

AWARDSRING

CUSTOMER-ONLY EVENT

# Welcome.

*We're starting in just a moment.*

This event is exclusively for AwardSpring customers.

JUNE 4, 2026

FUND PLATFORM LAUNCH

11:00 AM ET

AWARDSRING

TODAY'S SPEAKER

# Alex Stepien

CEO, AwardSpring

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*Alex Stepien is the CEO of AwardSpring, and has been building leading edtech businesses for almost 20 years. Alex joined AwardSpring in late 2024.*



JUNE 4, 2026

FUND PLATFORM LAUNCH

CUSTOMER WEBINAR

# We have three things to share with you today.

01

## The Fund Platform

Unifying the Donor Fund lifecycle

02

## AwardSpring Alpha

Raise your hand to try the latest and greatest

03

## AI Summer School

Class is in session.  
Up your AI game and elevate your impact.

# Higher education is at an inflection point.

## State aid is declining.

Public funding per student keeps slipping, and the gaps are widening.

## Federal policy is uncertain.

Institutions can't plan a decade out on aid rules that shift year to year.

## Tuition sensitivity is rising.

Families weigh cost harder than ever, and walk when the math doesn't work.

*Private scholarship dollars are one of the most powerful levers institutions have left, but most aren't treating them that way.*

# Donors have been treated as second fiddle for too long.

- Scholarship funds sit inside Financial Aid, managed as compliance items, not donor relationships.
- The donor gives. The fund awards. No one closes the loop.
- Advancement doesn't know what FA awarded. FA doesn't know what Advancement promised. Finance sees neither in real time.

**This isn't a technology problem.**

*It's a structural one.*

Three offices, three systems, no shared view of a dollar that was given in trust.

# The cost of the status quo.

**\$700M**

**Unawarded every year**

Estimated scholarship funds that never reach a student across U.S. higher ed.

**71%**

**Foundations affected**

Had at least one fund go unawarded in the last year.

**37%**

**No donor protocol**

Had no process to tell the donor when a fund went unawarded.

*Not because institutions don't care, because the system was never built to prevent it. The donors funding these scholarships deserve better.*

AWARDSPRING

# What it looks like when it works.

- A scholarship is awarded, and the donor hears about it within days, not months.
- The fund is tracked in real time. Financial Aid, Advancement, and Finance share one view.
- When it's time for donors to give again, the conversation is about impact, not apology.

*This is what your institutions deserve to deliver. This is what we built.*

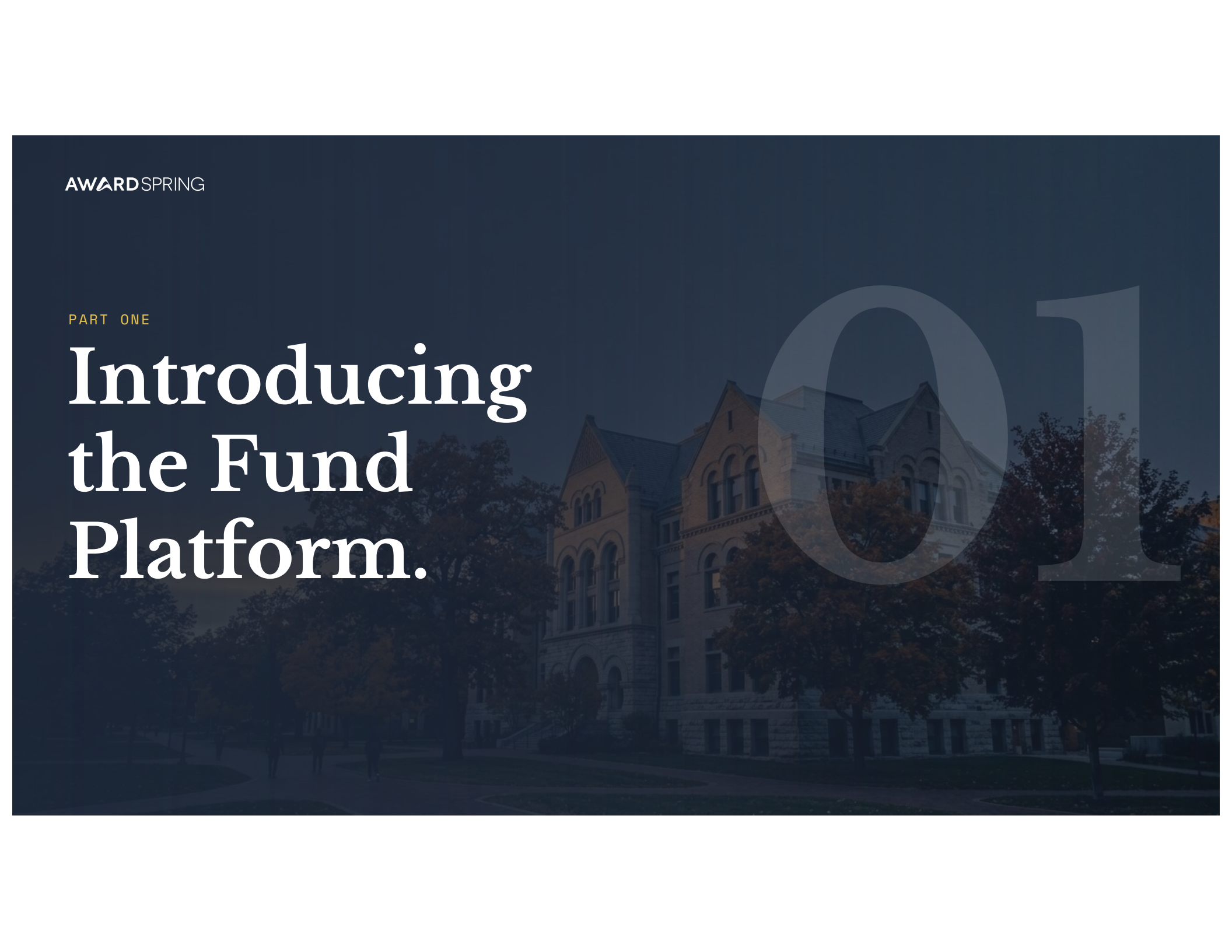


AWARDSPRING

PART ONE

# Introducing the Fund Platform.

01



# What we built.

Donor Management



Scholarship Management



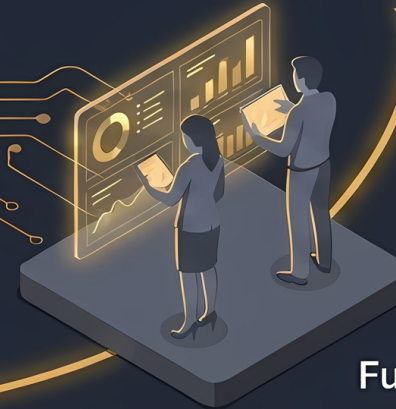
SpringIQ



Donor Experience & Stewardship



Fund Management



AWARDSPRING

# SpringIQ

AwardSpring's AI, built into every product, building toward one outcome: nothing slips.

TODAY

## A second set of eyes.

Briefs, scores, drafts, and flags assembled from your real records in seconds. Fact-checked, never guessed.

NEXT

## Autopilot where you want it.

Co-pilot or autopilot, per workflow. The rote work runs itself; your team keeps the judgment calls.

THE DESTINATION

## Nothing slips.

Every eligible student surfaced. Every fund deployed. Every donor told what their gift did. Unawarded dollars become exceptions, not statistics.

*We named the cost of the status quo. SpringIQ is how it ends.*

AWARDSPRING

FUND PLATFORM · TODAY

# You're already on the platform.

Scholarship  
Management  
LIVE

Donor  
Management  
LIVE

Donor Experience &  
Stewardship  
SUMMER 2026

Fund  
Management  
AUTUMN 2026

**SpringIQ** · the AI layer running across every product

**Fund Platform** · one data graph, every dollar connected

INTEGRATES WITH YOUR STACK

blackbaud

ellucian

workday

MailChimp

INTUIT  
quickbooks

FundMiner

slate

...and so much more

# What's coming next.

## Donor Experience & Stewardship

COMING SUMMER 2026

## Fund Management

COMING AUTUMN 2026

*And there's a way to be first to everything new, including these. That's what we want to show you next.*

FUND PLATFORM · COMING SUMMER 2026



# Donor Experience & Stewardship

*A major-gift experience for every donor, at any gift size.*

DONOR EXPERIENCE & STEWARDSHIP · SUMMER 2026

# A major-gift experience for every donor, at any gift size.

Four in five first-time donors never give again, not because they stopped caring, but because no one ever showed them what their gift did.

Stewardship doesn't scale, so the personal touch reaches only major donors. Donor Experience & Stewardship gives every donor that experience, at any gift size, for every fund, not just scholarships.

First-time donor retention: 13.8%; overall: 42.9%. Fundraising Effectiveness Project, 2024.

The screenshot shows a digital impact report for the Hartwell Engineering Fund. At the top, it identifies the donor as 'Eleanor' and states 'Your gift is still working.' Below this, a group photo of students is shown. A central dashboard displays four key metrics: 17 students funded since 2018 (4 graduated, 13 active), a 96% scholar retention rate (vs. 81% university average), \$312K deployed to tuition & labs (\$250K principal, 4.6% payout), and a 3.7 average scholar GPA (2 in honors research). The 'Meet your scholars' section features three student profiles: Maya Chen (Mechanical Engineering, GPA 3.9), Daniel Okoro (Electrical Engineering, GPA 3.8), and Sofia Reyes (Biomedical Engineering, GPA 3.7). Each profile includes a photo, name, major, GPA, a quote about the scholarship's impact, and a key achievement. A 'Your giving history' box at the bottom right shows a total of \$312,000.

Coastal Carolina University | Office of Advancement | My Impact | Scholars | Giving | Messages | Concierge | EH

TEAL NATION - ENDOWED PARTNER

## Thank you, Eleanor. Your gift is *still working.*

Eight years on, the Hartwell Endowed Engineering Fund is shaping a new generation of engineers at Coastal Carolina — students you'll meet below.

[Give again](#) | [Download impact report](#)

**17** Students funded since 2018  
4 graduated | 13 active

**96%** Scholar retention rate  
vs. 81% university average

**\$312K** Deployed to tuition & labs  
\$250K principal | 4.6% payout

**3.7** Average scholar GPA  
2 in honors research

### Meet your scholars

The students your fund supports this year. Their stories are pulled from real outcome data by SpringIQ. [View all 13 scholars →](#)

**Maya Chen**  
Mechanical Engineering - GPA 3.9  
"The Hartwell Fund let me stop working night shifts and join the solar-vehicle team. We placed second at nationals."  
NASA internship offer - Fall 2026

**Daniel Okoro**  
Electrical Engineering - GPA 3.8  
"First in my family to study engineering. This scholarship is the reason I'm graduating debt-free this spring."  
Graduating May 2026 - honors

**Sofia Reyes**  
Biomedical Engineering - GPA 3.7  
"I'm building a low-cost prosthetic in the lab your fund equipped. None of this happens without you."  
Undergrad research grant recipient

**NOTE FROM YOUR SCHOLAR**

**Your giving history**  
**\$312,000**

DONOR EXPERIENCE & STEWARDSHIP · WHAT IT DOES

# Stewardship that runs itself.

- A living donor portal for every donor, not just major gifts
- Impact stories generated from real fund and outcome data
- An automated thank-you loop, quality-checked and routed
- A communication cadence so no one slips through the cracks
- A donor self-service concierge

**AWARD SPRING** Search scholarships, applicants, donors... jane.doe@university.edu

**Thank-You Loop Manager**  
Autonomous closed loop — every gift gets a quality-checked thank-you, routed to the right channel. Loop settings

Thank-you completion rate: **84%**  
Industry baseline 27% · marked in amber

In the loop now: **312** (across 5 stages)

Routed to donors this week: **148** (+22 vs last week)

Avg. turnaround: **2.1d** (from 19 days manual)

Requested (64)	Collected (48)	AI Quality Review (22)	Polished (30)	Routed to donor (148)
<b>AR</b> Ana Ruiz STEM Leaders - \$1,200 Requested 2h ago	<b>RB</b> Robert Bynum Bynum Family - \$8,000 Student note received	<b>DK</b> Dana Kim's letter First-Gen Fund - \$200 Flagged — generic & impersonal Reviewing below ↓	<b>EH</b> Eleanor Hartwell Hartwell Fund - Major Polished - awaiting staff	<b>JP</b> James Park Annual Fund - \$200 Emailed - opened 1d ago
<b>TO</b> Theo Glass Annual Fund - \$500 Requested 4h ago	<b>MV</b> Maria Vasquez STEM Leaders - \$2,500 Video clip received	<b>JL</b> Jordan Lee's letter Arts Fund - \$450 Passed quality check	<b>CW</b> Carmen Whitfield Rural Excellence - \$700 Polished - auto-route	<b>SO</b> Samuel Okafor Community Impact - \$3,000 Mailed printed card

62 more requested

**SpringIQ flagged this thank-you — and rewrote it**  
Dana Kim - First-Gen Fund - \$300 gift - quality score lifted 41 → 92 Needed polish

ORIGINAL DRAFT · SCORE 41	SPRINGIQ POLISH · SCORE 92
Dear Donor,  Thank you for your generous gift. It means a lot to me and will help with my education. I really appreciate your support.  Sincerely, A Student	Dear Mr. Park,  Thank you for the First-Gen Fund scholarship. As the first in my family to attend college, your gift covered the books I'd been putting off buying — and let me say yes to a research role this spring.  With gratitude, Dana Kim, Class of 2027

Added the donor's name and the specific fund — pulled from records. Replaced 3 generic phrases with a concrete, verified detail.

Edit Approve polish

Logout

DONOR EXPERIENCE & STEWARDSHIP · WHY  
AWARDSRING

# The story lives where the award happens.

Stewardship is only as good as the story you can tell, and most systems can't tell one, because the proof lives in the scholarship office, not the donor database.

AwardSpring already has it: who a fund supported, what it funded, and what happened to the students. That's the raw material for every impact story, every portal, every thank-you, and no standalone donor CRM has it.

Coastal Carolina University Office of Advancement JP

ANNUAL FUND DONOR

**James, your \$200 did *real things* this year.**

You gave once. Here's exactly where it went — no form letter, no guesswork.

<b>4</b> students your gift helped fund	<b>100%</b> went straight to scholarships	<b>3<sup>rd</sup></b> year giving — thank you
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Coastal Carolina Annual Fund

ONE OF YOUR STUDENTS

**Tasha Williams**  
First-Generation Nursing Student - Sophomore

*"The annual fund covered my textbooks and a chunk of housing. It doesn't sound like much, but it's the reason I didn't have to drop a class to pick up extra shifts."*

TW Tasha plans to work in pediatric care after graduating in 2028.

“

Mr. Park — I don't know if donors ever hear this, but the small gifts add up to something huge for someone like me. Thank you for not skipping us.

TW **Tasha Williams**  
Annual Fund recipient - Class of 2028

Your giving Lifetime: **\$600**

DONOR EXPERIENCE & STEWARDSHIP · WHO IT'S FOR

# Who it's for.

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## Stewarding by hand

Advancement and foundation offices still building stewardship and impact reports manually.

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## Stitching tools together

Teams on separate tools outside AwardSpring, frustrated with the integration and workflow.

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## Going personal and digital

Offices that want a more personal, more digital donor stewardship experience for every gift.

FUND PLATFORM · COMING AUTUMN 2026



# Fund Management

*One real-time view of your entire fund portfolio.*

# One real-time view of your entire fund portfolio.

Every fund touches three offices: the one that raised it, the one that puts it to work, the one that accounts for it. None of them share a system, so answering the basics takes an analyst, a spreadsheet, and a week, and most teams never ask.

Funds drift, and hundreds of millions in scholarship dollars go unawarded every year.

**AWARD SPRING** Search scholarships, applicants, donors... jane.doe@university.edu

FUND MANAGEMENT · FUNDS · ADVISOR CONSOLE

**Fund Advisor Console** Open in reporting + New fund

Per-fund command center — health, trends & the actions queued against it.

Filter 540 funds...

- Eleanor M. Hartwell Engineering Scholarship \$1.84M - 59% used
- Veterans Memorial STEM Award \$840K - underwater
- Peoria County First-Gen Fund \$2.10M - 41% used
- Lindgren Family Nursing Scholarship \$950K - 94% used
- Margaret Cho Arts Endowment \$1.21M - 88% used
- Westmore Presidential Scholars \$5.40M - 97% used
- Ruiz Bilingual Education Award \$430K - 71% used
- Carver Agricultural Sciences Fund \$1.55M - 83% used

**At risk** Fund #EENG-0142 - Engineering - Endowed 2003

**Eleanor M. Hartwell Engineering Scholarship**

Restricted endowment supporting junior & senior mechanical-engineering majors with demonstrated need.

Health score / 100: 62 (down 8 pts this cycle)

BALANCE	SPENDABLE	AWARDED	UTILIZATION
FY26	FY26	FY26	
\$1.84M	\$87.4K	\$52.0K	59%

Root causes detected: SPRINGLY, Criteria too restrictive, Award below max, Single-major eligibility

**Three-cycle trends** Where the health score is coming from

- Utilization: 59% (falling 4 cycles)
- Awards / year: 6 (capacity for 9 / yr)
- Balance trajectory: \$1.84M (↑ +18% over 5 yrs)

**Pending recs**

- Criteria Optimization**: Drop the single-major restriction to all of Engineering — projected utilization 59% → 88%, +3 awards/yr. [Review] [Dismiss]
- Utilization Maximization**: \$35.4K spendable still unawarded for FY26 — 4 eligible finalists identified in the review queue. [Match now] [Later]

**Stewardship queue** View all

- MB: Send FY25 impact report (Hartwell family - due in 8 days)
- DR: Thank-you letter approved (Recipient: J. Okafor - sent)
- TS: RSVP — donor luncheon (Awarding response: Apr 18)

Logout

FUND MANAGEMENT · WHAT IT DOES

# See it, understand it, act on it.

- One fund-health view, every fund scored with the reason why
- Restrictions and spend flow, monitored against policy
- Plan the future: model the what-if before you act
- AI that recommends the fix, with you approving every change

**AWARD SPRING** Search scholarships, applicants, donors... jane.doe@university.edu

FUND MANAGEMENT > SPRINGIQ AGENTS > CRITERIA OPTIMIZATION

**Recommendation detail** Agent #CO-2291 · generated 2 hours ago · awaiting your decision

CRITERIA OPTIMIZATION AGENT 94% confidence

**Widen Peoria County First-Gen Fund to statewide — unlock 47 eligible students**  
A geographic restriction is keeping this \$2.10M fund 59% under-awarded. Expanding to Illinois resident first-gen students preserves donor intent while reaching a viable pool.

**Eligible-student pool**  
Applicants meeting all criteria in the FY28 cycle

Current · Peoria County  
**12**  
eligible · 2 awarded / yr

Proposed · Illinois statewide  
**59**  
eligible · +47 students unlocked

**Projected utilization lift**  
Modeled over the next four award cycles

Utilization 41% → 87%  
**+46 pts**  
2 → 7 Awards per year  
**\$71K**  
Additional spend reaching students / yr

**Agent reasoning**

- Fund has awarded only 2 of a possible 7 scholarships/yr for 4 consecutive cycles — a persistent, not seasonal, shortfall.
- Cross-referenced the SIS: the Peoria County first-gen applicant pool has shrunk 38% since the fund was established in 2016.
- Donor gift agreement language permits "the county or surrounding region" — statewide expansion is within the documented intent.
- Comparable Illinois funds widened from county to state see a median +44 pt utilization lift with no donor objections on file.
- No SFFA / protected-class criteria involved — this is a geographic change only, clearing automated compliance review.

**Donor-ready proposal** AI DRAFT

**Proposed Modification — Peoria County First-Gen Fund**  
Prepared for the Hartwell-Greene family · Westmore University Foundation

In keeping with the donors' intent to support first-generation students of limited means, the Foundation proposes the following amendment to the eligibility criteria:

**Geographic eligibility**  
Open to residents of Peoria County, Illinois; the State of Illinois; who are first-generation college students.

All other criteria — first-generation status, demonstrated financial need, and 2.8 minimum GPA — remain unchanged. This amendment is expected to fund 5 additional students per year while honoring the fund's founding purpose.

Authorized signature \_\_\_\_\_ Date \_\_\_\_\_

Generate PDF

Logout

# From a fund's balance to what to do about it.

AWARDSPRING
Search scholarships, applicants, donors...
jane.doe@university.edu

Dashboard
Scholarships
Donors
\$ Funds
Tasks
Engagement
Reporting
Configuration

FUND MANAGEMENT > SPRINGIQ AGENTS > FUND RECOVERY

**Fund Recovery Workspace**
Value history
Approve recovery plan

Modeling the paths back above historic-dollar-value for an underwater endowment.

● Underwater · 3 quarters
Fund #STEM-0077 · Endowed 2009

CURRENT VALUE	HISTORIC-DOLLAR-VALUE	GAP TO HDV	RECOVERY ETA
\$0.96M	\$1.04M	-\$80K	~2 qtrs

**Recovery waterfall** + SPRINGIQ MODELED

How the recommended plan returns the fund above HDV

\$1.04M	-\$80K	\$0.96M	+\$50K	+\$60K	\$1.07M HDV \$1.04M
Original gift	Market loss	Current value	Market recovery	Donor top-up	Projected

**Modeled recovery paths**

SpringIQ ranked four options by time-to-HDV and donor impact

Spending freeze

Pause awards 4 quarters; rely on market recovery only.

Above HDV in ~6 qtrs

Donor top-up

Solicit \$60K commemorative gift from veterans alumni circle.

Above HDV in ~2 qtrs

Criteria modification

Reduce award size \$5K->\$3.5K to slow the spend rate.

Above HDV in ~5 qtrs

Consolidation

Merge into Westmore STEM Excellence Fund (last resort).

Resolves immediately

AwardSpring sits where funds are actually awarded, so it already knows which funds matched students, which sat idle, and why. That's the difference between reporting the past and recommending the fix, and every award cycle makes it smarter.

# Who it's for.

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## Living in a mega-spreadsheet

Organizations tracking fund balances and future availability in one giant spreadsheet.

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## Fighting for fund visibility

Teams with hard handoffs to finance or central leadership who need real insight into fund health.

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## Losing funds to low utilization

Leaders facing poor fund utilization and weak donor retention, especially in a down market.

Donor Management



Scholarship Management



SpringIQ



Fund Management



Donor Experience & Stewardship



AWARDSPRING

AWARDSPRING

PART TWO

# AwardSpring Alpha.

*Be first. Help shape what's next.  
Opt in for early access to the latest and greatest*

02

# We've never shipped faster.

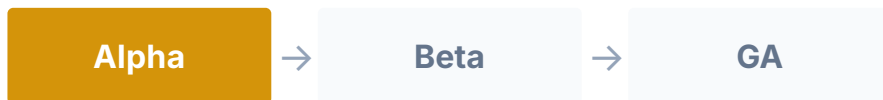


*We know not everyone is comfortable with the rapid pace of change, so we're giving you a way to raise your hand if you want to try the latest and greatest.*

# We're building what comes next. And we want our customers to help shape it.

Introducing the **AwardSpring Alpha program**, the opt-in lane for customers who want to be on the front edge of everything new on the Fund Platform.

# What Alpha is.



*Alpha is the only one you choose: opt in to see new capabilities first.*

- See it first.
- Shape the roadmap. Your feedback routes straight to product.
- A direct line to the product team: a roundtable and feedback channel, not a ticket queue.
- Recognized as an innovator institution.

## HONEST BY DESIGN

Alpha features are early: they evolve, and occasionally they break. Support is best-effort. Don't bet mission-critical work on them yet. When they're ready, they graduate.

**Eligibility:** any customer in good standing. Not a pricing or packaging change. Participation costs nothing.

# The first wave: Major donor management enhancements, and our integrations marketplace

## Donor Management

RELEASING IN THE FIRST WAVE

- Unified donor profiles with SpringIQ AI
- Communications engine
- Automations
- Modern payment pages
- Events

## Integrations Marketplace

ACROSS THE WHOLE PLATFORM, NOT JUST DONOR MANAGEMENT

- **Advancement CRM** · Blackbaud, HubSpot
- **Finance & ERP** · QuickBooks, Ellucian
- **Student Information Systems**
- **Giving, Events & P2P** · GiveCampus, Classy, OneCause
- **Payments**
- **Marketing & Email** · Mailchimp, Constant Contact
- **Donor Enrichment & Wealth** · iWave, DonorSearch, Clearbit

# How to join.

We're seeking volunteers: no application, no invite. Three independent ways to opt in; none required before the others.

01

## Sign up on the launch landing page

The fastest way in: register the program for your account.

02

## An admin enables Alpha account-wide

Optional. Turn the whole account on at once.

03

## Turn on individual features in-product

Try a single capability without flipping everything.

**Sign up for Alpha**

[awardspring.com/alpha](https://awardspring.com/alpha) → Sign up once; each new Alpha release is brought to you to try.

**Pricing:** feature access is always free during Alpha. We'll communicate any add-on features before institutions try them.

AWARDSPRING

PART THREE

# AI Summer School.

*Get your team fluent in working with AI.  
Practical, hands-on, higher-ed lens.*

03

AI has fundamentally changed  
how we operate at AwardSpring.

We want our customers to experience that too.

*That's why we built AI Summer School.*

# Introducing AI Summer School.

AI Summer School teaches practical AI through a higher-ed lens, helping your team make sense of a fast-moving AI landscape. It's real AI fluency for your team, not AwardSpring product training.

## 5-week term cohort

Weekly live sessions, peer work, assignments, and a graduation artifact: your first working agent.

## Led by James Francis, CAIO

Alex bookends kickoff and graduation; guest experts headline modules.

TERM 1

July 14 – Aug 11, 2026

Cohorts form after a 2-minute placement survey. We put you in the right room.

**\$799** / seat

**Free for Pro & Enterprise customers**

One seat per account; bring your team for \$799 each.

# What you'll learn.

## Practical AI fundamentals

Prompting, and what an agent / MCP / skill actually is.

## Build your first working agent

Hands-on: you leave with something real.

## AI workflows for FA & Advancement

Applied to the offices you actually run.

## Change management & adoption

Get a team to actually use it, not just admire it.

## Light governance

Sensible guardrails without slowing everything down.

## Tool roundups

What's worth your time, and what isn't.

*Curriculum is modular, assembled around what the placement survey reveals about your cohort.*

# Claim your seat.

**June 4 opens intake only.** Take the 2-minute placement survey today. No payment or cohort selection yet.

You'll hear which cohort by June 20. Term 1 starts the week of July 14, 2026.

Take the placement survey

[awardspring.com/ai-summer-school](https://awardspring.com/ai-summer-school)

# What this all means for you.

## **01** Fund Platform is live

Your products are already on it, nothing to migrate, nothing to buy.

## **02** Alpha program

Opt in if you want to see and shape what's next. Or do nothing.

## **03** AI Summer School

Take the placement survey to claim a seat for Term 1.

AWARDSPRING

NEXT STOP

# We'll be at NASFAA on June 29.

*Come find us. We'll be showing the Fund Platform  
on the floor.*

Our Stewardship Research Report drops that day, too.



AWARDSRING

Thank you for being  
an AwardSpring  
customer.

*We built this for you.*

Replay link sent within 24 hours.

JUNE 4, 2026

awardspring.com

