analysis.	EO/AEO/EPM	Q4 2015	On Schedule

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	On Schedule
Pending recommendations from program analysis review and update existing desk and procedure manuals.	AEO/EPM	Q3 2015	On Schedule
Store updated Board process manual in centralized location at the Board.	AEO/EO	Q4 2015	On Schedule

For example, weekly legislative updates.	ASC /EO	Q2 2014	Completed
Develop monthly EO report to Board to report Licensing and Enforcement stats.	EO/EPM/AEO	Q1 2015	On Schedule
Survey Board Members on Board Member updates/materials and training to determine satisfaction with frequency of information.	EO/EPM	Q1 2016	On Schedule
Develop Board of Psychology Board Member Orientation Training.	EO/AEO/EPM	Q4 2016	On Schedule

