



Joint IOU Report on Public Purpose Program Surcharge Update

Low Income Oversight Board Meeting
WebEx

March 14, 2024

Customer Bill – Public Purpose Program Surcharge (2022-2024)

	What does the surcharge for public purpose programs cover (CARE, ESA, FERA, etc.)?	Where is this on their bill?	How much has the average bill gone up from January of 2022 to January of 2024?	How much of this was attributed to public purpose programs by category (CARE, ESA, etc.)?
SCE	<p>Low-Income:</p> <ul style="list-style-type: none"> CARE Subsidy, CARE and FERA Admin, ESAP, CARE Balancing Account <p>PPP Balancing Account + Uncollectibles:</p> <ul style="list-style-type: none"> PPPAM Balancing Account, CIA <p>ERRA Forecast (Fuel and Purchased Power (F&PP)/Clean Energy Programs)</p> <ul style="list-style-type: none"> F&PP for TMNBC, BMNBC, PPP <p>Other:</p> <ul style="list-style-type: none"> EPIC, SGIP, Summer Reliability OIR <p>Energy Efficiency(EE):</p> <ul style="list-style-type: none"> EE Procurement and Schools EE Stimulus Program 	The PPP surcharge appears in the “Details of your new charges” section of the customer’s bill.	<p>A typical non-CARE and CARE residential customer using 500 kWh per month saw an average monthly bill increase of \$39.19 or 28.2% and \$26.55 or 28.2%, respectively.</p> <p>The increase from January of 2022 to January of 2024 is primarily attributed to Wildfire, ERRA, and GRC related changes.</p>	This increase in Residential non-CARE and CARE bills from January of 2022 to January of 2024 attributable to PPP is \$0.90 and \$0.61, respectively.

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	What does the surcharge for public purpose programs cover (CARE, ESA, FERA, etc.)?	Where is this on their bill?	How much has the average bill gone up from January 2022 to January of 2024?	How much of this was attributed to public purpose programs by category (CARE, ESA, etc.)?
PG&E - Electric	<p>Low-Income:</p> <ul style="list-style-type: none"> CARE Subsidy, CARE Admin, ESA, CARE Balancing Account <p>PPP Balancing Account + Uncollectibles:</p> <ul style="list-style-type: none"> PPPRAM Balancing Account, RUBA (non-Generation) <p>ERRA Forecast (Fuel and Purchased Power (F&PP)/Clean Energy Programs)</p> <ul style="list-style-type: none"> TMNBC, BioMAT, DAC-GT <p>Other:</p> <ul style="list-style-type: none"> EPIC, Emergency (Summer) Reliability OIR <p>Energy Efficiency(EE):</p> <ul style="list-style-type: none"> EE, EE Procurement, and Schools EE Stimulus Program 	Gas and Electric PPP charges are found in the “Details of Gas Charges” and “Your Electric Charges Breakdown” sections of the Gas and Electric bills (outlined in green on the sample bills).	<p>A residential <u>Non- CARE</u> customer with typical usage of 500 kWh per month experienced an electric bill increase from January 2022 to January 2024 of \$71 or 47%. This is primarily attributed to an increase in distribution and generation rates.</p> <p>A residential <u>CARE</u> customer with typical usage of 500 kWh per month experienced an electric bill increase from January 2022 to January 2024 of \$44 or 45%. This is primarily attributed to an increase in distribution and generation rates.</p>	<p>The increase in Residential <u>Non- CARE</u> customer’s electric bill from January 2022 to January 2024 attributable to PPP is \$3.50, or 5% of the total increase, largely due to an increase in CARE surcharge and uncollectibles.</p> <p>The increase in Residential <u>CARE</u> customer’s electric bill from January 2022 to January 2024 attributable to PPP is \$0.95, or 2% of the total increase, largely due to an increase in uncollectibles.</p>

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	What does the surcharge for public purpose programs cover (CARE, ESA, FERA, etc.)?	Where is this on their bill?	How much has the average bill gone up from January 2022 to January of 2024?	How much of this was attributed to public purpose programs by category (CARE, ESA, etc.)?
PG&E - Gas	<p>Energy Efficiency(EE):</p> <ul style="list-style-type: none"> EE ,Schools EE Stimulus Program and EE Balancing Account <p>Energy Savings Assistance Program (ESA):</p> <ul style="list-style-type: none"> ESA programs and ESA Balancing Account <p>California Alternate Rates for Energy Administration (CARE):</p> <ul style="list-style-type: none"> CARE Discount, CARE A&G, and CARE Balancing Account <p>Research, Development, & Demonstration (RD&D):</p> <ul style="list-style-type: none"> RD&D statewide authorized funding and RD&D balancing account <p>Board of Equalization Administration Costs (BOE):</p> <ul style="list-style-type: none"> BOE admin cost 	Gas and Electric PPP charges are found in the “Details of Gas Charges” and “Your Electric Charges Breakdown” sections of the Gas and Electric bills (outlined in green on the sample bills).	<p>➤ A Residential <u>Non- CARE</u> customer with typical usage of 33 therms per month experienced a gas bill increase from January 2022 to January 2024 of \$6.98 or 11%. This increase is attributable primarily due to the increase in transportation and PPP rates and a lesser extent due to the procurement rate.</p> <p>➤ A Residential <u>CARE</u> customer with typical usage of 29 therms per month experienced a gas bill increase from January 2022 to January 2024 of \$3.81 or 9%. This increase is attributable primarily due to the increase in transportation and PPP rates and a lesser extent due to the procurement rate.</p>	<p>➤ This increase in Residential <u>Non-CARE</u> customer’s gas bill from January 2022 to January 2024 attributable to PPP is \$0.23 or 0.4%.</p> <p>➤ This increase in Residential <u>CARE</u> customer’s gas bill from January 2022 to January 2024 was off-set by a decrease attributable to PPP of \$-0.04 or -0.1% due to overcollections in The ESA balancing account being returned to CARE customers.</p>

Note: PG&E is using the illustrative Gas Procurement as filed in the G-PPPs surcharge, Transportation and PPPS rates from January 2022 and January 2024. SoCalGas is using a “typical” average bill to calculate how much an average bill has gone up between November 2021 to January 2022.

Customer Bill – Public Purpose Program Surcharge (2022-2024)



	What does the surcharge for public purpose programs cover (CARE, ESA, FERA, etc.)?	Where is this on their bill?	How much has the average bill gone up from January of 2022 to January of 2024?	How much of this was attributed to public purpose programs by category (CARE, ESA, etc.)?
Gas	CARE, ESA, EE. AB 841 (Schools Energy Efficiency), SD Port, RD&D	Gas and Electric PPP charges are found in the "Other Charges & Credits" sections of the customer's bill	<p>➤ A Residential <u>Non-CARE</u> customer with typical usage of 25 therms per month experienced a gas bill decrease from January 2022 to January 2024 of \$5.65 or 9.5%.</p> <p>➤ A Residential <u>CARE</u> customer with typical usage of 21 therms per month experienced a gas bill decrease from January 2022 to January 2024 of \$3.83 or 9.8%.</p>	<p>➤ This decrease in Residential <u>Non-CARE</u> customer's gas bill from January 2022 to January 2024 was due to the commodity. The PPP increased by \$0.14 or 6% due to increases in CARE and Energy Efficiency.</p> <p>➤ A Residential <u>CARE</u> customer's gas bill from January 2022 to January 2024 attributable to PPP is an increase of \$0.09 or 0.2% of total bill due to increase in Energy Efficiency.</p>

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	What does the surcharge for public purpose programs cover (CARE, ESA, FERA, etc.)?	Where is this on their bill?	How much has the average bill gone up from January of 2022 to January of 2024?	How much of this was attributed to public purpose programs by category (CARE, ESA, etc.)?
Electric	<p>California Alternative Rates for Energy (CARE), Family Electric Rate Assistance (FERA), Energy Savings Assistance (ESA), Energy Efficiency (EE), Electric Program Investment Charge (EPIC), Self-Generation Incentive Program (SGIP), Food Bank Discount, San Diego Port, AB 841 (Schools Energy Efficiency), Flex Alert, Economic Development Rate (EDR), Wildfire and Natural Disaster Resiliency Rebuild (WNDRR)*, Tree Mortality Non-Bypassable (TMNB), Residential Uncollectible Balancing Account (RUBA), Percentage of Income Payment Plan (PIPP) Pilot, Green Tariffs (GT) Programs not covered by Greenhouse Gas (GHG) Revenues.</p> <p>* Currently zero revenue requirement</p>	Gas and Electric PPP charges are found in the "Other Charges & Credits" sections of the customer's bills	<p>➤ A Typical bundled inland/coastal Residential <u>Non- CARE</u> customer using 400 kWh experienced a bill decrease from January 2022 to January 2024 of -\$3/month or - 2.1% (excludes the semi-annual California Climate Credit (CCC)).</p> <p>➤ A Typical bundled inland/coastal Residential <u>CARE</u> customer using 400 kWh experienced a bill decrease from January 2022 to January 2024 of -\$2/month or - 2.3% (excludes CCC).</p>	<p>➤ The decrease in a Typical Residential <u>Non-CARE</u> customer from January 2022 to January 2024 attributed to PPP is -\$1 or - 27.2%, primarily related to decreases in TMNB and School Energy Efficiency Stimulus Program Balancing Account (SEESPBA) partially offset by increases in CARE program costs.</p> <p>➤ The decrease in a Typical Residential <u>CARE</u> customer from January 2022 to January 2024 attributed to PPP is -\$2 or - 103%, primarily related to decreases in TMNB and SEESPBA.</p>

Customer Bill – Public Purpose Program Surcharge (2022-2024)



	What does the surcharge for public purpose programs cover (CARE, ESA, FERA, etc.)?	Where is this on their bill?	How much has the average bill changed from January of 2022 to January of 2024?	How much of this was attributed to public purpose programs by category (CARE, ESA, etc.)?
SoCalGas	CARE, ESA, RD&D, EE	The PPP surcharge appears in the “Taxes & Fees on Gas Charges” section of the customer’s bill.	<ul style="list-style-type: none">➤ A Residential <u>Non- CARE</u> customer with typical usage of 37 therms per month experienced a gas bill decrease from January 2022 to January 2024 of \$6.64 or 9.5%. This decrease is attributable primarily due to the commodity rate decrease which was offset by an increase in transportation and PPPS..➤ A Residential <u>CARE</u> customer with typical usage of 27 therms per month experienced a gas bill decrease from January 2022 to January 2024 of \$3.79 or 9.3%. This decrease is attributable primarily due to the commodity rate which was offset by an increase in transportation and PPPS.	<ul style="list-style-type: none">➤ This change in Residential <u>Non- CARE</u> customer’s gas bill from January 2022 to January 2024 attributable to PPP is \$2.45 or 3.5% due to increases in the Energy Efficiency, Energy Savings Assistance Program and CARE program costs.➤ This increase in Residential <u>CARE</u> customer’s gas bill from January 2022 to January 2024 attributable to PPP is \$1.54 or 3.8% due to an increase in the Energy Efficiency and the Energy Savings Assistance Program costs.

Note: SoCalGas is using the actual Gas Procurement, Transportation and PPPS rates from January 2022 and Jan 2024. SoCalGas is using a “typical” average bill to calculate how much an average bill has gone up between Jan 2022 to Jan 2024.