CATALYST

Catalyst 2025
Atlanta, GA

Pitch to Purpose: Get funding to expand with EnergyCAP

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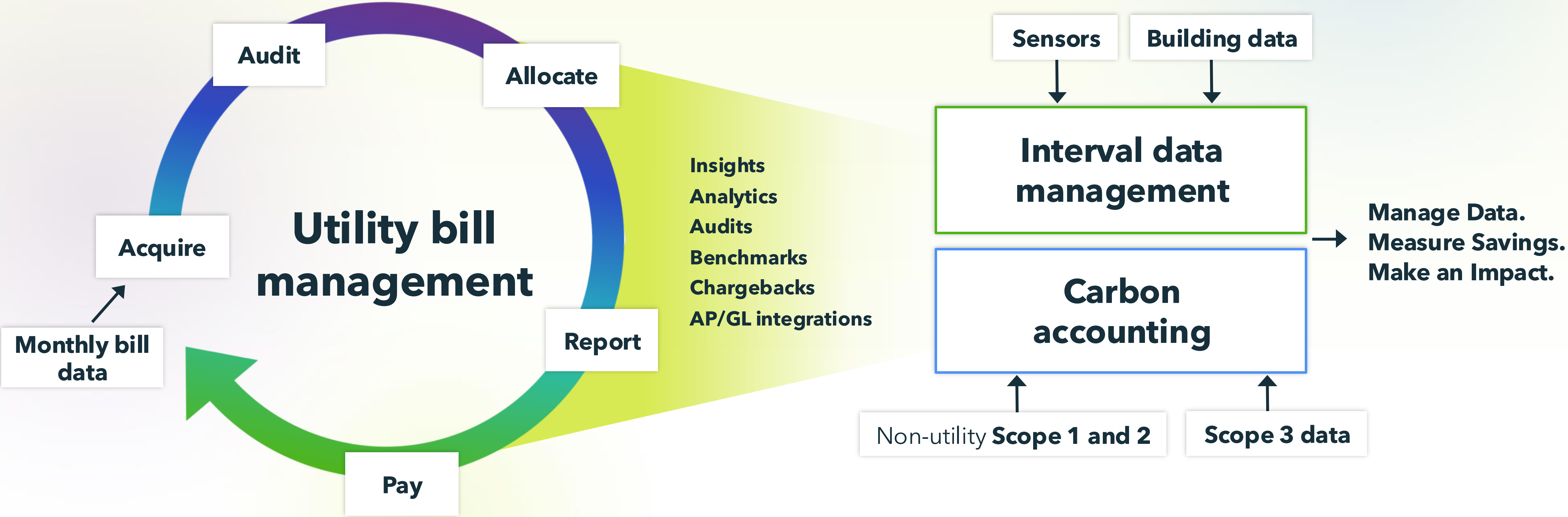
Agenda

- ✓ EnergyCAP savings maturity model
- ✓ Outline key benefits and ROI
- ✓ Craft a persuasive proposal
- ✓ How CSU Fullerton did this last year!
- ✓ Q&A

EnergyCAP Solutions



Utility bill management

- Audit
- Allocate
- Report
- Pay
- Acquire

Monthly bill data

Insights
Analytics
Audits
Benchmarks
Chargebacks
AP/GL integrations

Sensors

Building data

Interval data management

Carbon accounting

Non-utility **Scope 1 and 2**

Scope 3 data

Manage Data.
Measure Savings.
Make an Impact.

EnergyCAP Savings Maturity Model

Maturity Stage	**Product/Service**	**Estimated Additional Savings**	**Cumulative savings/ cost avoidance**	**Key Value Drivers**
1. Utility foundation	**Utility Bill Management (UBM)**	1–3%	1–3%	- Data consolidation - Time savings - Low-hanging fruit from bill auditing & benchmarking
2. Automate data	**Bill CAPture + Managed Services**	+2–5%	3–8%	- Automation of bill entry - Reduced manual effort - Additional billing errors identified
3. Streamline payment	**Bill Payment**	+3–4%	6–10%	- Eliminate late fees - Streamlined processing - Time savings in AP workflows
4. Monitor usage	**Smart Analytics**	+5–10%	11–20%	- Energy usage monitoring - Efficiency upgrades (CAPex) - Operational savings (schedules, set points, proactive management)
5. Comply & report	**CarbonHub**	+1–3%	**12–25+%**	- Simplified ESG & GHG reporting - Time savings - Improved compliance readiness

* Savings dependent on internal teams or consultants acting on data provided by EnergyCAP software

Justification & overcoming objections

Common concerns	*“It’s too expensive”* *“We’re fine with spreadsheets”* *“We don’t have the resources”*
Counter strategies	▪ Demonstrate fast ROI and long-term savings ▪ Outline the opportunity cost of “not acting” ▪ Highlight time and cost savings with measurable metrics ▪ Present real-world success stories
Consensus building tips	▪ Build a coalition of champions across facilities, finance, IT, and sustainability team ▪ Present a clear, unified vision for operational excellence

Craft a winning proposal

Scan QR to get a **proposal PowerPoint template**

Executive summary
Define objectives and key benefits

Current challenges
Detail manual inefficiencies and data fragmentation

Proposed solution
Introduce energy management software (EnergyCAP) and its features

Cost benefit analysis
Outline savings, ROI, and payback period

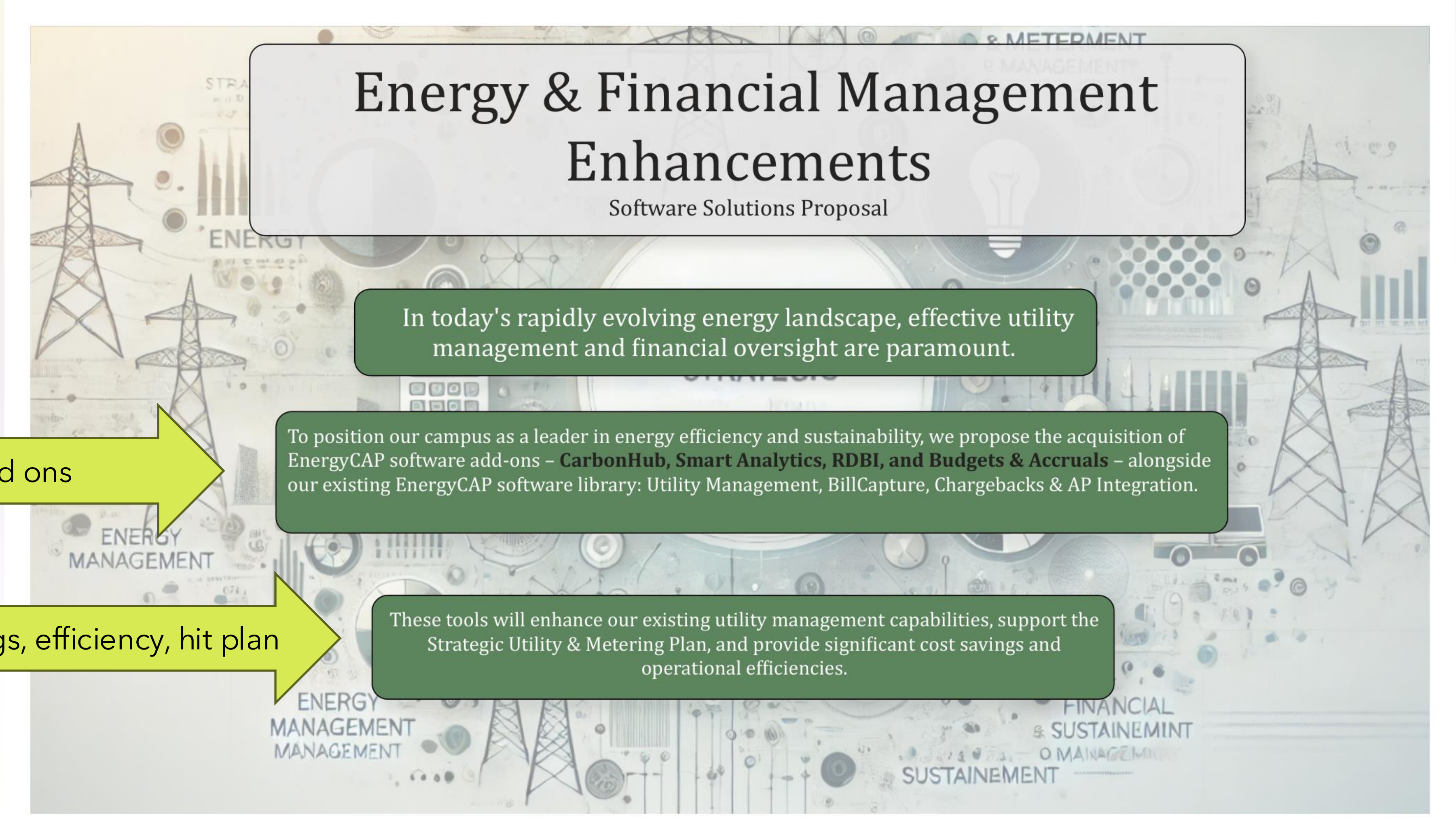
Implementation plan
Phases, training, and support

Stakeholder impact
Benefits for facilities, sustainability, finance, and IT

Risks and mitigation
Address potential concerns and strategies

Tools and templates
Use EnergyCAP's proposal templates for a structured, persuasive pitch

Executive summary: What do you want?


& METERMENT
ENERGY
ENERGY MANAGEMENT
ENERGY MANAGEMENT MANAGEMENT
FINANCIAL & SUSTAINEMINT
SUSTAINEMENT

Energy & Financial Management Enhancements

Software Solutions Proposal

In today's rapidly evolving energy landscape, effective utility management and financial oversight are paramount.

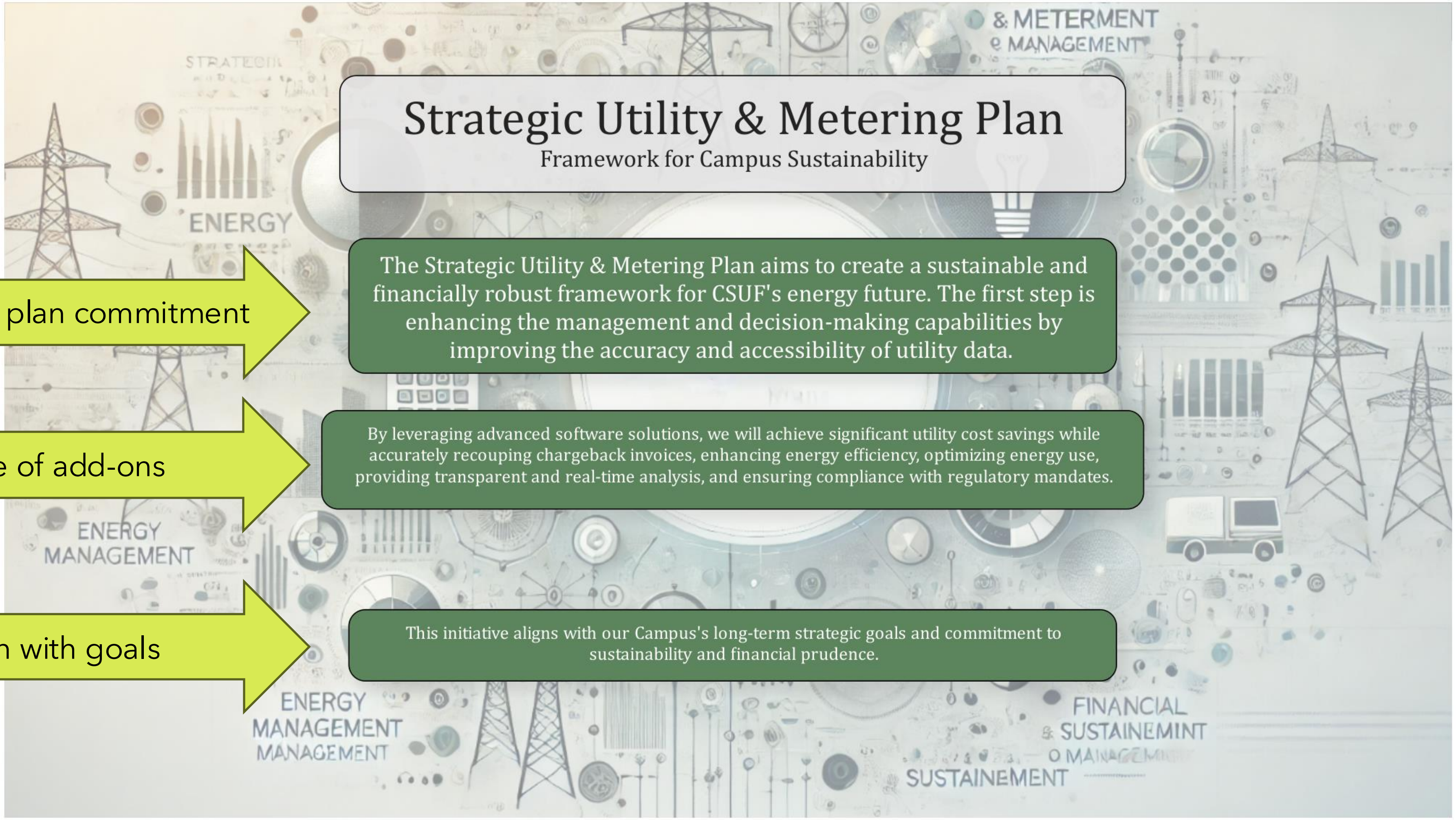
List the add ons

To position our campus as a leader in energy efficiency and sustainability, we propose the acquisition of EnergyCAP software add-ons – **CarbonHub, Smart Analytics, RDBI, and Budgets & Accruals** – alongside our existing EnergyCAP software library: Utility Management, BillCapture, Chargebacks & AP Integration.

Why? Cost savings, efficiency, hit plan

These tools will enhance our existing utility management capabilities, support the Strategic Utility & Metering Plan, and provide significant cost savings and operational efficiencies.

How the ask aligns to strategic goals


STRATEGIC
ENERGY
& METERMENT
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ENERGY MANAGEMENT
ENERGY MANAGEMENT MANAGEMENT
FINANCIAL & SUSTAINEMINT
SUSTAINEMENT

Strategic Utility & Metering Plan

Framework for Campus Sustainability

Review the plan commitment

The Strategic Utility & Metering Plan aims to create a sustainable and financially robust framework for CSUF's energy future. The first step is enhancing the management and decision-making capabilities by improving the accuracy and accessibility of utility data.

Value of add-ons

By leveraging advanced software solutions, we will achieve significant utility cost savings while accurately recouping chargeback invoices, enhancing energy efficiency, optimizing energy use, providing transparent and real-time analysis, and ensuring compliance with regulatory mandates.

Align with goals

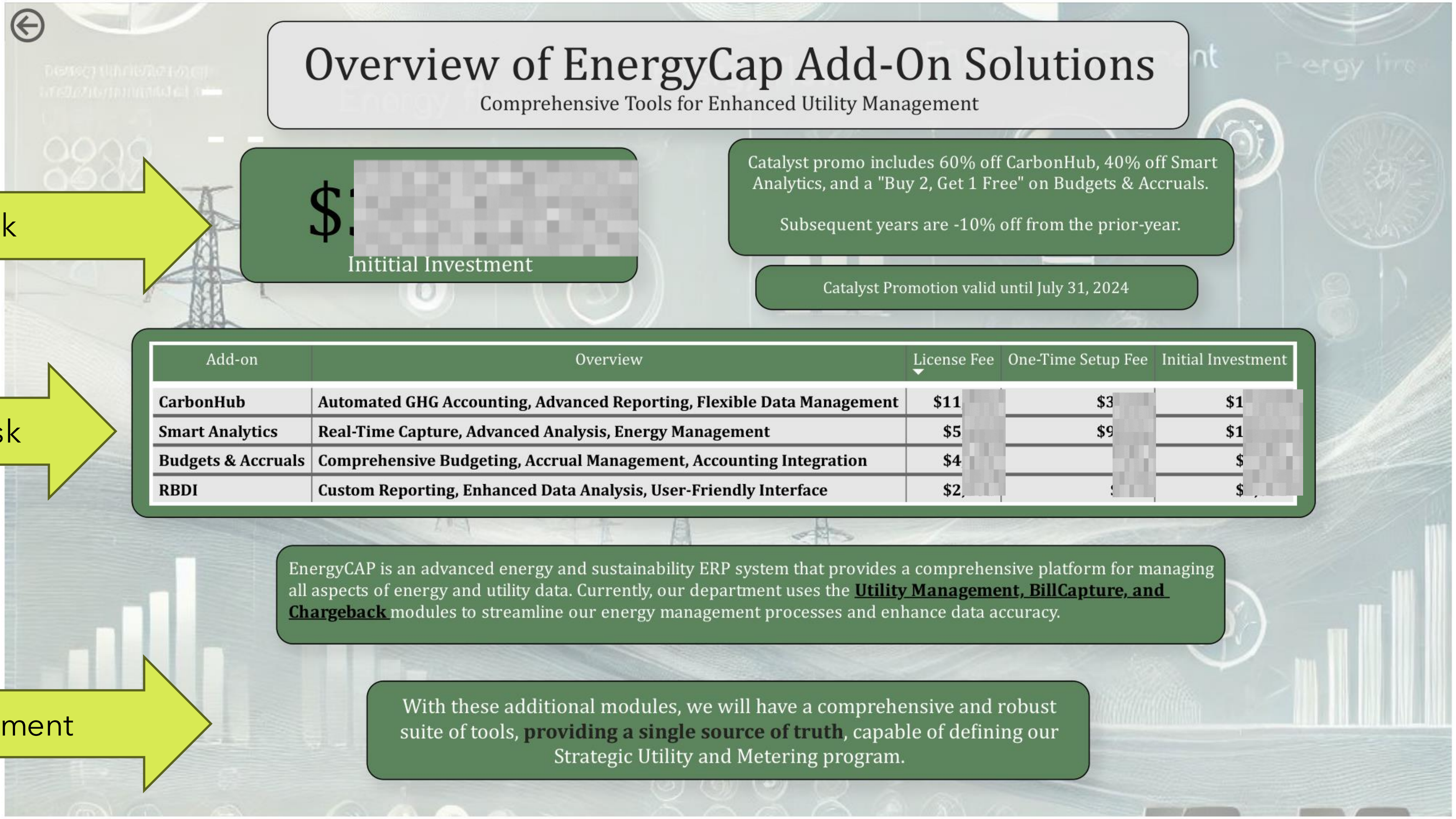
This initiative aligns with our Campus's long-term strategic goals and commitment to sustainability and financial prudence.

Financial overview of the ask…

Total $ ask

Line item $ ask

Value & alignment



Overview of EnergyCap Add-On Solutions

Comprehensive Tools for Enhanced Utility Management

$[redacted]

Inititial Investment

Catalyst promo includes 60% off CarbonHub, 40% off Smart Analytics, and a "Buy 2, Get 1 Free" on Budgets & Accruals.

Subsequent years are -10% off from the prior-year.

Catalyst Promotion valid until July 31, 2024

Add-on	Overview	License Fee	One-Time Setup Fee	Initial Investment
CarbonHub	**Automated GHG Accounting, Advanced Reporting, Flexible Data Management**	**$11**[redacted]	**$3**[redacted]	**$1**[redacted]
Smart Analytics	**Real-Time Capture, Advanced Analysis, Energy Management**	**$5**[redacted]	**$9**[redacted]	**$1**[redacted]
Budgets & Accruals	**Comprehensive Budgeting, Accrual Management, Accounting Integration**	**$4**[redacted]	[redacted]	**$**[redacted]
RBDI	**Custom Reporting, Enhanced Data Analysis, User-Friendly Interface**	**$2,**[redacted]	[redacted]	**$**[redacted]

EnergyCAP is an advanced energy and sustainability ERP system that provides a comprehensive platform for managing all aspects of energy and utility data. Currently, our department uses the **Utility Management, BillCapture, and Chargeback** modules to streamline our energy management processes and enhance data accuracy.

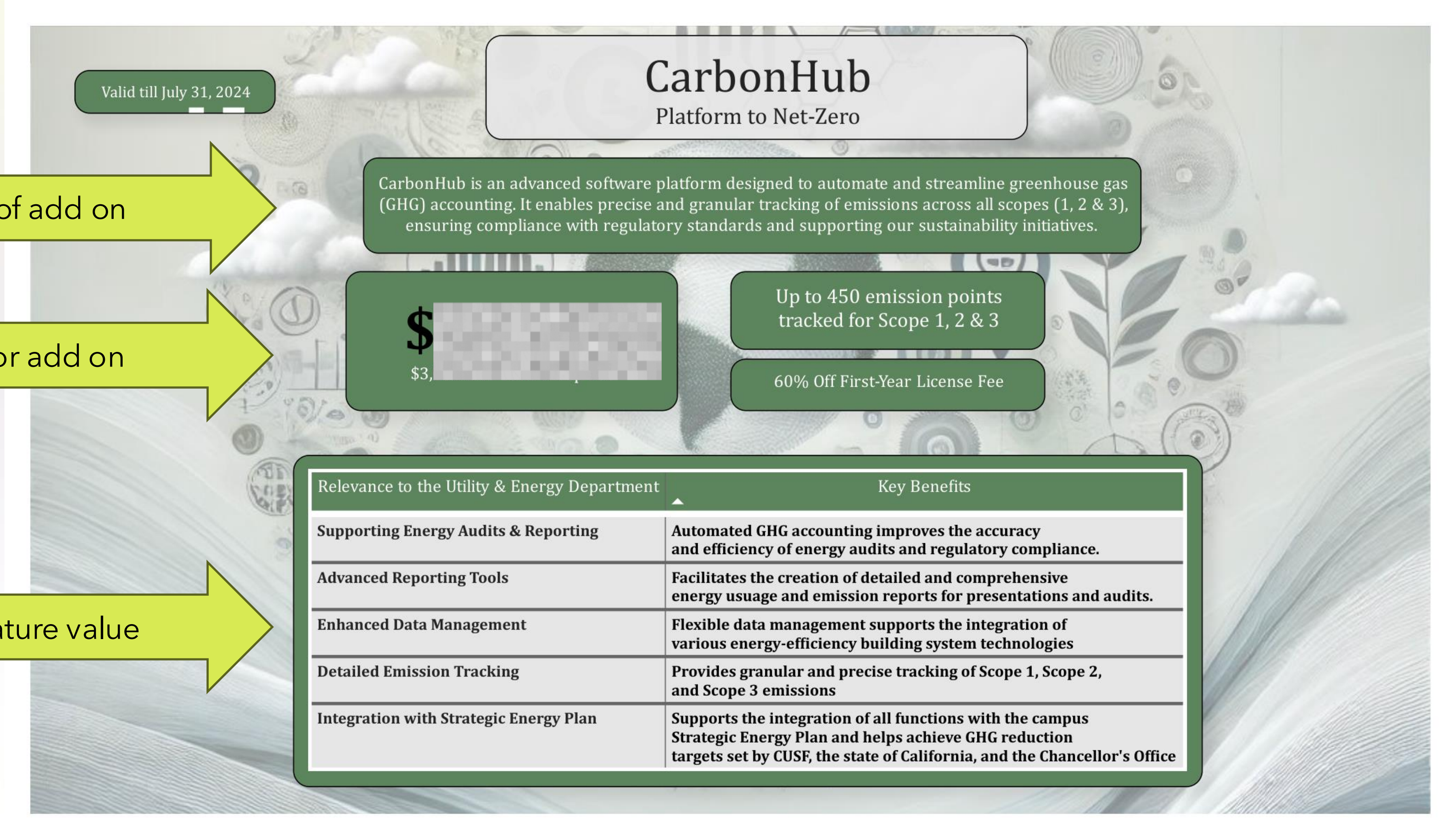
With these additional modules, we will have a comprehensive and robust suite of tools, **providing a single source of truth**, capable of defining our Strategic Utility and Metering program.

CarbonHub add on overview & cost

Overview of add on

Total ask for add on

Detailed feature value



Valid till July 31, 2024

CarbonHub

Platform to Net-Zero

CarbonHub is an advanced software platform designed to automate and streamline greenhouse gas (GHG) accounting. It enables precise and granular tracking of emissions across all scopes (1, 2 & 3), ensuring compliance with regulatory standards and supporting our sustainability initiatives.

$ [redacted]

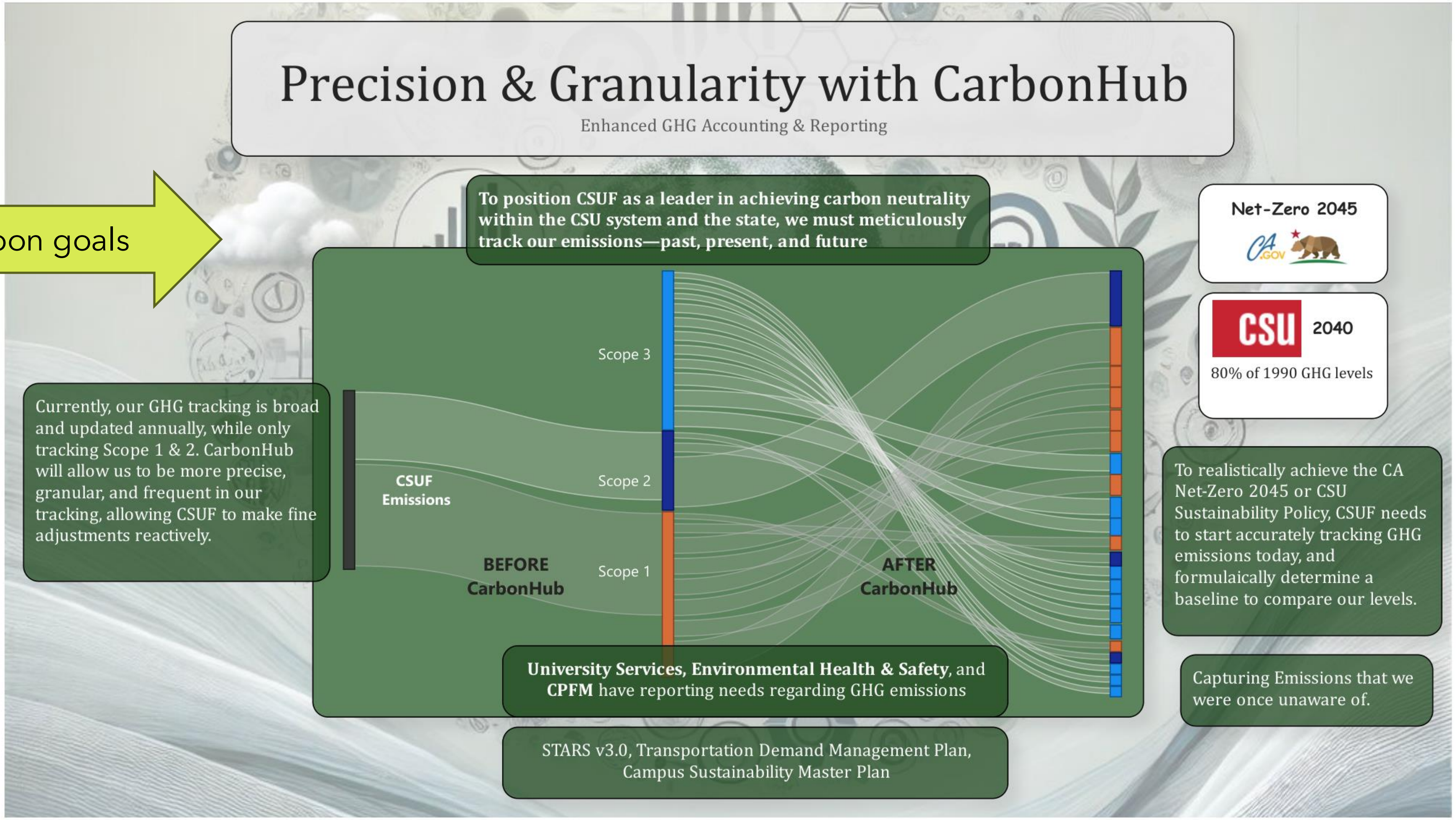
Up to 450 emission points tracked for Scope 1, 2 & 3

60% Off First-Year License Fee

Relevance to the Utility & Energy Department	Key Benefits
Supporting Energy Audits & Reporting	**Automated GHG accounting improves the accuracy and efficiency of energy audits and regulatory compliance.**
Advanced Reporting Tools	**Facilitates the creation of detailed and comprehensive energy usage and emission reports for presentations and audits.**
Enhanced Data Management	**Flexible data management supports the integration of various energy-efficiency building system technologies**
Detailed Emission Tracking	**Provides granular and precise tracking of Scope 1, Scope 2, and Scope 3 emissions**
Integration with Strategic Energy Plan	**Supports the integration of all functions with the campus Strategic Energy Plan and helps achieve GHG reduction targets set by CUSF, the state of California, and the Chancellor's Office**

CarbonHub value tied to goals

Details for carbon goals



Precision & Granularity with CarbonHub

Enhanced GHG Accounting & Reporting

To position CSUF as a leader in achieving carbon neutrality within the CSU system and the state, we must meticulously track our emissions—past, present, and future

Currently, our GHG tracking is broad and updated annually, while only tracking Scope 1 & 2. CarbonHub will allow us to be more precise, granular, and frequent in our tracking, allowing CSUF to make fine adjustments reactively.

University Services, **Environmental Health & Safety**, and **CPFM** have reporting needs regarding GHG emissions

STARS v3.0, Transportation Demand Management Plan, Campus Sustainability Master Plan

Net-Zero 2045

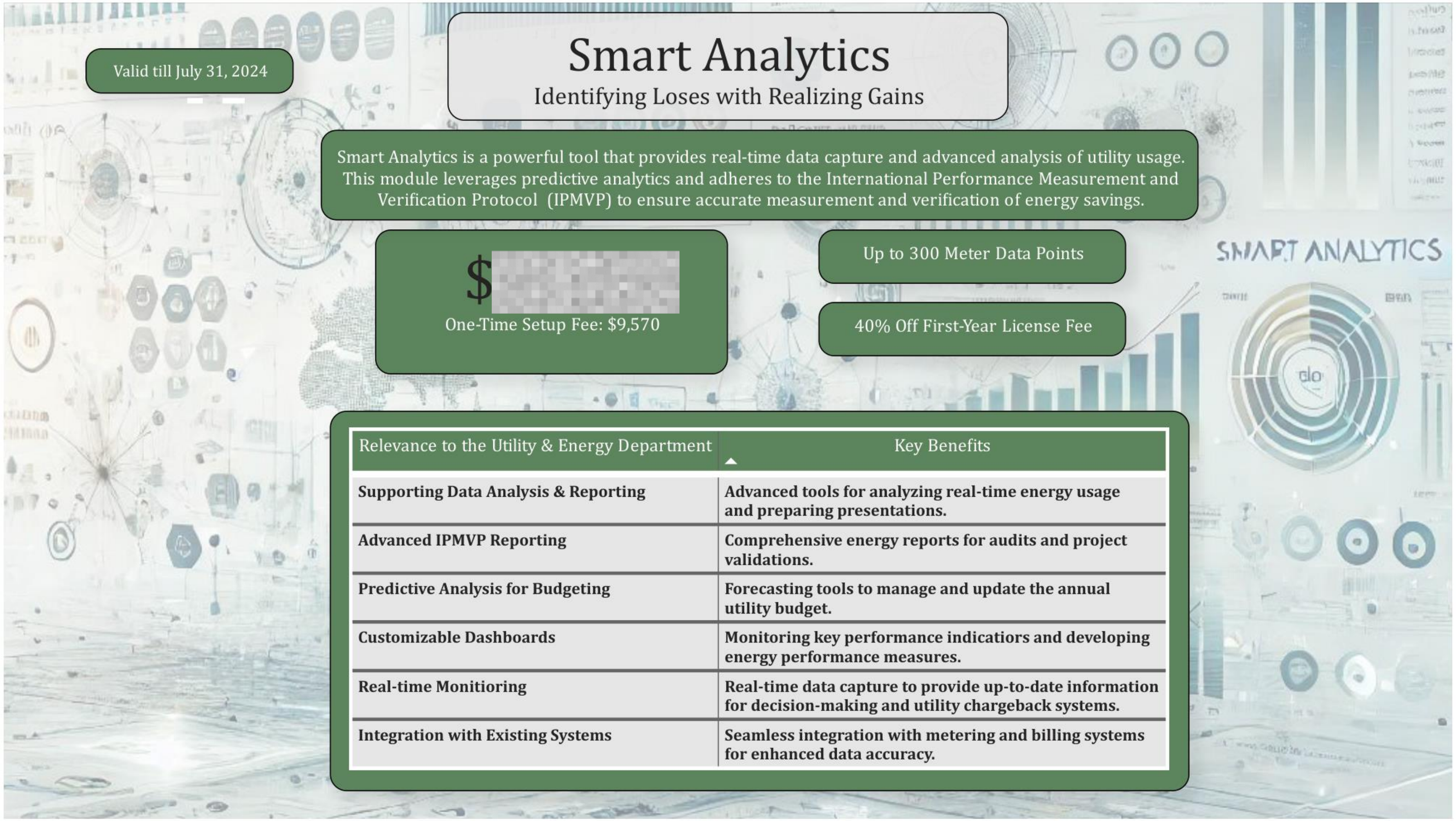
CSU 2040

80% of 1990 GHG levels

To realistically achieve the CA Net-Zero 2045 or CSU Sustainability Policy, CSUF needs to start accurately tracking GHG emissions today, and formulaically determine a baseline to compare our levels.

Capturing Emissions that we were once unaware of.

ESA Add on overview


SMART ANALYTICS

Valid till July 31, 2024

Smart Analytics

Identifying Loses with Realizing Gains

Smart Analytics is a powerful tool that provides real-time data capture and advanced analysis of utility usage. This module leverages predictive analytics and adheres to the International Performance Measurement and Verification Protocol (IPMVP) to ensure accurate measurement and verification of energy savings.

$[redacted]

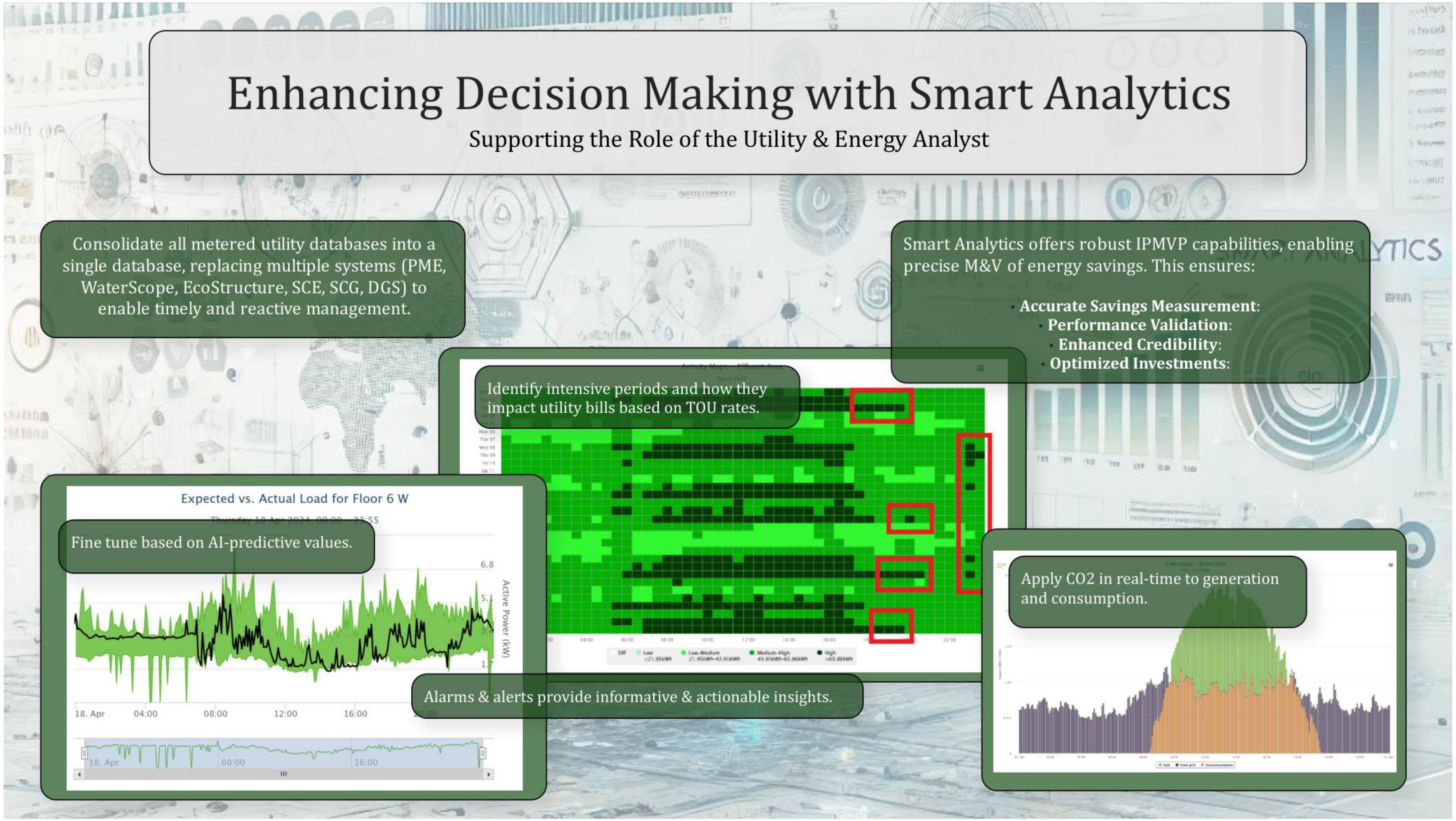
One-Time Setup Fee: $9,570

Up to 300 Meter Data Points

40% Off First-Year License Fee

Relevance to the Utility & Energy Department	Key Benefits
Supporting Data Analysis & Reporting	**Advanced tools for analyzing real-time energy usage and preparing presentations.**
Advanced IPMVP Reporting	**Comprehensive energy reports for audits and project validations.**
Predictive Analysis for Budgeting	**Forecasting tools to manage and update the annual utility budget.**
Customizable Dashboards	**Monitoring key performance indicators and developing energy performance measures.**
Real-time Monitioring	**Real-time data capture to provide up-to-date information for decision-making and utility chargeback systems.**
Integration with Existing Systems	**Seamless integration with metering and billing systems for enhanced data accuracy.**

ESA value and expected outputs



Enhancing Decision Making with Smart Analytics

Supporting the Role of the Utility & Energy Analyst

Consolidate all metered utility databases into a single database, replacing multiple systems (PME, WaterScope, EcoStructure, SCE, SCG, DGS) to enable timely and reactive management.

Smart Analytics offers robust IPMVP capabilities, enabling precise M&V of energy savings. This ensures:

- **Accurate Savings Measurement**:
- **Performance Validation**:
- **Enhanced Credibility**:
- **Optimized Investments**:

Identify intensive periods and how they impact utility bills based on TOU rates.

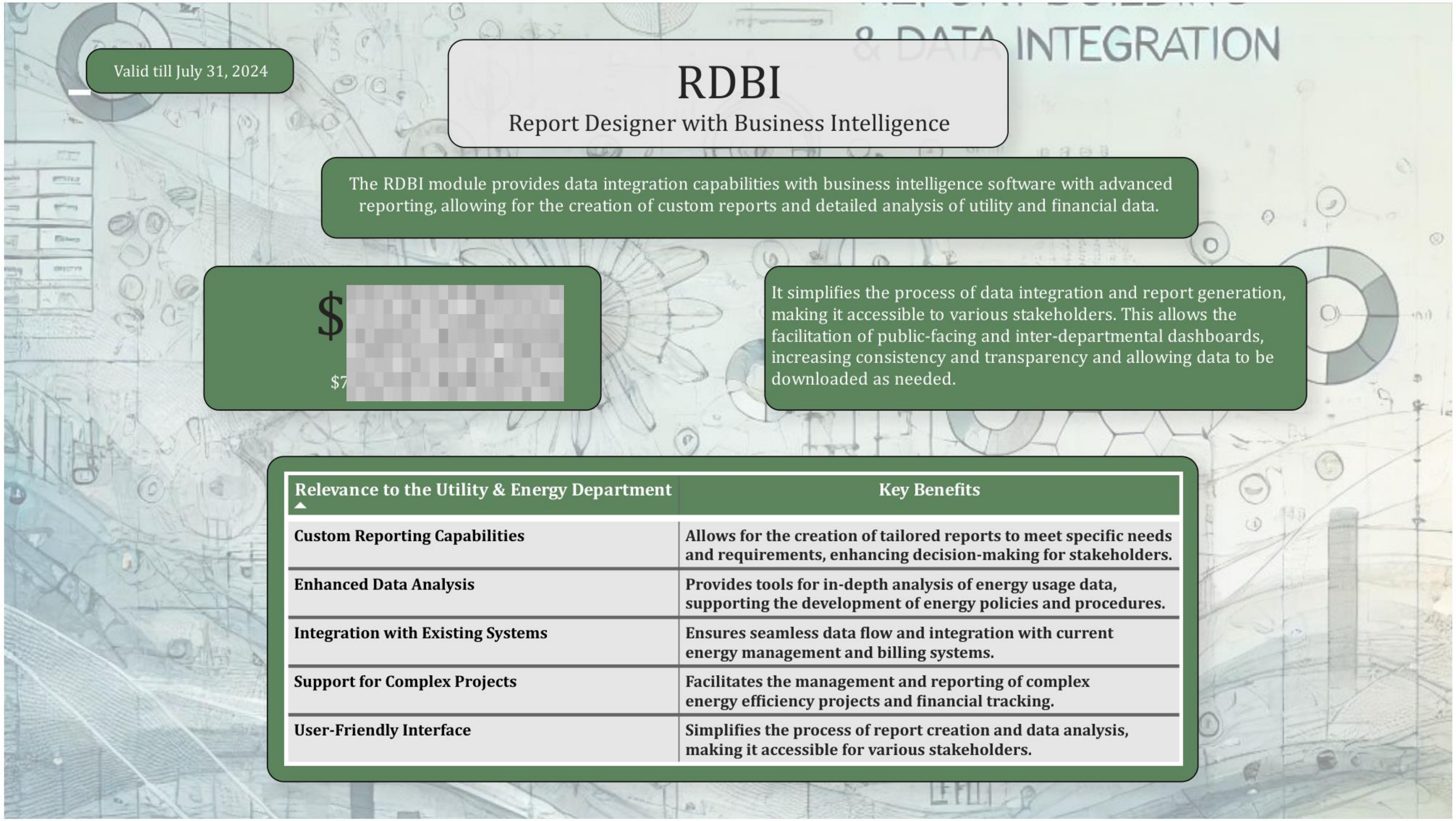
Fine tune based on AI-predictive values.

Alarms & alerts provide informative & actionable insights.

Apply CO2 in real-time to generation and consumption.

Expected vs. Actual Load for Floor 6 W
Active Power (kW)
6.8
5.1
1.7
18. Apr
04:00
08:00
12:00
16:00
Off
Low
Low-Medium
Medium-High
High

RDBI overview


& DATA INTEGRATION

Valid till July 31, 2024

RDBI

Report Designer with Business Intelligence

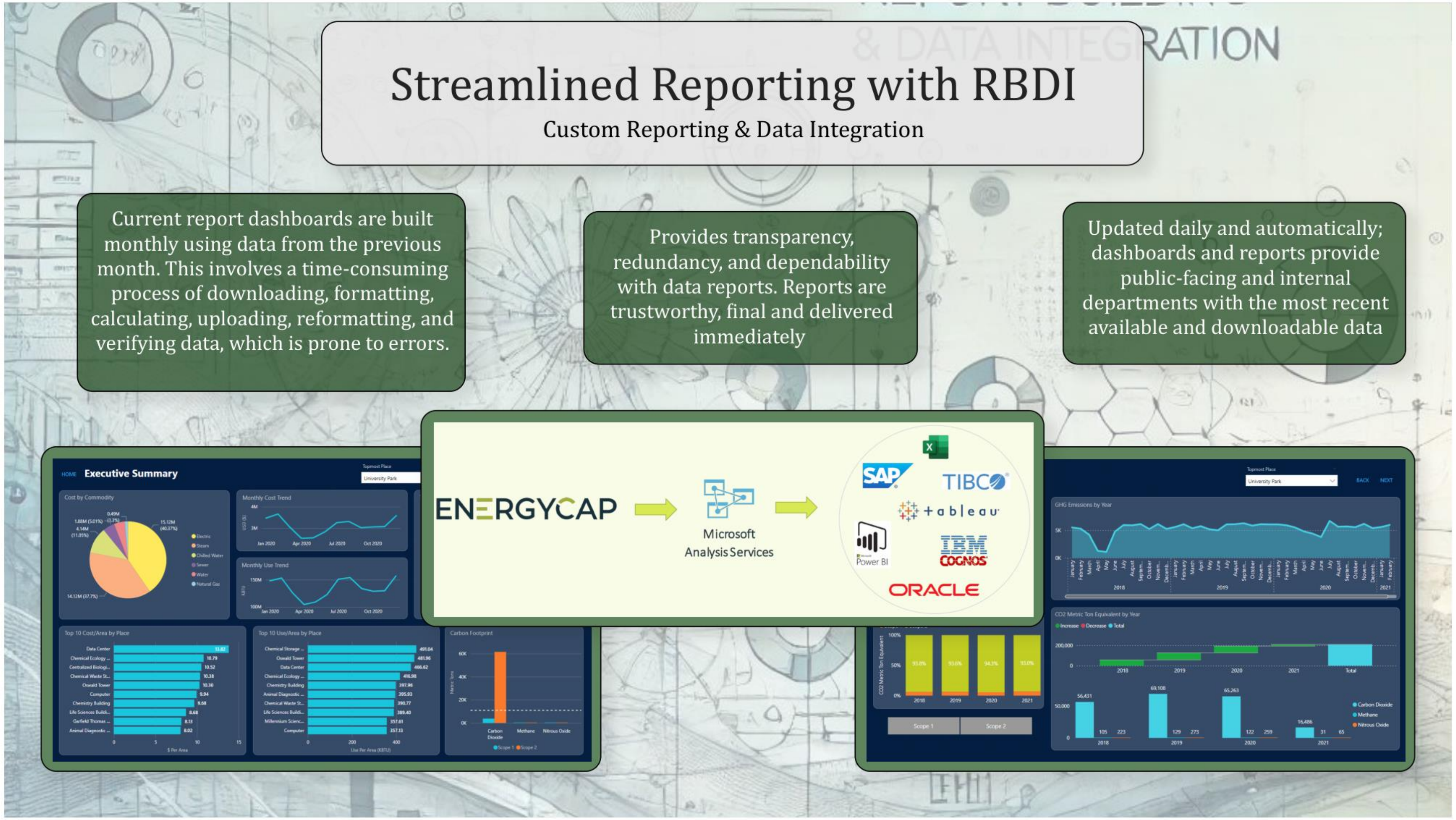
The RDBI module provides data integration capabilities with business intelligence software with advanced reporting, allowing for the creation of custom reports and detailed analysis of utility and financial data.

$ [redacted]

It simplifies the process of data integration and report generation, making it accessible to various stakeholders. This allows the facilitation of public-facing and inter-departmental dashboards, increasing consistency and transparency and allowing data to be downloaded as needed.

Relevance to the Utility & Energy Department	Key Benefits
Custom Reporting Capabilities	**Allows for the creation of tailored reports to meet specific needs and requirements, enhancing decision-making for stakeholders.**
Enhanced Data Analysis	**Provides tools for in-depth analysis of energy usage data, supporting the development of energy policies and procedures.**
Integration with Existing Systems	**Ensures seamless data flow and integration with current energy management and billing systems.**
Support for Complex Projects	**Facilitates the management and reporting of complex energy efficiency projects and financial tracking.**
User-Friendly Interface	**Simplifies the process of report creation and data analysis, making it accessible for various stakeholders.**

RDBI value and expected outputs



Streamlined Reporting with RBDI

Custom Reporting & Data Integration

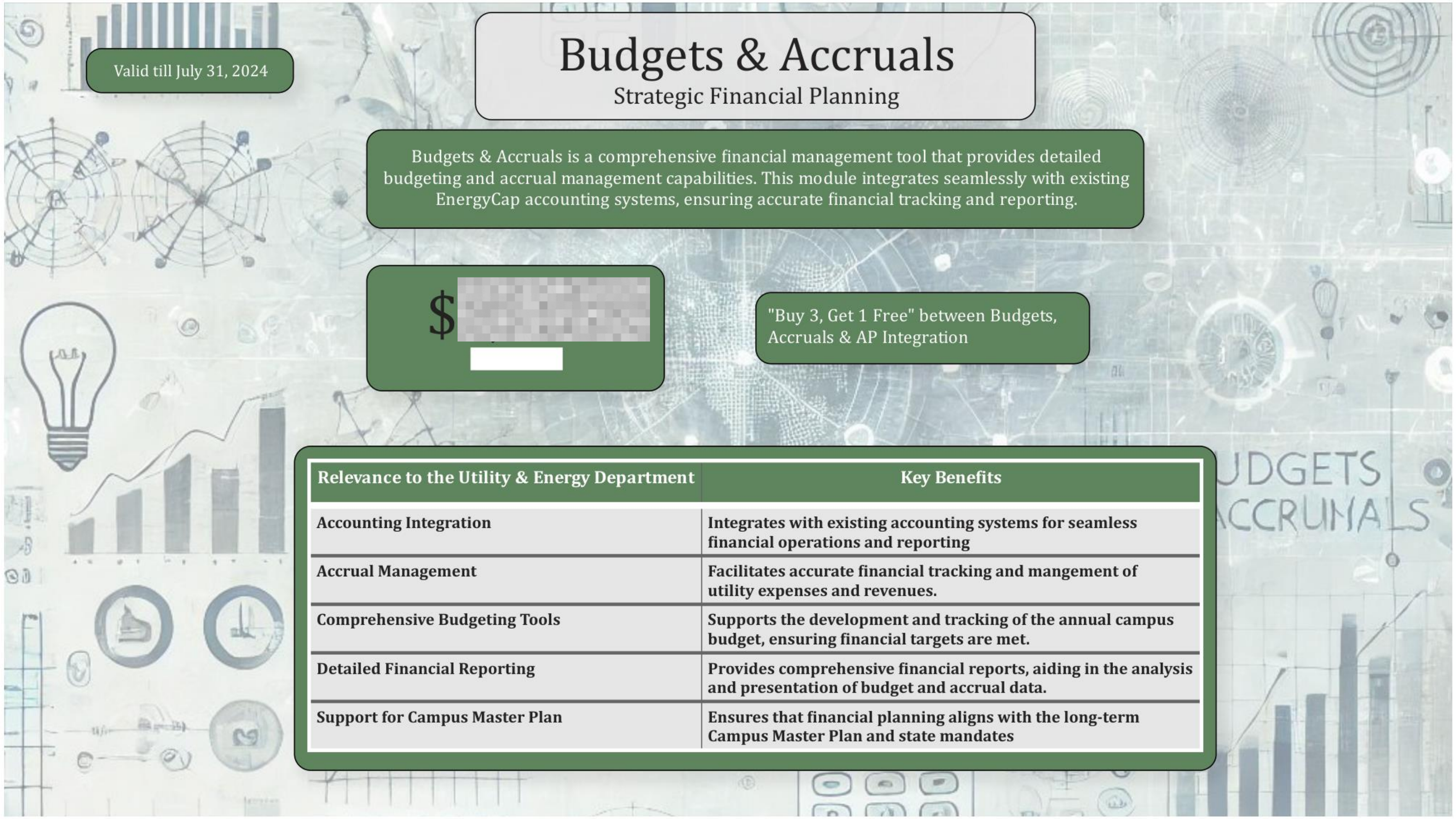
Current report dashboards are built monthly using data from the previous month. This involves a time-consuming process of downloading, formatting, calculating, uploading, reformatting, and verifying data, which is prone to errors.

Provides transparency, redundancy, and dependability with data reports. Reports are trustworthy, final and delivered immediately

Updated daily and automatically; dashboards and reports provide public-facing and internal departments with the most recent available and downloadable data

& DATA INTEGRATION
Executive Summary
Cost by Commodity
Monthly Cost Trend
Monthly Use Trend
Top 10 Cost/Area by Place
Top 10 Use/Area by Place
Carbon Footprint
ENERGYCAP
Microsoft Analysis Services
SAP
TIBCO
tableau
Power BI
IBM COGNOS
ORACLE
GHG Emissions by Year
CO2 Metric Ton Equivalent by Year
Scope 1
Scope 2

Budgets & Accruals overview



Valid till July 31, 2024

Budgets & Accruals

Strategic Financial Planning

Budgets & Accruals is a comprehensive financial management tool that provides detailed budgeting and accrual management capabilities. This module integrates seamlessly with existing EnergyCap accounting systems, ensuring accurate financial tracking and reporting.

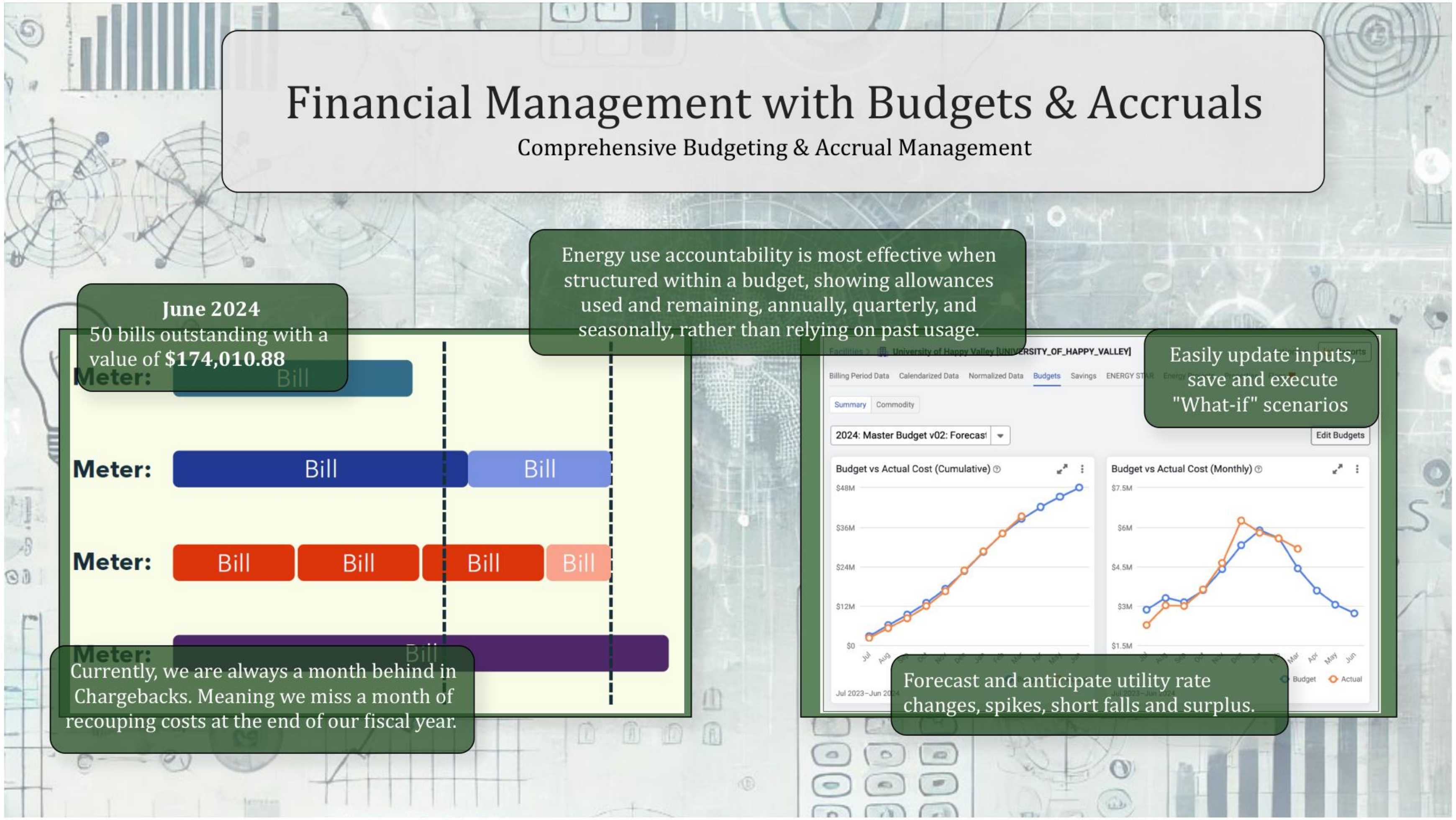
$[redacted]

[redacted]

"Buy 3, Get 1 Free" between Budgets, Accruals & AP Integration

Relevance to the Utility & Energy Department	Key Benefits
Accounting Integration	Integrates with existing accounting systems for seamless financial operations and reporting
Accrual Management	Facilitates accurate financial tracking and mangement of utility expenses and revenues.
Comprehensive Budgeting Tools	Supports the development and tracking of the annual campus budget, ensuring financial targets are met.
Detailed Financial Reporting	Provides comprehensive financial reports, aiding in the analysis and presentation of budget and accrual data.
Support for Campus Master Plan	Ensures that financial planning aligns with the long-term Campus Master Plan and state mandates

Budgets & Accruals value & expected outputs



Financial Management with Budgets & Accruals

Comprehensive Budgeting & Accrual Management

Energy use accountability is most effective when structured within a budget, showing allowances used and remaining, annually, quarterly, and seasonally, rather than relying on past usage.

June 2024
50 bills outstanding with a value of **$174,010.88**

Currently, we are always a month behind in Chargebacks. Meaning we miss a month of recouping costs at the end of our fiscal year.

Easily update inputs, save and execute "What-if" scenarios

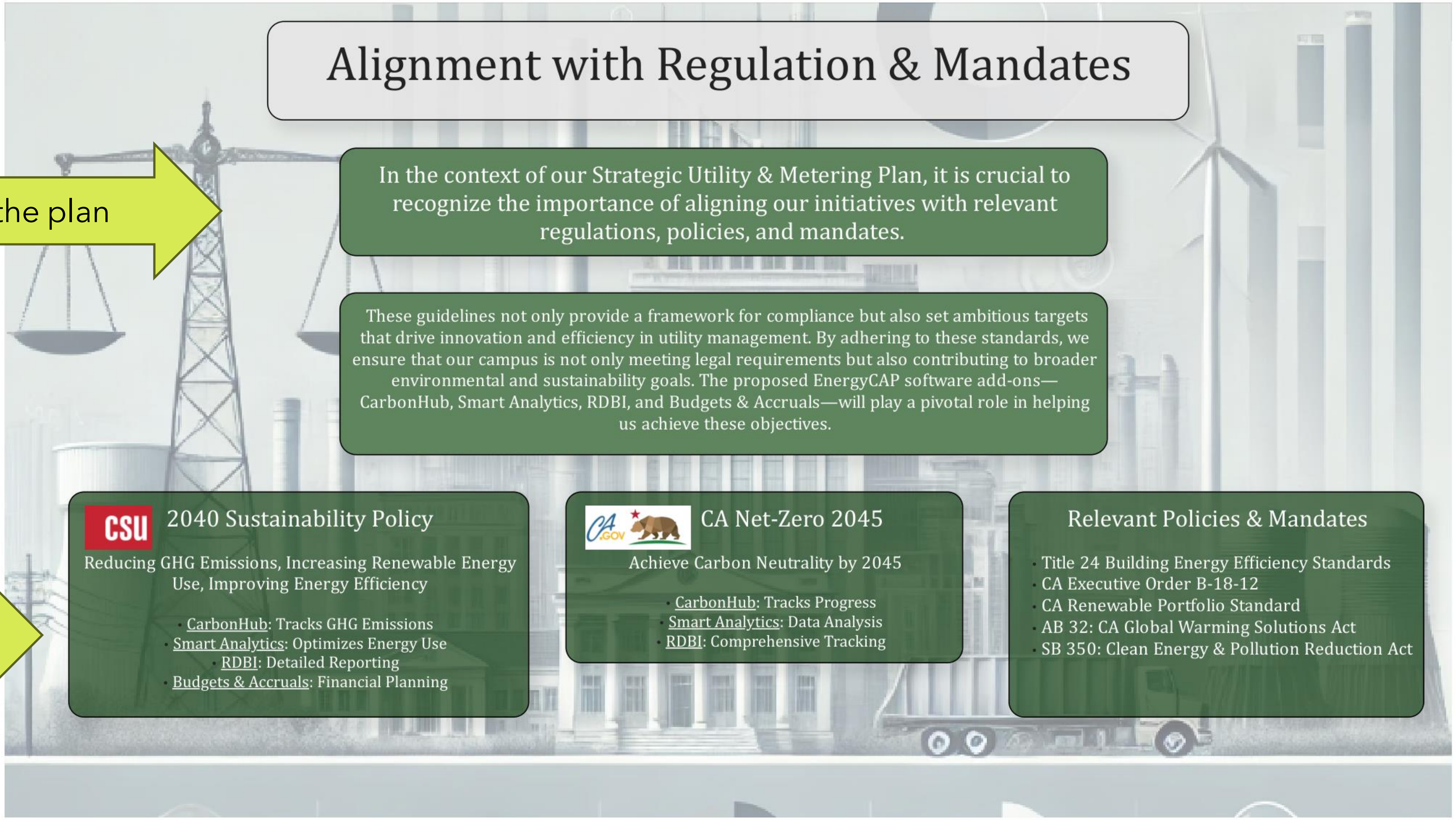
Forecast and anticipate utility rate changes, spikes, short falls and surplus.

Meter:
Bill
Meter:
Bill
Bill
Meter:
Bill
Bill
Bill
Bill
Meter:
Bill
University of Happy Valley [UNIVERSITY_OF_HAPPY_VALLEY]
Billing Period Data
Calendarized Data
Normalized Data
Budgets
Savings
Summary
Commodity
2024: Master Budget v02: Forecast
Edit Budgets
Budget vs Actual Cost (Cumulative)
$48M
$36M
$24M
$12M
$0
Jul
Aug
Jul 2023–Jun 2024
Budget vs Actual Cost (Monthly)
$7.5M
$6M
$4.5M
$3M
$1.5M
Mar
Apr
May
Jun
Budget
Actual

Again, address the "why?" "why now?"

Reminder of the plan

Reminder of the regulations



Alignment with Regulation & Mandates

In the context of our Strategic Utility & Metering Plan, it is crucial to recognize the importance of aligning our initiatives with relevant regulations, policies, and mandates.

These guidelines not only provide a framework for compliance but also set ambitious targets that drive innovation and efficiency in utility management. By adhering to these standards, we ensure that our campus is not only meeting legal requirements but also contributing to broader environmental and sustainability goals. The proposed EnergyCAP software add-ons—CarbonHub, Smart Analytics, RDBI, and Budgets & Accruals—will play a pivotal role in helping us achieve these objectives.

CSU 2040 Sustainability Policy

Reducing GHG Emissions, Increasing Renewable Energy Use, Improving Energy Efficiency

- CarbonHub: Tracks GHG Emissions
- Smart Analytics: Optimizes Energy Use
- RDBI: Detailed Reporting
- Budgets & Accruals: Financial Planning

CA.GOV CA Net-Zero 2045

Achieve Carbon Neutrality by 2045

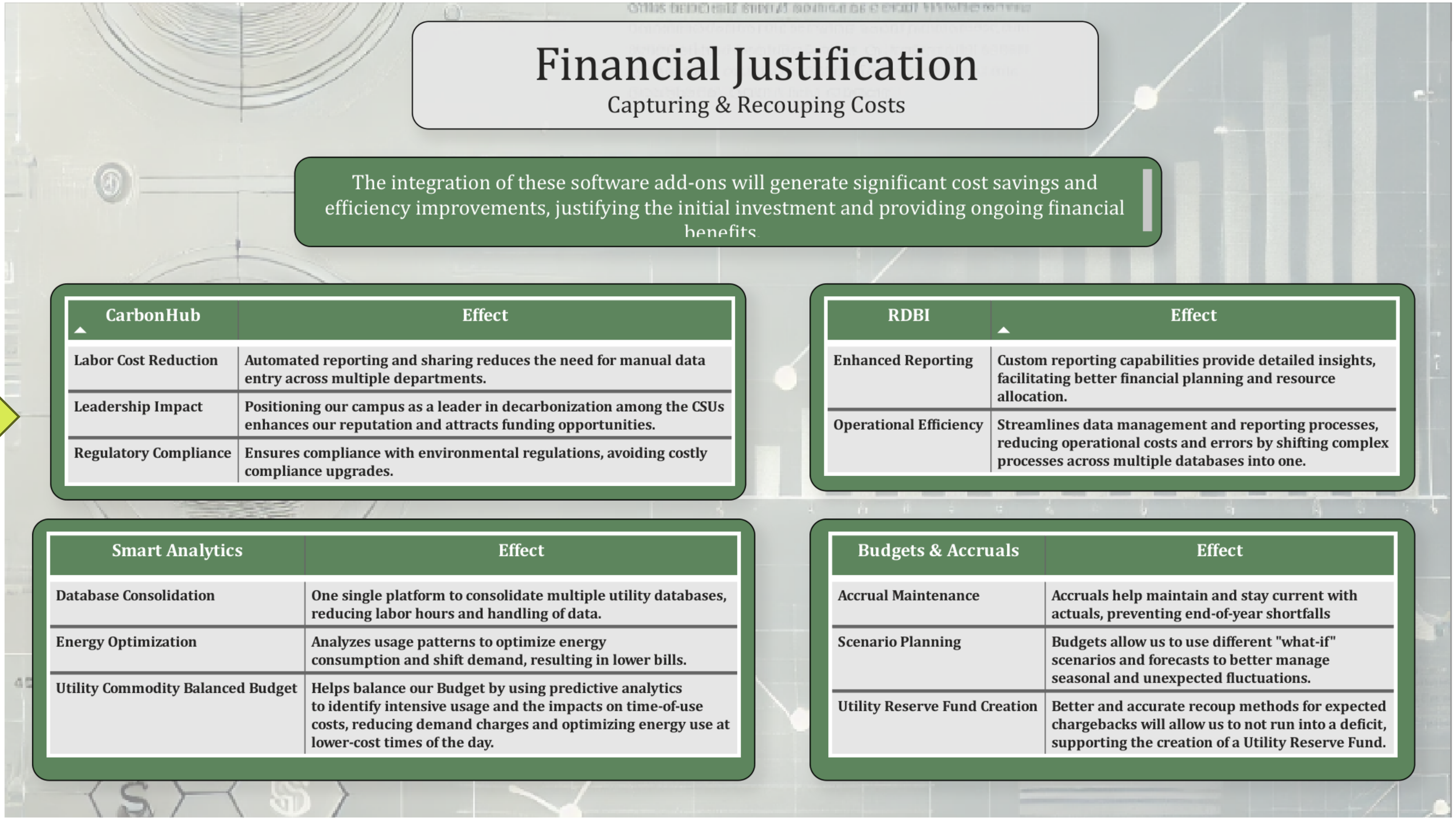
- CarbonHub: Tracks Progress
- Smart Analytics: Data Analysis
- RDBI: Comprehensive Tracking

Relevant Policies & Mandates

- Title 24 Building Energy Efficiency Standards
- CA Executive Order B-18-12
- CA Renewable Portfolio Standard
- AB 32: CA Global Warming Solutions Act
- SB 350: Clean Energy & Pollution Reduction Act

Value justification rollup

Roll up of Add on value with feature details



Financial Justification

Capturing & Recouping Costs

The integration of these software add-ons will generate significant cost savings and efficiency improvements, justifying the initial investment and providing ongoing financial benefits

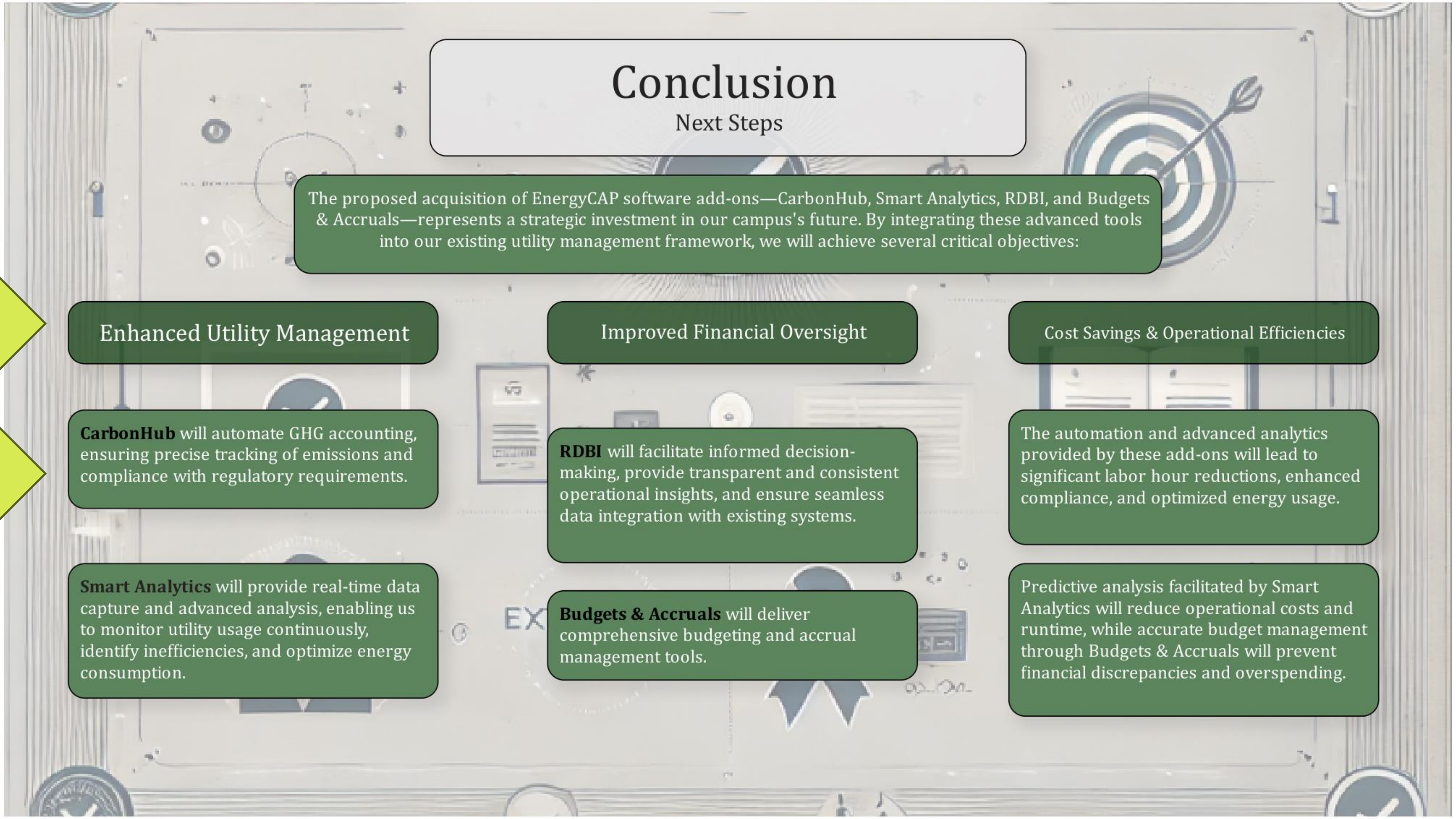
CarbonHub	Effect
Labor Cost Reduction	Automated reporting and sharing reduces the need for manual data entry across multiple departments.
Leadership Impact	Positioning our campus as a leader in decarbonization among the CSUs enhances our reputation and attracts funding opportunities.
Regulatory Compliance	Ensures compliance with environmental regulations, avoiding costly compliance upgrades.

RDBI	Effect
Enhanced Reporting	Custom reporting capabilities provide detailed insights, facilitating better financial planning and resource allocation.
Operational Efficiency	Streamlines data management and reporting processes, reducing operational costs and errors by shifting complex processes across multiple databases into one.

Smart Analytics	Effect
Database Consolidation	One single platform to consolidate multiple utility databases, reducing labor hours and handling of data.
Energy Optimization	Analyzes usage patterns to optimize energy consumption and shift demand, resulting in lower bills.
Utility Commodity Balanced Budget	Helps balance our Budget by using predictive analytics to identify intensive usage and the impacts on time-of-use costs, reducing demand charges and optimizing energy use at lower-cost times of the day.

Budgets & Accruals	Effect
Accrual Maintenance	Accruals help maintain and stay current with actuals, preventing end-of-year shortfalls
Scenario Planning	Budgets allow us to use different "what-if" scenarios and forecasts to better manage seasonal and unexpected fluctuations.
Utility Reserve Fund Creation	Better and accurate recoup methods for expected chargebacks will allow us to not run into a deficit, supporting the creation of a Utility Reserve Fund.

Conclusion



Conclusion

Next Steps

The proposed acquisition of EnergyCAP software add-ons—CarbonHub, Smart Analytics, RDBI, and Budgets & Accruals—represents a strategic investment in our campus's future. By integrating these advanced tools into our existing utility management framework, we will achieve several critical objectives:

Enhanced Utility Management	Improved Financial Oversight	Cost Savings & Operational Efficiencies
CarbonHub will automate GHG accounting, ensuring precise tracking of emissions and compliance with regulatory requirements.	**RDBI** will facilitate informed decision-making, provide transparent and consistent operational insights, and ensure seamless data integration with existing systems.	The automation and advanced analytics provided by these add-ons will lead to significant labor hour reductions, enhanced compliance, and optimized energy usage.
Smart Analytics will provide real-time data capture and advanced analysis, enabling us to monitor utility usage continuously, identify inefficiencies, and optimize energy consumption.	**Budgets & Accruals** will deliver comprehensive budgeting and accrual management tools.	Predictive analysis facilitated by Smart Analytics will reduce operational costs and runtime, while accurate budget management through Budgets & Accruals will prevent financial discrepancies and overspending.

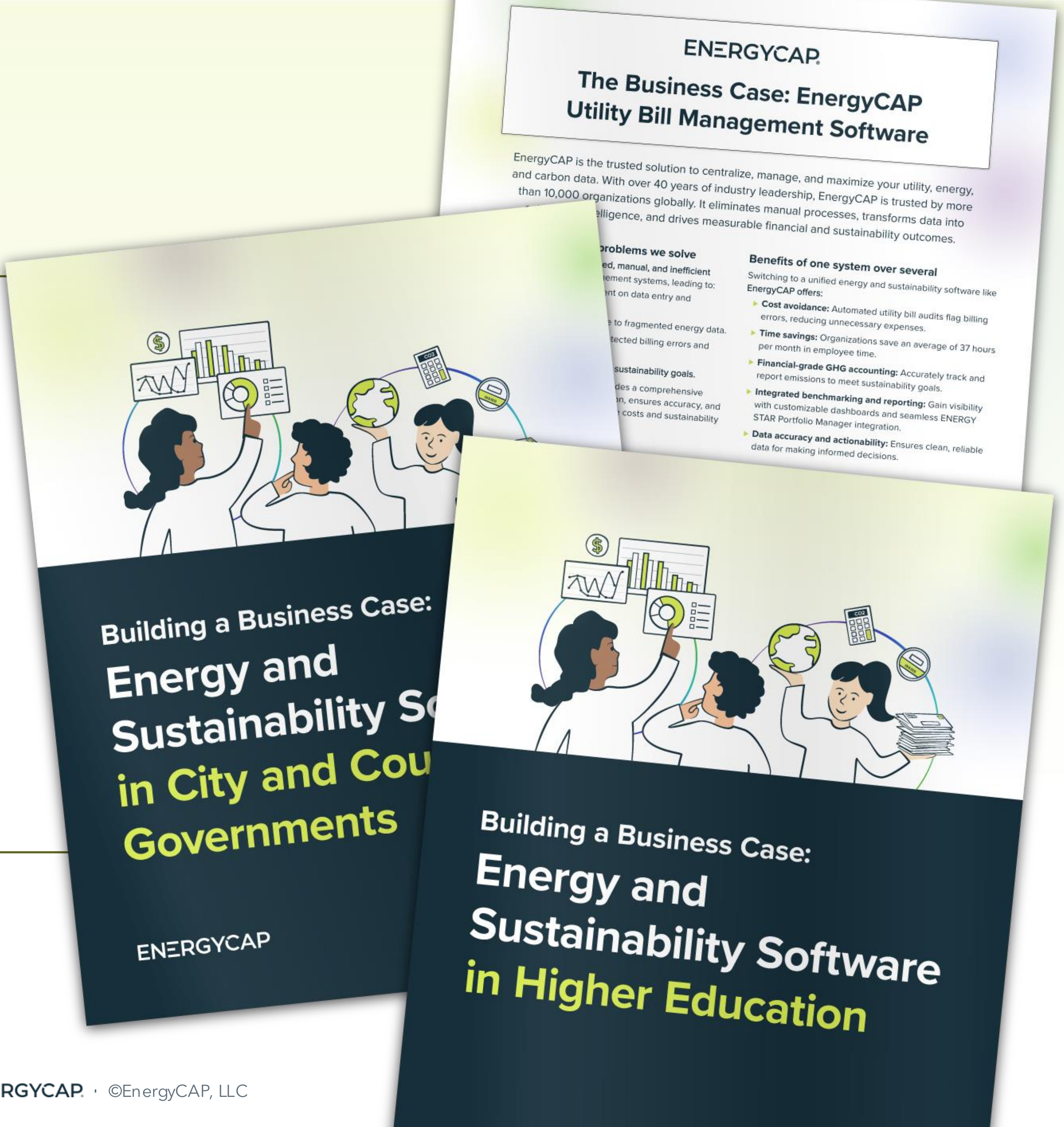
Value buckets

Add on overview

Build the **business case**

(Includes a proposal PowerPoint template)

Scan QR to download PDFs



ENERGYCAP

The Business Case: EnergyCAP Utility Bill Management Software

EnergyCAP is the trusted solution to centralize, manage, and maximize your utility, energy, and carbon data. With over 40 years of industry leadership, EnergyCAP is trusted by more than 10,000 organizations globally. It eliminates manual processes, transforms data into elligence, and drives measurable financial and sustainability outcomes.

problems we solve

ed, manual, and inefficient
ement systems, leading to:
nt on data entry and

to fragmented energy data.
tected billing errors and

sustainability goals.
des a comprehensive
n, ensures accuracy, and
costs and sustainability

Benefits of one system over several

Switching to a unified energy and sustainability software like EnergyCAP offers:

- **Cost avoidance:** Automated utility bill audits flag billing errors, reducing unnecessary expenses.
- **Time savings:** Organizations save an average of 37 hours per month in employee time.
- **Financial-grade GHG accounting:** Accurately track and report emissions to meet sustainability goals.
- **Integrated benchmarking and reporting:** Gain visibility with customizable dashboards and seamless ENERGY STAR Portfolio Manager integration.
- **Data accuracy and actionability:** Ensures clean, reliable data for making informed decisions.

Building a Business Case:
Energy and
Sustainability Sc
in City and Cou
Governments

ENERGYCAP

Building a Business Case:
Energy and
Sustainability Software
in Higher Education

One solution, one price

Get everything EnergyCAP has to offer bundled into one powerful subscription:

✓ Utility Management

✓ Carbon Hub

✓ Smart Analytics

✓ Chargebacks

✓ Advanced accounting

✓ BI reports

No more picking and choosing. Just one platform, one price, and total control over your energy and sustainability data

Q&A

Check out upcoming events and webinars at

www.EnergyCAP.com/events