



Board of Behavioral Sciences

Memo

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To: Board Members **Date:** November 6, 2024
From: Steve Sodergren
Executive Officer
Subject: Executive Officer Report

BUDGET UPATE

The Board’s budget for fiscal year (FY) 2024-25 is \$14,300,000. Based on the information available to the Board, expenditures to date are \$3,551,446.

- Personal Services \$1,796,972 (12.57%)
- Operating Expenses & Equipment \$1,754,474 (11.21%)
- Enforcement \$138,641 (0.97%)
- Exams \$12,600 (0.09%)

The Board’s Fund Condition for FY 2024-25 currently reflects a reserve of 17.9 months.
Attachment A – BBS Fund Condition

PERSONNEL UPDATE

PROMOTIONS/NEW EMPLOYEES

Enforcement Unit

Staff Services Analyst /Enforcement - Criminal Convictions Unit – Kalan Novey was hired as the Enforcement Analyst within the Criminal Convictions Unit. Kalan’s first day in this position was October 1, 2024.

Associate Governmental Program Analyst Enforcement - Consumer Complaint & Investigations Unit – Nikisha Narayan was hired from the Department of Justice as an Enforcement Analyst within the Criminal Convictions Unit. Nikisha’s first day in this position was October 16, 2024.

Licensing Unit

Staff Services Analyst (Licensing Analyst)/ LMFT & LEP Licensing Unit – Veronica Rosas was hired from the Board of Registered Nursing to a position within the LMFT & LEP Licensing Unit. Veronica’s first day as a Licensing Analyst was October 23, 2024.

Staff Services Analyst (Licensing Analyst)/ LMFT & LEP Licensing Unit – Lisa Ammon was hired from the Board of Barbering and Cosmetology to a position within the LMFT & LEP Licensing Unit. Lisa’s first day as a Licensing Analyst was October 29, 2024.

Registration Unit

Office Technician (OT)/ Registration Unit – Michael Novang was hired from the Department of General Services to the Office Technician position. Michael’s first day with the Board was on October 1, 2024.

VACANCIES

The Board currently has zero (0) vacancies.

LICENSING UPDATE

POPULATION

A total of 5,514 new registration/licenses were issued in the first quarter of fiscal year (FY) 2024/2025. As of October 25, 2024, the Board has 147,065 registrants/licensees which is an approximate 1% gain since the fourth quarter of FY 2023/2024. This figure includes all licenses that have been issued and that are current and/or eligible to renew.

Attachment B1: BBS Population Report

APPLICATIONS RECEIVED/APPROVED (FY 2023-24)

Overall, in the first quarter of FY 2024/25, the Board received approximately 10% more applications than were received in the fourth quarter of FY 2023/2024.

Attachment B2: Licensing Applications Received/Processing Times

PROCESSING TIMES

To align the Board's reporting of processing times with the Department of Consumer Affairs (DCA) standards, staff will adjust how processing times are reported. Previously, the Board calculated processing times from the date an application was received or the postmark date until it was reviewed. Under DCA’s parameters, however, processing times are measured from the date an application is fully cashiered and "opened" in the system. Moving forward, processing times will be reported using DCA’s methodology.

Attachment B2: Licensing Applications Received/Processing Times

ADMINISTRATION APPLICATIONS RECEIVED

Overall, in the first quarter of FY 2024/25, the Board received approximately 6% more applications than were received in the fourth quarter of FY 2023/2024.

Attachment B3: Administration Applications Received

Attachment B4: Renewal Applications Received

EXAMINATION UPDATE

EXAMINATION PASS RATES

A total of 5,714 exams were administered in the 4th quarter of FY 2023/2024. This represents an approximate 2% increase in exam administrations from the 3rd quarter of FY 2023/2024. For a detailed view of the school pass rate, please see Attachment A-Exam School Report 4th Quarter FY 2023-2024.

Attachment C1: Exam Pass Rate Report

Attachment C2: Exam School Report 3rd Quarter FY 2023-2024.

BOARD DEVELOPED EXAMINATIONS

LMFT Clinical Examination

Effective January 1, 2025, the LMFT clinical examination will reduce from a 120-day waiting period to a 90-day waiting period.

This will increase the examination development workshops through OPES.

Board staff is working with the Breeze team to update the database business rules for examination approval at the 90-day waiting period.

Board staff is working with Pearson Vue on updating the exam candidate handbook and the LMFT clinical examination failed score reports.

Pearson Vue

The Pearson Vue contract has been approved through December 31, 2027.

NATIONAL EXAMNIATIONS

ASWB

The ASWB contract ends June 30, 2025. Board staff will be working with ASWB and the Department of Consumer Affairs in procuring a contract through June 30, 2030. This is a no fee contract and will be for services only.

NBCC (CCE)

The NBCC (CCE) contract for the NCMHCE ends June 30, 2025. Board staff will be working with NBCC (CCE) and the Department of Consumer Affairs in procuring a contract through June 30, 2030. This is a no fee contract and will be for services only. Board staff will request NBCC (CCE) take over the approval of the non-ESL accommodations.

ENFORCEMENT UPDATE

In the first quarter of FY 2024/25, the Board received 519 consumer complaints and 284 criminal convictions. Additionally, 570 cases were closed and 16 were referred to the office of the Attorney General. Currently, the average number of days to complete formal discipline is 369 days, the average number of days a case is at the Attorney General's office is 265 days, and the average number of days to complete a Board investigation is 63 days.

During the first quarter of FY 2024/25, the Board received petitions for modifications or early termination of probation.

EDUCATION AND OUTREACH

SOCIAL MEDIA ENGAGEMENT

The social media engagement report is attached.

Attachment E1: Social Media Engagement

OUTREACH EVENTS

During the first quarter of FY 2024/25, Board staff conducted ten outreach events. Staff have been encouraging stakeholder and organizations to submit request for outreach by emailing www.bbs.outreach@dca.ca.gov.

Attachment E2: Outreach Event Report

ORGANIZATIONAL EFFECTIVENESS

BREEZE SYSTEM UPDATES

Staff efforts remain on track to meet the projected completion timeline for online application registration by January 2025. Testing of the AMFT online application is scheduled to commence by the end of 2024.

COMMUNICATION

The Department of Consumer Affairs (DCA) Consumer Information Center handled 4,010 calls for the Board during the first quarter of FY 2024/25. The average wait time per call was 1:14 minutes.

Board staff received 32,674 emails during the first quarter of FY 2024/25.

Attachment F1: BBS Calls Received/Handled by CIC

Attachment F2: BBS Emails Received

STRATEGIC PLAN UPDATE

The Strategic Plan Update is attached.

Attachment G: BBS Strategic Plan Update November 2024

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0773 - Behavioral Science Fund
Analysis of Fund Condition
(Dollars in Thousands)
2024 Budget Act With FM 3 Projections

Prepared 10.31.2024

	Actuals 2023-24	CY 2024-25	BY 2025-26	BY +1 2026-27	BY +2 2027-28
BEGINNING BALANCE					
Prior Year Adjustment	\$ 18,461	\$ 16,240	\$ 23,467	\$ 28,596	\$ 33,352
Adjusted Beginning Balance	\$ 269	\$ -	\$ -	\$ -	\$ -
	<u>\$ 18,730</u>	<u>\$ 16,240</u>	<u>\$ 23,467</u>	<u>\$ 28,596</u>	<u>\$ 33,352</u>
REVENUES, TRANSFERS AND OTHER ADJUSTMENTS					
Revenues					
4121200 - Delinquent fees	\$ 177	\$ 178	\$ 183	\$ 183	\$ 183
4127400 - Renewal fees	\$ 12,075	\$ 12,489	\$ 12,457	\$ 12,457	\$ 12,457
4129200 - Other regulatory fees	\$ 186	\$ 189	\$ 190	\$ 190	\$ 190
4129400 - Other regulatory licenses and permits	\$ 7,893	\$ 8,449	\$ 7,600	\$ 7,600	\$ 7,600
4163000 - Income from surplus money investments	\$ 704	\$ 500	\$ 423	\$ 493	\$ 557
4171400 - Escheat of unclaimed checks and warrants	\$ 24	\$ 16	\$ 12	\$ 12	\$ 12
4171500 - Escheat Unclaimed Property	\$ 1	\$ -	\$ -	\$ -	\$ -
4172500 - Miscellaneous revenues	\$ 4	\$ 3	\$ 4	\$ 4	\$ 4
Totals, Revenues	<u>\$ 21,064</u>	<u>\$ 21,824</u>	<u>\$ 20,869</u>	<u>\$ 20,939</u>	<u>\$ 21,003</u>
Transfers to Other Funds					
Loan from Behavioral Sciences Fund (0773) to General Fund (0001) per Control Section 13.40, Budget Act of 2023	\$ -10,000	\$ -	\$ -	\$ -	\$ -
Totals, Transfers and Other Adjustments	<u>\$ -10,000</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>
TOTALS, REVENUES, TRANSFERS AND OTHER ADJUSTMENTS	<u>\$ 11,064</u>	<u>\$ 21,824</u>	<u>\$ 20,869</u>	<u>\$ 20,939</u>	<u>\$ 21,003</u>
TOTAL RESOURCES	<u>\$ 29,794</u>	<u>\$ 38,064</u>	<u>\$ 44,336</u>	<u>\$ 49,535</u>	<u>\$ 54,355</u>
Expenditures:					
1111 Department of Consumer Affairs (State Operations)	\$ 12,604	\$ 13,608	\$ 14,736	\$ 15,178	\$ 15,634
9892 Supplemental Pension Payments (State Operations)	\$ 212	\$ 158	\$ -	\$ -	\$ -
9900 Statewide General Administrative Expenditures (Pro Rata) (State Operations)	\$ 738	\$ 831	\$ 1,004	\$ 1,004	\$ 1,004
TOTALS, EXPENDITURES AND EXPENDITURE ADJUSTMENTS	<u>\$ 13,554</u>	<u>\$ 14,597</u>	<u>\$ 15,740</u>	<u>\$ 16,182</u>	<u>\$ 16,638</u>
FUND BALANCE					
Reserve for economic uncertainties	\$ 16,240	\$ 23,467	\$ 28,596	\$ 33,352	\$ 37,718
Months in Reserve	13.4	17.9	21.2	24.1	26.5

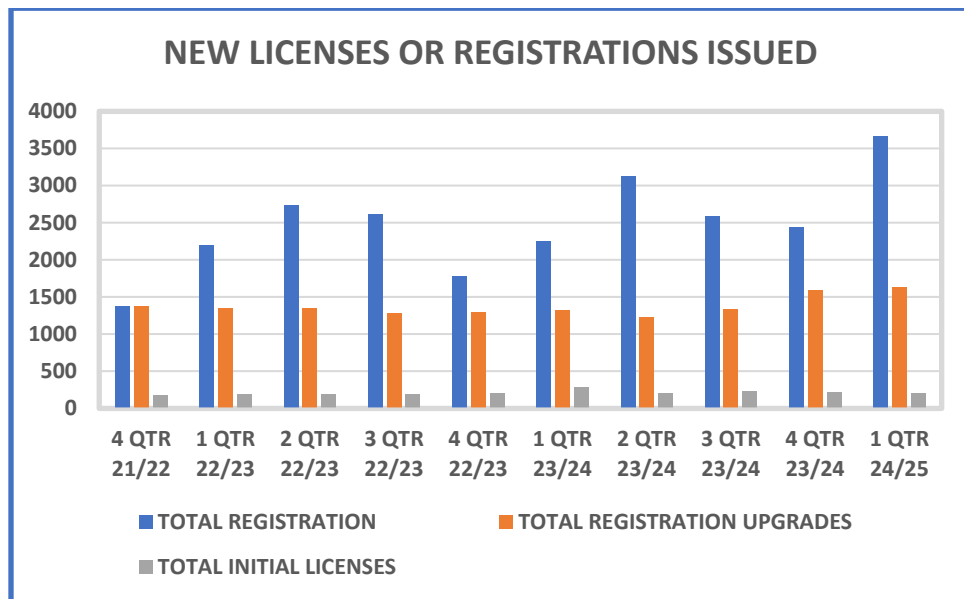
NOTES:

1. Assumes workload and revenue projections are realized in CY and ongoing.
2. Expenditure growth projected at 3% beginning BY.

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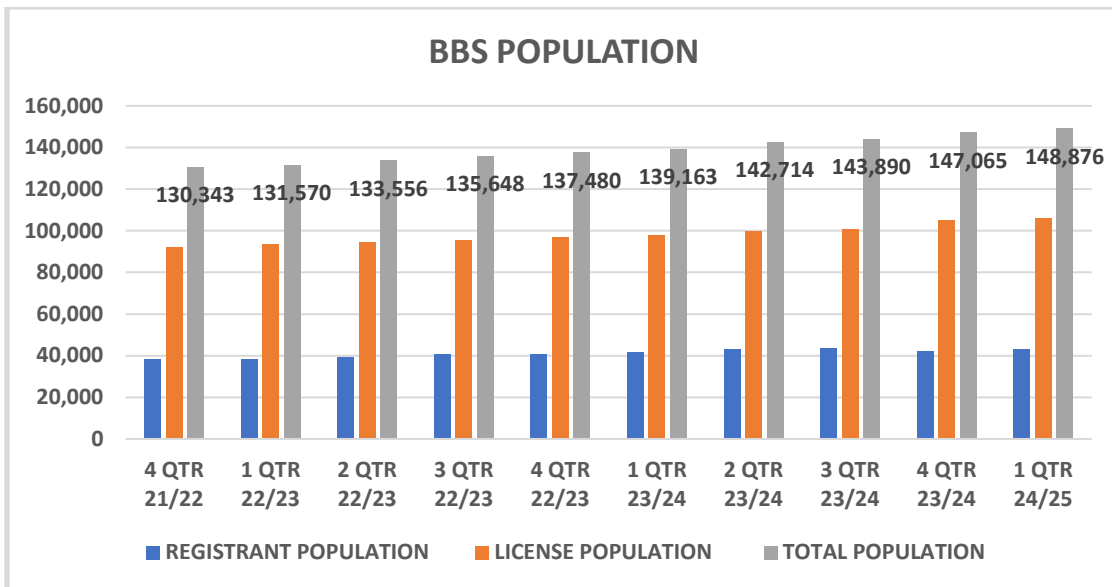
ATTACHMENT B1: LICENSING POPULATION

NEW REGISTRATIONS & LICENSES ISSUED FY 24/25					
	1st Qtr Volumes	2nd Qtr Volumes	3rd Qtr Volumes	4th Qtr Volumes	TOTALS
AMFT Registration	1,558				1,558
ASW Registration	1,633				1,633
APCC Registration	476				476
LMFT Upgrade	759				759
LMFT Initial	8				8
LCSW Upgrade	709				709
LCSW Initial	95				95
LEP Initial	45				45
LPCC Upgrade	170				170
LPCC Initial	61				61
TOTAL	5,514				5,514



ATTACHMENT B1: LICENSING POPULATION

POPULATION AS OF SEPTEMBER 3, 2024				
	CURRENT	CURRENT INNACTIVE	DELINQUENT	
AMFT	15,812	0	1,800	17,612
LMFT	48,679	3,564	3,579	55,380
	64,491	3,564	5,379	73,434
ASW	17,399	0	2,887	20,286
LCSW	35,843	2,209	2,245	40,297
	53,242	2,209	5,132	60,583
LEP	1,731	265	311	2,307
	1,731	265	311	2,307
LPCC	4,821	180	163	5,164
APCC	5,307	0	2,081	7,388
	10,128	180	2,244	12,552
	129,592	6,218	13,066	148,876

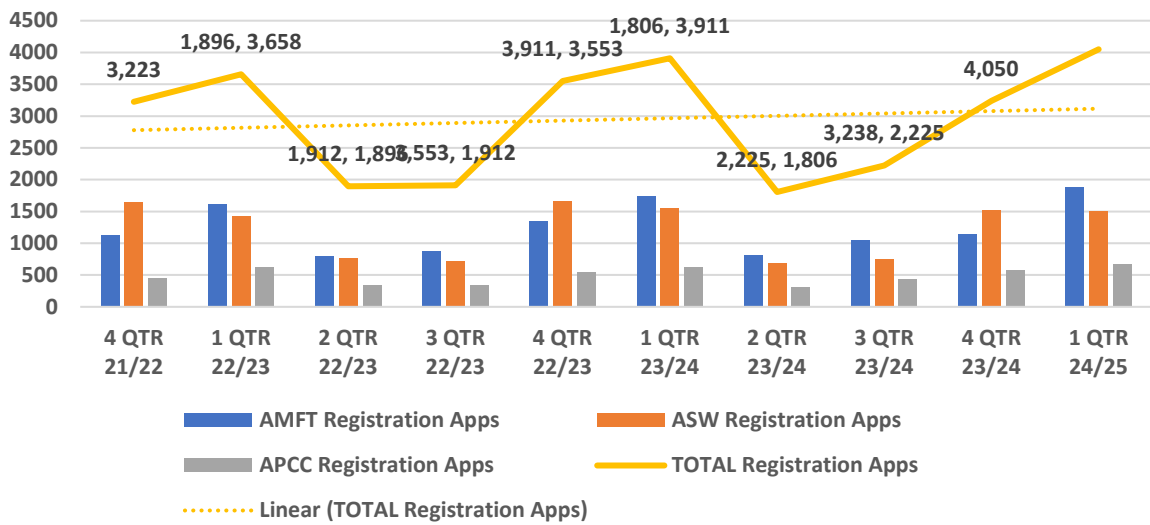


Attachment B2: Licensing Applications Received/Processing Times

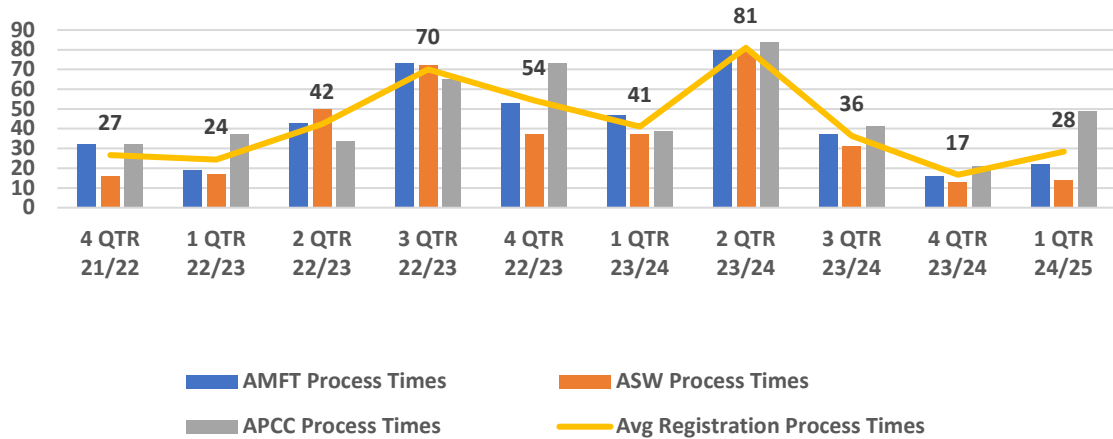
APPLICATIONS RECEIVED FY 24/25					
Applications	1st Qtr Volumes	2nd Qtr Volumes	3rd Qtr Volumes	4th Qtr Volumes	+/- Last Qtr
AMFT Registration	1,881				+65%
AMFT Sub Registration	165				-2%
LMFT Exam	808				-5%
LMFT Out of State	9				-3%
ASW Registration	1,501				-2%
ASW Sub Registration	295				-22%
LCSW Exam	761				+17%
LCSW Out of State	111				+28%
LEP Exam	70				+53%
APCC Registration	668				+17%
APCC Sub Registration	21				-1%⁹
LPCC Examination	196				-5%
LPCC Out of State	73				-21%
Total Applications	5,608				

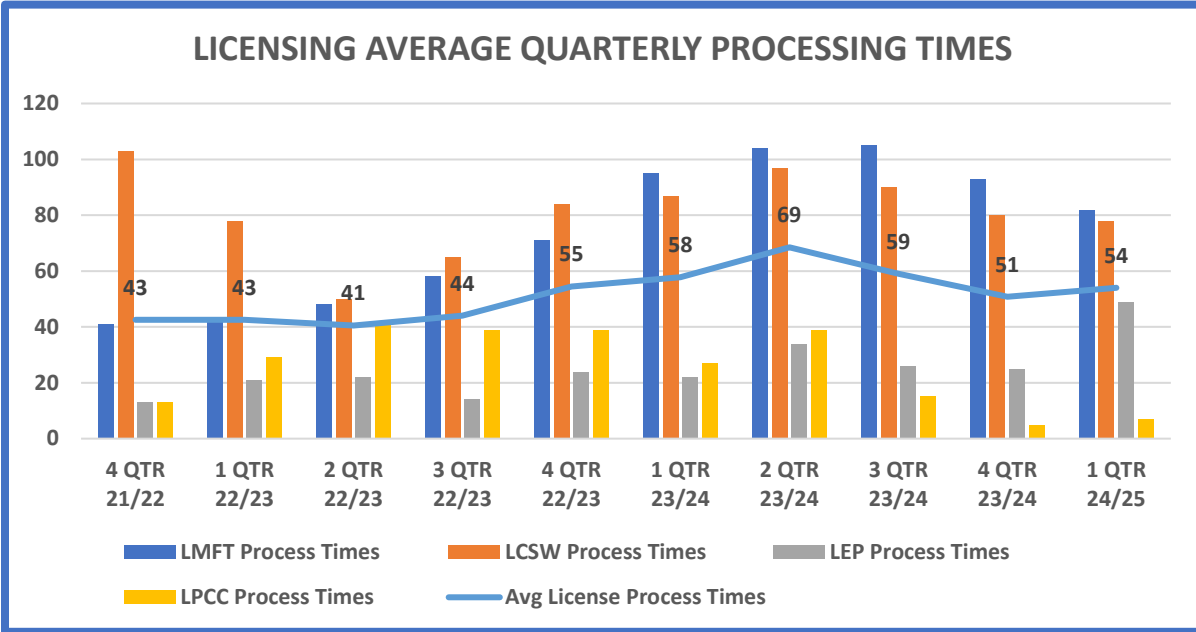
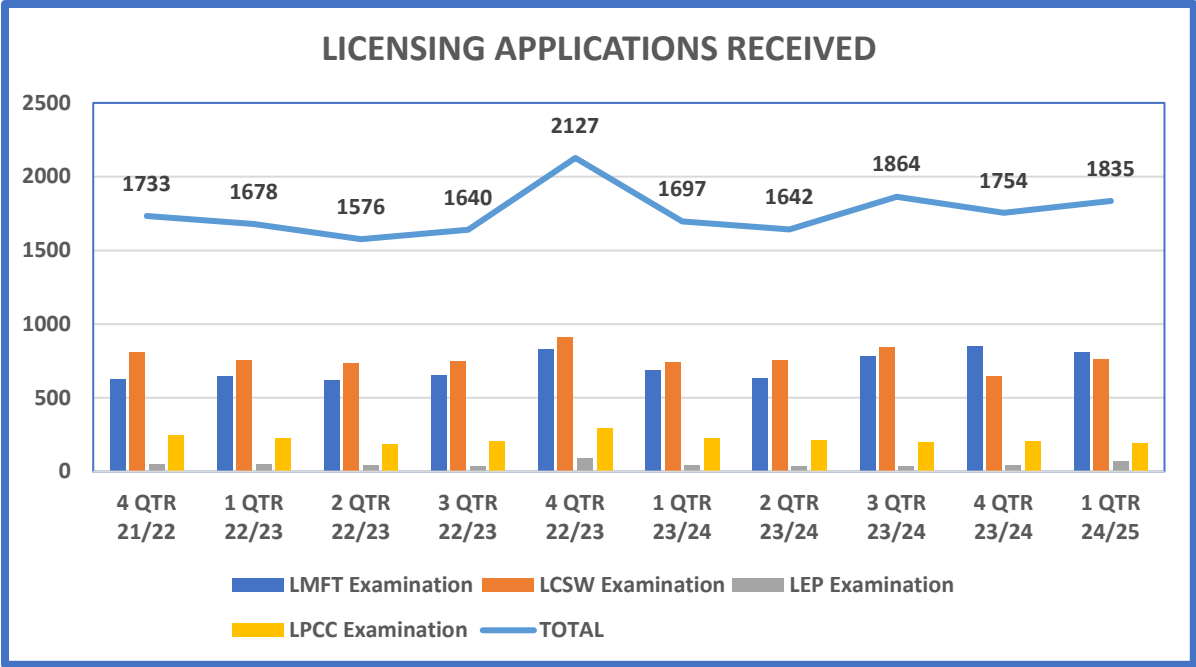
APPLICATION PROCESSING TIMES FY 24/25					
Applications	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	+/- Last Qtr
AMFT Registration	22				+6
LMFT Examination	82				-11
ASW Registration	14				+1
LCSW Examination	78				-2
LEP Examination	12				+24
APCC Registration	49				+28
LPCC Examination	7				+2

REGISTRATION APPLICATIONS RECEIVED



REGISTRATION AVERAGE QUARTERLY PROCESSING TIMES





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Attachment B3: Administration Applications Received

ADMINISTRATIVE APPLICATION VOLUMES FY 24/25						
Applications		1st Qtr Volumes	2nd Qtr Volumes	3rd Qtr Volumes	4th Qtr Volumes	TOTAL
Duplicate Certification No Fee	M	60				60
	O	0				0
Duplicate Cert with Fee	M	33				33
	O	1,424				1,424
Supervisor Certification	M	0				0
	O	113				113
Change of Name	M	80				80
	O	418				418
Change of Address	M	73				73
	O	3,420				3,420
Certification Letter	M	88				88
	O	891				891
TOTAL Applications		6,600				6,600
M=Manual (Submitted Paper Form) O=Online (Submitted Online Form)						

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ATTACHMENT B4: RENEWAL APPLICATIONS RECEIVED

RENEWAL APPLICATIONS RECEIVED FY 24/25						
Renewals		1st Qtr Volumes	2nd Qtr Volumes	3rd Qtr Volumes	4th Qtr Volumes	TOTAL
AMFT	M	2,608				2,608
	O	3,102				3,102
LMFT	M	3,470				3,470
	O	6,721				6,721
ASW	M	2,812				2,812
	O	4,402				4,402
LCSW	M	2,453				2,453
	O	4,728				4,728
LEP	M	144				144
	O	223				223
APCC	M	751				751
	O	1,165				1,165
LPCC	M	246				246
	O	479				479
TOTAL RENEWALS		33,304				33,304
Active from Inactive		71				71
Active from Retired		1				1
Retired		48				48
M=Manual (Submitted Paper Form) O=Online (Submitted Online Form)						

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Att. D – Consumer Complaint and Conviction Report

CONSUMER COMPLAINT & CRIMINAL CONVICTION REPORT FY 24/25					
	1st Qtr Volumes	2nd Qtr Volumes	3rd Qtr Volumes	4th Qtr Volumes	TOTAL
Consumer Complaints	519				519
Criminal Convictions	284				284
Cases Closed	570				570
Referred to Attorney General	16				16
Cases Pending at Attorney General	93				93
Accusations Filed	16				16
Statement of Issues Filed	5				5
Citations Issued	31				31
Final Disciplinary Orders	21				21
AVERAGES					
Average Number of Days to Complete Formal Discipline*	369				369
Average Number of Days a Case is at Attorney General**	265				265
Average Number of Days to Complete Board Investigations	63				63

*This statistic is measured by the average number of days to complete the enforcement process for cases investigated and transmitted to the Attorney General’s (AG) Office for formal discipline within the reference period. The DCA Performance Measure to complete formal discipline is 540 days.

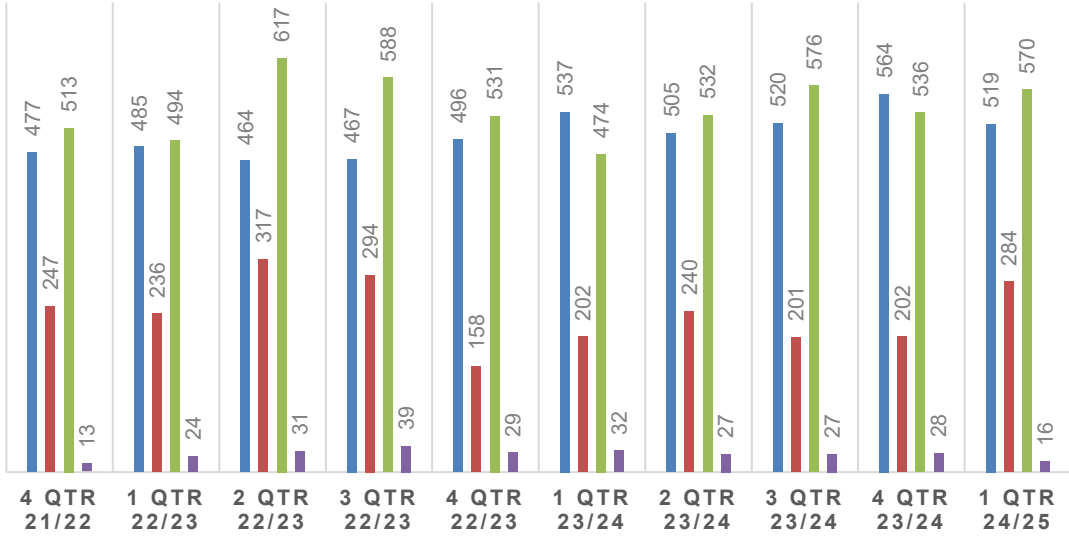
**This statistic is measured from the date the Board refers the matter to the AG’s Office to the date the case is complete.

PETITIONS RECEIVED July 1 – September 30

Modification and Early Termination	4
Reinstatement	1
Reconsideration	1
Vacate Default Decision	0
Ineligible/withdrawn	1

ENFORCEMENT ACTIVITIES

- Consumer Complaints
- Criminal Convictions
- Cases Closed
- Referred to Attorney General



ATTACHMENT E1: Social Media Engagement

SOCIAL MEDIA ENGAGEMENT (Fourth Quarter FY 2023/24)				
	REACH	VISITS	FOLLOWS	FOLLOWERS
Facebook	25,600	118,000	1,300	33,936
Instagram	12,800	20,400	1,600	15,192
Reach: how many people that have interacted with content				
Visits: number of times a Facebook/Instagram page has been visited				
Follows: number of people that began following the Board's page				

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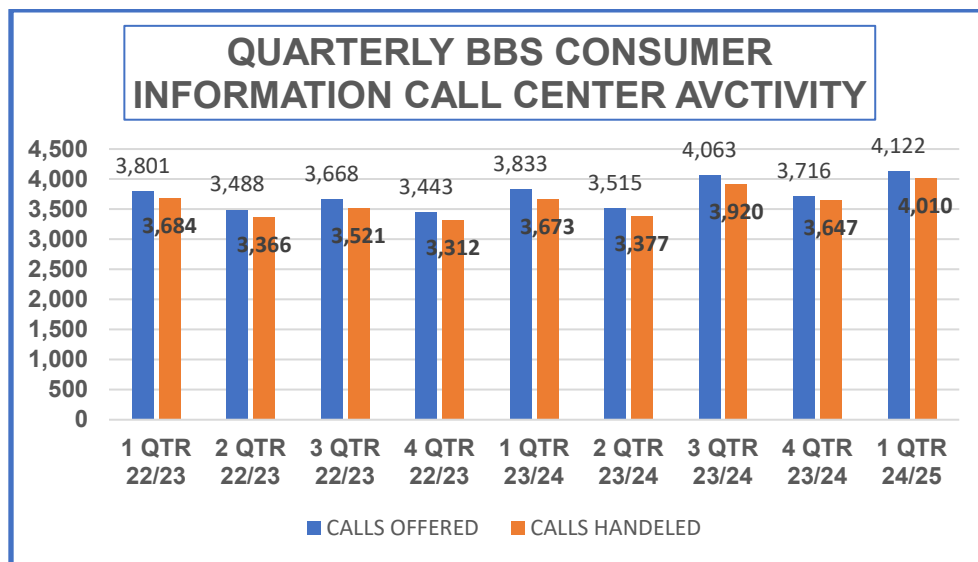
Attachment E2: Outreach Event Report

July 12, 2024	Virtual	MFT Consortium Sacramento
July 17, 2024	Virtual	MFT Consortium Orange County
July 26, 2024	Virtual	Penny Lane Centers
September 10, 2024	In Person	University of San Francisco-LMFT
September 13, 2024	Virtual	MFT Consortium Greater LA
September 18, 2024	Virtual	MFT Consortium Orange County
September 26, 2024	Virtual	MFT Consortium Inland Empire
September 27, 2024	Virtual	MFT Consortium Central Valley
September 27, 2024	Virtual	MFT Consortium Sacramento
September 28, 2024	Virtual	CAMFT Pre-License Symposium
October 16, 2024	Virtual	NASW-CA
October 25, 2024	Virtual	MFT Consortium Northern CA
October 25, 2024	Virtual	CAMFT-Central Coast Consortium

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ATTACHMENT F: BBS Calls Received/Handled by CIC

MONTH	OFFERED	HANDLED	AVG WAIT	MAX WAIT
23-Jan	1,214	1,155	2:10	7:41
23-Feb	1,183	1,136	1:08	12:48
23-Mar	1,271	1,230	1:25	16:20
23-Apr	1,020	974	1:52	5:00
23-May	1,190	1,159	1:23	13:36
23-Jun	1,233	1,179	1:48	5:59
23-Jul	1,253	1,214	2:10	19:05
23-Aug	1,431	1,374	2:45	7:10
23-Sep	1,149	1,085	2:38	3:09
23-Oct	1,259	1,219	1:17	11:10
23-Nov	1,193	1,149	1:46	14:27
23-Dec	1,063	1,009	2:24	8:39
24-Jan	1,495	1,439	2:50	11:42
24-Feb	1,266	1,231	1:50	20:34
24-Mar	1,302	1,250	1:06	13:02
24-Apr	1,242	1,215	1:15	17:19
24-May	1,250	1,213	1:23	11:52
24-Jun	1,224	1,219	1:36	13:52
24-July	1,422	1,368	1:26	12:18
24-Aug	1,438	1,402	1:06	12:24
24-Sep	1,262	1,240	0:51	7:30



Attachment F2 – BBS Emails Received

EMAILS RECEIVED FY 24/25					
UNIT	1st Qtr Volumes	2nd Qtr Volumes	3rd Qtr Volumes	4th Qtr Volumes	+/- Last Qtr
Criminal Conviction Unit	3,245				+13%
Consumer Complaint Unit	842				+7%
Discipline/Probation Unit	169				+8%
Licensing Unit	5,568				-1%
Registration Unit	8,225				+31%
Examination Unit	4,744				-36%
Cashier Unit	4,425				+23%
Administrative Unit	5,456				+24%
TOTAL EMAILS	32,674				+9%



STRATEGIC PLAN UPDATE NOVEMBER 2024

Goal 1: Licensing

Establishing 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
	START DATE	Q1 2022
1.1.1	Electronic Form Submittal 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
1.1.1.1	Staff submitted a project request to DCA's Office of Information Services (OIS) to research possible modifications to the Breeze system that will allow applicants to submit supervision forms through Breeze.	April 2023
1.1.2	Breeze Reconfiguration-Board License Types (WA 165) 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
1.1.3.1	Staff began collaborating with DCA's BreEZe team to design the online transaction.	July 2023
1.1.3.2	Staff met with the BreEZe design team to discuss the profile reports and application details.	April 2024
1.1.4	Breeze Subsequent Registration Application Establish online registrant applications.	Ongoing
1.1.5	Breeze Licensure Application Establish online licensing applications	Planned
1.1.6	Breeze Application Deficiencies Update Breeze to allow for applicants to view their application deficiencies through their Breeze account.	Ongoing

1.1.6.1	Staff began reviewing and modifying the current BreeZe deficiency phrases for each license type.	July 2023
1.1.7	Application “Check-in” Process Implemented a new application “check in” process that allows for the early identification and resolution of application errors.	January 2023
1.1.8	Licensing Support Analyst Hired a licensing support assistant to coordinate the collection of application materials to allow licensing evaluator to focus on processing and evaluating rather than researching documents.	March 2023
1.1.9	Breeze Law & Ethics Re-Exam Application Established the online submittal of the Law & Ethics R-exam application through Breeze	April 2023
	END DATE	Q4 2024

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
	START DATE	Q1 2022
1.2.1	Process Improvement As-Is Mapping Participate in As-Is mapping session to document the current business process.	March 2022
1.2.2	Process Improvement Value Stream Added Mapping Participate in Value Stream Added mapping sessions	June 2022
1.2.3	Process Improvement Could be Mapping Participate in Could be Mapping sessions	October 2022
1.2.4	Process Improvement Report Finalization OIO finalizing the draft of the report.	March 2023
1.2.5	Process Improvement Implementation Staff is utilizing the OIO report to perform a task analysis of key positions to determine appropriate staffing levels.	August 2024

Number	Major Activity	Completion Date
1.2.6	Supervised Hours Review Improvement Reviewed the process for evaluating experience and found ways to improve and streamline the process.	May 2023
	END DATE	Q1 2024

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
	START DATE	Q1 2023
1.3.1	Barriers to Licensure Initiate and/or participate in conversation regarding barriers to licensure	Ongoing
1.3.1.1	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
1.3.1.2	Met with representatives from CA Dept of Health Care Access and Information regarding the mental health workforce and wellness coaches.	January 2023
1.3.1.3	Sergio Aguilar-Gaxiola, MD, PhD, presented “An Overview of California’s Behavioral Health Workforce: Challenges and Recommendations” to the Licensing Committee	January 2023
1.3.1.4	Met with representatives from California Alliance of Child and Family Services to discuss recommendation to increase the mental health workforce.	April 2023
1.3.1.5	Representatives from California Alliance of Child and Family Services made a presentation to the Workforce Development Committee regarding testing disparities and barriers.	October 2023
1.3.1.6	Conducted a pathway to licensure survey to collect information on barriers that Board registrants and licensees may face during the pathway to licensure.	April 2024
1.3.1.7	Staff reported to the Workforce Development Committee on the survey results.	August 2024

Number	Major Tasks	Completion Date
	END DATE	Q4 2025

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
	START DATE	Q2 2022
1.4.1	Registration Application Tutorial Developed a power point presentation that explains the process of applying for a registration and the 90-day rule. The presentation highlights common errors and how to complete an application to avoid delays.	September 2022
1.4.2	Social Media-Registration/License Maintenance Alerts 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	Registration Sixth Year Alert 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	Website-Instructional Videos 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
1.4.6	Online Application Status Checks 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
1.4.7	License Application Courtesy Email Implemented automated “courtesy email notifications” (CEN) to licensing and examination applicants to notify them when applications are approved.	January 2023
1.4.8	Registration Application Courtesy Email Implement automated “courtesy email notifications” (CEN) to registrant applicants to notify them when applications are approved.	Planned

Number	Major Tasks	Completion Date
1.4.9	Initial License Application Courtesy Email Implement automated “courtesy email notifications” (CEN) to initial license applicants to notify them when applications are approved.	Planned
1.4.10	10 Tips for a Smoother Licensing Process Developed a publication that assists applicants during their licensure process, including tips on applying, use of BreEZe, registration renewal, exams, avoiding loss of experience hours, and the best ways to communicate with the BBS.	May 2023
1.4.11	Update Application Packets Decrease application deficiencies by improving application instructions, providing an application checklist, and performing a complete overhaul of the out-of-state licensure applications.	October 2023
1.4.12	Tips When Taking on a New Supervisee Published in the Board’s spring newsletter and will be posted as a separate document.	March 2024
1.4.13	Restructure of Website Implement changes to the existing website structure to ensure that information is more easily accessible	Ongoing
1.4.13.1	Staff is reviewing current website structure and discussing possible changes with DCA’s website team	August 2024
	END DATE	Q4 2025

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
	START DATE	Q1 2022
1.5.1	Pathway to Licensure Videos Develop Pathway to Licensure Videos	COMPLETED
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	Pathway to licensure video complete	September 2022

Number	Major Tasks	Completion Date
	START DATE	Q1 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 post-production	January 2023
1.5.1.5	LCSW Degree Requirement, LPCC Degree Requirement videos in post-production.	March 2023
1.5.1.6	Law & Ethics Exam, Registrant, 90-day Rule in post-production.	October 2023
1.5.1.7	Supervision and Criminal history video in production.	October 2023
1.5.1.8	Videos posted to the internet and a link created in the Board's FAQs. Staff advertised videos on the Board's social media platforms.	March 2023
	END DATE	Q1 2024

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
	START DATE	Q1 2023
2.1.1	Subject Matter Expert Recruitment Implement improvements to the current recruitment process to increase pool of SME candidates.	Ongoing
2.1.1.1	Staff began to revise the current subject matter expert application to include additional voluntary demographic information.	March 2023
2.1.1.2	Staff coordinated with the DCA's Public Information Office in developing a social media campaign to promote the Board's SME program.	March 2024

Number	Major Tasks	Completion Date
2.1.2	Subject Matter Diversity Collaborate with OPES to identify ways to increase diversity of participants in exam development workshops.	Planned
2.1.2.1	Collaborate with DCA's Public Information Office to translate SME social media posts into different languages.	April 2024
	END DATE	Q1 2024

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
	START DATE	Q4 2022
2.2.1	ASWB 90-Day Waiting Period Waiver	December 2022
2.2.2	Exam Eligibility Expiration Date Notification: Develop a procedure to notify exam candidates of their impending exam eligibility expiration date.	February 2023
2.2.2.1	Staff began working on developing an exam eligibility expiration report.	August 2022
2.2.2.2	Staff completed report and began to notify exam candidates. This will be done monthly.	February 2023
2.2.3	Path A Email Notifications Staff began tracking and sending email 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	LEP Exam Waiting Periods 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	ESL Accommodation Requirements Determine whether the Board's current English as a Second Language (ESL) accommodation requirements need to be modified to mirror the Association of Social Work Boards English Language Learner accommodation requirements.	Ongoing

Number	Major Tasks	Completion Date
2.2.5.1	The Workforce and Development Committee directed staff to draft language amending section 1805.2 to include another option for qualifying for the additional examination time that would include the application certification under penalty of perjury that their primary or 1st language is one other than English and explore revising the examination time to two hours.	January 2024
2.2.5.2	The Workforce and Development Committee directed staff to draft discussed language into and bring the proposal to the Policy and Advocacy Committee for consideration.	April 2024
2.2.5.3	Draft language discussed at Policy and Advocacy Committee meeting.	August 2024
2.2.6	Exam No-Show Notifications Staff began tracking and sending email notifications to exam candidates for Boards administered exams who were a no-show. This notification provides instructions on the process to re-apply for the exam.	September 2022
2.2.7	File Abandonment Notifications Staff began tracking and sending email notifications to exam candidates who abandoned their licensing file as per CA CCR 1806. The notification provides instructions on how to reapply.	September 2022
2.2.8	Clinical Exam Seven Year Limit Notification Staff began tracking and sending notification to exam candidates who have been in the clinical exam cycle for seven years from their first attempt and must retake and pass the current version of the law and ethics exam. This notification provides instruction on how to apply for the law and ethics exam and provides the date they must exam by to ensure they maintain licensure eligibility.	September 2022
	END DATE	Q4 2023

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
	START DATE	Q3 2021

Number	Major Tasks	Completion Date
2.3.1	AMFTRB Exam Review 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	AMFTRB Exam Review Presentation 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	AMFTRB Staff Research Board staff opened discussions with AMFTRB executive staff to address Board’s concerns.	January 2023
2.3.4	AMFTRB Presentation Lois Paff Bergen from AMFTRB presented to the Board an overview of the AMFTRB examination and its development.	August 2023
2.3.5	AMFTRB Board Discussion Conducted a discussion in closed session to discuss the acceptance of the AMFTRB exam.	February 2024
2.3.6	AMFTRB Statutes and Regulatory Amendments Staff presented statutory and regulatory amendments that will be needed to accept the AMFTRB national exam for licensure	August 2024
	END DATE	Q2 2024

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
	START DATE	Q1 2022
3.1.1	Applicant-Enforcement Communication	Planned

Number	Major Tasks	Completion Date
	Review current process used to communicate with applicants, complainants, and respondents during the complaint process.	
3.1.2	Complaint-Enforcement Communication Review current process used to communicate with applicants, complainants, and respondents during the complaint process.	Planned
	END DATE	Q4 2025

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
	START DATE	Q4 2022
3.2.1	Enforcement Outreach Materials Develop and publish outreach material that includes flow chart of enforcement process.	Ongoing
3.2.1.1	Staff met to discuss possible ideas for the outreach materials.	April 2024
3.2.2	Enforcement Outreach Videos Develop video presentations that explain the enforcement process steps.	Planned
3.2.2.1	Staff met to possible ideas for the video presentations.	April 2024
	END DATE	Q4 2023

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
	START DATE	Q2 2022
3.3.1	Uniform Standards & Disciplinary Guidelines Review 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
3.2.1.4	Recommended changes brought to the P & A Committee	July 2023
3.2.1.5	Recommended changes approved by the Board; staff preparing regulation package for DCA initial review	August 2023
3.2.1.6	Regulation proposal was noticed to the public on February 2, 2024, and the public comment period ended on March 25, 2024.	February 2024
3.2.1.7	Public comment period ended.	March 2024
3.2.1.8	Recommend changes brought to Board	May 2024
3.3.2	Enforcement Statutes & Regulation Review Review current statutes and regulations related to enforcement to determine possible needed updates.	Planned
	END DATE	Q4 2024

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
	START DATE	Q1 2023
3.4.1	Probation Program Reporting Develop an automated report for the probation program that will assist in determining trends and possible opportunities for improvement.	Planned
3.4.2	Application Denial Reporting Develop an automated report that for application denials that will assist in determining trends in violations.	Planned

Number	Major Tasks	Completion Date
	END DATE	Q4 2024

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
	START DATE	Q1 2023
3.5.1	Subject Matter Expert Recruitment Staff began to revise the current subject matter expert application to include additional voluntary demographic information.	March 2023
3.5.1.1	Staff coordinated with the DCA's Public Information Office in developing a social media campaign to promote the Board's SME program.	March 2024
3.5.2	Subject Matter Diversity Identify ways to increase diversity of subject matter experts.	Planned
3.5.2.1	Staff are collaborating with DCA's Public Information Office to translate SME social media posts into different languages.	April 2024
	END DATE	Q4 2023

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
	START DATE	Q1 2022

Number	Major Tasks	Completion Date
4.1.4	Temporary License Allowance Consider an Incidental allowance for out-of-state provider providing online telehealth in CA.	COMPLETED
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 and moving through the legislative process	January 2023
4.1.4.6	AB 232 signed by the Governor and becomes law January 1, 2024.	October 2023
4.1.5	Telehealth Service Platforms Review Research alternative modes of services (email, texting, and app-based therapy) to identify consumer protection issues that current law does not address.	Ongoing; Timeline same as 4.1.6 below.
4.1.6	Online Therapy Sites Review Discuss the necessity of regulating online therapy sites.	Ongoing
4.1.6.1	Online therapy site and alternative modes of therapy discussion brought to Telehealth Committee	December 2022
4.1.6.2	Staff discussed potential concerns with Legislature (Business and Professions Committee)	December 2022
4.1.6.3	Telehealth Committee reviewed draft survey for licensees and registrants who have experience working for these platforms.	March 2023
4.1.6.4	Survey distributed to licensees and registrants via social media, email subscriber list, and professional associations	April 2023
4.1.6.5	Survey results discussed at Telehealth Committee; next steps determined.	June 2023
4.1.6.6	Online-Only Therapy Platform guidance document reviewed by the Telehealth Committee. Committee directed staff to publish the document.	December 2024
4.1.7	Inter-State Compact Review Examine, research, and discuss Inter-state compacts.	COMPLETED

Number	Major Tasks	Completion Date
4.1.7.1	Inter-state compacts discussion brought to Telehealth Committee. Committee determined staff will continue to monitor ongoing progress of compacts.	June 2023
4.1.7.2	SB 2566 (Wilson) Interstate Counseling Compact introduced. The Policy & Advocacy Committee held a discussion concerning the bill. No recommendation at this time.	April 2024
4.1.7.3	SB 2566 (Wilson) Interstate Counseling Compact brought to the Board for discussion. Board approved motion was to oppose AB 2566 and reach out to the California Commission on Uniform Laws.	May 2024
4.1.8	Telehealth Best Practice Documents Create best practices document to assist employers/supervisor in determine the best way to proceed with telehealth	COMPLETED
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
4.1.8.4	Telehealth Committee reviewed three best practice documents: for providers, supervisors, and consumers	March 2023
4.1.8.5	Staff worked with DCA's publication office to finalize the documents. Documents were presented to the Board.	April 2023
4.1.8.6	Telehealth best practice documents posted to the Board website and advertised through social media.	July 2023
	END DATE	Q4 2025

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.

Number	Major Tasks	Completion Date
	START DATE	Q1 2023
4.2.1	Six Year Rule Discuss 6 years rule (experience hours and length of registration).	July 2022
4.2.2	Law & Ethics Exam Age Limit Discuss in committee the CA law and ethics exam age limit and limiting attempts.	Planned
4.2.3	NCMHCE Acceptance Without Experience Determine National Clinical Mental Health Counseling Examination (NCMHCE) acceptability from applicants who do not have supervised experience.	Planned
4.2.4	Registration of Trainees Consider and make recommendation on the registration of trainees.	Planned
4.2.5	Early Eligibility for Clinical Examinations Permitting applicants for licensure to take the required clinical examination after completing 1,500 hours of postgraduate supervised experience.	Ongoing
4.2.5.1	Early exam eligibility discussed during the Workforce Development Committee.	January 2024
4.2.5.2	Workforce Development Committee directed staff to start drafting the language, consult with legal for direction on what will be proposed in statute and in regulations, and continue discussions to iron out details	April 2024
4.2.5.3	Staff presented proposed language to the Workforce Development Committee.	August 2024
	END DATE	Q4 2025

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
	START DATE	Q4 2023
4.3.1	Course Requirement Timing Make timing and requirement of course consistent across license types where needed.	Ongoing
4.3.1.1	Staff presented an overview of the additional coursework requirements to the Workforce Committee. The Committee discussed the Human Sexuality Coursework and possible amendments.	April 2024
4.3.1.2	Staff presented to the Workforce Committee recommended amendments to the child abuse assessment and reporting coursework requirements.	August 2024
	END DATE	Q4 2025

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
	START DATE	Q1 2023
4.4.1	Advertising Regulations Update: Update advertising statutes and regulations	COMPLETED
4.4.1.1	Recommendations brought to P & A Committee	October 2022
4.4.1.2	Continued discussion of potential amendments to statute and regulation at P&A Committee	October 2023
4.4.1.3	Continued discussion of potential amendments to statute and regulations. Board directed staff to pursue as a legislative proposal.	November 2023
4.4.1.4	Senate Bill 1024 (Ochoa Bogh) was introduced.	January 2024
4.4.1.5	Senate Bill 1024 (Ochoa Bogh) enrolled.	July 2024
4.4.2	Review Requirements for Posting Legal Name Review and possibly amend requirements for posting legal name	COMPLETED

Number	Major Tasks	Completion Date
	START DATE	Q1 2023
4.4.2.1	SB 372 introduced by stakeholders and is currently moving through the Legislature. The Board will consider updating its position for the latest version of the bill at its August meeting. Staff will continue to provide technical support as the bill moves through the legislative process.	Ongoing
4.4.2.2	SB 372 signed by the Governor and becomes law January 1, 2024.	October 2023
	END DATE	Q4 2025

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
	START DATE	Q1 2022
5.1.1	Staffing Needs Evaluation Determine current organizational needs based upon current processing times and future workload projections.	Planned
5.1.1.1	Paperwork submitted for approval of two Limited Term Management Service Technicians.	December 2022
5.1.1.2	Approved for one Limited Term Management Service Technician. Filled the position as an evaluator in the Registration Unit.	February 2024
5.1.1.3	Approved for one Limited Term Staff Services Analyst. Filled the position as a Licensing Analyst.	June 2024
5.1.2	Duty Statement Updates Review staff duty statements to ensure they properly reflect current duties.	Ongoing
5.1.2.1	Board AEO began meeting with unit managers to discuss current duties of their unit and staff members to ensure all duties have been documented.	March 2024
5.1.4	Organizational Structure Review Determine appropriate ideal organizational structure.	Planned

Number	Major Tasks	Completion Date
	START DATE	Q1 2022
5.1.4.1	Board restructured its Registration, Examination, and Cashiering Unit. Restructure created a separate Registration Unit.	February 2024
5.1.4.2	Board restructured its Licensing Unit. The restructure consisted of adding a second Licensing Manager and assigning each manager to oversee two license types.	June 2024
5.1.5	Staff Training and Development Research training opportunities for staff and create a training pathway for upward mobility.	Ongoing
5.1.5.1	Staff met to discuss the creation and implementation of “BBS Academy” and ways to increase awareness of training opportunities for staff.	April 2024
5.1.5.2	Conducted a staff training survey to identify training staff’s training needs and desires.	August 2024
	END DATE	Q2 2023

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
	START DATE	Q1 2022
5.2.1	Process Improvement As-Is Mapping Participate in As-Is mapping session to document the current business process.	March 2022
5.2.2	Process Improvement Value Stream Added Mapping Participate in Value Stream Added mapping sessions	June 2022
5.2.3	Process Improvement Could be Mapping Participate in Could be Mapping sessions	October 2022
5.2.4	Process Improvement Report Finalization OIO finalizing the draft of the report.	March 2023
5.2.5	Process Improvement Change Management Workshop OIO to conduct organization change management workshop	Planned

Number	Major Activity	Completion Date
5.2.6	Process Improvement Implementation Staff is utilizing the OIO report to perform a task analysis of key positions to determine appropriate staffing levels.	August 2024
	END DATE	Q1 2023

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
	START DATE	Q1 2022
	END DATE	Q1 2024

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
	START DATE	Q1 2022
6.3.1	Develop social media campaign for awareness days and months.	Ongoing
6.3.1.1	Developed Social media campaign for National School Counseling Week (February 6-10), Mental Health Awareness Month (May), National Minority Mental Health Awareness Month (July), National Psychotherapy Day (September 25), National Social Workers Month (February 2023
6.3.2	Outreach Coordination Streamlined outreach with schools and associations by creating a new centralized calendar and email account dedicated to outreach events and requests.	March 2023
6.3.3	Quarterly School Outreach Presentations Develop quarterly outreach events for schools that will focus on the pathway to licensure and law and ethics.	Planned

Number	Major Tasks	Completion Date
	START DATE	Q1 2022
	END DATE	Q4 2025

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
	START DATE	Q4 2022
6.4.1	<p>6 Hours of Continuing Education for Attending Meetings Discussed the possibility at the August 2024 P & A Committee meeting. Credit 6 hours of CE per renewal cycle for licensees attending California Board of Behavioral Sciences meetings.</p>	August 2024
	END DATE	Q4 2025