STATE OF CALIFORNIA
DEPARTMENT OF CONSUMER AFFAIRS

BUSINESS, CONSUMER SERVICES, AND HOUSING AGENCY • GOVERNOR EDMUND G. BROWN JR.

**BOARD OF PSYCHOLOGY**
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# MEMORANDUM

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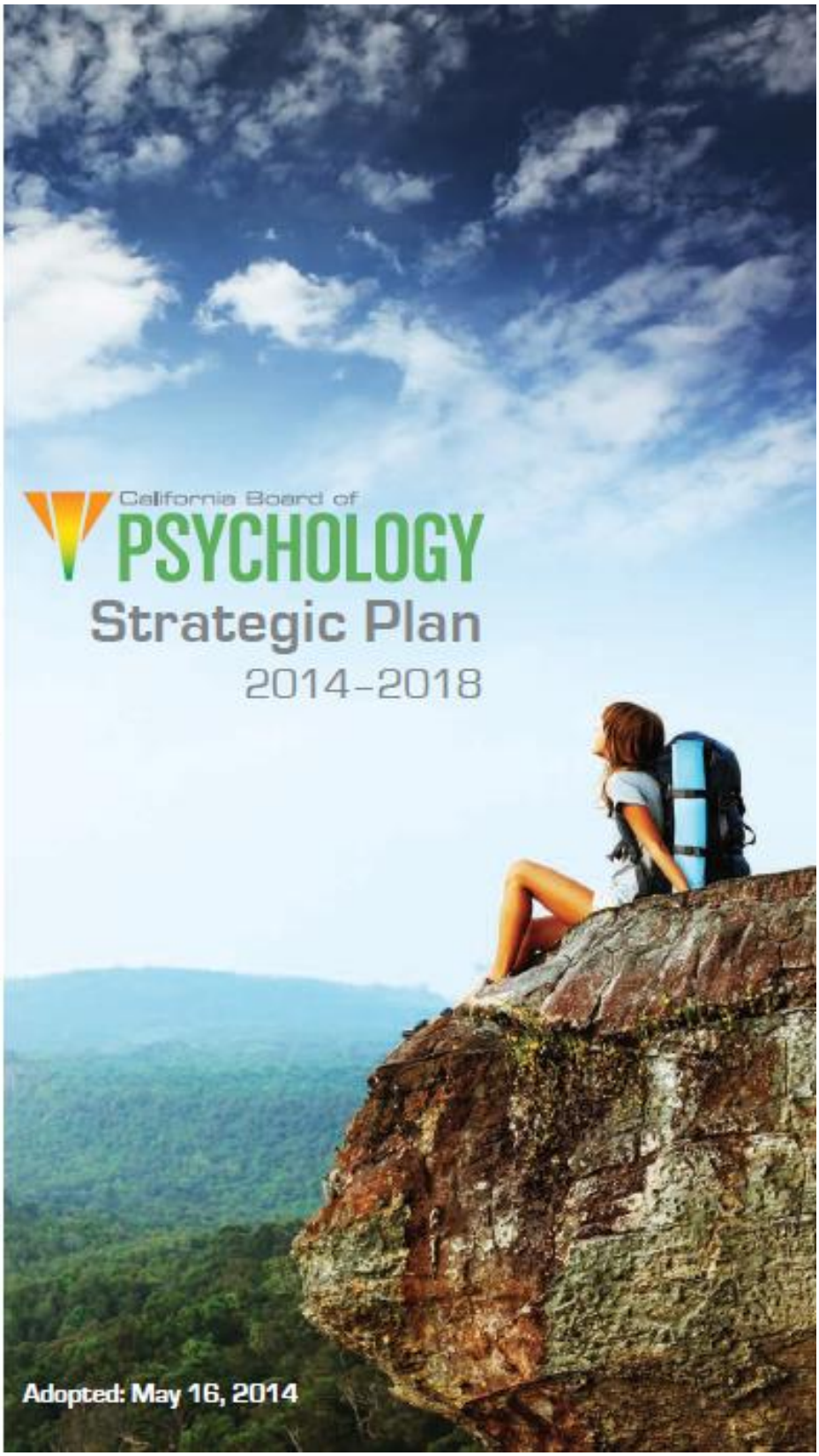
|---|---|
| **DATE** | August 8, 2014 |
| **TO** | Psychology Board Members |
| **FROM** | Antonette Sorrick<br>Executive Officer |
| **SUBJECT** | **Strategic Plan Update 15 (a)** |

**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.



California Board of

# PSYCHOLOGY

## Strategic Plan

2014–2018

Adopted: May 16, 2014

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# California Board of Psychology Members

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ANTONETTE SORRICK, EXECUTIVE OFFICER, BOARD OF PSYCHOLOGY

# Message from the Board President

As President of the Board of Psychology it is a privilege to introduce the 2014 strategic plan and to express appreciation for the work and contribution of all Board Members and staff in developing our current strategic plan which includes a number of areas for increased emphasis and change in 2014 and forward.

The Board will continue its primary focus on the following areas:

- Protecting the health, safety and welfare of consumers
- Advocating for the highest principles of professional psychological service, and
- Empowering consumers through education on licensee/registrant discipline actions and through providing best available info on current trends in psychological service options

In addressing the aforementioned areas, we intend to continue protecting the public while also looking for additional ways to advocate the highest principles for the profession and empowering the consumer through information and education. Additional areas of focus will include:

- Increased emphasis on reducing licensing times, greater transparency about the disciplinary process, and additional outreach and education to licensees, stakeholders and the public
- Continuing the process of developing and adopting regulations on telepsychology
- Greater involvement in the legislative process with proactive involvement on issues affecting the board and psychology
- Promulgating and codifying new regulations for continuing professional development
- Understanding the value of providing excellent customer service in all we do

I would like to thank the reader of this document for helping to achieve our goals and look forward to our continued communications over the next five years.

Michael Erickson, PhD
Board President

# About the California Board of Psychology

The California Board of Psychology dates back to 1958 when the first psychologists were certified in the State. The Board of Psychology is one of 30 regulatory entities which fall under the organizational structure of the Department of Consumer Affairs. Historically, the Board has been closely affiliated with the Medical Board of California.

The Board consists of nine members (currently five licensed psychologists and four public members) who are appointed to the Board for four-year terms. Each member may serve a maximum of two terms. The five licensed members and two public members are appointed by the Governor. One public member is appointed by the Senate Rules Committee, and one public member is appointed by the Speaker of the Assembly. Public members cannot be licensed by the Board of Psychology or by any other Department of Consumer Affairs healing arts board.

The Board's Executive Officer is appointed by the Board to ensure that the Board functions efficiently and serves solely in the interests of the consumers of psychological services in the State of California.

The Board of Psychology is funded totally through license, application, and examination fees. The Board receives absolutely no tax money from the general revenue fund of the State of California.

The Board of Psychology exists solely to serve the public by:

- Protecting the health, safety, and welfare of consumers of psychological services with integrity honesty, and efficiency;
- Advocating the highest principles of professional psychological practice;
- Empowering the consumer through education on licensee/registrant disciplinary actions and through providing the best available information on current trends in psychological service options.

## How Does the Board Accomplish its Mission?

The Board accomplishes its mission by working to ensure that psychologists provide consumers appropriate and ethical psychological services and do not exploit consumers by abusing the power advantage inherent in any psychotherapeutic relationship. The Board also works to ensure:

- Those entering the profession of psychology possess minimal competency to practice psychology independently and safely. This is achieved by requiring candidates for a license to possess an appropriate doctorate degree from an approved or accredited university and by requiring the completion of a minimum of 3,000 hours of supervised professional experience. Each license applicant must also pass a national written examination and a California examination. In addition, in order to renew a license, a psychologist must complete 36 hours of approved continuing education every two years.
- The Board's enforcement efforts are focused on protecting a vulnerable consumer population from exploitative, unscrupulous, and/or otherwise incompetent licensed psychologists.
- Through outreach and education efforts, the Board can provide targeted messaging for its direct and indirect stakeholders.

## Who Does the Board Regulate?

The Board of Psychology regulates psychologists, psychological assistants, and registered psychologists. Licensed psychologists may practice independently in any private or public setting. Psychological assistants must possess a qualifying master's degree and are registered to a licensed psychologist or to a board-certified psychiatrist as employees who may provide limited psychological services to the public under the direct supervision of the psychologist or psychiatrist to whom they are registered. Registered psychologists must possess a doctoral degree which meets licensure requirements and possess at least 1,500 hours of qualifying supervised professional experience. Registered psychologists are registered to engage in psychological activities at nonprofit community agencies that receive a minimum of 25% of their funding from some governmental source. Registered psychologists may not engage in psychological activities outside the approved nonprofit community agency where they are registered.

# 2010 Strategic Plan Accomplishments

The California Board of Psychology accomplished the following goals since the adoption of the previous 2010 strategic plan.

1. The Board participated in the development, implementation and testing for the Department of Consumer Affairs' new licensing and enforcement database system BreEZe. The Board was part of the first rollout of the BreEZe system in 2013. This new system will improve the functionality of the Board's core functions.
2. The Board worked with stakeholders to establish new continuing education requirements for licensees to provide a competency-based continued professional development model.
3. The Board implemented new continuing education regulations to redefine the Board's continuing education provider approval system and transfer the auditing system for continuing education hours from the Mandatory Continuing Education for Psychologists Accrediting Agency (MCEPAA) to the Board.
4. Pursuant to the Consumer Protection Enforcement Initiative (CPEI), the Board established draft Uniform Standards Related to Substance-Abusing Licensees. These standards will guide all disciplinary decisions brought before the Board.
5. In order to be more transparent and accessible to the Board's stakeholders, the Board utilized webcasting technology for meetings and posted all meeting materials on its Web site prior to each meeting.
6. In an effort to meet the needs of the Board's consumers, the Board's enforcement staff completed a comprehensive training program including the following: Basic and Advanced Investigative Training by the Council for Licensing Enforcement and Regulation (CLEAR), and the Department of Consumer Affairs' Enforcement Academy.

# Mission

The Board of Psychology advances quality psychological services for Californians by ensuring ethical and legal practice and supporting the evolution of the profession.

# Vision

A California with the best psychological services in the nation.

# Values

Transparency

Integrity

Consumer Protection

Inclusiveness

Excellence

Accountability

# Strategic Goals

## 1 *LICENSING*

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

## 2 *CONTINUING EDUCATION*

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

## 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.

## 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.

## 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.

## 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.

# 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 |
|---|---|---|
| Enter into contract with CPS to review licensing function. | ASC | Q2 2014 |
| Begin CPS review. | ASC/CPS | Q3 2014 |
| CPS finalizes review and provides findings to EO. | EO/CPS | Q1 2015 |
| EO share findings with staff and Board. | EO | Q1 2015 |
| Implement findings from CPS review. | LC/AEO | Q1 2015 |
| Incorporate CPS changes on website (if needed). | ASC | Q2 2015 |
| Update desk procedure manuals based on CPS findings. | LC | Q4 2015 |
| Incorporate CPS changes in BreEZe (if needed). | E&BC | Q4 2015 |

| 1.2 Establish and implement a plan to address current and future licensing backlogs. | Responsibility | Timeframe |
|---|---|---|
| Provide weekly updates to EO and AEO regarding licensing processing time statistics. | LC | Ongoing |
| Present licensing statistics to Board Members at quarterly Board meetings. | LC | Ongoing |
| Reorganizing the application workflow (river concept). | LC | Q3 2014 |
| Train staff on new workflow and procedures. | LC | Q3 2014 |
| Update documents/forms if needed. | LC | Q3 2014 |
| Create and update desk procedure manuals. | LC | Q4 2014 |
| Allow online submission of applications through BreEZe. | EB&C/LC | Q1 2015 |

Legend for Responsibility Column: AEO - Assistant Executive Officer | ASC - Administrative Services Coordinator | CEA - Continuing Education Analyst | CPS - Process Mapping Vendor | E&BC - Examinations & BreEZe Coordinator | EO - Executive Officer | PC - Probation Coordinator | EPM - Enforcement Program Manager | LC - Licensing Coordinator

| 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 |
|---|---|---|
| Conduct job analysis and compile justification data to support BCP (CPS report). | LC/ASC | Q1 2015 |
| Obtain Board approval of BCP concept. | EO/Board | Q2 2015 |
| Submit BCP concept paper to DCA Budget Office. | ASC/LC | Q2 2015 |
| Draft and submit BCP to DCA Budget Office. | ASC/LC | Q2 2015 |
| Obtain DCA Budget Office approval of BCP. | ASC/Budget Office | Q3 2015 |
| Obtain Agency approval of BCP. | EO/Agency | Q3 2015 |
| Submit BCP to Department of Finance. | EO | Q3 2015 |
| Obtain BCP approval from Department of Finance. | EO/DOF | Q4 2015 |
| Obtain legislative approval for BCP. | EO | Q2 2016 |

| 1.4 Establish communication tools to facilitate the licensing process for applicants. | Responsibility | Timeframe |
|---|---|---|
| Identify areas where clarification is needed to facilitate licensing process. | LC/EO | Q2 2014 |
| Create YouTube video outlining the licensing application process. | LC/DCA Public Affairs | Q2 2014 |
| Create a YouTube video providing an overview of licensure as a psychologist. | LC/DCA Public Affairs | Q2 2014 |
| Create YouTube video outlining the psychological assistant application process. | LC/DCA Public Affairs | Q3 2014 |
| Create a YouTube video providing an overview of registration as a psychological assistant. | LC/DCA Public Affairs | Q3 2014 |
| Create a YouTube video providing an overview of the registered psychologist registration process. | LC/DCA Public Affairs | Q4 2014 |
| Create a YouTube video outlining the registered psychologist application process. | LC/DCA Public Affairs | Q4 2014 |
| Create a YouTube video outlining the continuing education process and requirements. | LC/DCA Public Affairs | Q4 2014 |
| Post videos on website as they are developed. | ASC | Q1 2016 |
| Promote videos in newsletter and social media to licensees. | EO | Ongoing |
| Ongoing visits to schools to educate students and trainees on licensing process. | LC/AEO/EO | Ongoing |

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| 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 |
|---|---|---|
| Identify functionality that is currently not working properly or unavailable in BreEZe. | E&BC | Ongoing as issues arise |
| Submit a request to change or add functionality in BreEZe. | E&BC | Ongoing as issues arise |
| Work with BreEZe team to identify which release change or added functionality will occur. | E&BC | Ongoing as issues arise |
| Submit change or added functionality to Change Control Board (if required). | E&BC | Ongoing as issues arise |
| Attend Licensing Users Group to collaborate with other R1 boards to identify global changes and other problem areas and functionalities. | E&BC/LC/CEA | Monthly |
| Educate staff on BreEZe changes. | E&BC | Ongoing as issues arise |

| 1.6 Provide customer service training to licensing staff to enhance service to stakeholders | Responsibility | Timeframe |
|---|---|---|
| Identify deficiencies in customer service. | LC | Q1 2014/Ongoing |
| Identify training needs. | AEO/LC | Q1 2014/Ongoing |
| Schedule training for staffing. | LC | Q1 2014/Ongoing |
| Establish customer service performance measures. | AEO/LC | Q1 2015 |

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

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

| 1.9 Create "Retired" status for licensed psychologists. | Responsibility | Timeframe |
|---|---|---|
| Identify statutory and regulatory changes necessary to establish a "Retired" status for licensed psychologists. | AEO/ASC | Q3 2014 |
| Board ratifies suggested changes. | EO/Board | Q4 2014 |
| Draft legislation. | EO/ASC | Q4 2014 |
| Coordinate meetings with affected stakeholders to solicit input on regulation development. | EO/ ASC | Q1 2015 |
| Draft new regulatory language to establish "Retired" status requirements and guidelines and obtain Board Approval. | ASC/Board | Q3 2015 |
| Create rulemaking packet including initial statement of reason, proposed text and notice. | ASC | Q3 2015 |
| Submit regulation package to the Office of Administrative Law. | ASC | Q4 2015 |
| Conduct regulation hearing. | Board President | Q4 2015 |
| Obtain regulation approval by Office of Administrative Law. | ASC/OAL | Q1 2016 |
| Work with BreEZe team to configure "Retired" status. | E&BC | Q1 2017 |
| Educate staff on "Retired" status. | LC/AEO | Q4 2017 |
| Inform stakeholders via various communication methods. | ASC/EO | Q4 2017 |

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# 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 |
|---|---|---|
| Promulgate regulatory package. | ASC | Q3 2014 |
| Incorporate CE/CPD changes in BreEZe. | E&BC | Q3 2014 |
| Draft new regulatory language to establish CE/CPD requirements and guidelines and obtain Board Approval. | EO/ASC | Q1 2015 |
| Create rulemaking packet including initial statement of reason, proposed text and notice. | ASC | Q3 2015 |
| Submit regulation package to the Office of Administrative Law. | ASC | Q3 2015 |
| Conduct regulation hearing. | Board President | Q3 2015 |
| Obtain regulation approval by Office of Administrative Law. | ASC | Q4 2015 |
| Educate staff and licensees on new regulation. | AEO/LC | Q1 2016 |
| Update forms and information on website | ASC | Q2 2016 |

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

| 3.2 Adopt regulations to clarify and strengthen the Board's position on the practice of telepsychology. | Responsibility | Timeframe |
|---|---|---|
| Examine research and guidelines from other state entities on the emerging field of telehealth. | ASC | Q1 2014 |
| Establish a BOP telehealth committee. | Board President | Q4 2014 |
| Coordinate meetings with affected stakeholders to solicit input on regulation development. | EO/ASC | Q1 2015 |
| Draft new regulatory language to establish telehealth requirements and guidelines and obtain Board Approval. | ASC/Board | Q3 2015 |
| Create rulemaking packet including initial statement of reason, proposed text and notice. | ASC | Q3 2015 |
| Submit regulation package to the Office of Administrative Law. | ASC | Q3 2015 |
| Conduct regulation hearing. | Board President | Q4 2015 |
| Obtain regulation approval by Office of Administrative Law. | ASC/OAL | Q1 2016 |
| Educate staff and licensees on new regulation. | EO/AEO | Q1 2016 |

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LC - Licensing Coordinator

# 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 |
|---|---|---|
| Provide newsletter article about Board overview and functionality to increase transparency for stakeholders about the role of the Board. | EPM/EO | Q3 2014 |
| 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 |
| 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 |
| Create an FAQ page for consumers and licensees about enforcement process and place on Board website. | EPM/EO/ASC | Q3 2015 |

| 4.2 Identify and seek clarification to strengthen statutory and regulatory language regarding Statement of Issues and public reprimands. | Responsibility | Timeframe |
|---|---|---|
| Determine whether the Board has legal authority to issue public reprimands and investigate other board processes for such authority. | EPM | Q4 2014 |
| If legal authority exists, develop a model for the Board. | EPM | Q1 2015 |
| If legal authority exists, present model to Board for approval. | EPM | Q2 2015 |

| | | |
|---|---|---|
| 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 |
| If legal authority exists, develop a model for the Board. | EPM | Q4 2015 |
| If legal authority exists, present model to Board for approval. | EPM | Q5 2015 |

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

| 4.4 Establish standardized training and educational resources for Expert Reviewers to improve effectiveness and consistency. | Responsibility | Timeframe |
|---|---|---|
| Establish an annual training schedule for expert reviewers. | EPM/EO | Q3 2014 |
| Provide all experts with any changes to the Board's disciplinary guidelines and laws and regulations. | EPM/EO | Q4 2014 |
| Solicit subject matter expert presenters on relevant topics for Annual training. | EPM/EO | Q1 2015 |
| Conduct Annual training for expert reviewers. | EPM/EO | Q4 2015 |
| Archive annual training presentations to use as a training tool for onboarding new Expert Reviewers. | EPM/EO | Q1 2016 |

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

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

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| 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 |
|---|---|---|
| Enter into contract with CPS to review enforcement function. | ASC | Q2 2014 |
| Begin CPS review. | ASC/CPS | Q3 2014 |
| CPS finalizes review and provides findings to EO. | EO/CPS | Q1 2015 |
| EO share findings with staff and Board. | EO | Q1 2015 |
| Implement findings from CPS review. | EPM | Q1 2015 |
| Incorporate CPS changes on website (if needed). | ASC | Q2 2015 |
| Update desk procedure manuals based on CPS findings. | EPM | Q4 2015 |
| Incorporate CPS changes in BreEZe (if needed) | E&BC | Q4 2015 |

| 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 |
|---|---|---|
| Conduct job analysis and compile justification data to support BCP (CPS report). | EPM/ASC | Q1 2015 |
| Obtain Board approval of BCP concept. | EO/Board | Q2 2015 |
| Submit BCP concept paper to DCA Budget Office. | ASC/EPM | Q2 2015 |
| Draft and submit BCP to DCA Budget Office. | ASC/EPM | Q2 2015 |
| Obtain DCA Budget Office approval of BCP. | ASC/Budget Office | Q3 2015 |
| Obtain Agency approval of BCP. | EO/Agency | Q3 2015 |
| Submit BCP to Department of Finance. | EO | Q3 2015 |
| Obtain BCP approval from Department of Finance. | EO/DOF | Q4 2015 |
| Obtain legislative approval for BCP. | EO | Q2 2016 |

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# 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 |
|---|---|---|
| Develop a communications plan. | EO | Q2 2014 |
| Present to Board for Board ratification. | EO | Q2 2014 |
| Implementation of plan. | EO | Ongoing |

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

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# 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 |
|---|---|---|
| Conduct unit overview at staff meetings to educate staff on different business processes of the Board. | EO | Q1 2014 |
| Create an annotated organization chart to educate staff on individual staff expertise/ focus. | AEO | Q3 2014 |
| Develop schedule for manager/lead presentation at unit weekly meetings to disseminate overview to unit staff. | EO/Each unit Manager/Lead | Q4 2014 |
| 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 2014 |

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

Legend for Responsibility Column: AEO - Assistant Executive Officer | ASC - Administrative Services Coordinator | CEA - Continuing Education Analyst | CPS - Process Mapping Vendor | E&BC - Examinations & BreEZe Coordinator | EO - Executive Officer | PC - Probation Coordinator | EPM - Enforcement Program Manager | LC - Licensing Coordinator

| 6.3 Perform a program analysis of the Board's operational procedures to streamline Board staff functions and processes. | Responsibility | Timeframe |
|---|---|---|
| Submit vendor contract to conduct analysis on Board function. | ASC | Q2 2014 |
| Obtain DCA approval on contract to perform CPS program analysis. | ASC/DCA | Q2 2014 |
| Work with contracted vendor to conduct analysis of Board function. | EO/AEO | Q3 2014 |
| Review CPS analysis with all staff to address recommendations. | EO /AEO | Q2 2015 |
| Develop appropriate process improvements based on recommended changes provided by analysis. | EO/AEO/EPM | Q4 2015 |

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

| 6.5 Identify and implement tools and communication methods to improve Board member understanding of Board staff activities between meetings | Responsibility | Timeframe |
|---|---|---|
| For example, weekly legislative updates. | ASC /EO | Q2 2014 |
| Develop monthly EO report to Board to report Licensing and Enforcement stats. | EO/EPM/AEO | Q1 2015 |
| Survey Board Members on Board Member updates/materials and training to determine satisfaction with frequency of information. | EO/EPM | Q1 2016 |
| Develop Board of Psychology Board Member Orientation Training. | EO/EPM | Q4 2016 |

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# Strategic Planning Process

To understand the environment in which the Board operates and identify factors that could impact the Board's success, the California Department of Consumer Affairs' SOLID unit conducted an environmental scan of the internal and external environments by collecting information through the following methods:

- An online survey sent to 5,000 stakeholders, comprised of psychology professionals, professional associations, California colleges, and others who expressed interest in the strategic direction of the Board. The online survey received 794 responses.
- Telephone interviews with Board members in February, 2014.
- Focus group discussion with Board staff in February, 2014.

The most significant themes and trends identified from the environmental scan were discussed by the Board during a strategic planning session facilitated by SOLID on March 14 and 15, 2014. This information guided the Board in the development of its mission, vision, and values, while directing the strategic goals and objectives outlined in this 2014 – 2018 strategic plan.

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*This strategic plan is based on stakeholder information and discussions facilitated by SOLID for the California Board of Psychology in January and February 2014. Subsequent amendments may have been made after Board adoption of this plan.*