

Departmental Self-Study

This form is to assist the departmental team in collecting information before the site visit about departmental policies, resources, and demographics.

All departments must complete a Self-Study prior to the visit. The departmental team should consider the creation of this document to provide both a review of information for the site visit group as well as an opportunity for the department to reflect on its practices, policies, and current situation. This document should be developed in a transparent, reflective process and should include thoughtful considerations of the current context and point the directions for future improvements. It can be used after the visit as guidance for strategic actions taken by the department to create a more inclusive and equitable environment for everyone.

The document must not exceed 5 pages. All data and information will be treated confidentially and shared only within the site visit group.

We recommend you review Theme 2 (“Developing a self-study report”) from the Effective Practices for Physics Programs (EP3) section on “[How to undertake an undergraduate program review](#)”. This subsection provides guidance on how to conduct a thoughtful, inclusive, and reflective process that results in a self-study report.

Further, we recommend the departmental team review the resources listed at the end of this document prior to creating the self-study report to familiarize themselves with current effective practices in creating an inclusive departmental environment.

The self-study should include four sections:

1. **Current issue reflections.** What issues exist that are prompting the visit? Is there a history that the site visitors should know about? Have you requested an APS climate site visit in the past? What actions were taken to address raised concerns / recommendations? Have you taken actions as a result of other reviews?
2. **Visit expectations.** What are your hoped-for outcomes of such a visit once you receive the report and act on its recommendations? What specific issues would you like the visitors to probe?
3. **Participation data.** Provide background data to inform site visitors and departmental members on how members of marginalized groups experience the department and progress through various stages. Examples should include:
 - a. Enrollment, retention, and graduation numbers for various groups broken down by various demographics (e.g., gender, race/ethnicity, domestic/international)
 - b. Progress of graduate students through each of the key milestones broken down by gender and race/ethnicity (e.g., offers, acceptances, matriculation, passing qualifying exams, graduation)
 - c. Faculty identities broken down by gender and race/ethnicity
 - d. Brief analysis of data (e.g., trends, comparisons to peer or aspirant departments)

4. **Resources and practices.** Describe resources available to students, postdocs, staff, and faculty members. Examples include:
 - a. Availability of lactation rooms, gender neutral restrooms, etc.
 - b. Formal mentoring programs
 - c. Campus or departmental support groups (e.g., women in physics, SPS)
 - d. Childcare availability
 - e. Mental health resources and training
 - f. Policies that promote good work/life balance
 - g. Maternity / dependent care policies
 - h. Career guidance

Resources for the departmental team to review prior to constructing the self-study report:

- [TEAM-UP report Departmental Self-Assessment Rubric](#)
- [NERCHE Self-Assessment Rubric for the Institutionalization of Diversity, Equity, and Inclusion in Higher Education](#)
- [Climate and Culture section of EP3](#)
- [DEI section of EP3](#)
- Demographic data for peer / aspirant departments is [available at APS](#).