

Approved by Executive Sponsors April 2026

CEMI DEEP Value Realization: Key Performance Indicators (KPIs)

The following KPIs reflect a refined set of measures incorporating feedback from the DEEP PMO, select Core Working Group team members, Project Leadership Team (PLT), AAD Senior Leadership Team (SLT) and CEMI DEEP Executive Sponsors. They are presented for consideration to the CEMI DEEP Executive Sponsors for final approval as CEMI DEEP KPIs within the broader CEMI Program.

The KPIs are organized into three primary categories:

- **Prioritized KPIs** (*identified by DEEP Executive Sponsors and reviewed by DEEP PLT*)
- **Deprioritized KPIs** (*KPIs determined to be unmeasurable or otherwise unsuitable as a project KPI*)

These KPIs reflect the metrics identified during our earlier business case development efforts, along with additional metrics that were drawn from Huron's KPI library. These KPIs align with the broader CEMI Program's KPI categories and structure and will leverage a similar tracking framework. The intent is to identify a limited and impactful set of KPIs that:

- Are measurable using existing systems and data sources
- Demonstrate meaningful organizational impact across AAD, Cornell Lab, and WCM
- Align closely with the overarching goals and strategic objectives of the CEMI Program

Each KPI includes considerations informed by feedback from Cornell stakeholders, as well as indicators of commonly used metrics in comparable initiatives (Leading Practice). Check marks by area (CEMI, AAD, WCM, and Cornell Lab) indicate where leaders from each group indicated interest in a particular KPI.

Prioritized KPIs

No.	KPI Description	Considerations	Leading Practice	CEMI	AAD	WCM	Lab
1	Increase in overall number of prospects identified for qualification (and by level)	May be difficult to measure based on definition of pipeline. This does extend into the effective use of additional tools, such as wealth screening and AI capabilities.	X		✓	✓	✓
2	Increase in Retention Rates	This metric was flagged by Cornell Lab specifically for consideration. This is less relevant to WCM.			✓		✓
3	Increase in the average size of major gifts by year 5	This metric is sourced from the original business case developed prior to selection. Question regarding whether this is better served as overall higher revenue (WCM).			✓	✓	
4	Incremental increase in unrestricted revenue by year 5 following implementation	This metric is sourced from the original business case developed prior to selection.			✓	✓	
5	Incremental increase in matching gifts by year 5 following implementation	This metric is sourced from the original business case developed prior to selection. This has limited impact for WCM.			✓		✓
6	Decrease in the total number of hours required to reconcile operating systems to the GL.	This was identified by AAD as a critical efficiency gain, however, there are limitations to reporting capabilities to effectively track and measure the baseline.			✓		
7	Decrease in number of shadow systems	This metric has a direct tie back to overarching CEMI objectives.	X	✓	✓		
8	Incremental increase in annual giving revenue by year 2 following implementation	This metric is sourced from the original business case developed prior to selection. Noted as important for WCM.			✓	✓	

No.	KPI Description	Considerations	Leading Practice	CEMI	AAD	WCM	Lab
9	Increased integration of information with other systems (data volume and/or number of integrated systems)	This metric could support understanding of enterprise-level data availability and enrichment of various data sources. Noted as a priority for WCM.				✓	
10	Increase in Engagement (of Clicks/Interactions)	Difficult to measure in current state but will be more easily measurable in future for email content. There can be inconsistency from year to year in how these types of metrics are defined based on the needs of the business. Noted as a priority for Cornell Lab.			✓		✓

Deprioritized KPIs

No	KPI Description	Considerations	Leading Practice	CEMI	AAD	WCM	Lab
11	Decrease in number of duplicate records measured in number of duplicate records	While a metric of interest and easy to measure, there is recognition that this metric may skew in favor of AAD due to known issues in PSCR. <i>Reason for de-prioritization: understood to be an outcome of the project, particularly for AAD but does not rise to the level of a priority KPI.</i>		✓			
12	Increase in completeness of email information measured in number of active email addresses	This metric could extend to the impact of a more connected ecosystem through the integration with Marketing Cloud. <i>Reason for de-prioritization: Does not rise to the level of a priority KPI.</i>			✓		
13	Increase in efficiency of processing gifts	Generally considered a valuable metric, with some alignment needed around establishing the baseline definitions. <i>Reason for de-prioritization: Given difficulty in measuring baseline</i>	X		✓	✓	

No	KPI Description	Considerations	Leading Practice	CEMI	AAD	WCM	Lab
		<i>metrics and intersection with improvements to reconciliation process, reconciliation was prioritized.</i>					
14	Decrease in system related costs through support of fewer systems	This metric could provide valuable insights regarding overall technology investments in support of advancement and aligns with overall CEMI objectives. <i>Reason for de-prioritization: Recognition that costs may increase as a result of different contracting types related to cloud-based technology.</i>	X	✓	✓		
15	Total Cost of Ownership Delta	This was specifically prioritized by WCM and extends the tracking and definitions above to include operational costs associated with maintaining the new ecosystem. <i>Reason for de-prioritization: The accounting infrastructure does not exist across the areas to support this reporting.</i>	X			✓	
16	Improved Constituent Experience	This metric was identified by the Senior Leadership Team. <i>Reason for de-prioritization: While we expect an improvement to the constituent experience through the implementation of a Portal, current systems don't allow for establishment of baseline metrics.</i>			✓		
17	Donors Giving to Capacity	This metric was identified by the Senior Leadership. <i>Reason for de-prioritization: The recommendation is to consider this metric for possible future evaluation but does not yet rise to the top for KPIs at this time.</i>			✓		