



NOTICE OF TELECONFERENCE **GOVERNMENT AND PUBLIC AFFAIRS COMMITTEE MEETING**

Committee Members

Janette N.V. Cruz, Chair
Rafael Sweet

The Board of Chiropractic Examiners' (Board) Government and Public Affairs Committee will meet by teleconference on:

Friday, June 16, 2023
1:00 p.m. to 3:00 p.m.
(or until completion of business)

The Committee may take action on any agenda item.

Teleconference Instructions: The Government and Public Affairs Committee will hold a public meeting via Webex Events. Pursuant to the statutory provisions of Government Code section 11133, neither a public location nor teleconference locations are provided.

To access and participate in the meeting via teleconference, attendees will need to click on, or copy and paste into a URL field, the link below and enter their name, email address, and the event password, or join by phone using the access information below:

<https://dca-meetings.webex.com/dca-meetings/j.php?MTID=m15d45c7bccba91ddb9b3d712eb9f3a5e>

If joining using the link above

Webinar number: 2484 594 5742
Webinar password: BCE06162023

If joining by phone

+1-415-655-0001 US Toll
Access code: 248 459 45742
Passcode: 22306162

Instructions to connect to the meeting can be found at the end of this agenda.

Members of the public may, but are not obligated to, provide their names or personal information as a condition of observing or participating in the meeting. When signing into the Webex platform, participants may be asked for their name and email address. Participants who choose not to provide their names will be required to provide a unique identifier, such as their initials or another alternative, so that the meeting moderator can identify individuals who wish to make a public comment. Participants who choose not to provide their email address may utilize a fictitious email address in the following sample format: XXXXXX@mailinator.com.

Note: Members of the public may also submit written comments to the Committee on any agenda item by Tuesday, June 13, 2023. Written comments should be directed to chiro.info@dca.ca.gov for Committee consideration.

AGENDA

- 1. Call to Order / Roll Call / Establishment of a Quorum**
- 2. Review and Possible Approval of March 13, 2023 Committee Meeting Minutes**
- 3. Update on Board's Administration Program, Including Budget and Fund Condition, Business Modernization and Implementation of Connect System, and Status of Board's Pending Rulemaking Packages**
- 4. Update and Discussion on the Status, Tracking, and Reporting of 2022–2026 Strategic Plan Objectives**
- 5. Review, Discussion, and Possible Recommendation Regarding 2022–2026 Strategic Plan Objective 3.3 to Create an Outreach Plan to Improve Communication with Stakeholders, Share Helpful Information, and Clarify the Board's Role and Duties**
- 6. Review, Discussion, and Possible Recommendation Regarding 2022–2026 Strategic Plan Objective 5.4 to Re-Design the Board Member Onboarding Procedures and Orientation Process**
- 7. Public Comment for Items Not on the Agenda**
Note: Members of the public may offer public comment for items not on the agenda. However, the Committee may not discuss or take action on any matter raised during this public comment section that is not included on this agenda, except to decide whether to place the matter on the agenda of a future meeting. [Government Code Sections 11125, 11125.7(a).]
- 8. Future Agenda Items**
Note: Members of the Committee and the public may submit proposed agenda items for a future Committee meeting. However, the Committee may not discuss or take action on any proposed matter except to decide whether to place the matter on the agenda of a future meeting. [Government Code Section 11125.]
- 9. Adjournment**

This agenda can be found on the Board's website at www.chiro.ca.gov. The time and order of agenda items are subject to change at the discretion of the Committee Chair and may be taken out of order. In accordance with the Bagley-Keene Open Meeting Act, all meetings of the Board are open to the public.

The Board plans to webcast this meeting at <https://thedcapage.wordpress.com/webcasts/>. Webcast availability cannot, however, be guaranteed due to limitations on resources or other technical difficulties that may arise. The meeting will not be canceled if webcast is not available. If you wish to participate or to have a guaranteed opportunity to observe, please attend the meeting via Webex Events.

Government Code section 11125.7 provides the opportunity for the public to address each agenda item during discussion or consideration by the Committee prior to it taking any action on said item. Members of the public will be provided appropriate opportunities to comment on any issue before the Committee, but the Committee Chair may, at their discretion, apportion available time among those who wish to speak. Members of the public will not be permitted to yield their allotted time to other members of the public to make comments. Individuals may appear before the Committee to discuss items not on the agenda; however, the Committee can neither discuss nor take official action on these items at the time of the same meeting (Government Code sections 11125 and 11125.7(a)).

This meeting is being held via Webex Events. The meeting is accessible to individuals with disabilities. A person who needs a disability-related accommodation or modification to participate in the meeting may make a request by contacting the Board at:

Telephone: (916) 263-5355

Email: chiro.info@dca.ca.gov

Telecommunications Relay Service: Dial 711

Mailing Address:

Board of Chiropractic Examiners

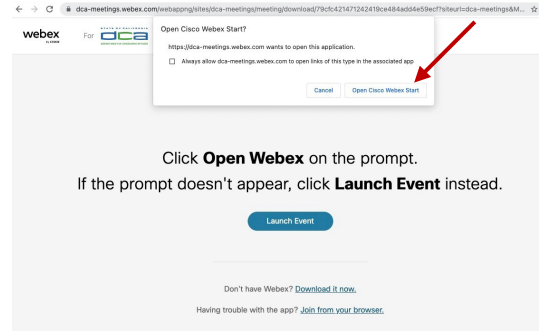
1625 N. Market Blvd., Suite N-327

Sacramento, CA 95834

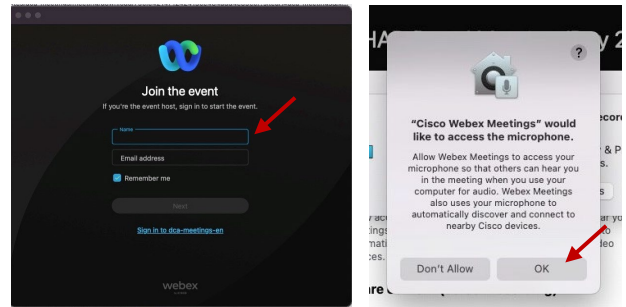
Providing your request at least five (5) business days before the meeting will help to ensure availability of the requested accommodation.

If joining using the meeting link

- 1 Click on the meeting link. This can be found in the meeting notice you received.
- 2 If you have not previously used Webex on your device, your web browser may ask if you want to open Webex. Click "Open Cisco Webex Start" or "Open Webex", whichever option is presented. DO NOT click "Join from your browser", as you will not be able to participate during the meeting.



- 3 Enter your name and email address*. Click "Join as a guest". Accept any request for permission to use your microphone and/or camera.

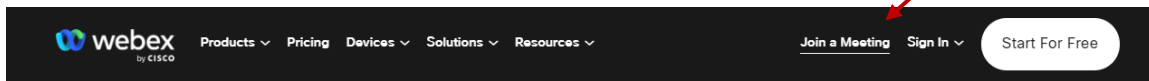


* Members of the public are not obligated to provide their name or personal information and may provide a unique identifier such as their initials or another alternative, and a fictitious email address like in the following sample format: XXXXX@mailinator.com.

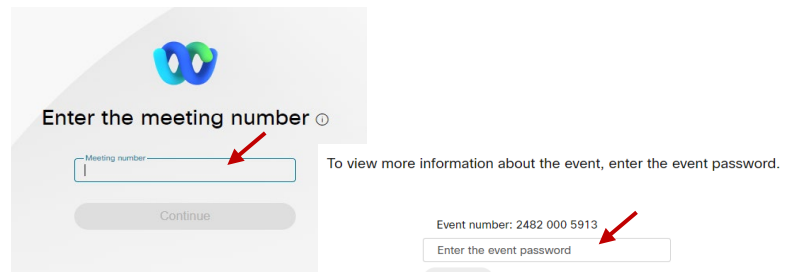
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If joining from Webex.com

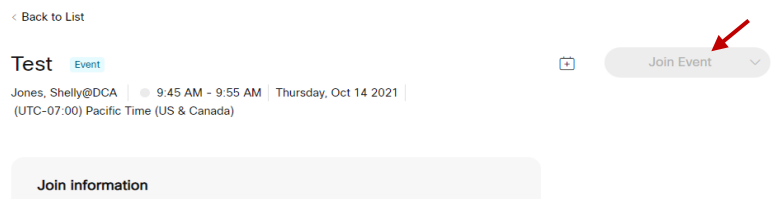
- 1 Click on "Join a Meeting" at the top of the Webex window.



- 2 Enter the meeting/event number and click "Continue". Enter the event password and click "OK". This can be found in the meeting notice you received.



- 3 The meeting information will be displayed. Click "Join Event".



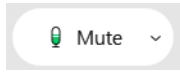
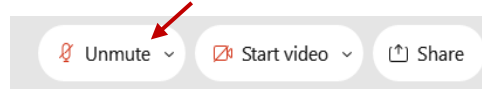
OR

Connect via telephone*:

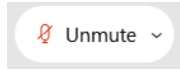
You may also join the meeting by calling in using the phone number, access code, and passcode provided in the meeting notice.

Microphone

Microphone control (mute/unmute button) is located on the command row.

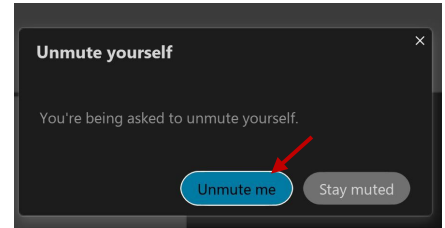


Green microphone = Unmuted: People in the meeting can hear you.



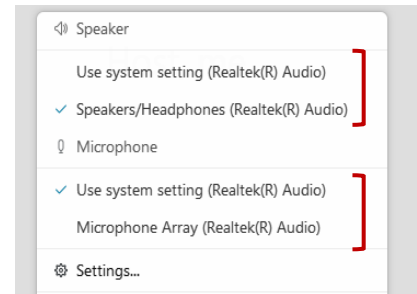
Red microphone = Muted: No one in the meeting can hear you.

Note: Only panelists can mute/unmute their own microphones. Attendees will remain muted unless the moderator enables their microphone at which time the attendee will be provided the ability to unmute their microphone by clicking on "Unmute Me".



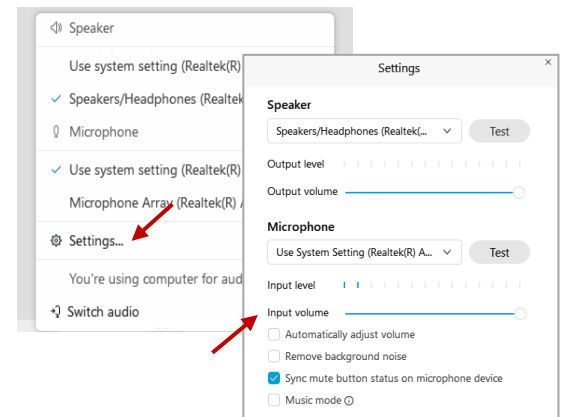
If you cannot hear or be heard

- 1 Click on the bottom facing arrow located on the Mute/Unmute button.
- 2 From the pop-up window, select a different:
 - Microphone option if participants can't hear you.
 - Speaker option if you can't hear participants.



If your microphone volume is too low or too high

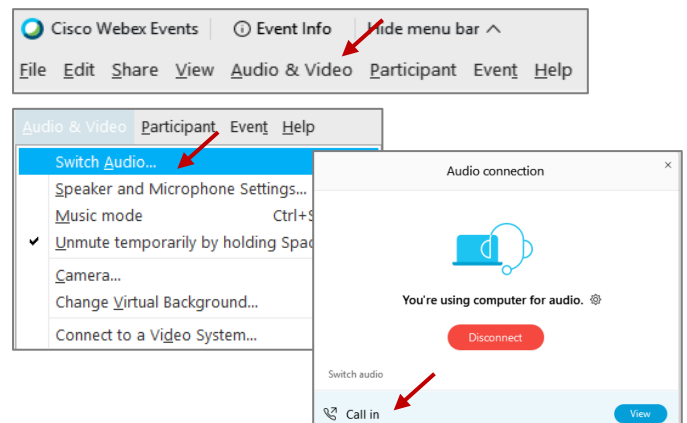
- 1 Locate the command row – click on the bottom facing arrow located on the Mute/Unmute button.
- 2 From the pop-up window:
 - Click on "Settings...":
 - Drag the "Input Volume" located under microphone settings to adjust your volume.



Audio Connectivity Issues

If you are connected by computer or tablet and you have audio issues or no microphone/speakers, you can link your phone through Webex. Your phone will then become your audio source during the meeting.

- 1 Click on "Audio & Video" from the menu bar.
- 2 Select "Switch Audio" from the drop-down menu.
- 3 Select the "Call In" option and following the directions.



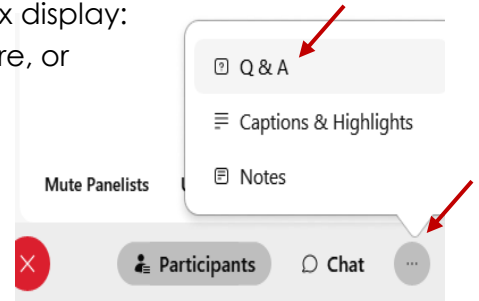
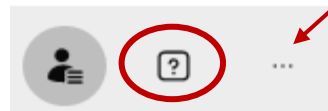
The question-and-answer (Q&A) and hand raise features are utilized for public comments.

NOTE: This feature is not accessible to those joining the meeting via telephone.

Q&A Feature

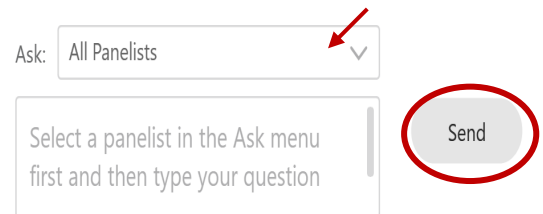
1 Access the Q&A panel at the bottom right of the Webex display:

- Click on the icon that looks like a “?” inside of a square, or
- Click on the 3 dots and select “Q&A”.



2 In the text box:

- Select “All Panelists” in the dropdown menu,
- Type your question/comment into the text box, and
- Click “Send”.



OR

Hand Raise Feature

- 1
- Hovering over your own name.
 - Clicking the hand icon that appears next to your name.
 - Repeat this process to lower your hand.

If connected via telephone:

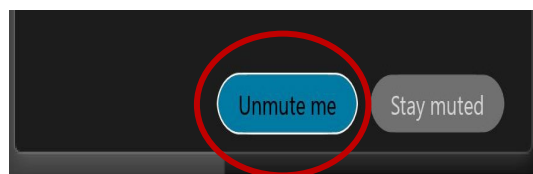
- Utilize the raise hand feature by pressing *3 to raise your hand.
- Repeat this process to lower your hand.

Unmuting Your Microphone



The moderator will call you by name and indicate a request has been sent to unmute your microphone. Upon hearing this prompt:

- Click the **Unmute me** button on the pop-up box that appears.

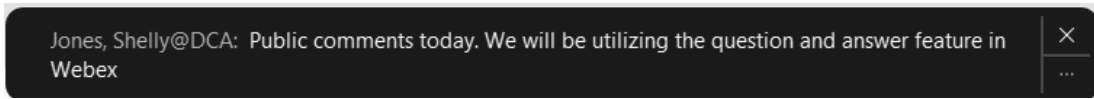


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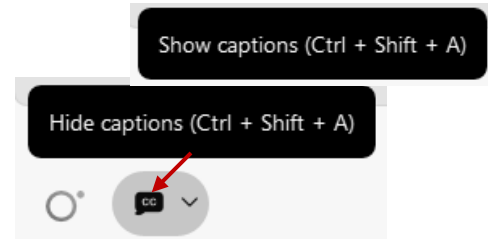
If connected via telephone:

- Press *3 to unmute your microphone.

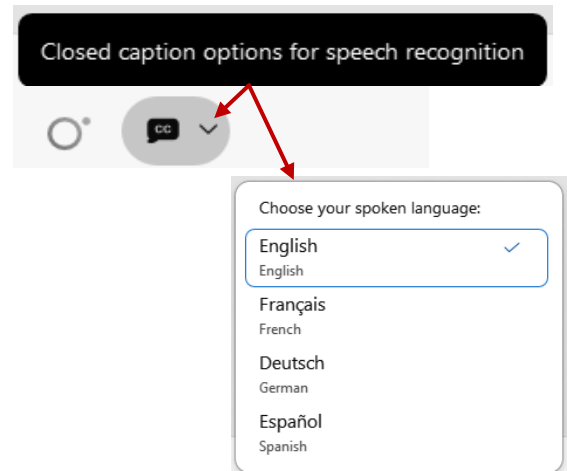
Webex provides real-time closed captioning displayed in a dialog box on your screen. The captioning box can be moved by clicking on the box and dragging it to another location on your screen.



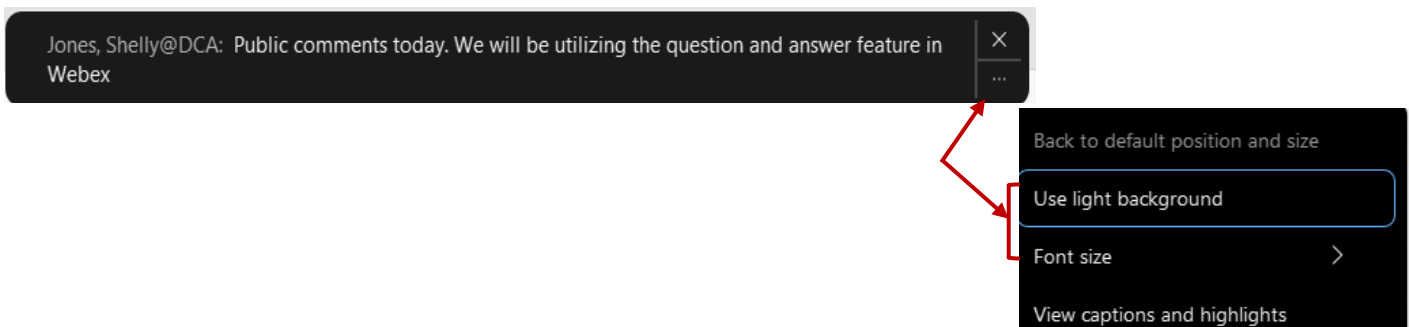
The closed captioning can be hidden from view by clicking on the closed captioning icon. You can repeat this action to unhide the dialog box.



You can select the language to be displayed by clicking the drop-down arrow next to the closed captioning icon.



You can view the closed captioning dialog box with a light or dark background or change the font size by clicking the 3 dots on the right side of the dialog box.





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1625 N. Market Blvd., Suite N-327, Sacramento, CA 95834
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Agenda Item 1
June 16, 2023

Call to Order, Roll Call, and Establishment of a Quorum

Purpose of the Item

Janette N.V. Cruz, Chair of the Board's Government and Public Affairs Committee, will call the meeting to order. Roll will be called by Rafael Sweet.

Committee Members

Janette N.V. Cruz, Chair
Rafael Sweet



Agenda Item 2
June 16, 2023

Review and Possible Approval of March 13, 2023 Committee Meeting Minutes

Purpose of the Item

The Committee will review and possibly approve the minutes of the previous meeting.

Action Requested

The Committee will be asked to make a motion to approve the March 13, 2023 Committee meeting minutes.

Attachment

- March 13, 2023 Government and Public Affairs Committee Meeting Minutes (Draft)



**BOARD OF CHIROPRACTIC EXAMINERS
GOVERNMENT AND PUBLIC AFFAIRS COMMITTEE
MEETING MINUTES
March 13, 2023**

In accordance with the statutory provisions of Government Code section 11133, the Government and Public Affairs Committee (Committee) of the Board of Chiropractic Examiners (Board) met via teleconference/Webex Events with no physical public locations on March 13, 2023.

Committee Members Present

Janette N.V. Cruz, Chair
Rafael Sweet

Staff Present

Kristin Walker, Executive Officer
Dixie Van Allen, Licensing & Administration Manager
William Walker III, Enforcement Manager
Amanda Ah Po, Enforcement Analyst
Tammi Pitto, Enforcement Analyst
Kenneth Swenson, Board Counsel, Attorney III, Department of Consumer Affairs (DCA)
Steven Vong, Regulatory Counsel, Attorney III, DCA

1. Call to Order / Roll Call / Establishment of a Quorum

Ms. Cruz called the meeting to order at 11:00 a.m. Mr. Sweet called the roll. All members were present, and a quorum was established.

2. Review and Possible Approval of December 5, 2022 Committee Meeting Minutes

Motion: Mr. Sweet moved to approve the minutes of the December 5, 2022 Government and Public Affairs Committee meeting.

Second: Ms. Cruz seconded the motion.

Public Comment: None.

Vote: 2-0 (Ms. Cruz-AYE and Mr. Sweet-AYE).

Motion: Carried.

3. Update on Board's Administration Program, Including Budget and Fund Condition, Business Modernization and Implementation of Connect System,

and Status of Board's Pending Rulemaking Packages and 2022–2026 Strategic Plan Objectives

Ms. Walker shared that former Enforcement Analyst Christina Bell retired from state service on February 6, 2023, and recruitment efforts are underway to refill her position, the Assistant Executive Officer position, and the Administrative Technician position. She also announced that the Board's previous regulatory counsel, Heather Hoganson, accepted a promotional position at the Office of Health Care Affordability and her last day with DCA was March 3, 2023. Ms. Walker welcomed the Board's new regulatory counsel, Steven Vong.

Ms. Walker updated the Committee on the implementation of the Connect system and shared that refinements to the applicant and licensee user dashboards were released on February 28, 2023. She explained the refinements were originally planned to coincide with the full implementation of cashiering in the system; however, user testing revealed the need for further development of the cashiering functionality before it can be released. She stated the next focus for the project is on the development and implementation of the continuing education (CE) provider portal so staff can accept and process CE provider and course applications in the system.

Ms. Cruz asked how the system refinements and communications with users have been going so far. Ms. Walker replied that the system is currently offline for maintenance and security enhancements but after it is restored, staff plans to spread information regarding the refinements through the Board's listserv and social media channels. She noted in addition to making the dashboard more intuitive to navigate, the refinements are expected to resolve a few bugs in the system that were preventing some users from being able to renew their licenses. She stated after staff feels that those issues have been stabilized, they will be notifying licensees and providing information to the associations to share with their membership.

Ms. Cruz asked about the estimated timeline for implementing the cashiering functionality. Ms. Walker stated the vendor needs to complete additional development of the workflow for processing renewals that are paid by check and the transfer of related data between the Connect system and the central CAS database. She estimated the work may be completed by late spring 2023.

Ms. Walker provided an update on the Board's 20 pending regulatory proposals and shared that the Continuing Education Committee is developing a proposal to amend the annual CE requirements for licensees and course approval process and a proposal to potentially mandate basic life support certification for all active licensees. She stated the Enforcement Committee is working on proposals to update the record keeping requirements for patient files, amend the Board's Disciplinary Guidelines and implement the Uniform Standards for Substance Abusing Licensees, and update the regulations regarding the role and supervision of unlicensed staff within a chiropractic practice. She added the Licensing Committee has been discussing the filing of addresses and

practice locations with the Board and is developing regulations regarding chiropractic college curriculum. She also explained staff is preparing rulemaking packages to: update the fee amounts within the Board's regulations for consistency with the new fee schedule; repeal the sponsored free healthcare events regulations based on the repeal of the underlying statutory authority; delegate authority to the Assistant Executive Officer; repeal California Code of Regulations, title 16, section 354 (Successful Examination); and update the chiropractic college regulations excluding curriculum.

Ms. Walker provided an overview of the Board's budget and fund condition and noted the Board's expenditures from FY 2021-22 exceeded its revenue primarily due to significant legal costs for cases at the Attorney General's Office and heard by the Office of Administrative Hearings. She shared that the current year's budget is more balanced due to the fee increase and savings in legal fees.

Ms. Cruz asked about the variation in income from surplus money investments on the fund condition statement. Ms. Walker replied that line item is part of the Board's miscellaneous income and varies based on interest rates, but it does not have a significant impact on the Board's fund. Ms. Cruz also asked about staff providing a detailed budget report beyond the overall schedule. Ms. Walker replied that she has evaluated some samples of reports from other DCA boards that provide a breakdown of line-item expenditures and staff plans to implement a similar report over the next few months.

Mr. Sweet noted the fluctuation in expenditures for legal services from the Attorney General's Office and asked if there is anything the Board can do to adjust those costs. Ms. Walker replied the expenditures vary based on the number of cases and referrals throughout the year. She noted staff attempts to stay within the budgeted amount of \$933,000 per year, and most cost savings are realized through the negotiation of stipulated settlements to avoid hearing expenses.

Ms. Walker updated the Committee on the 2022–2026 Strategic Plan objectives. For Objective 1.4 to monitor the Board's fee structure, she reiterated that staff is working on internal budget activities and expects to begin discussions of the license fee structure with the Committee in fall 2023 to provide time to assess the impacts of the recent fee increase. She stated Objectives 3.1 through 3.5 are based on the need to enhance the Board's outreach and sharing of information, and staff has been working on content to post on the Board's website and social media as well as identifying outreach opportunities with various stakeholders. She noted Objectives 4.1 and 4.2 address the need to increase efficiency in the Board's rulemaking process. She stated staff has developed an action plan to complete the 20 pending regulatory proposals and she implemented a new requirement for all staff at or above the associate governmental program analyst level to complete the formal rulemaking training offered by the Office of Administrative Law. Ms. Walker added Objectives 5.1 through 5.3 focus on internal organizational development through improvement of the staff structure and training opportunities. She stated three recruitments for vacant positions have already been

released and management will be updating all duty statements to better reflect the role and expectations of each staff position. She also explained staff is developing updated Board member resource materials.

Ms. Cruz and Mr. Sweet thanked staff for their efforts in preparing the action plan to address the strategic plan objectives. Mr. Sweet asked if the estimated completion dates identified in the plan are still accurate. Ms. Walker replied that many of the action items are still in progress, but staff is on target with most of them and she does not have any concerns. Ms. Cruz asked about the impact of existing vacancies and the onboarding of new staff. Ms. Walker explained that staff is at capacity in terms of projects and pending regulations, but new staff is expected to alleviate that over the next few months and allow for further progress.

Public Comment: Falkyn Luouxmout asked if the Board meeting scheduled for April 20, 2023, would be held in-person or via Webex. He also stated Life Chiropractic College West recently announced an expansion to a campus in Nebraska so it may be noteworthy to include Nebraska when studying reciprocity requirements as part of the Board's Strategic Plan objectives.

4. Review, Discussion, and Possible Recommendation on Legislation Related to the Board, the Chiropractic Profession, the Department of Consumer Affairs (DCA), and/or Other Healing Arts Boards

- A. Assembly Bill (AB) 477 (Waldron) Legislative review of state boards.
- B. AB 765 (Wood) Physicians and surgeons.
- C. AB 795 (Flora) Unlawful sale of equipment, supplies, or services.
- D. AB 796 (Weber) Athletic trainers.
- E. AB 814 (Lowenthal) Veterinary medicine: animal physical rehabilitation.
- F. AB 820 (Reyes) State boards and commissions: seniors.
- G. AB 883 (Mathis) Business licenses: United States Department of Defense SkillBridge program.
- H. AB 913 (Petrie-Norris) Professions and vocations.
- I. AB 996 (Low) Department of Consumer Affairs: continuing education: conflict-of-interest policy.
- J. AB 1028 (McKinnor) Reporting of crimes: mandated reporters.
- K. AB 1055 (Bains) Alcohol drug counselors.
- L. AB 1101 (Flora) Department of Consumer Affairs.
- M. AB 1369 (Bauer-Kahan) Healing arts licensees.
- N. AB 1646 (Nguyen, Stephanie) Healing arts boards.
- O. AB 1751 (Gipson) Opioid prescriptions: information: nonpharmacological treatments for pain.
- P. Senate Bill (SB) 259 (Seyarto) Reports submitted to legislative committees.
- Q. SB 358 (Nguyen) Professional licenses: military service.
- R. SB 372 (Menjivar) Department of Consumer Affairs: licensee and registrant records: name and gender changes.

- S. SB 764 (Padilla) Department of Consumer Affairs: regulatory boards: removal of board members.
- T. SB 770 (Wiener) State boards and commissions.
- U. SB 802 (Roth) Licensing boards: disqualification from licensure: criminal conviction.
- V. SB 820 (Alvarado-Gil) Consumer complaints.

Ms. Walker provided the staff report on the 22 bills listed on the meeting agenda. She noted nine bills – AB 477, AB 913, AB 1101, AB 1369, AB 1646, SB 358, SB 764, SB 770, and SB 820 – are spot bills and do not require any discussion during this meeting.

Ms. Walker summarized and shared the staff recommendation for the following bills:

- AB 765 (Wood), known as the California Patient Protection, Safety, Disclosure, and Transparency Act, would make various legislative findings and declarations regarding the use of titles by health care professionals and would prohibit any person who is not licensed as a physician and surgeon from using medical specialty titles or any titles, terms, letters, words, abbreviations, descriptions of services, designations, or insignia, alone or in combination with any other title, indicating or implying that the person is licensed to practice as such. Staff recommends watching the bill, but staff is concerned with the potential impact on the Board's Enforcement Program because doctors of chiropractic who have achieved diplomate status in chiropractic specialty areas also use some of the specified titles and descriptions of services.
- AB 795 (Flora) would increase the exclusion for cash sales of \$100 to \$200 from the misdemeanor crime of selling equipment, supplies, or services to any person with knowledge that the equipment, supplies, or services will be used in the performance of a service or contract in violation of the licensing requirements of the Business and Professions Code. In addition, the bill would increase the fine for this crime from not less than \$1,000 to not less than \$2,000. Staff does not anticipate any impact to the Board from this bill and recommends watching it.
- AB 796 (Weber) would establish the California Board of Athletic Training as a new DCA healing arts board. Staff recommends watching this bill.
- AB 814 (Lowenthal) would state the intent of the Legislature to enact subsequent legislation to authorize a veterinarian to refer an animal to a licensed physical therapist holding an advanced certification to provide animal physical rehabilitation under the supervision of a veterinarian. Staff recommends watching this bill and will monitor for future amendments that may enact the planned legislation.

- AB 820 (Reyes) would state the intent of the Legislature to enact legislation that would increase representation for older adults on state boards and commissions. Staff recommends watching this bill.
- AB 883 (Mathis) would require a DCA board to expedite, and authorize the board to assist, the initial licensure process for an applicant who supplies satisfactory evidence that they are enrolled in the United States Department of Defense SkillBridge program. Staff estimates a minor fiscal impact to update the initial license application based on this bill, and staff recommends the Board support this bill based on its intent to expedite the licensure process for an additional group of military members.
- AB 996 (Low) would require any DCA board or bureau that is responsible for approving CE providers or courses to develop and maintain a conflict-of-interest policy that, at a minimum, discourages the qualification of any CE course if the provider of that course has an economic interest in a commercial product or enterprise directly or indirectly promoted in that course. Staff recommends the Board support this bill because it ensures CE courses are not being used as opportunities to sell products and services directly to licensees.
- AB 1028 (McKinnor) would, on or after January 1, 2025, remove the requirement that a health practitioner make a report to law enforcement when they suspect a patient has suffered physical injury caused by assaultive or abusive conduct, and instead, require a health practitioner who knows or reasonably suspects is experiencing any form of domestic violence or sexual violence to provide brief counseling, education, or other support, and offer a warm handoff or referral to advocacy services before the end of the patient visit. Staff recommends watching this bill.
- AB 1055 (Bains) would establish the Allied Behavioral Health Board within DCA for the regulation of alcohol drug counselors. Staff recommends watching this bill.
- AB 1751 (Gipson) would require a prescriber to discuss the risks of addiction and overdose associated with the use of opioids and the availability of nonpharmacological treatments for pain with the patient before directly dispensing or issuing the first prescription for a controlled substance containing an opioid and then offer, if appropriate, a referral to a provider of nonpharmacological treatments for pain, such as acupuncture, chiropractic care, physical therapy, occupational therapy, or licensed mental health provider services. This bill would also make various findings and declarations about the importance of the awareness of these types of treatments for pain to help combat the opioid crisis. Staff recommends the Board support this bill because it provides consumer protection by ensuring patients are aware of the risks of addiction associated with opioid use and the availability of other treatments for pain.

- SB 259 (Seyarto) would require a state agency to post on its website any report that the agency submits to a committee of the Legislature. Staff recommends watching this bill.
- SB 372 (Menjivar) would require a DCA board to update a licensee or registrant's records, including records contained within an online license verification system, to include the licensee or registrant's updated legal name or gender upon receipt of government-issued documentation demonstrating the name or gender change and prohibit the board from charging a higher fee for reissuing a document with a corrected or updated legal name or gender than the fee it charges for reissuing a document for any other changes. Staff recommends watching this bill.
- SB 802 (Roth) would require a DCA board to notify an applicant in writing within 30 days after a decision is made to deny an application for licensure based solely or in part on the applicant's conviction history. Existing law does not specify a timeframe during which this written notification must be transmitted. Staff recommends watching this bill.

Mr. Sweet asked if there has been any licensee feedback on the implementation of AB 1028 (McKinnor). Ms. Walker explained that when the Board discussed the concept in 2022, the licensee members expressed concerns with the proposal because some licensees may lack the appropriate training to provide the required counseling or education to their patients prior to the handoff to advocacy services. Mr. Sweet noted AB 765 (Wood) appears to have the greatest fiscal impact to the Board and asked about the likelihood of the bill passing. Ms. Walker replied that the bill has not yet been discussed by a policy committee but potentially could pass this year so the Board may want to consider offering feedback and potential amendments to the author's office.

Ms. Cruz noted AB 1028 (McKinnor) contains a provision that the health practitioner shall not be civilly or criminally liable for any report that is made in good faith and asked if practitioners have discretion in determining whether to make the report. Ms. Walker explained that health practitioners would be required to provide the counseling or education and a referral for advocacy services whenever they suspect a patient may be experiencing domestic or sexual violence, and that provision would protect them from liability when making that report in good faith.

Motion: Ms. Cruz moved to recommend to the Board that it adopt the staff recommendation to support AB 883 (Mathis) Business licenses: United States Department of Defense SkillBridge program.

Second: Mr. Sweet seconded the motion.

Public Comment: None.

Vote: 2-0 (Ms. Cruz-AYE and Mr. Sweet-AYE).

Motion: Carried.

Motion: Ms. Cruz moved to recommend to the Board that it adopt the staff recommendation to support AB 996 (Low) Department of Consumer Affairs: continuing education: conflict-of-interest policy.

Second: Mr. Sweet seconded the motion.

Public Comment: None.

Vote: 2-0 (Ms. Cruz-AYE and Mr. Sweet-AYE).

Motion: Carried.

Motion: Ms. Cruz moved to recommend to the Board that it adopt the staff recommendation to support AB 1751 (Gipson) Opioid prescriptions: information: nonpharmacological treatments for pain.

Second: Mr. Sweet seconded the motion.

Public Comment: Dawn Benton from the California Chiropractic Association (CalChiro) thanked the Committee for their recommendation of support for CalChiro's sponsored bill, AB 1751 (Gipson).

Vote: 2-0 (Ms. Cruz-AYE and Mr. Sweet-AYE).

Motion: Carried.

Motion: Ms. Cruz moved to direct staff to gather additional information regarding AB 765 (Wood) Physicians and surgeons and AB 1028 (McKinnor) Reporting of crimes: mandated reporters for discussion at the April 20, 2023 Board meeting.

Second: Mr. Sweet seconded the motion.

Public Comment: Falkyn Luouxmont requested that the discussion of AB 765 (Wood) also include the title "physical therapist" because physical therapists are providing adjustments and manipulations but their legal scope of practice does not include the detection of subluxation.

Vote: 2-0 (Ms. Cruz-AYE and Mr. Sweet-AYE).

Motion: Carried.

Ms. Cruz provided an opportunity for the public to comment on any of the other bills that were not included in the Committee's motions.

Public Comment: None.

5. Public Comment for Items Not on the Agenda

Public Comment: None.

6. Future Agenda Items

Ms. Cruz proposed a discussion regarding the tracking and reporting of progress on the 2022–2026 Strategic Plan objectives to the Board.

Public Comment: None.

7. Adjournment

Ms. Cruz adjourned the meeting at 12:13 p.m.

DRAFT



**Agenda Item 3
June 16, 2023**

Update on Board's Administration Program, Including Budget and Fund Condition, Business Modernization and Implementation of Connect System, and Status of Board's Pending Rulemaking Packages

Purpose of the Item

The Executive Officer and Board staff will provide the Committee with an update on the Board's Administration Program activities, including:

- Budget and Fund Condition
- Business Modernization and Implementation of the Connect System
- Board's Pending Rulemaking Packages

Action Requested

This agenda item is informational only and provided as a status update to the Committee. No action is required or requested at this time.

Attachment

- Executive Officer's June 13, 2023 Memo to Committee Members Regarding Administration Program Activities



MEMORANDUM

Agenda Item 3 Attachment

DATE	June 13, 2023
TO	Members of the Board of Chiropractic Examiners' Government and Public Affairs Committee
FROM	Kristin Walker, Executive Officer
SUBJECT	Update on Board's Administration Program

This report provides an overview of recent Board of Chiropractic Examiners' (BCE) Administration Program activities.

BCE Board and Committee Meetings

The following meetings have been scheduled:

- June 16, 2023 – Government and Public Affairs Committee
- July 20, 2023 – Board
- August 18, 2023 – Licensing Committee
- September 18, 2023 – Government and Public Affairs Committee
- October 19-20, 2023 – Board
- December 4, 2023 – Government and Public Affairs Committee

Business Modernization Project and Implementation of the Connect System

BCE continues to collaborate with the Department of Consumer Affairs (DCA) Office of Information Services and three other programs (California Acupuncture Board; Board for Professional Engineers, Land Surveyors, and Geologists; and Bureau for Private Postsecondary Education) in the first cohort of a Business Modernization Project to develop and implement a new application, licensing, and enforcement system known as Connect.

Through three phased software releases from September 2020 through June 2021, BCE implemented these licensing functions:

- Initial license applications (doctor of chiropractic and satellite certificates)
- License renewals (doctor of chiropractic and satellite certificates)
- Address changes and cancellation of satellite certificates

- Online payment for all other paper applications

On July 1, 2022, BCE added functionality to the system to waive the application and initial license fees for spouses of active duty members of the military who are assigned to a duty station in California and hold a current license to practice in another state, as required by [Business and Professions Code \(BPC\) section 115.5](#).

In August 2022, BCE implemented the Department of Health Care Access and Information (HCAI) health workforce data survey for licensees to complete during their electronic license renewal process, as required by [BPC section 502](#).

Through a software release on February 28, 2023, BCE updated the user dashboards for applicants and licensees, provided the ability for licensees to maintain and store their continuing education records in the system, and added a list of BCE links, resources, and direct contact information for each of BCE's units to the user dashboard.

BCE is currently working to implement temporary licenses and satellite certificates for military spouses and partners beginning July 1, 2023, as required by [Assembly Bill \(AB\) 107 \(Salas, Chapter 693, Statutes of 2021\)](#), fully implement cashiering functionality in the system for all business processes, and develop the continuing education module to process course applications electronically.

Legislation Impacting the Board

[AB 765 \(Wood\)](#) **Physicians and surgeons: medical specialty titles.** This bill, known as the California Patient Protection, Safety, Disclosure, and Transparency Act, would make it a misdemeanor for any person who does not have a valid, unrevoked, and unsuspended physician and surgeon certificate to use any medical specialty title, as specified, or any titles, terms, letters, words, abbreviations, description of services, designations, or insignia indicating or implying the person is licensed to practice medicine. This bill was held under submission in the Assembly Appropriations Committee and is dead for 2023.

[AB 883 \(Mathis\)](#) **Business licenses: United States Department of Defense SkillBridge program.** This bill was amended on May 18, 2023, and would require a DCA board, on or after July 1, 2024, to expedite, and authorize the board to assist, the initial licensure process for an applicant who supplies satisfactory evidence to the board that they are an active-duty member of a regular component of the Armed Forces of the United States enrolled in the United States Department of Defense SkillBridge program. This bill passed the Assembly on May 30, 2023, and the Senate Business, Professions and Economic Development Committee on June 12, 2023, and has been referred to the Senate Military and Veterans Affairs Committee.

[AB 996 \(Low\)](#) **Department of Consumer Affairs: continuing education: conflict-of-interest policy.** This bill would require any DCA board or bureau that is responsible for

approving continuing education providers or courses to develop and maintain a conflict-of-interest policy that, at a minimum, discourages the qualification of any continuing education course if the provider of that course has an economic interest in a commercial product or enterprise directly or indirectly promoted in that course, and requires conflicts to be disclosed at the beginning of each continuing education course. This bill passed the Assembly on May 25, 2023, and has been referred to the Senate Business, Professions and Economic Development Committee.

AB 1028 (McKinnor) Reporting of crimes: mandated reporters. This bill would, on or after January 1, 2025, remove the requirement that a health practitioner make a report to law enforcement when they suspect a patient has suffered physical injury caused by assaultive or abusive conduct, and instead, require a health practitioner who provides medical services to a patient whom the health practitioner knows or reasonably suspects is experiencing any form of domestic violence or sexual violence to provide brief counseling, education, or other support, and offer a warm handoff or referral to local and national domestic violence or sexual violence advocacy services before the end of the patient visit. This bill passed the Assembly on May 31, 2023, and is pending assignment in the Senate.

AB 1707 (Pacheco) Health professionals and facilities: adverse actions based on another state's law. This bill would prohibit a DCA healing arts board from denying an application for licensure or suspending, revoking, or otherwise imposing discipline upon a licensee on the basis of a civil judgment, criminal conviction, or disciplinary action in another state if that judgment, conviction, or disciplinary action is based solely on the application of another state's law that interferes with a person's right to receive sensitive services that would be lawful if provided in this state. This bill passed the Assembly on May 22, 2023, and has been referred to the Senate Business, Professions and Economic Development Committee and Judiciary Committee.

Senate Bill (SB) 372 (Menjivar) Department of Consumer Affairs: licensee and registrant records: name and gender changes. This bill was amended on June 12, 2023, and would require a DCA board to update a licensee's or registrant's license by replacing references to the former name or gender on the license or registration, as specified, if the board receives documentation, as described, from the licensee or registrant demonstrating that the licensee's or registrant's legal name or gender has been changed. If the board operates an online license verification system, the bill would require the board to replace references to the licensee's or registrant's former name or gender with the individual's current name or gender, as applicable, on the publicly viewable information displayed on the internet. The bill would prohibit a board from publishing information relating to the licensee's or registrant's former name or gender online, and for specified licensees or registrants, the board would be prohibited from posting enforcement records online, but would be required to direct the public to contact the board, as prescribed. The bill would require the board, if requested by a licensee or registrant, to reissue any license created by the board and conferred upon the licensee or registrant, and would prohibit the board from charging a higher fee

for reissuing a license with an updated legal name or gender than the fee it charges for reissuing a license with other updated information. This bill passed the Senate on May 22, 2023, and has been referred to the Assembly Business and Professions Committee.

[SB 447 \(Atkins\)](#) GO-Biz. This bill would, among other things, repeal the provisions that prohibit a state agency and the Legislature from requiring any of its employees, officers, or members to travel to, or from approving a request for state-funded or state-sponsored travel to, states with discriminatory laws. There are currently [23 states](#) that are subject to this existing ban on state-funded and state-sponsored travel. This bill passed the Senate on May 24, 2023, and has been referred to the Assembly Committee on Jobs, Economic Development, and the Economy.

[SB 544 \(Laird\)](#) Bagley-Keene Open Meeting Act: teleconferencing. This bill would, among other things, remove existing teleconference requirements within the Bagley-Keene Open Meeting Act and instead require a state body to provide a means by which the public may remotely hear audio of the meeting, remotely observe the meeting, or attend the meeting by providing on the posted agenda a teleconference telephone number, an internet website or other online platform, and a physical address for at least one site, including, if available, access equivalent to the access for a member of the state body participating remotely. The bill would revise existing law to no longer require that members of the public have the opportunity to address the state body directly at each teleconference location, but would continue to require that the agenda provide an opportunity for members of the public to address the state body directly. The bill would also require a member or staff to be physically present at the location specified in the notice of the meeting. This bill was amended on April 27, 2023, to define a “remote location,” require a state body to end or adjourn the meeting upon discovering that a means of remote participation has failed and cannot be restored, and require a member of a state body who attends by teleconference from a remote location to disclose whether any individuals 18 years of age or older are present in the room with the member and the general nature of the member’s relationship with any such individuals. This bill passed the Senate on May 15, 2023, and has been referred to the Assembly Governmental Organization Committee.

[SB 802 \(Roth\)](#) Licensing boards: disqualification from licensure: criminal conviction. This bill would require a DCA board to notify an applicant in writing within 30 days after a decision is made to deny an application for licensure based solely or in part on the applicant’s conviction history, of all of the following: 1) the denial or disqualification of licensure; 2) any existing procedure the board has for the applicant to challenge the decision or request reconsideration; 3) that the applicant has the right to appeal the board’s decision; and 4) the processes for the applicant to request a copy of their complete conviction history and question the accuracy or completeness of the record pursuant to Penal Code sections 11122 through 11127. Existing law requires this written notification to be sent to the applicant but does not specify a timeframe during

which it must be transmitted. This bill passed the Senate on April 13, 2023, and has been referred to the Assembly Business and Professions Committee.

Personnel Updates

Austin Maha joined the Board as an Administrative Technician effective May 30, 2023. In addition, former Enforcement Analyst Tammi Pitto was promoted to the Board's Assistant Executive Officer effective June 1, 2023.

Recruitment efforts are currently underway to refill a vacant Associate Governmental Program Analyst position and a vacant Special Investigator position in the Enforcement Unit.

Proposed Regulations

- 1. Licensing and Regulatory Fees (Changes Without Regulatory Effect: Amend California Code of Regulations [CCR], Title 16, Sections 310.1, 317.1, 321, 323, 360, 362, 363, 367.5, 367.10, 370, and 371):** This action under CCR, title 1, section 100 will update the licensing and regulatory fee amounts within the Board's regulations and forms for consistency with the fee amounts codified in BPC section 1006.5. This package is planned to be submitted to the Office of Administrative Law (OAL) in summer 2023.
- 2. Addition of Licensee Telephone Numbers and Email Addresses to Board Directory (Amend CCR, Title 16, Section 303):** This proposal will implement the requirement from SB 1434 for the Board to include licensees' telephone numbers and email addresses in the Board's directory and clarify the requirement for the filing of a public "address of record." The Board approved the proposed regulatory text at its April 20, 2023 meeting. Staff is preparing the regulatory package for this proposal and plans to submit it to DCA for review in June 2023.
- 3. Repeal Sponsored Free Health Care Events (Changes Without Regulatory Effect: Repeal CCR, Title 16, Sections 309–309.4):** This action under CCR, title 16, section 100 repealed the Board's sponsored free health care events regulations to reflect the repeal of the underlying statutory authority for these regulatory provisions effective January 1, 2018. This package was approved by OAL on May 4, 2023.
- 4. Delegation of Authority to the Assistant Executive Officer and Citation Program (Amend CCR, Title 16, Sections 306, 389, 390, 390.3, 390.4, and 390.5):** This regulatory proposal will delegate to the Assistant Executive Officer the authority to expedite enforcement and administrative functions on behalf of the Executive Officer. Additionally, this proposal will ensure consistency with BPC section 125.9 regarding BCE's citation program and criteria established for evaluating compliance with a citation and order of abatement. Staff is preparing the

regulatory package for this proposal and plans to submit it to DCA for review in summer 2023.

5. **Annual Continuing Education Requirements for Licensees and Continuing Education Course Approval Process (Amend CCR, Title 16, Sections 360–364):** This proposal will amend the annual continuing education (CE) requirements for licensees, establish five course competency areas that will be approved by the Board, define the three recognized learning formats for CE courses, update the CE course review and approval process, and create a re-approval process for CE courses that have been previously approved by the Board. The Board approved the proposed regulatory text at its April 20, 2023 meeting. Staff is preparing the regulatory package for this proposal and plans to submit it to DCA for review in June 2023.
6. **Basic Life Support Certification for All Licensees (Add CCR, Title 16, Section 371.1):** This proposal will mandate the maintenance of basic life support certification, including cardiopulmonary resuscitation (CPR), for all licensees as a condition of licensure in active status. Staff is gathering additional information regarding possible accommodations for individuals with temporary or permanent disabilities from the certifying entities and will present that information to the Continuing Education Committee for discussion at a future meeting.
7. **Temporary Licensure for Military Spouses (Amend CCR, Title 16, Section 320):** This proposal will update CCR, title 16, section 320 for consistency with the provisions of [AB 107 \(Salas, Chapter 693, Statutes of 2021\)](#), which provide for temporary licensure of military spouses. This proposal is being developed by staff and is planned to be presented to the Board for review and discussion at its July 20, 2023 meeting.
8. **Repeal Successful Examination (Obsolete Provision) [Repeal CCR, Title 16, Section 354]:** This proposal will repeal an obsolete provision in the Board's regulations that conflicts with other existing laws and regulations that prohibit the unlicensed practice of chiropractic. Staff is preparing the regulatory package for this proposal and plans to submit it to DCA for review in June 2023.
9. **Sexual Contact with a Patient and Required Actions Against Registered Sex Offenders (Add CCR, Title 16, Sections 384.1 and 384.2):** This Consumer Protection Enforcement Initiative (CPEI) proposal will require any proposed decision containing a finding of fact that a licensee engaged in any act of sexual contact, as defined, or is subject to registration as a sex offender in any tier, to contain an order of revocation and prohibit the decision from containing a stay of the revocation. In addition, this proposal will require any Board decision containing a finding of fact that a licensee engaged in any act of sexual contact to contain an order of revocation, and require the Board to deny or revoke a license for any applicant, licensee, or petitioner who is subject to registration as a sex offender in

any tier and prohibit the Board from issuing a stay of the revocation for any individual who is subject to registration as a tier two or three offender. The Board approved the proposed regulatory text at its April 20, 2023 meeting. Staff is preparing the regulatory package for this proposal and plans to submit it to DCA for review in June 2023.

- 10. Record Keeping Requirements for Chiropractic Patient Records, Including Retention and Disposition of Records Upon Closure of Practice or Death/Incapacity of Licensee (Amend CCR, Title 16, Section 318):** This proposal will update the record keeping requirements to specify the necessary documentation for the patient history, complaint, diagnosis/analysis, and treatment and to differentiate between an initial patient encounter and an established patient visit. In addition, this proposal will specify the retention period and requirements for the disposition of patient records. Staff is updating this proposal based on feedback provided by the Enforcement Committee during its March 2, 2023 meeting.
- 11. Discipline by Other Public Agencies and Licensee Reporting Requirements (Amend CCR, Title 16, Sections 304 and 314):** This CPEI proposal will update the reporting of licensee arrests, convictions, and discipline by other public agencies and clarify a licensee's duty to report any violation of the statutes and regulations governing the practice of chiropractic to the Board. This proposal was discussed by the Enforcement Committee at its June 8, 2023 meeting and is planned to be presented to the Board for approval at its July 20, 2023 meeting.
- 12. Disciplinary Guidelines and Uniform Standards for Substance Abusing Licensees (Amend CCR, Title 16, Section 384):** This proposal will update the *Disciplinary Guidelines and Model Disciplinary Orders* and implement the Uniform Standards for Substance Abusing Licensees. Staff is updating this proposal based on feedback provided by the Enforcement Committee during its March 2, 2023 meeting.
- 13. Filing and Evaluation Process for Petitions for Reinstatement, Reduction of Penalty, or Early Termination of Probation (Add CCR, Title 16, Section 385):** This CPEI proposal will update and enhance the process for petitions for reinstatement, reduction of penalty, and early termination of probation before the Board. This proposal was discussed by the Enforcement Committee at its June 8, 2023 meeting and is planned to be presented to the Board for approval at its July 20, 2023 meeting.
- 14. Approval of Chiropractic Schools and Educational Requirements (Amend CCR, Title 16, Sections 330-331.16):** This proposal will amend the regulations regarding approval of chiropractic colleges to align with the accrediting body, the Council on Chiropractic Education, and eliminate any unduly prescriptive content that could be restrictive to the evolving nature of higher education. This rulemaking package is being developed by staff.

- 15. Chiropractic College Curriculum Requirements (Amend CCR, Title 16, Section 331.12.2 and Add CCR, Title 16, Section 331.12.3):** This proposal will update the minimum curriculum and clinical experience requirements for Board-approved chiropractic colleges. At the January 20, 2023 meeting, the Board voted to return these proposed changes to the Licensing Committee for further study and discussion. Staff is updating this proposal based on the discussion by the Licensing Committee at its May 12, 2023 meeting.
- 16. Order for Physical or Mental Examination of Applicants (Add CCR, Title 16, Section 324):** This CPEI proposal will allow the Board to order an applicant to complete a physical or mental examination when evidence exists that the applicant may be unable to practice safely due to a mental or physical condition affecting their competency. This proposal is being developed by staff and is planned to be presented to the Licensing Committee for review and discussion in summer 2023.
- 17. Supervision of Unlicensed Individuals at Chiropractic Practices (Amend CCR, Title 16, Section 312):** This CPEI proposal will clarify the role of and delineate the activities that can be performed by unlicensed individuals within a chiropractic practice, define and establish the supervision requirements by a licensed doctor of chiropractic, and require that unlicensed individuals follow and provide only the treatment defined in the supervising doctor's treatment plan. Staff is updating this proposal based on feedback provided by the Enforcement Committee during its March 2, 2023 meeting.
- 18. Chiropractic Practice Locations and Display of License (Amend CCR, Title 16, Sections 306.3 and 308 and Add CCR, Title 16, Section 308.1):** This CPEI proposal will update the requirements for filing practice locations with the Board and displaying a license/certificate and notice to patients at each practice location. This proposal is being developed by staff and the Licensing Committee.
- 19. CE Exemptions and Reduction of Requirements (Add CCR, Title 16, Section 364.1):** This proposal will create a process for granting an exemption from the annual CE requirement for a licensee who provides satisfactory proof to the Board that they have been adversely affected by a natural disaster or a state or federal declared state of emergency. This proposal is being developed by staff and is planned to be presented to the Continuing Education Committee for further discussion at a future meeting.
- 20. CE Provider Approval Process and Appeal Process for Denial of CE Courses and Providers:** This proposal will establish minimum requirements for approval of CE providers and update the process for appealing the denial of a CE course or provider application. This proposal is currently being developed by staff and the Continuing Education Committee.

Records Retention Schedule

At the October 27, 2022 Board meeting, the Board approved the Government and Public Affairs Committee's recommendation to retain meeting minutes for 100 years, continuing education records for five years, and disciplinary case files resulting in revoked or surrendered licenses for 75 years. BCE staff is compiling an inventory of its current paper and electronic records and will work with DCA's records management coordinator to implement an updated records retention schedule in summer 2023.

Review of Existing Licensing, CE, and Enforcement Processes

BCE staff has been conducting a comprehensive review of its existing paper-based licensing and CE processes to identify and remove any duplicative or unnecessary steps, improve processing timeframes, and prepare for the integration of these processes into the Connect system.

In addition, staff from each of BCE's units have been cross-trained on most of the licensing functions to better assist applicants, licensees, and members of the public who contact BCE.

BCE's Enforcement Unit also began a project with DCA's Organizational Improvement Office (OIO) to evaluate BCE's complaint intake, desk investigation, and field investigation processes and to identify strategies that will improve productivity, reduce investigation timeframes, and provide excellent customer service to those involved in the consumer complaint process. The recommendations from this project are being implemented throughout fiscal year 2022-23.



**Agenda Item 4
June 16, 2023**

**Update and Discussion on the Status, Tracking, and Reporting of 2022–2026
Strategic Plan Objectives**

Purpose of the Item

Staff will provide the Committee with an update on the status of the Board's 2022–2026 Strategic Plan objectives. Following the update, the Committee will discuss methods for tracking and reporting staff's progress on these objectives to the Board.

Action Requested

The Committee will be asked to provide direction to staff on the reporting of the 2022–2026 Strategic Plan objectives to the Board.

Background

At the October 27, 2022 meeting, the Board adopted its [2022–2026 Strategic Plan](#), which contains 19 objectives in five goal areas of licensing and professional qualification, enforcement, public relations and outreach, laws and regulations, and organizational development.

Staff subsequently participated in action planning sessions with the Department of Consumer Affairs' SOLID Training and Planning Solutions to identify the specific tasks and actions staff will take to implement each of the objectives within the plan. Staff presented the action plan to the Board at the January 20, 2023 meeting.

The Committee's role includes overseeing all administrative issues regarding the Board's operations and monitoring the Board's progress in achieving strategic plan goals and objectives.

At this meeting, the Committee will be asked to discuss the status of the strategic plan objectives and methods for reporting staff's progress on these objectives to the Board.

Attachment

- Status of 2022–2026 Strategic Plan Objectives, June 2023

**Status of 2022–2026 BCE Strategic Plan Objectives
(June 2023)**

GOAL 1: LICENSING AND PROFESSIONAL QUALIFICATION

Objective 1.1: Complete comprehensive updates to the Board’s continuing education program and regulations to provide clarity and accessibility, and to ensure continuing licensee competency and public protection.

Start Date: Q1 2023

End Date: Q1 2024

Oversight by: Continuing Education Committee

Success Measure: Promulgated updated continuing education regulations and educated licensees and continuing education providers on those regulations.

Task Number	Task Description	Responsible Party	Due Date	Status
1.1.1	Identify proposed framework for licensee continuing education (CE) requirements and course approval process and obtain CE Committee and Board approval.	Executive Officer	Q1 2023	Complete
1.1.2	Draft proposed language for updated regulations and obtain approval from DCA regulatory counsel.	Executive Officer	Q1 2023	Complete
1.1.3	Conduct fiscal analysis of CE regulations and develop proposed fee amounts for course approval and reapproval.	Executive Officer	Q1 2023	In Progress
1.1.4	Present final regulatory proposal to Board for approval.	Executive Officer	Q2 2023	Complete
1.1.5	Finalize regulatory package and initiate the rulemaking process.	Executive Officer	Q2 2023	In Progress

Task Number	Task Description	Responsible Party	Due Date	Status
1.1.6	Inform licensees and CE providers of changes through written notices, outreach, and information sessions.	Executive Officer	Q3 2023 – ongoing	Not Started (requires completion of 1.1.5)
1.1.7	Complete regulatory process.	Executive Officer	Q1 2024	Not Started (requires completion of 1.1.5)

Objective 1.2: Establish a robust, effective Licensing Committee to identify issues and increase efficiency.

Start Date: Q1 2023

End Date: Q3 2023

Oversight by: Licensing Committee

Success Measure: The completion of the action plan for all current pending licensing issues.

Task Number	Task Description	Responsible Party	Due Date	Status
1.2.1	Gather background information to educate Licensing Committee members on pending licensing issues.	Licensing Manager	Q1 2023	In Progress
1.2.2	Train Licensing Lead (staff member) as a Licensing Committee liaison (calendar, meeting agendas, etc.).	Executive Officer and Assistant Executive Officer	Q2 2023	On Hold (pending selection and hiring of Licensing Lead) This role has been assigned to Tammi Pitto until the position has been filled.

Task Number	Task Description	Responsible Party	Due Date	Status
1.2.3	Educate Licensing Committee members on background and history of prior actions.	Executive Officer	Q2 2023 – ongoing	In Progress
1.2.4	Identify current issues, discuss possible solutions, and present recommendations to the Licensing Committee Chair.	Assistant Executive Officer	Q2 2023	In Progress
1.2.5	Staff works with the Licensing Committee Chair to create an action plan for pending and current issues identified above.	Assistant Executive Officer and Licensing Liaison	Q3 2023	On Hold (requires completion of tasks 1.2.1-1.2.4)

Objective 1.3: Review reciprocity requirements to minimize barriers to licensure in California.

Start Date: Q2 2023

End Date: Q3 2024

Oversight by: Licensing Committee

Success Measure: The Board has identified how they are going to minimize any potential barriers to licensure through reciprocity.

Task Number	Task Description	Responsible Party	Due Date	Status
1.3.1	Conduct an environmental scan of reciprocity requirements (BCE, other states, and other DCA healing arts boards).	Assistant Executive Officer	Q2 2023	In Progress
1.3.2	Analyze the data that has been collected.	Assistant Executive Officer	Q3 2023	On Hold (requires completion of environmental scan)

Task Number	Task Description	Responsible Party	Due Date	Status
1.3.3	Develop potential options and recommendation for the Licensing Committee on how to minimize barriers to licensure.	Assistant Executive Officer	Q3 2023	On Hold (requires completion of environmental scan)
1.3.4	Summarize environmental scan, analysis, potential options, and recommendation.	Assistant Executive Officer	Q4 2023	On Hold (requires completion of environmental scan)
1.3.5	Present findings and recommendations to the Licensing Committee.	Licensing Liaison	Q1 2024	On Hold (requires completion of environmental scan)
1.3.6	Present Licensing Committee's recommendation to the Board.	Executive Officer	Q3 2024	On Hold (requires completion of environmental scan)

Objective 1.4: Continue to monitor the Board's license fee structure to ensure the Board's financial stability, maintain access to the Board's services, and determine whether the Board needs to consider plans for restructuring its fees.

Start Date: Q3 2022
End Date: Q4 2025

Oversight by: Government and Public Affairs Committee

Success Measure: The Board has delivered its report on its fee structure with recommendations to the Legislature.

Task Number	Task Description	Responsible Party	Due Date	Status
1.4.1	Bring any budget issues to the Board's attention.	Executive Officer	Q3 2022 – ongoing	In Progress

Task Number	Task Description	Responsible Party	Due Date	Status
1.4.2	Establish regular and thorough monthly process to monitor BCE's budget and fund condition.	Lead Administrative Analyst	Q1 2023	In Progress
1.4.3	Establish quarterly budget meetings with budget analyst at DCA.	Lead Administrative Analyst	Q1 2023	Complete
1.4.4	Conduct analysis of the impact of recent fee restructuring.	Lead Administrative Analyst	Q3 2023 – ongoing	In Progress
1.4.5	Provide reports to the Government and Public Affairs Committee on the impact of recent fee restructuring.	Lead Administrative Analyst	Q3 2023 – ongoing	Not Started
1.4.6	Create report on license fee structure (due to Legislature by January 1, 2025)	Executive Officer and Assistant Executive Officer	Q2 2025	Not Started
1.4.7	Submit license fee structure report to Legislature with 2025 Sunset Review Report.	Executive Officer	Q4 2025	Not Started

GOAL 2: ENFORCEMENT

Objective 2.1: Implement updated Disciplinary Guidelines, Uniform Standards for Substance Abusing Licensees, and Consumer Protection Enforcement Initiative (CPEI) regulations, to provide consistency and clarity in disciplinary penalties, help educate licensees and the public, and deter violations.

Start Date: Q1 2023

End Date: Q4 2025

Oversight by: Enforcement Committee

Success Measure: Completed regulation process for all three areas (Disciplinary Guidelines, Uniform Standards for Substance Abusing Licensees, and CPEI regulations).

Task Number	Task Description	Responsible Party	Due Date	Status
2.1.1	Disciplinary Guidelines & Uniform Standards – finish developing the proposed guidelines.	Assistant Executive Officer	Q1 2023	In Progress
2.1.2	Disciplinary Guidelines & Uniform Standards – vet through Regulatory Counsel and DAG Liaison (AG’s office).	Assistant Executive Officer	Q1 2023	On Hold (pending completion of task 2.1.1)
2.1.3	Disciplinary Guidelines & Uniform Standards – present proposal to Enforcement Committee.	Enforcement Lead	Q2 2023	On Hold (pending completion of tasks 2.1.1 and 2.1.2)
2.1.4	Disciplinary Guidelines & Uniform Standards – present proposal to Board.	Enforcement Lead	Q4 2023	On Hold (pending completion of tasks 2.1.1-2.1.3)
2.1.5	Disciplinary Guidelines & Uniform Standards – begin regulatory process.	Assistant Executive Officer	Q1 2024	On Hold (pending completion of tasks 2.1.1-2.1.4)
2.1.6	Disciplinary Guidelines & Uniform Standards – complete regulatory process.	Assistant Executive Officer	Q1 2025	On Hold (pending completion of tasks 2.1.1-2.1.5)
2.1.7	CPEI (12 regulations) – develop an action plan for the different regulations (assign to committees) and formalize plans with committee chairs to clarify assignments.	Executive Officer	Q1 2023	In Progress
2.1.8	CPEI – develop proposals.	Assistant Executive Officer	Q4 2023	In Progress

Task Number	Task Description	Responsible Party	Due Date	Status
2.1.9	CPEI – vet through DCA Regulatory Counsel.	Assistant Executive Officer	Q4 2023	In Progress
2.1.10	CPEI – present proposals to appropriate Committees.	Enforcement Lead / Licensing Lead	Q1 2024	In Progress
2.1.11	CPEI – present proposals to Board.	Enforcement Lead / Licensing Lead	Q3 2024	In Progress
2.1.12	CPEI – begin regulatory process.	Assistant Executive Officer	Q4 2024	On Hold (pending completion of tasks 2.1.7-2.1.11)
2.1.13	CPEI – complete regulatory process.	Assistant Executive Officer	Q4 2025	On Hold (pending completion of tasks 2.1.7-2.1.12)

Objective 2.2: Streamline internal enforcement processes and standards, including complaint intake, investigations, and case management activities, to increase efficiency and ensure timely action.

Start Date: Q4 2022

End Date: Q2 2025

Oversight by: Enforcement Committee

Success Measure: Enforcement Program is meeting the established performance measure targets.

Task Number	Task Description	Responsible Party	Due Date	Status
2.2.1	Conduct process review with OIO.	Enforcement Analysts	Q4 2022	Complete
2.2.2	Document baseline processing times.	Executive Officer	Q1 2023	Complete

Task Number	Task Description	Responsible Party	Due Date	Status
2.2.3	Standardize internal enforcement process – make sure all standards are met each time – considering OIO recommendations.	Assistant Executive Officer and Enforcement Manager	Q1 2023	In Progress
2.2.4	Update duty statements for staff in Enforcement Unit, separating case management from investigations (increasing specialization).	Executive Officer	Q1 2023	In Progress
2.2.5	Update and document all processes/procedures.	Assistant Executive Officer and Enforcement Manager	Q2 2023	In Progress
2.2.6	Update training of all staff, cross-train on all tasks.	Enforcement Manager	Q2 2023	In Progress
2.2.7	Measure impact of process improvements on enforcement timeframes.	Executive Officer	Q2 2025	On Hold (pending completion of tasks 2.2.1-2.2.6)

Objective 2.3: Improve the effectiveness of the Enforcement Program by implementing Expert Witness program enhancements, including recruitment, training, and ongoing assessment of subject matter experts in specific areas of chiropractic practice.

Start Date: Q1 2023
End Date: Q4 2025

Oversight by: Enforcement Committee

Success Measure: Program enhancements implemented, observed improvement in expert reports, and higher success rate at hearings.

Task Number	Task Description	Responsible Party	Due Date	Status
2.3.1	Begin recruitment process for new SMEs.	Executive Officer	Q1 2023	In Progress
2.3.2	Staff review SME applications.	Enforcement Manager	Q1 2023	On Hold (pending completion of 2.3.1)
2.3.3	Enforcement Committee members interview and vet potential SMEs.	Enforcement Committee	Q2 2023 – ongoing	On Hold (pending completion of tasks 2.3.2 and 2.3.3)
2.3.4	Contract with SMEs selected.	Enforcement Lead	Q2 2023 – ongoing	On Hold (pending completion of tasks 2.3.1-2.3.3)
2.3.5	Train SMEs.	Executive Officer and Assistant Executive Officer	Q3 2023 – ongoing	On Hold (pending completion of tasks 2.3.1-2.3.4)
2.3.6	Measure effectiveness of expert witnesses (success ratio, input from Deputy Attorney General [DAG]).	Assistant Executive Officer and Enforcement Manager	Q4 2023 – ongoing	In Progress
2.3.7	Report on effectiveness of SMEs to Enforcement Committee and provide any further recommendations.	Enforcement Lead	Q4 2023 – ongoing	On Hold (pending completion of tasks 2.3.1-2.3.6)
2.3.8	Continue monitoring effectiveness of Expert Witness Program (identify benchmarks – outcomes and hearing success).	Executive Officer and Enforcement Committee	Q4 2025 – ongoing	On Hold (pending completion of tasks 2.3.1-2.3.7)

Objective 2.4: Develop and implement clearly defined standards for licensee recordkeeping by updating regulations to provide consistency and clarity to licensees, the public, and other stakeholders.

Start Date: Q4 2022

End Date: Q4 2024

Oversight by: Enforcement Committee

Success Measure: Adopted updated standards for licensee recordkeeping into regulation.

Task Number	Task Description	Responsible Party	Due Date	Status
2.4.1	Review and discuss requirements in other states.	Executive Officer and Enforcement Committee	Q4 2022	Complete
2.4.2	Develop a regulatory proposal for consideration by the Enforcement Committee.	Executive Officer	Q1 2023	In Progress
2.4.3	Have Legal/Regulations Counsel review proposal.	Executive Officer	Q1 2023	In Progress
2.4.4	Present proposal to Enforcement Committee for review, discussion, and possible recommendation to Board.	Executive Officer	Q2 2023	In Progress
2.4.5	Obtain Board approval of proposal.	Executive Officer	Q4 2023	On Hold (pending completion of tasks 2.4.1-2.4.4)
2.4.6	Begin regulatory process (formally submitting to DCA for approval, ready for Director's Review).	Assistant Executive Officer and Enforcement Lead	Q4 2023	On Hold (pending completion of tasks 2.4.1-2.4.5)

Task Number	Task Description	Responsible Party	Due Date	Status
2.4.7	Complete regulatory process.	Assistant Executive Officer and Enforcement Lead	Q4 2024	On Hold (pending completion of tasks 2.4.1-2.4.6)

GOAL 3: PUBLIC RELATIONS AND OUTREACH

Objective 3.1: Continue to foster relationships with legislators, healing arts boards, professional organizations, and government agencies to allow stakeholders to share ideas and perspectives.

Start Date: Q1 2023

End Date: Q4 2023

Oversight by: Government and Public Affairs Committee

Success Measure: Improved at least five relationships with stakeholders across all above groups.

Task Number	Task Description	Responsible Party	Due Date	Status
3.1.1	Identify relationships (existing and potential).	Executive Officer and Assistant Executive Officer	Q1 2023	Complete
3.1.2	Define each relationship's plan (avenues, content, include dialogues).	Executive Officer and Assistant Executive Officer	Q2 2023	In Progress
3.1.3	Arrange introductions/open channels of communication when needed.	Executive Officer	Q2 2023	In Progress
3.1.4	Schedule meetings/forums (develop MOUs if needed).	Executive Officer	Q4 2023 – ongoing	In Progress

Task Number	Task Description	Responsible Party	Due Date	Status
3.1.5	Managers network/regularly communicate with other healing arts peers (include staff as appropriate).	Enforcement and Licensing Managers	Q4 2023 – ongoing	Not Started

Objective 3.2: Continue to increase the Board’s presence and availability through outreach opportunities where the Board can collaborate and engage with stakeholders to allow for sharing of feedback, input, and suggestions.

Start Date: Q1 2023

End Date: Q3 2023

Oversight by: Government and Public Affairs Committee

Success Measure: Participated in at least three external outreach opportunities and hosted at least three listening sessions.

Task Number	Task Description	Responsible Party	Due Date	Status
3.2.1	Identify existing outreach opportunities where the Board can participate.	Executive Officer	Q1 2023	Complete
3.2.2	Publicize opportunities to provide feedback to the Board.	Assistant Executive Officer	Q1 2023	In Progress
3.2.3	Host roundtable discussions/listening sessions (document feedback).	Executive Officer	Q2 2023 – ongoing	In Progress
3.2.4	Review feedback given.	Executive Officer and Assistant Executive Officer	Q2 2023 – ongoing	In Progress

Task Number	Task Description	Responsible Party	Due Date	Status
3.2.5	Communicate feedback to appropriate policy committee chair, determine action (address in public meeting, etc.)	Executive Officer and Assistant Executive Officer	Q3 2023 – ongoing	In Progress

Objective 3.3: Create an outreach plan to improve communication with stakeholders, share helpful information, and clarify the Board’s role and duties.

Start Date: Q1 2023

End Date: Q1 2024

Oversight by: Government and Public Affairs Committee

Success Measure: Board has approved its outreach plan and released at least three updated materials.

Task Number	Task Description	Responsible Party	Due Date	Status
3.3.1	Document existing communication challenges, opportunities.	Executive Officer and Assistant Executive Officer	Q1 2023	Complete
3.3.2	Discern what stakeholder groups would like to know (internal, anecdotal, environmental scan feedback).	Licensing Manager	Q1 2023	Complete
3.3.3	Touch base with DCA outreach/communications unit (what’s available, state fair booths, etc.).	Executive Officer	Q1 2023	In Progress
3.3.4	Develop plan for modes of communication (social media, events, brochures, etc.).	Assistant Executive Officer	Q2 2023	In Progress

Task Number	Task Description	Responsible Party	Due Date	Status
3.3.5	Get plan approval from Government and Public Affairs Committee, then to Board for approval.	Assistant Executive Officer	Q3 2023	In Progress
3.3.6	Create/maintain outreach calendar.	Assistant Executive Officer	Q4 2023	In Progress
3.3.7	Create/update materials (printed materials, PDE) (get Board and legal review).	Assistant Executive Officer	Q1 2024	Not Started

Objective 3.4: Build an interactive social media presence to engage with stakeholders and assess stakeholder sentiment of the Board.

Start Date: Q1 2023
End Date: Q2 2024

Oversight by: Government and Public Affairs Committee

Success Measure: Board has developed a presence with at least bi-weekly posts across all accounts.

Task Number	Task Description	Responsible Party	Due Date	Status
3.4.1	Brainstorm among staff on what to share, identify priority items, clarify audiences.	Executive Officer	Q1 2023	In Progress
3.4.2	Establish internal procedure for use and management of social media accounts.	Executive Officer	Q1 2023	Complete
3.4.3	Meet with DCA Office of Public Affairs (strategy and graphics).	Executive Officer	Q1 2023	In Progress

Task Number	Task Description	Responsible Party	Due Date	Status
3.4.4	Discuss social media outreach with Government and Public Affairs Committee, get feedback on what to share.	Lead Administrative Analyst	Q2 2023	In Progress
3.4.5	Get input from Board members about information to share (events of interest).	Lead Administrative Analyst	Q2 2023	Not Started
3.4.6	Develop bank of material to share on an ongoing basis.	Assistant Executive Officer	Q2 2023 – ongoing	In Progress
3.4.7	Develop a system to track other accounts to monitor for sharing potential.	Assistant Executive Officer	Q2 2023	In Progress
3.4.8	Ask Board-approved colleges for material to share.	Licensing Manager	Q4 2023	Not Started
3.4.9	Review and determine how to measure stakeholder sentiment.	Assistant Executive Officer	Q2 2024	Not Started

Objective 3.5: Improve the Board’s website by providing informative content for applicants, licensees, the public, and other stakeholders and enhancing the functionality and user experience.

Start Date: Q1 2023

End Date: Q4 2024

Oversight by: Government and Public Affairs Committee

Success Measure: Updated format and content included for all business areas.

Task Number	Task Description	Responsible Party	Due Date	Status
3.5.1	Meet with OIS to determine process, timeline.	Executive Officer	Q1 2023	In Progress

Task Number	Task Description	Responsible Party	Due Date	Status
3.5.2	Assess current site – get and review metrics from OIS, identify structure and updates needed.	Executive Officer	Q1 2023	Complete
3.5.3	Review other DCA boards' websites to get layout ideas, identify a template to adopt.	Assistant Executive Officer	Q1 2023	Complete
3.5.4	Prioritize easy fixes and removing any obsolete information.	Assistant Executive Officer	Q2 2023	In Progress
3.5.5	Identify what informative content should appear on site (including FAQs, requirements in plain language, and steps).	Assistant Executive Officer	Q2 2023	In Progress
3.5.6	Review all current forms to improve them (verify ADA compliance, ensure fillable PDF versions, optimize for Connect, and confirm mobile device access).	Executive Officer	Q2 2023	In Progress
3.5.7	Communicate website redesign request to OIS.	Assistant Executive Officer	Q3 2023	Not Started (requires completion of 3.5.1)
3.5.8	Update forms.	Assistant Executive Officer	Q2 2024	Not Started (requires completion of 3.5.6)
3.5.9	Obtain feedback from external users on new website functionality through polls, listening sessions, and informal discussions.	Executive Officer and Assistant Executive Officer	Q4 2024	Not Started

GOAL 4: LAWS AND REGULATIONS

Objective 4.1: Increase efficiency in rulemaking processes to move pending regulatory packages forward, prevent a backlog of packages, and improve staff and Board effectiveness.

Start Date: Q1 2023

End Date: Q2 2026

Oversight by: Government and Public Affairs Committee

Success Measure: No current regulatory package older than two years.

Task Number	Task Description	Responsible Party	Due Date	Status
4.1.1	Implement regular (monthly) monitoring and reporting progress for pending regulations to maintain visibility.	Executive Officer	Q1 2023	Complete
4.1.2	Identify challenges observed in regulatory process.	Executive Officer	Q1 2023	Complete
4.1.3	Develop action plan to address all pending regulatory workload items.	Executive Officer	Q1 2023	Complete
4.1.4	Discuss proposals as a team to get staff input.	Executive Officer	Q1 2023 – ongoing	Complete
4.1.5	Train all AGPA and higher staff on rulemaking through DCA and OAL.	Assistant Executive Officer	Q2 2023	In Progress
4.1.6	Thoroughly research and develop background information and justification for all regulatory proposals before submitting to a committee for consideration.	Assistant Executive Officer and Committee Liaisons	Q2 2023 – ongoing	In Progress

Task Number	Task Description	Responsible Party	Due Date	Status
4.1.7	Develop initial package as proposals make their way through the committee process (to catch issues before final Board approval).	Assistant Executive Officer	Q2 2023 – ongoing	In Progress
4.1.8	Educate Board and Committee members on rulemaking process and best practices (include in onboarding).	Executive Officer and DCA Regulatory Counsel	Q3 2023	In Progress
4.1.9	Monitor pending regulatory workload volume and completion time.	Executive Officer	Q3 2023 – Q2 2026 and ongoing	In Progress

Objective 4.2: Perform a comprehensive review of existing regulations to identify and address any unnecessary or obsolete regulations and to clarify current regulations as needed.

Start Date: Q1 2023

End Date: Q4 2026

Oversight by: Government and Public Affairs Committee

Success Measure: Board has addressed issues identified during comprehensive review.

Task Number	Task Description	Responsible Party	Due Date	Status
4.2.1	Create action plan for review of regulations (possibly group by topic – licensing, enforcement, general)	Executive Officer	Q1 2023	Complete
4.2.2	Review all existing regulations to identify unnecessary, obsolete, or unclear regulations (as grouped by topic with staff SMEs).	Assistant Executive Officer	Q4 2023	In Progress

Task Number	Task Description	Responsible Party	Due Date	Status
4.2.3	Develop recommendations to address identified issue(s) for each regulation.	Assistant Executive Officer	Q2 2024	In Progress
4.2.4	Consult with DCA Regulatory Counsel.	Assistant Executive Officer	Q3 2024	In Progress
4.2.5	Present final recommendations to appropriate committee for review and discussion.	Assistant Executive Officer and Committee Liaisons	Q1 2025	Not Started
4.2.6	Committee makes recommendation to full Board.	Committees	Q4 2025	Not Started
4.2.7	Board approves proposal to amend or repeal as appropriate.	Board	Q4 2025	Not Started
4.2.8	Begin regulatory process.	Assistant Executive Officer and Lead Administrative Analyst	Q1 2026	Not Started
4.2.9	Complete regulatory process.	Assistant Executive Officer and Lead Administrative Analyst	Q4 2026	Not Started

GOAL 5: ORGANIZATIONAL DEVELOPMENT

Objective 5.1: Update processes and procedures, key staff roles, and staff organizational structure to establish clear responsibilities and increase efficiency.

Start Date: Q4 2022

End Date: Q3 2023

Oversight by: Government and Public Affairs Committee

Success Measure: Completed reorganization and have up-to-date documentation for all staff roles.

Task Number	Task Description	Responsible Party	Due Date	Status
5.1.1	Ensure all staff duties are accounted for.	Executive Officer	Q4 2022	Complete
5.1.2	Finalize reorganization plan and submit it to DCA Office of Human Resources for approval.	Executive Officer	Q1 2023	In Progress
5.1.3	Conduct change management activities.	Enforcement and Licensing Managers	Q1 2023	In Progress
5.1.4	Issue updated duty statements to staff.	Enforcement and Licensing Managers	Q1 2023	In Progress
5.1.5	Implement new organizational structure.	Executive Officer	Q1 2023	In Progress
5.1.6	Document current processes and ask for staff feedback and recommendations on proposed improvements (i.e., paperless, customer-focused).	Assistant Executive Officer	Q1 2023	In Progress
5.1.7	Standardize, document, and store updated processes and procedures.	Assistant Executive Officer	Q2 2023	In Progress
5.1.8	Train staff on the updated processes and procedures.	Assistant Executive Officer	Q3 2023	In Progress

Objective 5.2: Maintain a high-performance and engaged culture focused on effective training, individual development, and continuous improvement, to recruit and retain quality staff.

Start Date: Q4 2022

End Date: Q4 2024

Oversight by: Government and Public Affairs Committee

Success Measure: Improvement in employee engagement scores.

Task Number	Task Description	Responsible Party	Due Date	Status
5.2.1	Encourage an open, receptive, and problem-solving mindset.	Executive Officer	Q4 2022	Complete
5.2.2	Put together methods to solicit feedback and suggestions on the different processes. Possible method = role play activities during meetings for staff to better understand and serve stakeholders including consumers, licensees.	Executive Officer	Q4 2022	Complete
5.2.3	Conduct employee engagement survey to assess staff morale and establish baseline.	Executive Officer	Q1 2023	In Progress
5.2.4	Conduct listening sessions to obtain feedback (concerns, problems, etc.) from staff.	Executive Officer	Q1 2023	In Progress
5.2.5	Review and update job announcements (include telework opportunity).	Executive Officer	Q1 2023	Complete
5.2.6	Conduct all staff meetings to maintain line of communication and follow up on concerns, questions, etc. from listening sessions.	Executive Officer	Q1 2023 – ongoing	In Progress
5.2.7	Identify potential training topics for staff and management.	Assistant Executive Officer	Q1 2023 – ongoing	In Progress

Task Number	Task Description	Responsible Party	Due Date	Status
5.2.8	Implement basic cross-training for all Board processes (including Connect training).	Assistant Executive Officer	Q1 2023 – ongoing	In Progress
5.2.9	Develop and deliver and/or signup for staff trainings as a team.	Assistant Executive Officer	Q2 2023	In Progress
5.2.10	Develop and disseminate customer satisfaction survey.	Assistant Executive Officer	Q2 2023 – ongoing	In Progress
5.2.11	Encourage Individual Development Plans (IDPs) and conduct regular check ins to help staff to be effective and well-rounded in their own position and develop additional areas of interest.	Executive Officer	Q4 2023 – ongoing	In Progress
5.2.12	Conduct second employee engagement survey to assess staff morale and identify additional opportunities for improvement.	Executive Officer	Q1 2024	Not Started
5.2.13	Create action plan for improvement based on engagement survey results.	Executive Officer	Q2 2024	Not Started
5.2.14	Implement action plan to address employee engagement results and improvements.	Executive Officer and Assistant Executive Officer	Q4 2024	Not Started

Objective 5.3: Improve communication amongst staff and board members to facilitate effective collaboration.

Start Date: Q4 2022
End Date: Q4 2023

Oversight by: Government and Public Affairs Committee

Success Measure: Positive results on the annual communication survey.

Task Number	Task Description	Responsible Party	Due Date	Status
5.3.1	Encourage staff feedback and two-way communication during unit meetings.	Executive Officer	Q4 2022 – ongoing	In Progress
5.3.2	Implement and share a monthly structured report (follow through on updates and decisions) with Board members and staff.	Executive Officer	Q1 2023	In Progress
5.3.3	Present monthly report highlights during Board meetings.	Executive Officer	Q1 2023	In Progress
5.3.4	Re-establish regular unit meetings.	Enforcement and Licensing Managers	Q1 2023	In Progress
5.3.5	Encourage staff to review Board and committee meeting agendas, meeting minutes, and relevant meeting materials.	Executive Officer	Q1 2023	Complete
5.3.6	Create a resource list for liaisons to know which staff members to reach out to regarding specific topics.	Assistant Executive Officer	Q1 2023	In Progress
5.3.7	Introduce committee liaison to committee chairs.	Executive Officer	Q1 2023	In Progress
5.3.8	Introduce Board liaison to Board members.	Executive Officer	Q1 2023	Not Started (need to fill staff position)

Task Number	Task Description	Responsible Party	Due Date	Status
5.3.9	Add liaison contact information to existing rosters and the Board's website.	Executive Officer	Q1 2023	Not Started
5.3.10	Communicate any updates to staff.	Assistant Executive Officer	Q2 2023	In Progress
5.3.11	Create and distribute an annual survey to get feedback from staff and Board members regarding communication and collaboration.	Assistant Executive Officer	Q4 2023 – ongoing	Not Started

Objective 5.4: Re-design the board member onboarding procedures and orientation process to create effective board members.

Start Date: Q4 2022

End Date: Q2 2023

Oversight by: Government and Public Affairs Committee

Success Measure: Board has implemented the new onboarding and orientation process and the new materials have been shared with all Board members.

Task Number	Task Description	Responsible Party	Due Date	Status
5.4.1	Present proposed framework for a new orientation and onboarding process for new Board members to the Government and Public Affairs Committee.	Executive Officer	Q4 2022	Complete
5.4.2	Create welcome package (include forms).	Board Liaison/ Executive Officer	Q1 2023	In Progress
5.4.3	Update Board member resource binder.	Board Liaison/ Executive Officer	Q1 2023	In Progress

Task Number	Task Description	Responsible Party	Due Date	Status
5.4.4	Update new Board member training session materials.	Board Liaison/ Executive Officer	Q1 2023	In Progress
5.4.5	Outline Board member mentor responsibilities.	Board Liaison/ Executive Officer	Q1 2023	In Progress
5.4.6	Familiarize staff with mandatory Board member paperwork that needs to be completed upon appointment and annually.	Board Liaison/ Executive Officer	Q2 2023	In Progress
5.4.7	Create desk manual/guidelines for Board Liaison and share with all staff.	Board Liaison/ Executive Officer	Q2 2023	In Progress
5.4.8	Update Board Member Administrative Procedure Manual with updated framework.	Board Liaison/ Executive Officer	Q2 2023	In Progress



**Agenda Item 5
June 16, 2023**

**Review, Discussion, and Possible Recommendation Regarding 2022–2026
Strategic Plan Objective 3.3 to Create an Outreach Plan to Improve
Communication with Stakeholders, Share Helpful Information, and Clarify the
Board’s Role and Duties**

Purpose of the Item

The Committee will discuss opportunities for stakeholder outreach to improve communication and share information about the Board.

Action Requested

The Committee will be asked to provide feedback on staff’s proposed stakeholder outreach plan.

Background

The Board’s 2022–2026 Strategic Plan contains an objective to create an outreach plan to improve communication with stakeholders, share helpful information, and clarify the Board’s role and duties.

Staff identified potential opportunities to directly engage with distinct groups of stakeholders – the public/patients, licensees, applicants, students, chiropractic colleges, continuing education providers, professional associations, other state agencies, and other state chiropractic boards – through the development of updated website content and targeted communications for these groups.

Audience	Communication Plan
General Public and Chiropractic Patients	<ul style="list-style-type: none"> • Update the “Consumers” section of the Board’s website with additional information and resources to assist consumers in knowing what to expect when visiting a chiropractic practice • Develop relevant social media content and videos based on these consumer resources
Licensees	<ul style="list-style-type: none"> • Expand the “Licensees” section of the Board’s website to include informative guides on licensing applications and requirements • Update the Frequently Asked Questions (FAQs) to provide helpful solutions to common licensee questions

2022–2026 Strategic Plan Objective 3.3: Outreach Plan

June 16, 2023

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	<ul style="list-style-type: none">• Develop and post instructions for navigating and completing transactions in the Connect system• Create a database of social media content based on common licensee issues and reminders (i.e., office closures, license renewals, availability of the Connect system, etc.)
Applicants	<ul style="list-style-type: none">• Update the “Applicants” section of the Board’s website to include the steps for applying for initial licensure and information regarding the background check process• Create FAQs to assist applicants in understanding the licensure requirements
Students	<ul style="list-style-type: none">• Send welcome messages to new chiropractic students and congratulatory messages to graduating students• Conduct presentations for students on the licensure process and tips to avoid common enforcement violations
Chiropractic Colleges	<ul style="list-style-type: none">• Provide a quarterly update to chiropractic colleges on the Board’s activities and proposals• Schedule listening sessions to solicit feedback
Continuing Education Providers	<ul style="list-style-type: none">• Update and expand the continuing education content on the Board’s website• Create and disseminate a quarterly update to continuing education providers• Schedule listening sessions to solicit feedback
Professional Associations	<ul style="list-style-type: none">• Conduct presentations regarding the Board and issues of importance to members• Create and disseminate a quarterly update to professional associations
Other State Agencies and Chiropractic Boards	<ul style="list-style-type: none">• Develop relationships with other state agencies and other chiropractic boards to facilitate the sharing of information and discussion of emerging issues

At this meeting, the Committee is asked to discuss the proposed outreach plan.



**Agenda Item 6
June 16, 2023**

**Review, Discussion, and Possible Recommendation Regarding 2022–2026
Strategic Plan Objective 5.4 to Re-Design the Board Member Onboarding
Procedures and Orientation Process**

Purpose of the Item

The Committee will continue its policy discussion regarding planned improvements to the onboarding and orientation process for new Board members.

Action Requested

The Committee will be asked to provide feedback to staff on the planned content for the new Board member orientation session.

Background

The Board's 2022–2026 Strategic Plan contains an objective to re-design the Board member onboarding procedures and orientation process to create effective Board members.

During the October 4, 2022 meeting, the Committee discussed the following improvements to the onboarding process:

- Providing an initial meet-and-greet with the Executive Officer and Board Chair prior to an orientation.
- Covering Board member roles and responsibilities and Board functions during a structured orientation session with the Executive Officer, an existing Board member, and legal counsel.
- Assigning an existing Board member to act as a mentor and point-of-contact for the new Board member.
- Preparing and providing a comprehensive binder of materials on Board functions, committees and their roles, pertinent laws and regulations, chiropractic colleges, and the other agencies and associations involved with the Board.

Based on the Committee's feedback and discussion, staff drafted an updated onboarding and orientation process for new Board members (Attachment 1) that was reviewed by the Committee at the December 5, 2022 meeting and subsequently by the Board at its January 20, 2023 meeting.

2022–2026 Strategic Plan Objective 5.4: New Member Orientation

June 16, 2023

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At this meeting, the Committee is asked to discuss the proposed outline for the new Board member orientation session and provide feedback to staff.

Attachments

1. Onboarding Process for New Board Members
2. Proposed Outline for New Board Member Orientation Session (Draft)

Onboarding Process for New BCE Board Members

During the First Week of Appointment

- The Executive Officer places an introductory call to the new member, explains the oath of office completion requirement, confirms the member's availability to participate in the next scheduled Board meeting and their preferred contact information (phone, email, and mailing address), informs them that a welcome package will be sent to them, and schedules an initial meet-and-greet session.
- The Board Liaison emails and ships a welcome package, consisting of a letter from the Board Chair, all mandatory paperwork and training information, and the Board Member Resource Binder, to the new member.

Within Two Weeks

- The Executive Officer hosts an initial meet-and-greet session for the new member. Participants include the Board Chair, Executive Officer, Assistant Executive Officer, and Board Liaison. Following introductions, the group will discuss the new member's goals and interests.
- Following the meet-and-greet session, the Board Chair will identify a current Board member to act as a mentor to the new member. The Executive Officer will facilitate the introduction of the mentor and new member.
- The Board Chair will also identify committee assignment(s) for the new member. The Executive Officer will facilitate the introduction of the new member to the committee chair(s).
- The Executive Officer and Board Liaison will assist the new member with any questions regarding the mandatory paperwork, ensure all deadlines are met, and submit the completed forms to the Department of Consumer Affairs (DCA) Office of Human Resources and Board and Bureau Relations.
- The Executive Officer and Board Liaison will coordinate and schedule an orientation session with the new member and also encourage the new member to sign up for the next available Board Member Orientation Training (BMOT) session offered by DCA.

Within 30-45 Days

- The Executive Officer conducts an orientation session with the new member at the Board's office or via videoconference. Participants include the Executive Officer, Assistant Executive Officer, Board Liaison, Board's legal counsel, and the mentor, if available.

Before the New Member's First Board Meeting

- The Executive Officer schedules a meeting with the new member and the mentor to review and discuss the meeting agenda and materials and answer any questions the new member may have prior to their first meeting.

Before the New Member's First Mail Vote

- The Executive Officer facilitates a meeting with the new member and the Board's legal counsel to discuss any questions regarding the mail vote process and the member's role in the disciplinary process. The Executive Officer may only participate in the discussion if the matter involves a stipulated settlement.

As Needed (At Least Annually)

- The Board Liaison distributes a copy of any new or updated policies, procedures, or guidance documents to the Board for inclusion in their Board Member Resource Binder. The documents will also be posted in a shared cloud folder for electronic access by Board members.

Proposed Outline for New Board Member Orientation Session

Overview of the Board and the Chiropractic Profession

- Brief history of the Board and the regulation of chiropractic in California
- Introduction to the Chiropractic Initiative Act of California and key regulations
- Identify current Board members and staff
- Overview of the Board's four policy committees and current projects and proposals being considered at the committee and Board level
- Format for Board and committee meetings
- Brief background on stakeholder groups and related state agencies

Overview of the Department of Consumer Affairs

- Understand DCA's role and services provided to the Board
- Overview of the other DCA healing arts boards

Legal Overview: Bagley-Keene Open Meeting Act

- Understand the legal requirements for public meetings and communications between Board members outside of meetings
- Educate member on how to handle inquiries received from applicants and respondents

Enforcement Process and Disciplinary Procedures

- Overview of the complaint intake, investigation, and case closure processes
- Educate member on their role in the disciplinary process and the Board's voting procedures
- Understand how to apply the Board's *Disciplinary Guidelines* to disciplinary cases

Licensing and Continuing Education Overview

- Overview of the Board's license/certificate types, including the minimum qualifications and application processes
- Understand the Board's role in regulating chiropractic colleges and approving continuing education providers and courses

Administrative Functions

- Overview of the Board's administrative functions
- Understand the process for claiming per diem and travel expenses



Agenda Item 7
June 16, 2023

Public Comment for Items Not on the Agenda

Purpose of the Item

At this time, members of the public may offer public comment for items not on the meeting agenda.

The Committee may not discuss or take action on any matter raised during this public comment section that is not included on the agenda, except to decide whether to place the matter on the agenda of a future meeting. [Government Code Sections 11125, 11125.7, subd. (a).]



Agenda Item 8
June 16, 2023

Future Agenda Items

Purpose of the Item

At this time, members of the Committee and the public may submit proposed agenda items for a future Committee meeting.

The Committee may not discuss or take action on any proposed matter except to decide whether to place the matter on the agenda of a future meeting. [Government Code Section 11125.]



BUSINESS, CONSUMER SERVICES AND HOUSING AGENCY • GAVIN NEWSOM, GOVERNOR
DEPARTMENT OF CONSUMER AFFAIRS • CALIFORNIA BOARD OF CHIROPRACTIC EXAMINERS
1625 N. Market Blvd., Suite N-327, Sacramento, CA 95834
P (916) 263-5355 | Toll-Free (866) 543-1311 | F (916) 327-0039 | www.chiro.ca.gov



Agenda Item 9
June 16, 2023

Adjournment

Time: _____