

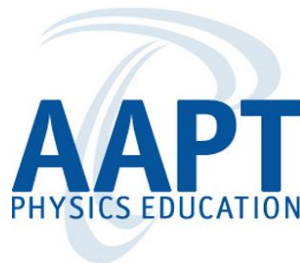
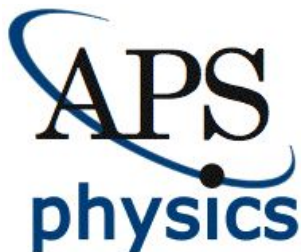
**Effective Practices for Physics Programs EP3**  
***Serving as an External Consultant for a***  
***Department Review***

*Chapter Contributors*

*Neal Abraham, Ted Hodapp, and Michael Jackson*

*Presenter*

*Neal Abraham, Mount Holyoke College*



## Agenda for this presentation

- What is this chapter of the EP3 guide about?
- Summary of the subsections of this chapter.
- Why serve as a consultant?
- Q&A/discussion will be part of the overall session.

## Contributors:

- Neal Abraham (Mount Holyoke College)
- Ted Hodapp (American Physical Society)
- Michael Jackson (Millersville University of Pennsylvania)

## This is one of two linked Chapters on Departmental Reviews

Preparing for a departmental review: guidance for a department chair and a leadership team to conduct a periodic departmental review and accompanying development of strategic goals with specific initiatives.

- Resources: Department Review Timeline, Possible Data to Gather and Analyze, Issues to Explore, Outline of a Self-Study Report, Site Visit Agenda, SMART Goals.

Advice for external consultants: guidance to individuals serving as external consultants for physics department program reviews.

- Resources: Sample MOU (consultant and institution), Advice for first-time consultants, Template for external consultants' report.

## Presenter:

- Neal Abraham, currently Five College Professor of Physics at Mount Holyoke College

## Experience in Departmental Reviews

- Participated in four Departmental Reviews as a faculty colleague or department chair at two physics departments in liberal arts colleges.
- Served as an external consultant to 32 department reviews and several divisional reviews -- at liberal arts colleges and comprehensive universities.
- As chief academic officer at a liberal arts college oversaw and coordinated 30 departmental reviews including recruiting and debriefing consultants and guiding planning.
- As chief academic officer at a liberal arts college and as executive director of a multi-institution consortium coordinated a dozen interdisciplinary and administrative program reviews.

## Where is it in the EP3 process?



For each section there will be several individuals (including yourself) contributing content

The task force and editorial director will then synthesize into one cohesive document.

We may have some additional questions for you. After internal vetting you will have a chance to see and comment on the synthesized section.

Each section will be sent for expert review to at least 4 individuals.

To see an example of a final section the Teacher Preparation can be found here: <http://apps3.aps.org/bpupp/>

# What will this chapter look like?

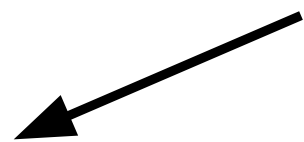
## Description

This section is for individuals serving as external consultants who provide reviews of physics departments. It includes advice on when to accept an invitation, information needed to prepare for and conduct a site visit, and developing a written report. Templates for external consultant agreements and written reports are also included. For advice for departments undergoing program review, see the chapter on **Program review: preparing for a departmental review**.

## Benefits

External consultants contribute to a department's self assessment and planning by providing perspectives, feedback, and analysis of issues, as well as a peer review of departmental programs, policies, and strategies for the future. They help share effective practices that benefit students and the wider physics community. Consultants benefit directly by expanding their knowledge of community practice, learning how to apply effective practices in other contexts, and preparing for their own departmental reviews.

Always present

 **Theme** (about 3 to 6 in a section)

- ***Evaluate the opportunity to serve as an external consultant***

- Understand the local review process.
- Identify and disclose conflicts of interest.
- Consider team size, makeup and its expertise.
- Decide whether to serve.
- Finalize arrangements.

 ***Actionable Practices*** (about 6 in each theme)

← **Actionable Practice** (about 6 in each theme)

- Understand the local review process.
  - *Learn about their process and expectations (e.g., proposed time frame for completing the self-study report and its design; specific issues of interest to the department or administration; structure and expectations of site visit and your report) for the development of the self-study report and site visit.*
  - *Discuss their plans for having other external consultants on the team including their backgrounds and how they would like the team to function.*
  - *Ask how the information from the review will be used (e.g., developing an action plan for improvement, its use in a cyclic review process).*

Click on **Actionable Practice** to see **Implementation Strategies**  
(about 6 for each actionable practice)



- **Prepare for the visit.**

- Confer with the site visit team.
- Discuss the development of the self-study report with the department contact.
- Plan the agenda for the site visit with the department contact.
- Review the briefing materials.

- **Conduct the visit.**

- Bring an open and constructive attitude to discussions.
- Act professionally.
- Frame and manage conversations during the visit.
- Investigate critical topics.
- Communicate with other members of the team throughout the visit.
- Devise and deliver succinct oral reports.

- **Develop the written report.**

- Strive to draft the entire written report before the team departs.
- Provide observations to identify strengths, concerns and opportunities.
- Craft recommendations.
- Complete the written report and submit it.

**You can find the draft chapters here:**

<https://ep3preview.netlify.app/sections/program-review-advice-to-external-consultants>

<https://ep3preview.netlify.app/sections/program-review-preparing-for-a-departmental-review>

**Note some key recommendations (voices of experience)**

- Use consultants from peer and aspirant departments.
- Terminology: department review, external consultants.
- Provide insights appropriate to the local context.
- Help departments identify improvements in curriculum, staffing, and programs that are more inclusive of students from different preparations and of students with different career aspirations to improve enrollments and retention.

## Reminder of some of the benefits of serving as an external consultant for a department review

- Expand your knowledge of community practices in other physics departments.
- Share insights on effective practices in physics departments with faculty colleagues at the institution you are advising.
- Learn alternatives for applying effective practices in teaching and managing a physics program in different contexts.
- Prepare for your own department review in the future.
- Advise administrators on how to interpret the situation in a physics department.

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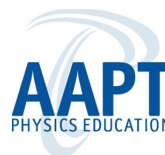
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