Institutional Statistics: A Deep Dive

WEBINAR · Tuesday, September 22, 2026 · 12:00 PM ET

insights by eLumen

Today's plan

1. **Quick recap**
   Where this dashboard fits and what it’s designed to show
2. **Questions it answers**
   Five real questions, answered live in the dashboard
3. **Under the hood**
   How each number is calculated, and the one key assumption to keep in mind
4. **Make it yours**
   Simple customizations you can make without a developer
5. **Known gaps & what's next**
   What's available now and the gap we are working to close

HOUSEKEEPING

Recorded
We'll share the recording afterward.

Questions in chat
Drop them in anytime; we'll address them in Q&A (~15 min at the end).

Mostly live demo
Slides carry annotated screenshots so you can use the deck as a reference later.

Sample data throughout. Names & numbers are fictitious.

Quick recap

Where Institutional Statistics Fits in the Workflow

Three dashboards, three questions

Faculty Participation

"Who is participating?"

Has assessment data been submitted?

Institutional Statistics

"What are we assessing and where?"

How much coverage do we have?

TODAY'S DEEP DIVE

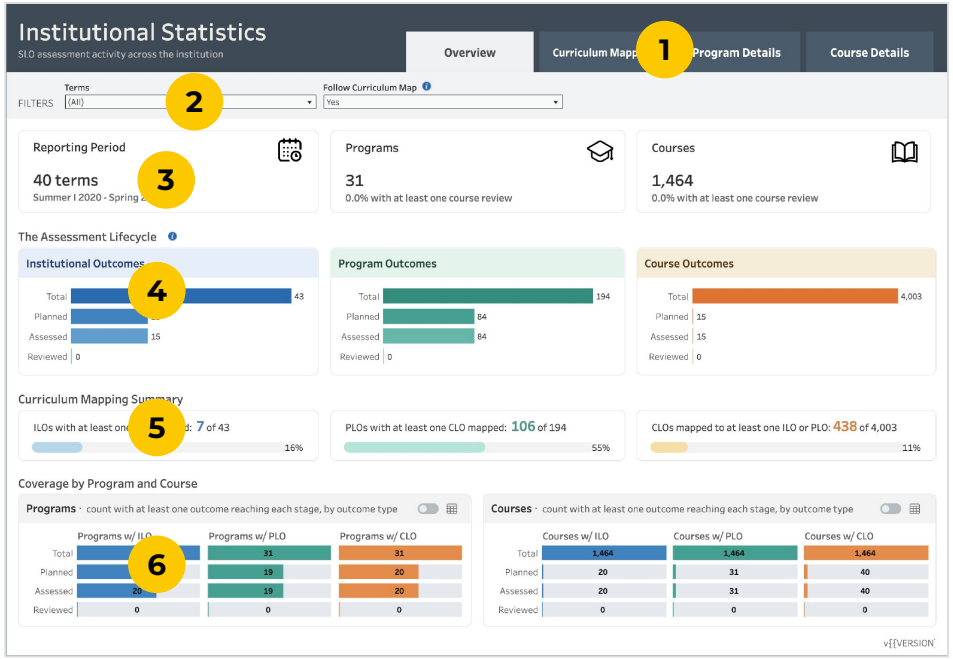
SLO Performance

"How are we & our students doing?"

What are the results telling us?

Institutional Statistics is the coverage step. Faculty Participation asks whether scores are entered; this dashboard asks how much of your outcome inventory those scores actually reach: which outcomes, programs and courses are mapped, assessed, and reviewed.

Anatomy of the Overview



1. **View tabs**
   Overview · Curriculum Mapping · Program Details · Course Details
2. **Filters**
   Terms, plus the Follow Curriculum Map switch
3. **Headline cards**
   Reporting period, programs, courses, with course-review %
4. **The Assessment Lifecycle**
   Total → Planned → Assessed → Reviewed, per outcome type
5. **Curriculum Mapping Summary**
   ILOs / PLOs with ≥1 CLO mapped; CLOs mapped up
6. **Coverage by Program and Course**
   How many programs / courses reached each stage

Screenshot: Overview tab. Every panel uses the same colors: blue = ILO, green = PLO, orange = CLO.

Four tabs, one question, different grain

Overview

The institution, in one screen

SHOWS

- Lifecycle funnels per outcome type
- Mapping summary
- Program & course coverage

Best for: the accreditation snapshot

Curriculum Mapping

One row per ILO / PLO

SHOWS

- Mapped / Unmapped status
- Count of CLOs mapped in
- Click a row → the mapped CLOs

Best for: finding the gaps in the map

Program Details

One row per program → term → SLO type

SHOWS

- Has ≥1 Mapping
- Has ≥1 Assessment / Finalized Result
- Included in ≥1 Completed Review

Best for: program coordinators

Course Details

One row per course

SHOWS

- Active / inactive CLOs
- Active CLOs with mapping, with scores
- Sections, % assessed, review status

Best for: department chairs

Only finalized results count anywhere on this dashboard. That is a different rule from Faculty Participation, and we'll come back to it.

Questions it answers

Five Common Questions this Dashboard Can Answer

Five example questions

1. **“How much of our outcome inventory is actually being assessed?”**
   Overview → Assessment Lifecycle: Total vs. Assessed, per outcome type

2. **“How many programs/courses reached each stage?”**
   Overview → Coverage by Program and Course; toggle to the table for percentages

3. **“Is our curriculum map complete?”**
   Overview mapping summary → Curriculum Mapping tab → filter Unmapped, click a row

4. **“Which programs are assessing, at which level, and when?”**
   Program Details → one dot per program × term × outcome type

5. **“Which courses have outcomes nobody has mapped or scored?”**
   Course Details → Active CLOs with Mapping / with Scores, % Sections Assessed

● LIVE

▸ INSTITUTIONAL STATISTICS

Live walkthrough

The five questions, answered live in the dashboard

“How much of our outcome inventory is actually being assessed?”

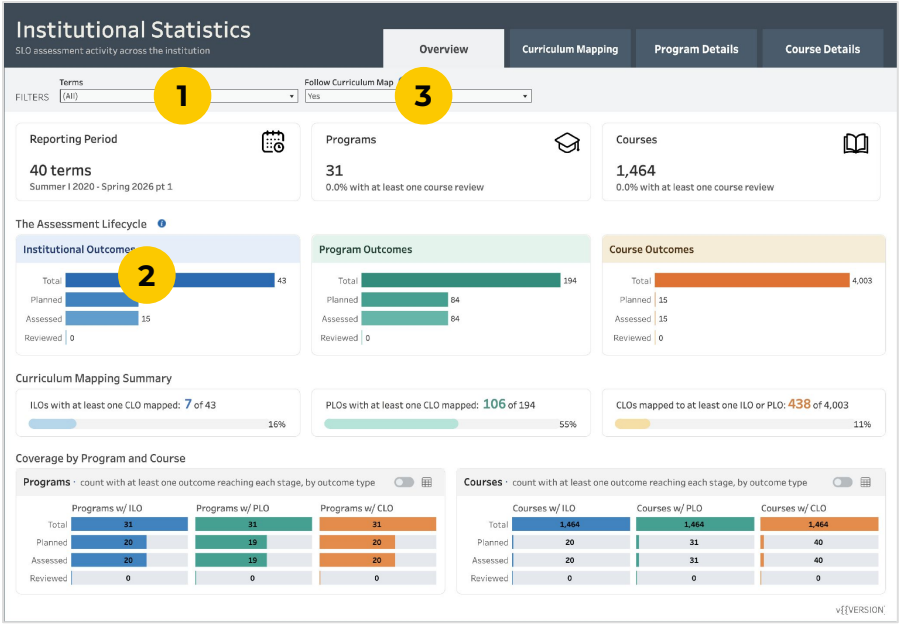
WHERE TO LOOK

Overview → The Assessment Lifecycle

1. **Pick the terms**
   Terms filter → the terms you want to look at. The Reporting Period card confirms the range.

2. **Read each funnel**
   Total = outcomes you have. Assessed = outcomes with at least one finalized score. Same shape for ILO, PLO, CLO.

3. **Flip Follow Curriculum Map**
   Yes counts evidence attributed through the map; No counts direct scoring only.



Planned and Assessed are equal by design today; the assumption slide explains why.

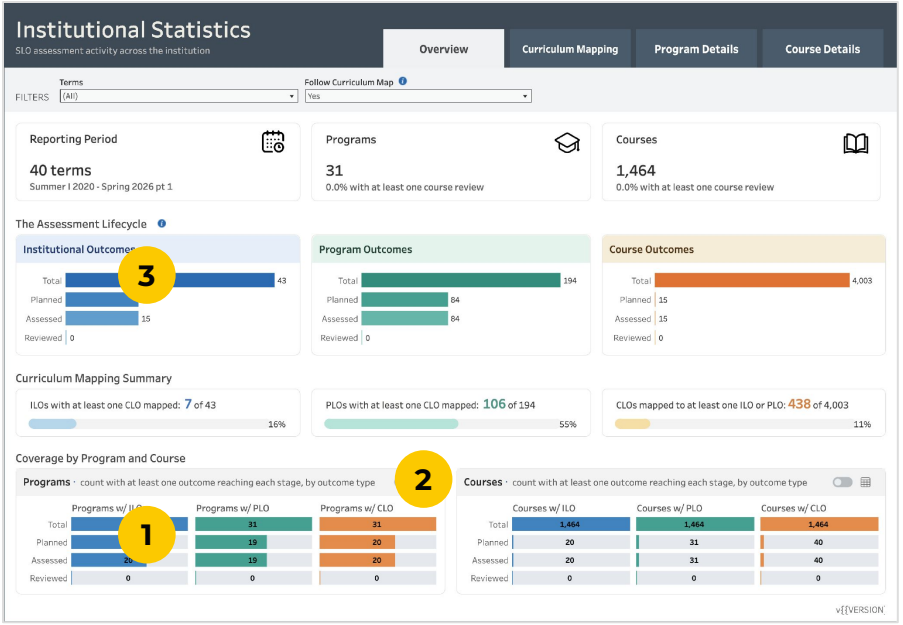
QUESTION 2 OF 5

“How many programs/courses reached each stage?”

WHERE TO LOOK

Overview → Coverage by Program and Course

1. **Read the two panels**
   Programs w/ ILO / PLO / CLO and Courses w/ ILO / PLO / CLO: count with at least one outcome of that type at each stage.
2. **Toggle to the table**
   The switch top-right of each panel swaps bars for a table with % Assessed and % Reviewed.
3. **Compare with the funnels**
   Funnels count outcomes; these panels count programs and courses. 15 CLOs assessed can be 40 courses, or 3.



The headline cards use the same idea: % of programs / courses with at least one course review.

QUESTION 3 OF 5

“Is our curriculum map complete?”

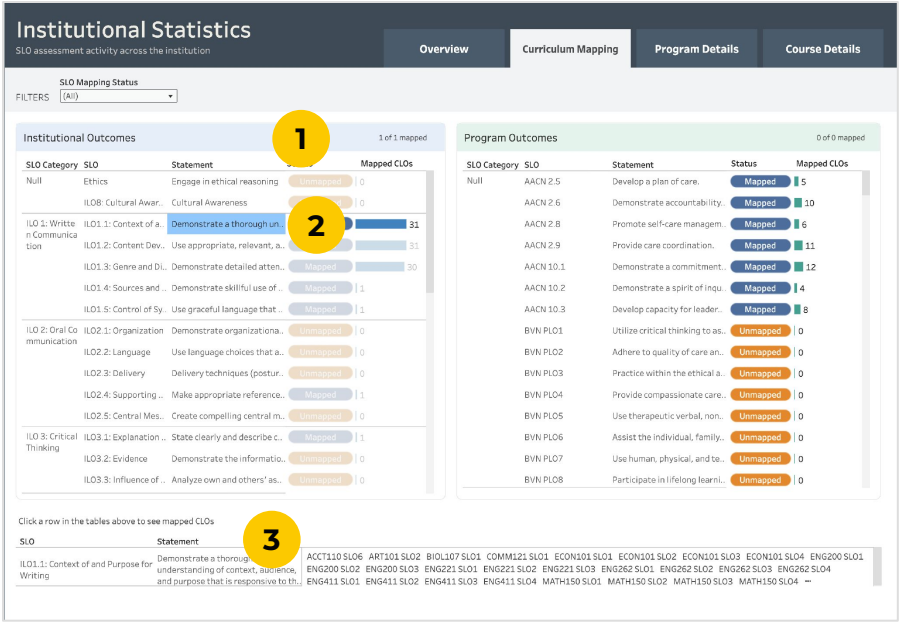
WHERE TO LOOK

Overview summary → Curriculum Mapping tab

1. **Read the three summary bars**
   ILOs with ≥1 CLO mapped, PLOs with ≥1 CLO mapped, CLOs mapped up to anything, each as x of y.

2. **Open Curriculum Mapping**
   One row per ILO and PLO with a Mapped / Unmapped pill and the count of CLOs mapped in. Filter SLO Mapping Status → Unmapped.

3. **Click a row**
   The bottom panel lists exactly which CLOs map into that outcome.



Unmapped ILOs and PLOs can only be assessed directly; no course-level evidence rolls up to them.

“Which programs are assessing, at which level, and when?”

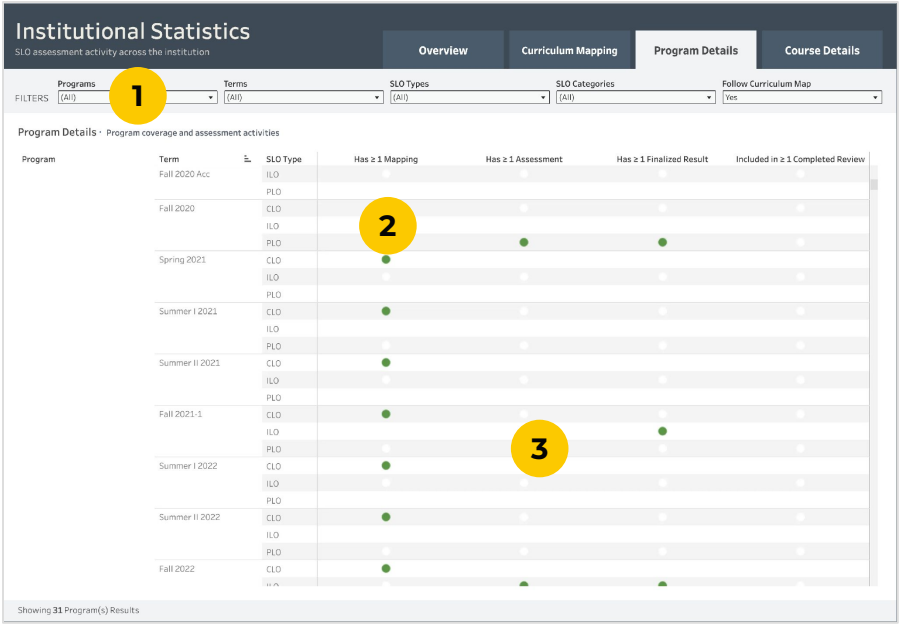
WHERE TO LOOK

Program Details tab

1 Scope it
Programs filter → yours. Terms → the cycle. SLO Types → PLO.

2 Read the dots
One row per term × outcome type. Green = at least one outcome reached that stage: mapped, assessed, finalized, reviewed.

3 Look for the empty rows
A term with no green in the PLO row is a term with no finalized program-outcome evidence.



Has ≥1 Assessment and Has ≥1 Finalized Result read the same today. See the assumption slide.

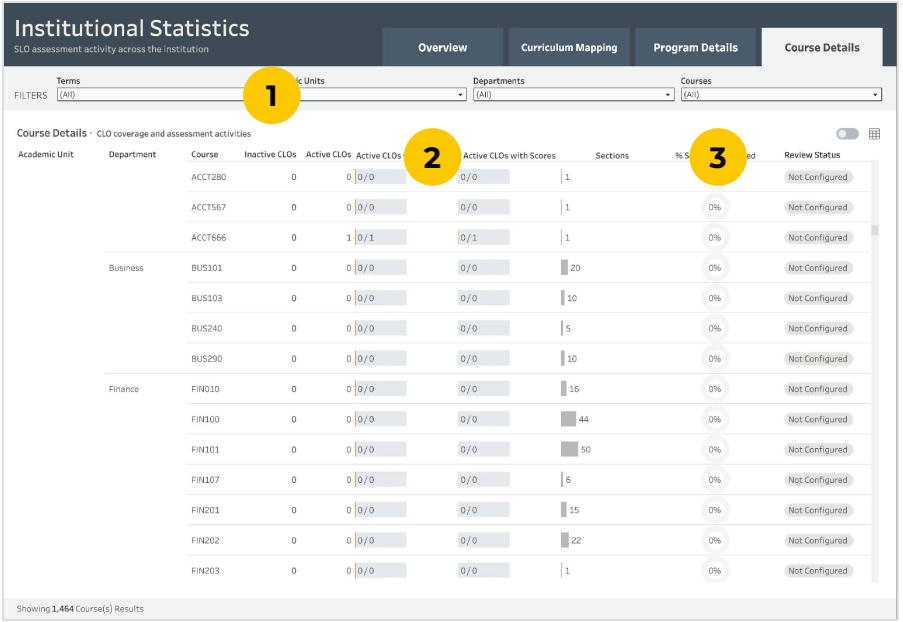
“Which courses have outcomes nobody has mapped or scored?”

WHERE TO LOOK
Course Details tab

1. **Narrow to your area**
   Academic Units / Departments / Courses filters, plus Terms.

2. **Read the x / y columns**
   Active CLOs with Mapping and Active CLOs with Scores, out of the course's active CLOs. 0 / 3 is a course to talk to.

3. **Check the sections**
   Sections, % Sections Assessed, and Review Status per course. Toggle to the table view for reflection and action columns.



Inactive CLOs are archived as of the selected term. They're shown, but excluded from every x / y.

Filter cheat sheet

Terms
Overview, Program Details, Course Details. Multi-select works; Reporting Period shows the range you picked.

Follow Curriculum Map
Overview, Program Details. Yes = direct + mapped evidence counts for ILO / PLO. No = direct scoring only.

SLO Mapping Status
Curriculum Mapping only. Mapped / Unmapped / All. Unmapped shows the outcomes with no CLO evidence path.

Programs · SLO Types · SLO Categories
Program Details. Narrow to one program, one outcome level, or one category of outcomes.

Academic Units · Departments · Courses
Course Details. The usual hierarchy; Courses is a long list, so type to search.

Table / visual toggle
Coverage panels and Course Details. Bars and pills to explore on screen; the table to export to other tools.

Archived outcomes
Not a filter. Handled per term: an outcome archived after the selected term still counts as active for it.

Private outcomes
Not a filter. Faculty-private outcomes are excluded from every count on every tab.

Under the hood

How the key numbers are calculated

The lifecycle: four stages, one formula shape

Total	Distinct outcomes of this type, not archived as of the term, private excluded.	`[is_archived_sf] = 0`
Planned	Today: identical to Assessed. See next slide.	`= Assessed`
Assessed	Outcomes with at least one finalized result in the term.	`AND [is_scored_sf] = 1`
Reviewed	Outcomes whose course had a published course review in the term.	`AND [is_reviewed_sf] = 1`

```
// Assessed – PLO   (ILO: 'ISLO', CLO: 'CSLO')
COUNTD(IF [slo_type_sf] = 'PSLO' AND [is_archived_sf] = 0
  AND IIF([param_CurriculumMapping],
          [is_scored_sf], [is_scored_direct_sf]) = 1
  THEN [Parent Outcome Version Id] END)
```

One row per outcome per term in the SLO Funnel table.

Three rules that apply to every count

Finalized only. An unfinalized score does not count as assessed here.

Parent outcome, not version. Every count is a distinct count of Parent Outcome Version Id, so revised outcomes roll up to one.

Archived is term-aware. An outcome counts as archived for a term only if its archive term started on or before that term.

The one assumption to know: Planned = Assessed

⚠️ Insights doesn't yet track planned assessments in the data lake, so **Planned is an alias of Assessed** for outcomes, programs, courses, and the Program Details dots.

What it means for you

- The Planned and Assessed bars are always the same length
- Has ≥ 1 Assessment and Has ≥ 1 Finalized Result light up together
- % Planned and % Assessed in the table views are one number

What it does not mean

- It does not inflate Assessed; that number is exact
- It does not affect Total, Reviewed, or any mapping count
- It's the same gap Faculty Participation has, seen from the other side

How to work around it

- Read Total → Assessed as the real funnel today
- Keep your assessment plan next to the dashboard for the ‘planned’ denominator
- A true planned stage is on the roadmap; the same fix serves both dashboards

Three mapping numbers, three perspectives

Overview · Mapping Summary

Perspective: CLO

Of the CLOs whose courses ran in the selected terms, how many are mapped to any ILO or PLO?

```
COUNTD(IF [is_mapped_sf] = 1 AND [slo_type_sf] = 'CSLO' THEN [Parent Outcome Version Id] END)  ÷  [# SLO Total - CLO]
```

Course Details · Active CLOs with Mapping

Perspective: Course

Within this course and term, how many of its active CLOs are mapped?

```
COUNTD(IF [is_clo_mapped_cs] = 1 AND [is_archived_for_term_cs] = 0 THEN [Parent Outcome Version Id] END)  ÷  [Active CLOs]
```

Curriculum Mapping · Mapped CLOs

Perspective: ILO / PLO

For this specific ILO or PLO, how many CLOs map into it?

```
COUNTD([parent_slo_id_cm])   →  Mapped if > 0, else Unmapped
```

Same word, three denominators. When someone quotes “% mapped”, ask which tab it came from. Mapping is binary and has no term; a mapping made last year counts in every term. Term-aware mapping is a known gap on the roadmap.

Program Details: what each dot means

Has ≥ 1 Mapping	**CLO:** the CLO itself, or its whole course, maps up to a PLO or ILO. **PLO / ILO:** one of this program's own CLOs, or one of its courses as a unit, maps into it.
Has ≥ 1 Assessment	Today: the same measure as Has ≥ 1 Finalized Result. They will diverge once planned assessments exist.
Has ≥ 1 Finalized Result	At least one outcome of this type has a finalized result from one of the program's sections in this term. Respects Follow Curriculum Map.
Included in ≥ 1 Completed Review	Some section of one of the program's courses has a published review this term.

Reading a row

Program → Term → SLO Type. Each row is one program in one term, for one level of outcome.

Green dot = at least one outcome reached that stage. Light dot = none did.

CLO row: Has ≥ 1 Mapping is usually green; one mapped CLO in any of the program's courses is enough.

A program reaches a course through program → course groups → courses → sections. Courses shared by two programs count for both.

Course Details columns

Inactive / Active CLOs	The course's CLOs, split by archived-as-of-term. Private excluded.
Active CLOs with Mapping	x / y: active CLOs mapped to any ILO or PLO, of all active CLOs.
Active CLOs with Scores	x / y: active CLOs with a finalized result in this section's term.
Sections · % Sections Assessed	Distinct sections; share with a finalized score on an active, non-private CLO.
Sections w/ Reflection · w/ Action (table view)	Sections with at least one reflection; with at least one recommended action.
Review Status	Highest review state across the course's sections.

Not Configured = no review cycle exists for the offering. Not Reviewed = a cycle exists but isn't published. Reviewed = published.

Make it yours

Simple customizations, no developer required

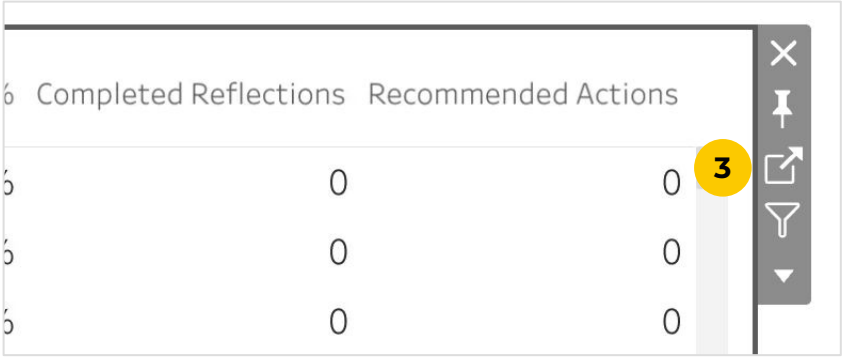
Before you customize

1. **You need a license that lets you edit**
   Editing, in Tableau Cloud or Tableau Desktop, needs a Creator or Explorer license. Not sure which you have? Ask your Tableau admin first.

2. **Work on a copy**
   Download → Tableau Workbook. Tableau Desktop: open the file and edit it. Tableau Cloud: upload it as a new workbook, then edit that one.

3. **Edit the sheet**
   Each chart or table is a worksheet. Hover it on the dashboard → click the ‘Go to Sheet’ icon.

4. **Undo is your friend**
   Ctrl/Cmd-Z undoes anything, including deletes. Ctrl/Cmd-S often.



Hover any table or chart on the dashboard → click the ‘Go to Sheet’ icon

Four customizations, easiest first

1. **Hide the Planned bar until it means something**
   Funnel sheet → Measure Names filter → uncheck Planned.

2. **Change the metric on the Programs card**
   Card sheet → drag e.g. % Program Assessed over % Program Reviewed → edit the caption.

3. **Add a Review Status filter to Course Details**
   Drag Review Status to Filters → Show Filter.

4. **Add a course-name column to Course Details**
   Unhide Course Name → drag it onto Rows next to Course. No formula.

● LIVE

▸ **INSTITUTIONAL STATISTICS**

Live walkthrough

The four customizations, in a copy of the workbook

Hide the Planned bar until it means something

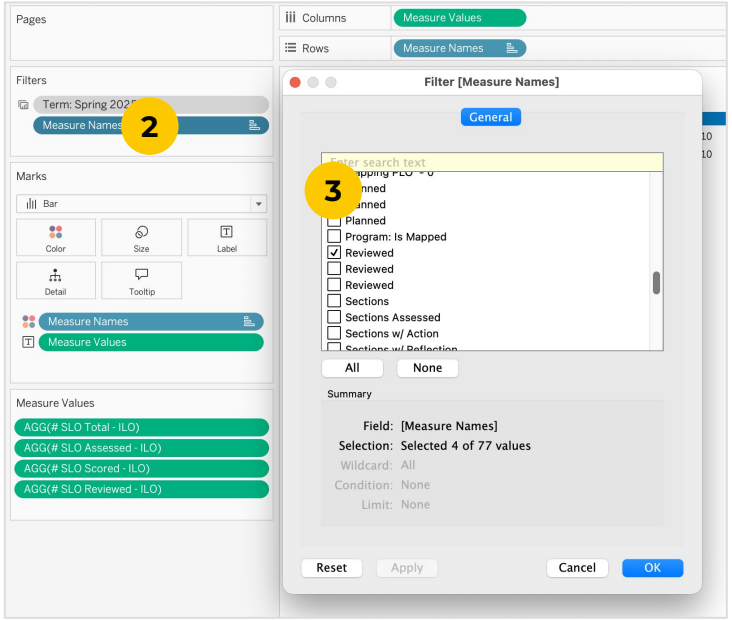
WHY Planned equals Assessed today, and two identical bars invite the question every single time.

1. **Open a funnel sheet**
   'Go to Sheet' from Institutional, Program, or Course Outcomes.

2. **Find the Measure Names filter**
   On the Filters shelf: Measure Names. Right-click → Edit Filter…

3. **Uncheck the checked Planned**
   It is # SLO Assessed under an alias. OK. Three bars remain.

4. **Repeat for the other funnels**
   Three outcome funnels plus the two coverage panels each have their own Measure Names filter.



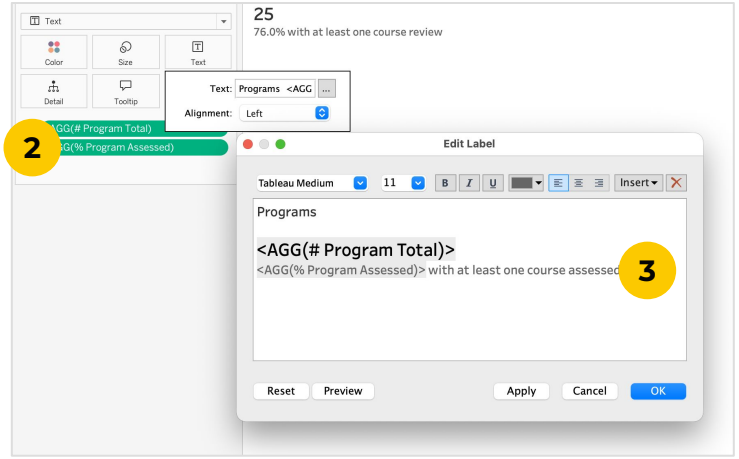
Change the metric on the Programs card

WHY The card shows programs with at least one course review.
Your institution may prefer % assessed or % planned.

1 **Open the card sheet**
'Go to Sheet' from the Programs card at the top of the Overview.

2 **Swap the measure**
Data pane → drag the measure you want (e.g. % Program Assessed) onto where % Program Reviewed sits to replace it.

3 **Edit the caption**
Click the Text icon on the Marks card and change "with at least one course review" to "with at least one course assessed".



Add a Review Status filter to Course Details

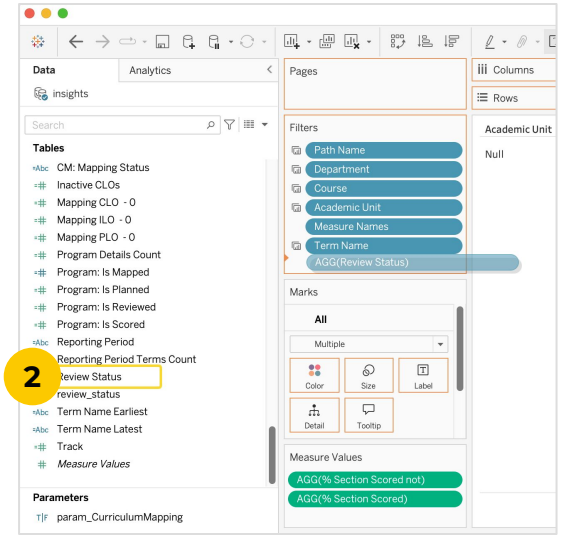
WHY Not Configured means no review cycle exists. That's a setup job, and someone needs the list.

1. **Open the table sheet**
   'Go to Sheet' from the Course Details table.

2. **Drag Review Status to Filters**
   Data pane → Review Status → drag it onto the Filters shelf. Click the Use all radio → OK.

3. **Add it to the dashboard**
   Back on the dashboard, click the Course Details table so its icons appear. Click the ▾ → Filters → Review Status.

4. **Format and position it**
   Filter ▾ → Single Value (Dropdown). Drag it next to the other Course Details filters.



Add a course-name column to Course Details

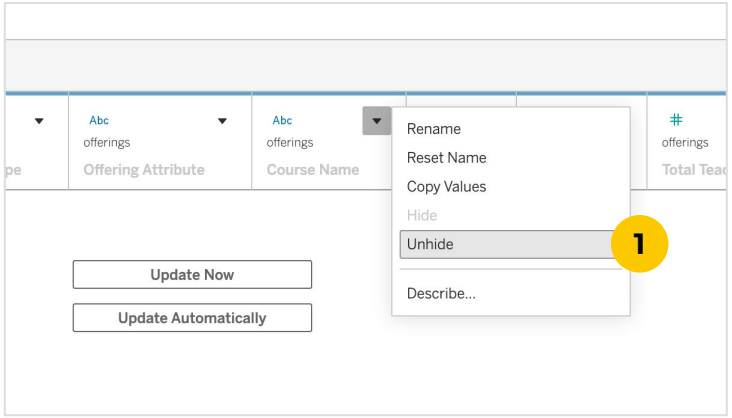
WHY Course codes are fine for chairs; the provost wants to read "Introduction to Accounting", not ACCT110.

1. **Unhide the field**
   Data pane → under offerings, find Name (offering) → right-click → Unhide.

2. **Open the table sheet**
   'Go to Sheet' from the Course Details table.

3. **Drag it onto Rows**
   Drop Course Name on the Rows shelf, right after Course. The column appears; widen it if it truncates.

4. **Check the table view too**
   The table-view sheet is separate, so repeat there if you use it.



Known gaps & what's next

What's coming

Available now

- Four tabs: Overview, Curriculum Mapping, Program Details, Course Details
- Lifecycle funnels and coverage for ILO, PLO and CLO
- Follow Curriculum Map switch: direct vs. mapped evidence
- Export any view as image, spreadsheet, or PDF
- Workbook file you can copy and customize

What's next

Term-aware mapping

Today a mapping has no term: made once, it counts in every term. Coming: mappings tied to terms, so a term shows only the map that was in place then.

Planned assessments

Today Planned = Assessed. Coming: a real planned stage, so the funnel shows what was scheduled and never scored.

Questions?

Q&A · ~5 minutes

Contact
Dr. Erin Bentrim
ebentrim@elumen.info

Thank you!

For more information:

www.elumenconnect.com/insights