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Comprehensive review and strategic planning of a physics department: how to make it work for your program

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Often when a department undertakes a comprehensive self-study and external review the response is to bemoan the work and it distracts everyone from regular duties that seem more pressing. By contrast I will describe how such a review can be a positive and constructive part of sustaining excellence and achieving departmental goals, particularly in making the program more accessible and inclusive. Successful completion of a comprehensive review and associated planning is an effective part of on-going planning and assessment activities, can contribute to meeting institutional accreditation requirements and will facilitate departmental resource allocation discussions with institutional leaders (dean and provost). The first step is to reimagine the process as a department-centered period of critical reflection. Steps toward making this more effective include building a positive departmental consensus about the process; critically examining and revising the departments goals and objectives; gathering and evaluating data about its students, graduates, programs, and outcomes; considering the departments successes and challenges; assessing and revising the departments initiatives for improvement; engaging with senior academic leaders of the institution in the review and planning processes; thinking hard about advice from external consultants and developing a strategic plan for the future that includes short-term, mid-range and long-term initiatives that require different levels of new resources (from none to substantial). The final outcomes of a comprehensive review should include plans for subsequent and on-going reviews of outcomes and the effectiveness of initiatives. Resources for this talk come from extensive personal experience and materials developed by APS and AAPT over several decades and guidance developed under the Effective Practices for Physics Programs (EP3) Project led by APS in collaboration with AAPT.