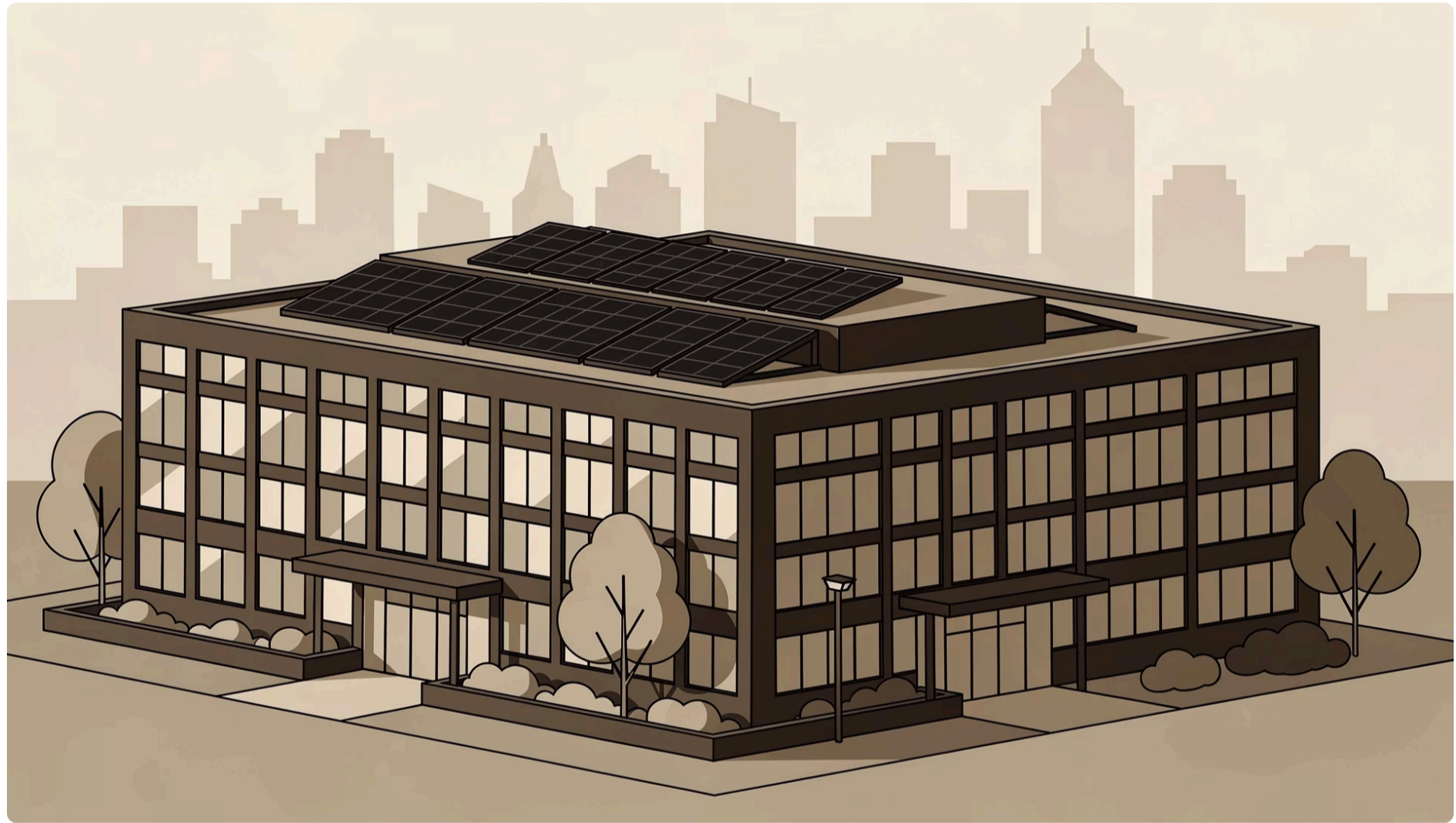




# ENERGY311

Be Your Own Power Grid™

## Energy311 Case Study: Buzz Oates



### About Buzz Oates

Buzz Oates is one of the largest privately held commercial real estate investment management firms in California's Central Valley and Mountain West regions. With a portfolio of approximately 27 million square feet valued at roughly \$4 billion, Buzz Oates manages industrial, office, retail, and land properties serving major tenants including Amazon, FedEx, Tesla, UPS, Whirlpool, and Kraft Heinz.

### Company Profile:

- **Industry:** Commercial Real Estate Investment & Management
- **Portfolio Size:** ~27 million sq ft
- **Portfolio Value:** ~\$4 billion
- **Service Areas:** California Central Valley and Mountain West
- **Key Leadership:** Phil Oates (Chairman), Larry Allbaugh (CEO), Kevin Ramos (CIO)
- **Headquarters:** 555 Capitol Mall, Suite 900, Sacramento, CA 95814

# The Challenge: Making Solar Profitable for Commercial Properties

As Buzz Oates expanded its solar footprint across multiple commercial and industrial properties in the Sacramento region, they faced a critical challenge: **How do you bill tenants for solar energy in a way that's accurate, transparent, and profitable?**

## Complex Multi-Tenant Billing Requirements

- Multiple properties with different solar system sizes (50 kW to 608 kW)
- Diverse tenant types with varying energy consumption patterns
- Need to bill at local utility rates (SMUD and PG&E) rather than fixed PPA pricing
- Requirement for "to the penny" accuracy to maintain tenant trust

## Technical Data Management Complexity

- Processing 15-minute interval data from SMUD and PG&E smart meters
- Integrating data from multiple inverter systems (Sol-Ark)
- Accessing utility Green Button data for accurate billing
- Managing revenue-grade CT measurements for grid import/export, solar production, and building loads

## Operational Efficiency Concerns

- Manual billing processes would be time-consuming and error-prone
- Need for real-time visibility into solar production and tenant consumption
- Integration with existing property management systems
- Scalability as solar portfolio expands

## Tenant Experience & Trust

- Tenants needed clear, transparent bills that matched utility rate structures
- Requirement to show solar savings explicitly
- Need for defensible accuracy to avoid disputes
- Professional billing experience that builds confidence

"I'd love to go head-to-head against a competitor that is proposing a PPA; you guys give control back to the property owner."

— Property Development Partner

# The Solution: Energy311's Complete Solar Billing Platform

Buzz Oates partnered with Energy311 to implement a comprehensive solar billing solution across their growing portfolio of commercial properties.

## Initial Implementation: Four Sacramento-Area Properties

### Phase 1 Deployment (Contract signed August-September 2024):

Property Address	Solar System Size	Annual Production	Utility
4450 Raley Blvd	50 kW	75,000 kWh	SMUD
2975 Ramco (Ernest Packaging)	150 kW	225,000 kWh	PG&E
1513 Boeing	125 kW	187,500 kWh	SMUD
16919 Boeing	130 kW	195,000 kWh	SMUD
<b>Total Phase 1</b>	<b>455 kW</b>	<b>682,500 kWh/year</b>	—

### Expansion Phase (In Progress):

- **3808 Faraday Ave, Davis:** 608 kW system (awaiting PG&E Permission to Operate)



# Energy311 Platform Capabilities Deployed

01

## Multi-Utility Rate Engine

- Automated processing of SMUD and PG&E rate schedules
- Real-time application of Time-of-Use (TOU) rates
- Support for complex commercial rate structures
- Quarterly rate updates automatically applied

02

## 15-Minute Interval Billing

- Integration with SMUD Green Button data portal
- Processing of utility smart meter data at 15-minute granularity
- Revenue-grade accuracy for grid import/export calculations
- Synchronized solar production and grid consumption tracking

03

## Inverter & Metering Integration

- Direct integration with Sol-Ark inverter systems
- Revenue-grade CT monitoring for:
  - Grid import/export
  - Solar PV production
  - Building load consumption
  - Battery charge/discharge (where applicable)

04

## Property Owner Portal

- Real-time visibility into solar production across entire portfolio
- Energy mix analysis (solar vs. grid power)
- Production and usage monitoring dashboards
- Email notifications for data anomalies or retrieval issues
- Historical and current bill access

05

## Seamless Tenant Billing

- Monthly billing statements delivered via email
- Bills calculated using prevailing utility rates (not fixed PPA pricing)
- Transparent breakdown showing:
  - Grid charges based on utility bill
  - Total charges from 15-minute interval data
  - Solar savings (Total Charges - Grid Charges)
  - Final tenant bill (Grid Charges + Solar Charges with discount)

# The Results: Scalable, Accurate, and Profitable Solar Billing

## Quantifiable Business Impact

1

### Operational Efficiency Gains

- **Automated Billing**  
**Process:** 100% automated tenant billing across 4 properties (expanding to 5+)
- **Real-Time Monitoring:**  
24/7 visibility into 455+ kW of solar production
- **Eliminated Manual Errors:**  
Zero billing disputes due to "to the penny" accuracy
- **Scalability Achieved:**  
Adding 608 kW system with no proportional increase in administrative burden

2

### Revenue Generation

- **Solar Production:** 682,500 kWh/year
- **Average Tenant Rate:**  
~\$0.12-0.15/kWh (prevailing SMUD/PG&E rates)
- **Gross Tenant Billing Revenue:** ~\$81,900 - \$102,375/year
- **Net Revenue After Platform Costs:** ~\$71,660 - \$92,135/year

### ROI Calculation:

**Platform investment pays for itself through automated operations**

**3X more revenue compared to traditional 25-year fixed PPA pricing**

**Flexibility to adjust rates as utility rates change (no long-term rate lock-in)**

**Scalable model: Each additional property increases revenue without proportional cost increase**

3

### Tenant Satisfaction & Trust

- **Transparent Billing:**  
Tenants receive bills that mirror familiar utility bill formats
- **Defensible Accuracy:** 15-minute interval billing ensures verifiable charges
- **Clear Solar Savings:** Bills explicitly show savings from solar production
- **Zero Billing Disputes:**  
Accurate calculations prevent tenant complaints

# Expansion & Growth

## 608kW

### Additional Capacity

Currently implementing 608 kW additional system (+134% capacity growth)

## 100%

### Platform Confidence

Buzz Oates expanding Energy311 to all new solar properties

## 0

### Billing Disputes

Platform scales effortlessly as portfolio grows

## Operational Excellence

### Data Quality & Reliability:

Energy311 successfully integrated with:

- SMUD's backend smart meter system (15-minute interval exports)
- PG&E Green Button data portal
- Sol-Ark inverter monitoring platforms
- Proactive data quality monitoring with automated alerts
- Seamless handling of utility system transitions and migrations

### Property Management Integration:

- Tenant information synchronized with lease management
- Automated billing triggered by tenant move-ins/move-outs
- Portal access for property managers to monitor all locations

## Stakeholder Testimonials

"We have a 608kW system we're bringing online soon, just waiting on the PTO from PG&E. What do you need to link up with a different location?"

— Nic Ramos, Assistant Property Manager, Buzz Oates Management Services

"You are providing a unique value proposition that doesn't exist in the marketplace."

— Solar Industry Partner

# Why Energy311? **The Competitive Advantage**

## What Makes Energy311 Different

**1**

### **Proven Platform, Not an MVP**

- 5+ years of platform development serving real customers
- Battle-tested billing engine processing millions of kWh
- Proven integration with 40+ utility providers
- Enterprise-grade reliability and security (SOC 2 Type II certified)

**2**

### **Multi-Utility Expertise**

- Active support for SMUD, PG&E, and 40+ other utility providers
- Automated quarterly rate updates
- Complex rate structure handling (TOU, demand charges, seasonal variations)
- No manual rate table management required

**3**

### **True 15-Minute Interval Processing**

- Not estimates or approximations
- Revenue-grade accuracy for every billing period
- Captures exact peak/off-peak timing for maximum accuracy
- Integration with utility smart meter systems and Green Button data

**4**

### **Flexible Revenue Model**

- Bill at prevailing utility rates (not locked into 25-year PPA pricing)
- Adapt to utility rate changes automatically
- Maximize property owner profit (3X more revenue vs. traditional PPAs)
- Transparent tenant billing builds trust

**5**

### **Complete Property Owner Visibility**

- Real-time production monitoring across entire portfolio
- Environmental impact reporting
- Energy mix analysis (solar vs. grid)
- Historical trend analysis and forecasting

**6**

### **Scalability Without Complexity**

- Adding new properties is seamless
- No proportional increase in administrative burden
- Single platform for entire portfolio
- Centralized reporting and management

# Energy311 vs. Traditional Approaches

Feature	Energy311	Traditional PPAs	Manual Billing	PM Software Add-ons
Billing Accuracy	<b>To the penny (15-min intervals)</b>	Fixed rates	Error-prone	Basic metering
Property Owner Revenue	<b>3X higher (utility rates)</b>	Fixed 25-year rate	Variable	Limited
Scalability	<b>Unlimited properties</b>	Per-property contracts	Labor-intensive	Single utility only
Multi-Utility Support	<b>40+ utilities</b>	Typically single utility	Manual per utility	Limited
Rate Updates	<b>Automatic quarterly</b>	Fixed for 25 years	Manual research	Manual
Tenant Portal	<b>Included</b>	Not provided	Not available	Basic
Property Owner Portal	<b>Real-time visibility</b>	No visibility	Spreadsheets	Limited reporting
Integration	<b>Native APIs</b>	None	Manual entry	Limited
Setup Time	<b>Days</b>	Months	Ongoing	Weeks



# Key Takeaways

## For Commercial Property Owners



### Solar + Energy311 = Profitable Tenant Billing

- Generate 3X more revenue compared to traditional PPAs
- Bill tenants at utility rates while capturing margin
- No long-term rate lock-in provides flexibility



### Automation Eliminates Operational Burden

- Zero manual billing processes
- Scalable across unlimited properties
- Real-time visibility without constant oversight



### Accuracy Builds Tenant Trust

- 15-minute interval billing is defensible
- Transparent bills reduce disputes
- Professional billing experience maintains relationships



### Platform Scales With Your Portfolio

- Adding properties is seamless
- Single platform for entire solar portfolio
- Centralized reporting and management

## For Solar Developers & Partners

### Energy311 Makes Projects Financially Viable

- Overcome PPA economics challenges
- Enable property owner to capture value
- Create win-win for landlords and tenants

### Proven Platform Reduces Risk

- 5+ years of production operations
- SOC 2 Type II security certification
- Established utility integrations

### Technical Integration Is Seamless

- Works with multiple inverter manufacturers (Sol-Ark, Enphase, etc.)
- Integrates with all major utilities
- Revenue-grade metering supported

# About Energy311

Energy311 is the only solar billing platform that combines:

- **5+ years of proven billing platform development** – not a startup MVP
- **AI Assistant with conversational interface** – not just dashboards and reports
- **Deep property management system integration** – native sync, not CSV exports

## Core Capabilities:

- Multi-utility rate engine (40+ utilities actively supported)
- 15-minute interval billing for revenue-grade accuracy
- AI-powered pre-bill validation and anomaly detection
- Native integration with leading PM systems (Yardi, RentManager, AppFolio, etc.)
- Real-time financial reporting and profit analytics
- 24/7 automated tenant support

## Security & Compliance:

- SOC 2 Type II certified
- ISO/IEC 27001, SOC 1/2/3, PCI DSS compliant infrastructure
- End-to-end data encryption
- GDPR compliant for tenant data privacy

## Contact Information:



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**Energy311 is making renewable energy profitable and transparent for property owners while delivering tenant savings and trust.**