

**BUREAU OF SECURITY AND INVESTIGATIVE SERVICES**

# **STRATEGIC PLAN**

2022–2026



Prepared by **SOLID Planning Solutions**



CALIFORNIA DEPARTMENT OF  
**CONSUMER  
AFFAIRS**



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## Bureau of Security and Investigative Services Advisory Committee Members

**Brian Boeglin**, Alarm Company Member

**Phil Chachere**, Training Facilities Member

**Anton Farmby**, Public Member

**Frank Huntington III**, Private Investigator Member

**Mark Miller**, Private Patrol Operator Member

**Darren Morgan**, Public Member

**Nancy Murrish**, Public Member

**Eli Owen**, Public Member

**Stanton Perez**, Public Member

**Chris Sayers**, Proprietary Security Employer Member

**Leon Scroggins**, Repossessor Member

**Glenn Younger**, Locksmith Member

**Gavin Newsom**

Governor

**Lourdes M. Castro Ramírez**

Secretary, Business, Consumer Services and Housing Agency

**Kimberly Kirchmeyer**

Director, California Department of Consumer Affairs

**Lynne Jensen**

Bureau Chief, Bureau of Security and Investigative Services

# Message from the Bureau Chief

I am excited to present the 2022–2026 Strategic Plan for the Bureau of Security and Investigative Services (BSIS). As the Bureau heads into the second century of private-security oversight, this latest plan outlines those values and tasks that all of us, both inside and outside the Bureau, have deemed vital in carrying out the statutory and regulatory mandates related to the Bureau’s mission. The Bureau looks toward the future with an eye to ongoing and robust collaboration with stakeholders to ensure the highest and best level of service toward California’s consumers and the Bureau’s licensees. While the “Bureau of Security and Investigative Services” is the name used to identify this organization, the Bureau’s character and reputation is built and sustained by the hard work of the Bureau’s employees. The employees here at the Bureau practice excellence on a daily basis, and make all things possible.

Respectfully,

**Lynne Jensen**

**Chief, Bureau of Security and Investigative Services**



# About the Bureau

The private-security industry in this country dates back to the 19th century with private citizens performing many duties that today are associated with federal and state law enforcement. The growth in the number of individuals and breadth of activities performed (guarding railroad shipments, detective work to investigate crimes, tracking down and apprehending criminals, and providing security advice to banks) was integral in determining that regulation of the industry was necessary.

In California, regulatory oversight of the private-security industry began in 1915 with the creation of the Detective Licensing Board under the State Board of Prison Directors to license and regulate private detectives. The Detective Licensing Board was subsequently renamed the Detective Licensing Bureau, and today its statutes are known as the Private Investigator Act. In 1955, the Detective Licensing Bureau became the Bureau of Private Investigators and Adjustors, which in 1970 was combined with the Collection Agency Licensing Bureau and renamed the Bureau of Collection and Investigative Services. As a result of legislation (Assembly Bill 936, Chapter 1263, Statutes of 1993), the Bureau was formally renamed the Bureau of Security and Investigative Services (BSIS).

BSIS issues licenses, registrations, certificates, and permits; however, for the purpose of this report, the terms “license” and “licensee” will be used. There are currently over 433,000 BSIS licenses held by about 350,000 businesses and individuals carrying out activities relating to alarm systems, locks, private investigation, private security, repossession, and firearm and baton training.

# Mission, Vision, and Values

## Mission

To protect and serve the public and consumers through effective regulatory oversight of the professions within the Bureau’s jurisdiction.

## Vision

To be a regulatory leader of the industries within the Bureau’s jurisdiction to promote consumer protection and public safety.

## Values

- Accountability
- Consumer Protection
- Customer Service
- Effectiveness
- Integrity
- Professionalism
- Teamwork
- Equity





# GOAL 1

## Licensing

Enhance licensing processes to increase efficiencies and promote quality customer service.

- 1.1** Establish a plan to move all license type applications online to reduce processing times and improve accuracy.
- 1.2** Work with the Office of Information Services to implement efficiencies in the information technology system (BreEZe) to improve internal and external processes and processing times.
- 1.3** As necessary, increase staff to improve licensing processing times and call response times.
- 1.4** Increase training and cross-training for all staff to improve succession planning and increase consistency and efficiencies.
- 1.5** Evaluate and update business processes to increase consistency and efficiencies.

## GOAL 2

# Enforcement

Advance quality proactive and reactive enforcement efforts.

- 2.1** Highlight enforcement actions of the Bureau to bring awareness of the laws and regulations to licensees and educate consumers.
- 2.2** Increase the number of inspections performed to increase compliance.
- 2.3** Conduct workshops and/or create a video to prepare licensees for inspections.
- 2.4** Evaluate staff duties and levels to increase inspections and decrease unlicensed activity.
- 2.5** Increase staff training to improve enforcement knowledge and consistency.
- 2.6** Develop tools to educate complainants and licensees on the Bureau's processes, expectations, and timelines.
- 2.7** Review and streamline enforcement and complaint processes to increase efficiency, consistency, and meet performance measures.
- 2.8** Conduct outreach to proprietary security employers regarding the Bureau's authority, requirements, and new laws going into effect.

# GOAL 3

## Discipline

Promote efficiency and consistency in disciplinary processes.

- 3.1** Enhance communication with the Department of Justice concerning Live Scan to reduce delays.
- 3.2** Educate licensees on Bureau disciplinary actions, including unlicensed activity citations, to increase awareness.
- 3.3** Develop and provide ongoing training to all enforcement staff to improve consistency in outcomes.
- 3.4** Improve external communications regarding the Bureau's authority, discipline process, and enforcement activities to increase consumer and licensee satisfaction.
- 3.5** Review and revise business processes to increase accountability and improve performance.

# GOAL 4

## Outreach

Identify and promote effective means to educate and inform Bureau applicants, licensees, and consumers.

- 4.1** Explore ways to educate licensees about existing requirements and new updates to laws and regulations to improve licensees' understanding of their responsibility as a licensee.
- 4.2** Revise the complaint acknowledgement letter and brochure to better inform consumers on the process, time frames, and expectations.
- 4.3** Update the Bureau's website to provide consumers and licensees better access to resources.
- 4.4** Provide written clarification on anonymous versus confidential reporting to improve consumer and licensee understanding.
- 4.5** Expand communication options to reach more licensees, consumers, and applicants.

## GOAL 5

# Administration and Customer Service

Cultivate a work environment where all staff value and practice personal accountability, respect of others, and quality customer service.

- 5.1** Continue to communicate with the industry via Listserv, social media, and emails regarding Bureau activities specific to licensing and enforcement.
- 5.2** Continue collaborating with the Consumer Information Center to improve call agent knowledge to increase caller satisfaction.



# Strategic Planning Process

Stakeholders include any individual or group who is influenced by or influences a program. Information for the Bureau’s environmental scan report was gathered by surveying external stakeholders and internal stakeholders (Advisory Committee members, Disciplinary Review Committee members, executive management, management, and staff) using the following methods:

- Interviews were conducted with BSIS’ executive management members during the month of June 2022 to capture “seeds, weeds, and needs” in the Bureau’s goal areas as well as to assess the challenges and opportunities BSIS is currently facing or might face in the upcoming years.
- An online manager focus group was conducted over the course of two sessions, one on July 6, 2022 and the other on July 20, 2022. Six managers attended the first session while four attended the second session. One participant, unable to attend the second session, was interviewed one-on-one. Managers provided insight into the Bureau’s seeds, weeds, and needs, as well as the challenges and opportunities it may face in the future.



- An online survey was sent to external stakeholders on June 16, 2022 and closed on July 14, 2022. In the survey, external stakeholders provided anonymous input regarding seeds, weeds, and needs in the Bureau’s goal areas as well as the challenges and opportunities BSIS is currently facing or might face in the upcoming years. A total of 483 people participated in the external stakeholder survey.
- An online survey was sent to internal stakeholders (Advisory Committee Members, Disciplinary Review Committee members, and staff) on June 16, 2022 and closed on July 14, 2022. In the survey, internal stakeholders provided anonymous input regarding seeds, weeds, and needs in the Bureau’s goal areas as well as the challenges and opportunities BSIS is currently facing or might face in the upcoming years. A total of nine committee members and 22 staff participated in the survey.

Bureau leadership and management were provided the results of the environmental scan, along with an objectives worksheet, three weeks before the strategic planning session on October 17, 2022. The most significant themes and trends identified in the environmental scan were discussed and guided strategic planning participants in their creation of objectives for the Bureau’s new strategic plan.



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