



Board of Behavioral Sciences

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# *Memo*

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**To:** Board Members

**Date:** January 24, 2023

**From:** Steve Sodergren  
Executive Officer

**Subject:** Strategic Plan Update

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Attached for your review is the Strategic Plan Update.

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# STRATEGIC PLAN UPDATE

## FEBRUARY 2023

## Goal 1: Licensing

*Establish licensing standards to protect consumers and allow reasonable and timely access to the profession.*

**Objective 1.1:** Streamline application process with online submission to decrease processing times.

**Success Measure:** Processing times have decreased from Q1 2022.

Number	Major Activity	Completion Date
	<b>START DATE</b>	<b>Q1 2022</b>
1.1.1	Staff is in discussion with the Department of Consumer's Office of Information Services and outside vendors to identify alternate solution for submitting transcripts and supervision forms.	Ongoing
1.1.2	Staff continues to work with the Breeze team to implement Work Authorization 165 that will make changes the Breeze system that will allow the Board to enhance its efficiencies	Ongoing
1.1.3	Establish online subsequent registration applications	Ongoing
1.1.4	Establish online registrant applications	Ongoing
1.1.5	Establish online licensing applications	Planned
1.1.6	Update Breeze to allow for applicants to view their application deficiencies through their Breeze account.	Planned
	<b>END DATE</b>	<b>Q4 2024</b>

**Objective 1.2:** Collaborate with the Department of Consumer Affairs’ Organizational Improvement Office to review the application process and implement improvements to reduce processing times.

**Success Measure:** Processing times have reduced since Q1 2022.

Number	Major Activity	Completion Date
	<b>START DATE</b>	<b>Q1 2022</b>
1.2.1	Participate in As-Is mapping session to document the current business process.	March 2022
1.2.2	Participate in Value Stream Added mapping sessions	June 2022
1.2.3	Participate in Could be Mapping sessions	October 2022
1.2.4	OIO finalizing the draft of the report.	March 2023
1.2.5	OIO to conduct organization change management workshop	Planned
	<b>END DATE</b>	<b>Q1 2023</b>

**Objective 1.3:** Partner with other agencies and stakeholder groups to reduce barriers to licensure and foster the development of a diverse and culturally responsive mental health workforce.

**Success Measure:** Plan created for a more culturally diverse workforce and increased outreach.

Number	Major Tasks	Completion Date
	<b>START DATE</b>	<b>Q1 2023</b>
1.2.1	<b>Initiate and/or participate in conversation regarding barriers to licensure</b>	<b>Ongoing</b>
1.2.1.1	Met with California Dean and Directors of social work and members of the National Association of Social Workers California Chapter to discuss the ASWB exam pass rate report.	December 2022

Number	Major Tasks	Completion Date
1.2.1.2	Met with representatives from CA Dept of Health Care Access and Information regarding the mental health workforce and wellness coaches.	January 2023
1.2.1.3	Sergio Aguilar-Gaxiola, MD, PhD, presented “An Overview of California’s Behavioral Health Workforce: Challenges and Recommendations” to the Licensing Committee	January 2023
	<b>END DATE</b>	<b>Q4 2025</b>

**Objective 1.4:** Increase communication to applicants and licensees to reduce common application or licensing maintenance errors.

**Success Measure:** Application deficiencies have decreased since Q2 2022.

Number	Major Tasks	Completion Date
	<b>START DATE</b>	<b>Q2 2022</b>
1.4.1	Developed a power point presentation that explains the process of applying for a registration. The presentation highlights common errors and how to complete an application to avoid delays.	September 2022
1.4.2	Develop Social Media plan that will alert registrants and licensee of important steps in maintaining and renewing their registration or license.	Ongoing
1.4.3	Began sending email notifications to registrants when they are reaching the sixth year of their registration to ensure they understand the process to apply for a subsequent registration.	March 2022
1.4.4	Develop short instruction videos to be posted on the Board’s website and through social media that will highlight how to apply for and renew a registration or license.	Planned
1.4.5	Exam and Licensing teams have implemented a new process that will notify exam candidates as to the next step toward licensure to ensure timely processing.	April 2022
1.4.6	Establish a system that will allow an applicant or licensee to check on the status of an application or renewal through the Board’s website or Breeze.	Planned
	<b>END DATE</b>	<b>Q4 2025</b>

**Objective 1.5:** Develop video presentations to increase understanding of the licensing process and the pathways to licensure.

**Success Measure:** Videos posted to website.

Number	Major Tasks	Completion Date
	<b>START DATE</b>	<b>Q1 2022</b>
<b>1.5.1</b>	<b>Pathway to Licensure Videos:</b> Develop Pathway to Licensure Videos	Ongoing
1.5.1.1	Started to collaborate with the Department of Consumer Affairs Public Information Office to develop Pathway to Licensure Videos to be posted on the Board’s website.	April 2022
1.5.1.2	Scripts reviewed and approved for 7 Steps to Licensure, LMFT Degree Requirements, LCSW Degree Requirements.	June 2022
1.5.1.3	Public Information Office completed 7 Steps to Licensure video.	September 2022
1.5.1.4	LMFT Degree Requirement video in postproduction	January 2023
1.5.1.5	LCSW Degree Requirements and LPCC Degree Requirements video in production	Ongoing
1.5.1.6	Pathway to LEP, CA Law & Ethics Exam, Tips for Registrants, Supervision for LMFT’s, Supervision for LCSWs, Supervision for LPCCs and Applicant Conviction Reporting videos in preproduction.	Ongoing
	<b>END DATE</b>	<b>Q4 2025</b>

## Goal 2: Examinations

*Administer fair, valid, comprehensive, and relevant licensing examinations.*

**Objective 2.1:** Identify and implement strategies to increase diversity of Subject Matter Experts to ensure that examinations are culturally responsive and address diverse populations.

**Success Measure:** Strategy/policy in place to increase the diversity of Subject Matter Experts (SMEs).

Number	Major Tasks	Completion Date
	<b>START DATE</b>	<b>Q1 2023</b>
2.1.1	Collaborate with DCA’s Office of Professional Examination Services to develop a plan to increase the diversity of Subject Matter Experts.	Planned
	<b>END DATE</b>	<b>Q1 2024</b>

**Objective 2.2:** Improve examination process to ensure timely and equitable access to licensure.

**Success Measure:** Decrease in time in the exam process.

Number	Major Tasks	Completion Date
	<b>START DATE</b>	<b>Q4 2022</b>
2.2.1	<b>ASWB 90-Day Waiting Period Waiver:</b> Board approved the Association of Social Work Boards (ASWB) exam policy #9 amendment that will allow California candidates for the ASWB Clinical Exam to be granted two waivers per year to take the exam sooner than the 90-day waiting period if they were within 10 points of passing.	Ongoing
2.2.1.1	Staff is working with ASWB to improve the process of granting the extensions.	October 2022
2.2.2	<b>Exam Eligibility Expiration Date Notification:</b> Develop a procedure to notify exam candidates of their impending exam eligibility expiration date.	Ongoing
2.2.2.1	Staff began working on developing a report that will alert candidates that are within three months of their eligibility expiration date.	August 2022
2.2.3	Staff began tracking and sending notifications to exam candidates who applied under Path A (portability) or have an exam deficiency in their application for licensure to ensure they understand the next step to licensure.	July 2022
2.2.4	Staff is discussing with OPES the possibility of reducing the examination waiting periods for the Licensed Educational Psychologist Standard Written Exam.	Ongoing
2.2.5	Determine whether the Board’s current English as a Second Language (ESL) accommodation requirements need to be modified to mirror the Association of Social	Planned



Number	Major Tasks	Completion Date
	Work Boards English Language Learner accommodation requirements.	
	<b>END DATE</b>	<b>Q4 2023</b>

**Objective 2.3:** Review, report, and determine feasibility of adopting the use of the Association of Marital and Family Therapists Regulatory Boards (AMFTRB) national exam for the Licensed Marriage and Family Therapist (LMFT) Clinical exam.

**Success Measure:** Board has discussed whether to adopt AMFTRB exam.

Number	Major Tasks	Completion Date
	<b>START DATE</b>	<b>Q3 2021</b>
2.3.1	Request the DCA’s Office of Professional Examination Service (OPES) to conduct a review of the Association of Marriage and Family Therapist Regulatory Board’s (AMFTRB) Clinical examination.	July 2021
2.3.2	OPES to present the findings of their review and provide a recommendation to the Board. Board determines if the AMFTRB Clinical exam should be adopted for California licensure.	November 2022
2.3.3	Board staff opened discussion with AMFTRB executive staff and have invited them to present additional information at the May Board meeting.	January 2023
	<b>END DATE</b>	<b>Q1 2023</b>

**Goal 3: Enforcement**

*Protect the health and safety of consumers through the enforcement of laws.*

**Objective 3.1:** Develop and implement an effective communication process from open to close of a case to ensure applicants, complainants, and respondents are better informed about the status of their case.

**Success Measure:** New process has been implemented.

Number	Major Tasks	Completion Date
	<b>START DATE</b>	<b>Q1 2022</b>
3.1.1	Review current process used to communicate with applicants, complainants, and respondents during the complaint process.	Planned
3.1.2	Identify which milestone terms to use to represent the status of the case.	Planned
3.1.3	Determine alternate ways to communicate with applicants, complainants, and respondents during the complaint process.	Planned
3.1.4	Report to the Board the new methods to report case status.	Planned
3.1.5	Implement new case status communication process.	Planned
	<b>END DATE</b>	<b>Q4 2025</b>

**Objective 3.2:** Educate licensees, associates, and consumers about the enforcement process to increase awareness of the Board’s enforcement role and responsibilities.

**Success Measure:** Awareness plan implemented.

Number	Major Tasks	Completion Date
	<b>START DATE</b>	<b>Q4 2022</b>
	<b>END DATE</b>	<b>Q4 2023</b>

**Objective 3.3:** Complete review and make recommendations on the Board’s existing enforcement statutes and regulations for clarity, cohesiveness, and equity.

**Success Measure:** Regulatory process has begun.

Number	Major Tasks	Completion Date
	<b>START DATE</b>	<b>Q2 2022</b>
<b>3.3.1</b>	<b>Uniform Standards &amp; Disciplinary Guidelines Review:</b> Review the Uniform Standards and Disciplinary Guidelines for possible updates or amendments.	Ongoing
3.3.1.1	Recommended changes brought to the P & A Committee	July 2022
3.3.1.2	Recommended changes brought to the P & A Committee	October 2022
3.2.1.3	Recommended changes brought to the P & A Committee	January 2023
<b>3.3.2</b>	Review current statutes and regulations related to enforcement to determine possible needed updates.	Planned
	<b>END DATE</b>	<b>Q4 2024</b>

**Objective 3.4:** Evaluate and establish internal policies and procedures related to enforcement issues to ensure an equitable process that reflects rehabilitation versus punitive measures for the purpose of consumer protection.

**Success Measure:** Updated policies, procedures, and reports.

Number	Major Tasks	Completion Date
	<b>START DATE</b>	<b>Q1 2023</b>
	<b>END DATE</b>	<b>Q4 2024</b>

**Objective 3.5:** Create diversity in the pool of qualified enforcement Subject Matter Experts to ensure equitable enforcement proceedings.

**Success Measure:** Strategy/policy in place to increase the diversity of SMEs.

Number	Major Tasks	Completion Date
	<b>START DATE</b>	<b>Q1 2023</b>
<b>3.5.1</b>	Review the current SME recruitment and training program and develop a plan to increase the diversity of enforcement Subject Matter Experts.	Planned

Number	Major Tasks	Completion Date
	<b>END DATE</b>	<b>Q4 2023</b>

**Goal 4: Legislation & Regulation**

*Ensure the statutes, regulations, policies, and procedures strengthen the Board’s mandates and mission.*

**Objective 4.1:** Implement statutes and regulations that comprehensively address telehealth and educate stakeholders, licensees, and consumers about telehealth.

**Success Measure:** Law passed, and outreach plan implemented.

Number	Major Tasks	Completion Date
	<b>START DATE</b>	<b>Q1 2022</b>
<b>4.1.4</b>	<b>Consider an Incidental allowance for out-of-state provider providing online telehealth in CA.</b>	<b>Ongoing</b>
4.1.4.1	Temporary practice allowance proposal was introduced at the Telehealth Committee	June 2022
4.1.4.2	Temporary practice allowance proposal brought to Policy and Advocacy Committee	July 2022
4.1.4.3	Temporary practice allowance proposal brought to Policy and Advocacy Committee	October 2022
4.1.4.4	Temporary practice allowance proposal brought to Board	November 2022
4.1.4.5	AB 232 (Aguiar-Curry) Introduced	January 2023
<b>4.1.5</b>	<b>Research alternative modes of services (email, texting, and app-based therapy) to identify consumer protection issues that current law does not address.</b>	<b>Ongoing</b>
<b>4.1.6</b>	<b>Discuss the necessity of regulating online therapy sites.</b>	<b>Ongoing</b>
4.1.6.1	Online therapy site and alternative modes of therapy discussion brought to Telehealth Committee	December 2022

<b>Number</b>	<b>Major Tasks</b>	<b>Completion Date</b>
4.1.6.2	Staff discussed potential concerns with Legislature (Business and Professions Committee)	December 2022
4.1.6.3	Staff to develop and distribute survey to licensees who have experience working for these platforms.	March 2023
<b>4.1.7</b>	<b>Examine and research Inter-state compacts.</b>	Ongoing
4.1.7.1	Inter-state compacts discussion brought to Telehealth Committee	June 2023
<b>4.1.8</b>	<b>Create best practices document to assist employers/supervisor in determine the best way to proceed with telehealth</b>	Ongoing
4.1.8.1	Best practices document discussion brought to Telehealth Committee	March 2022
4.1.8.2	Best practices document discussion brought to Telehealth Committee	June 2022
4.1.8.3	Best practices document discussion brought to Telehealth Committee (Staff directed to draft two documents; Videoconferencing in Supervision, Utilizing Telehealth to Deliver Services)	December 2022
	<b>END DATE</b>	<b>Q4 2025</b>

**Objective 4.2:** Review current licensing requirements regarding registration, exam, and supervised experience timeframes and make recommendation for possible amendments to current statutes and regulations.

**Success Measure:** Recommendations made to the Board.

<b>Number</b>	<b>Major Tasks</b>	<b>Completion Date</b>
	<b>START DATE</b>	<b>Q1 2023</b>
<b>4.2.1</b>	Discuss 6 years rule (experience hours and length of registration).	July 2022

Number	Major Tasks	Completion Date
	<b>START DATE</b>	<b>Q1 2023</b>
4.2.2	Discuss in committee the CA law and ethics exam age limit and limiting attempts.	Planned
4.2.3	Determine National Clinical Mental Health Counseling Examination (NCMHCE) acceptability from applicants who do not have supervised experience.	Planned
4.2.4	Consider and make recommendation on the registration of trainees.	Planned
	<b>END DATE</b>	<b>Q4 2025</b>

**Objective 4.3:** Review and update statutes and regulations related to additional coursework requirements for associates and the Continuing Education Unit requirements for licensees.

**Success Measure:** Law passed.

Number	Major Tasks	Completion Date
	<b>START DATE</b>	<b>Q4 2023</b>
4.3.1	Make timing and requirement of course consistent across license types where needed.	Planned
	<b>END DATE</b>	<b>Q4 2025</b>

**Objective 4.4:** Modernize and clarify statutes and regulations related to advertising to ensure they keep up with current advertisement practices.

**Success Measure:** Regulation proposal noticed to the public.

Number	Major Tasks	Completion Date
	<b>START DATE</b>	<b>Q1 2023</b>
4.4.1	<b>Advertising Regulations Update:</b> Update advertising statutes and regulations	Ongoing
4.4.1.1	Recommendations brought to P & A Committee	October 2022

Number	Major Tasks	Completion Date
	<b>START DATE</b>	<b>Q1 2023</b>
<b>4.4.2</b>	<b>Review Requirements for Posting Legal Name:</b> Review and possibly amend requirements for posting legal name	Planned
4.4.2.1	<b>Recommendation to be brought to P &amp; A Committee</b>	January 2023
	<b>END DATE</b>	<b>Q4 2025</b>

**Goal 5: Organizational Effectiveness**

*Build an excellent organization through proper Board governance, effective leadership, and responsible management.*

**Objective 5.1:** Review current organizational structure to ensure efficient operations and to foster upward career mobility among staff.

**Success Measure:** Office of Human Resources (OHR) approves the new organizational chart.

Number	Major Tasks	Completion Date
	<b>START DATE</b>	<b>Q1 2022</b>
<b>5.1.1</b>	Determine current organizational needs based upon current processing times and future workload projections.	Planned
<b>5.1.2</b>	Review staff duty statements to ensure they properly reflect current duties.	Planned
<b>5.1.4</b>	Determine appropriate ideal organizational structure.	Planned
<b>5.1.5</b>	Research training opportunities for staff and create a training pathway for upward mobility.	Planned
<b>5.1.6</b>	<b>Hire two additional Registrant Evaluators to assist with backlogs.</b>	<b>Ongoing</b>
<b>5.1.6.1</b>	Paperwork submitted for approval of two Limited Term Management Service Technicians.	December 2022
	<b>END DATE</b>	<b>Q2 2023</b>

**Objective 5.2:** Collaborate with the Department of Consumer Affairs' Organizational Improvement Office to review internal processes and implement improvements to better serve the stakeholders and the Board.

**Success Measure:** Streamlined processes implemented.

Number	Major Activity	Completion Date
	<b>START DATE</b>	<b>Q1 2022</b>
1.2.1	Participate in As-Is mapping session to document the current business process.	March 2022
1.2.2	Participate in Value Stream Added mapping sessions	June 2022
1.2.3	Participate in Could be Mapping sessions	October 2022
1.2.4	OIO finalizing the draft of the report.	March 2023
1.2.5	OIO to conduct organization change management workshop	Planned
	<b>END DATE</b>	<b>Q1 2023</b>

**Objective 5.3:** Advance transition to reduce the use of paper documents to promote environmental friendliness, reduce costs, and reduce processing times.

**Success Measure:** Paper reduction of 50%-75%.

Number	Major Tasks	Completion Date
	<b>START DATE</b>	<b>Q1 2022</b>
	<b>END DATE</b>	<b>Q1 2024</b>



**Objective 5.4:** Formalize a communication plan that will ensure quicker responses to emerging concerns from stakeholders.

**Success Measure:** Communication plan implemented.

Number	Major Tasks	Completion Date
	START DATE	Q1 2023
	END DATE	Q3 2023

### Goal 6: Outreach & Education

*Engage stakeholders through continuous communication about the practice and regulation of the professions, and mental health care.*

**Objective 6.1:** Create a more robust consumer and licensing education program through videos, social media campaigns, and electronic publications to ensure understanding of new changes in laws and regulations.

**Success Measure:** Plan implemented for increased communication of new law changes.

Number	Major Tasks	Completion Date
	START DATE	Q4 2022
	END DATE	Q4 2025

**Objective 6.2:** Collaborate with entities that work with consumers to increase equitable and inclusive outreach to diverse populations.

**Success Measure:** Complete at least 5 collaborations.

Number	Major Tasks	Completion Date
	START DATE	Q1 2023
	START DATE	Q4 2025

**Objective 6.3:** Increase Board engagement with schools, training programs, public events, and relevant professional organizations to raise awareness of the Board’s role and activities.

**Success Measure:** A presentation posted on website.

Number	Major Tasks	Completion Date
	<b>START DATE</b>	<b>Q1 2022</b>
6.3.1	Develop social media campaign for Domestic Violence Month	Planned
6.3.2	Develop a social media campaign for Mental Health Month	Planned
6.3.3	Develop a social media campaign for National Social Worker Month	Planned
	<b>END DATE</b>	<b>Q4 2025</b>

**Objective 6.4:** Identify and implement strategies to gain increased participation in Board meetings from a wider group of stakeholders.

**Success Measure:** Increase Board meeting attendance by 10%.

Number	Major Tasks	Completion Date
	<b>START DATE</b>	<b>Q4 2022</b>
	<b>END DATE</b>	<b>Q4 2025</b>