



ADVICE LETTER SUMMARY

ENERGY UTILITY



MUST BE COMPLETED BY UTILITY (Attach additional pages as needed)

Company name/CPUC Utility No.: Bear Valley Electric Service, Inc. (913-E)

Utility type:

- ELC GAS WATER
 PLC HEAT

Contact Person: Jeff Linam

Phone #: (909) 394-3600 x664

E-mail: RegulatoryAffairs@bvesinc.com

E-mail Disposition Notice to: RegulatoryAffairs@bvesinc.com

EXPLANATION OF UTILITY TYPE

ELC = Electric GAS = Gas WATER = Water
 PLC = Pipeline HEAT = Heat

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #: 493-E

Tier Designation: Tier 1

Subject of AL: Bear Valley Electric Service, Inc.'s Request to Establish a Income Graduated Fixed Charge Memorandum Account, pursuant to Decision 24-05-028

Keywords (choose from CPUC listing): Compliance

AL Type: Monthly Quarterly Annual One-Time Other:

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #: Decision 24-05-028

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL: N/A

Summarize differences between the AL and the prior withdrawn or rejected AL: N/A

Confidential treatment requested? Yes No

If yes, specification of confidential information:

Confidential information will be made available to appropriate parties who execute a nondisclosure agreement. Name and contact information to request nondisclosure agreement/ access to confidential information:

Resolution required? Yes No

Requested effective date: 6/14/24

No. of tariff sheets: 3

Estimated system annual revenue effect (%):

Estimated system average rate effect (%):

When rates are affected by AL, include attachment in AL showing average rate effects on customer classes (residential, small commercial, large C/I, agricultural, lighting).

Tariff schedules affected: Preliminary Statement Part V- Page 2, Preliminary Statement Part GGG, TOC Page 1

Service affected and changes proposed¹: N/A

Pending advice letters that revise the same tariff sheets: N/A

¹Discuss in AL if more space is needed.

Protests and all other correspondence regarding this AL are due no later than 20 days after the date of this submittal, unless otherwise authorized by the Commission, and shall be sent to:

CPUC, Energy Division
Attention: Tariff Unit
505 Van Ness Avenue
San Francisco, CA 94102
Email: EDTariffUnit@cpuc.ca.gov

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Clear Form



Bear Valley Electric Service, Inc.
P.O. Box 9028
San Dimas, CA 91773-9028
A Subsidiary of American States Water Company

June 14, 2024

Advice Letter No. 493-E

(U 913 E)

California Public Utilities Commission

Bear Valley Electric Service, Inc. ("BVES") hereby transmits for filing the following:

SUBJECT: Establish the Income Graduated Fixed Charge Memorandum Account

PURPOSE

Pursuant to Decision ("D.") 24-05-028, Ordering Paragraphs ("OP") 1 and 9, BVES is filing this advice letter to create a new Income-Graduated Fixed Charge ("IGFC") Memorandum Account ("IGFCMA").

1. Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, Bear Valley Electric Service, Inc., Liberty Utilities, and PacifiCorp d/b/a Pacific Power shall each file a Tier 1 advice letter within 30 days of the issuance date of this decision to create (a) a new Income-Graduated Fixed Charge Memorandum Account and (b) a new Income-Graduated Fixed Charge Balancing Account.¹

9. Bear Valley Electric Service, Inc., Liberty Utilities, and PacifiCorp d/b/a Pacific Power shall each file a Tier 1 advice letter within 30 days of the issuance date of this decision to create a new income-graduated fixed charges memorandum account to track all implementation costs and incremental administration costs of income-graduated fixed charges.²

The IGFCMA will be used to track and record all implementation costs and incremental administration costs associated with the income-graduated fixed charges.³ While OP 1 includes the implementation of an IGFC Balancing Account, BVES is not requesting an IGFC Balancing Account at this time because, pursuant to OP 11 of D.24-05-028, BVES will "record any over- or under-collection of revenues by income-graduated fixed charges as a separate line-item in its existing Base Revenue Requirement Balancing Account." BVES is requesting a modification to its Base Revenue Requirement Balancing Account Preliminary Statement to incorporate the requirement in OP 11.

¹ D.24-05-028, p. 162

² D.24-05-028, p. 164

³ D.24-05-028, p. 140

BACKGROUND

On June 30, 2022, Assembly Bill (“AB”) 205 was signed into law. On July 14, 2022, the Commission issued an Order Instituting Rulemaking 22-07-005 to establish demand flexibility policies and modify electric rates to advance the following objectives:

(a) enhance the reliability of California’s electric system; (b) make electric bills more affordable and equitable; (c) reduce the curtailment of renewable energy and greenhouse gas emissions associated with meeting the state’s future system load; (d) enable widespread electrification of buildings and transportation to meet the state’s climate goals; (e) reduce long term system costs through more efficient pricing of electricity; and (f) enable participation in demand flexibility by both bundled and unbundled customers.⁴

IGFC MEMORANDUM ACCOUNT

D.24-05-028 states that each utility is to establish a memorandum account to track all incremental implementation and administrative costs of income-graduated fixed charges and recover these costs through a future request. Costs to be included in the memorandum accounts may include, but are not limited to, the costs of upgrading billing systems, communications and outreach to customers to educate and inform customers about new IGFCs, and any costs of complying with any Commission mandated implementation and/or ongoing IGFC requirements.⁵ The disposition of any balance in this account will be addressed in a future Application.

TIER DESIGNATION

This advice letter is submitted with a Tier 1 designation, pursuant to D.24-05-028.

EFFECTIVE DATE

BVES respectfully requests this advice letter become effective June 14, 2024

NOTICE AND PROTESTS

A protest is a document objecting to the granting in whole or in part of the authority sought in this advice letter. A response is a document that does not object to the authority sought, but nevertheless presents information that the party tendering the response believes would be useful to the Commission in acting on the request.

A protest must be mailed within 20 days of the date the Commission accepts the advice letter for submission. The Calendar is available on the Commission's website at www.cpuc.ca.gov.

A protest must state the facts constituting the grounds for the protest, the effect that approval of the advice letter might have on the protestant, and the reasons the protestant believes the advice letter, or a part of it, is not justified. If the protest requests

⁴ D.24-05-028, p. 5

⁵ D.24-05-028, Attachment C, p. See Appendix A, Attachment 1, Section IV.

an evidentiary hearing, the protest must state the facts the protestant would present at an evidentiary hearing to support its request for whole or partial denial of the advice letter.

The utility must respond to a protest within five days.

All protests and responses should be sent to:

California Public Utilities Commission, Energy Division

505 Van Ness Avenue

San Francisco, California 94102

E-mail: EDTariffUnit@cpuc.ca.gov

The protest or correspondence should also be sent via U.S. mail and/or electronically, if possible, to BVES at the addresses shown below on the same date it is delivered to the Commission.

Bear Valley Electric Service, Inc.

Regulatory Affairs

E-mail: RegulatoryAffairs@bvesinc.com

If you have not received a reply to your protest within 10 business days, please contact Jeff Linam at (909) 630-5555.

Correspondence:

Any correspondence regarding this compliance filing should be sent by regular mail or e-mail to the attention of:

Jeff Linam

Manager, Regulatory Affairs

Bear Valley Electric Service, Inc.

630 East Foothill Blvd.

San Dimas, California 91773

Email: RegulatoryAffairs@bvesinc.com

The protest shall set forth the grounds upon which it is based and shall be submitted expeditiously. There is no restriction on who may file a protest.

Sincerely,

/s/Alicia Menchaca

Alicia Menchaca

Rate Analyst, Regulatory Affairs

Bear Valley Electric Service, Inc.

cc: Jenny Au, Energy Division

R. Mark Pocta, California Public Advocates Office
BVES General Order 96-B Service List
Service List for R.22-07-005

PRELIMINARY STATEMENT
IGFC MEMORANDUM ACCOUNT

GGG. INCOME-GRADUATED FIXED CHARGE MEMORANDUM ACCOUNT

(N)

Bear Valley Electric Service, Inc. ("BVES") shall maintain the Income-Graduated Fixed Charge Memorandum Account ("IGFCMA").

1. PURPOSE

The purpose of the IGFCMA is to track all incremental expenses and capital-related costs (i.e. depreciation, taxes, and return) incurred for the implementation and administration of the income-graduated fixed charges.

2. APPLICABILITY

The IGFCMA applies to all residential customer classes, except for those specifically excluded by the Commission.

3. RATES

The IGFCMA does not have a rate component.

4. ACCOUNTING PROCEDURES

BVES shall maintain the IGFCMA by making entries at the end of each month as follows:

- a. Entries shall be made to the IGFCMA at the end of each month to record the costs to the account or appropriate subaccounts.
- b. Interest shall to the IGFCMA on a monthly basis by applying a rate equal to one-twelfth of the 3-month Commercial Paper Rate, as reported in the Federal Reserve Statistical Release, to the average of the beginning-of-month and the end-of-month balances.

5. EFFECTIVE DATE

The IGFCMA shall have the effective date of June 14, 2024.

6. DISPOSITION

Disposition of amounts recorded in the IGFCMA shall be determined in a subsequent regulatory proceeding, as authorized by the Commission.

(N)

(Continued)

Advice Letter No. 493-E
Decision No. D.24-05-028

Issued By
Paul Marconi
President

Date Filed June 14, 2024
Effective June 14, 2024
Resolution No. _____

PRELIMINARY STATEMENTS

V. **BASE REVENUE REQUIREMENT BALANCING ACCOUNT (continued)**

5. ADJUSTMENTS TO THE REVENUE REQUIREMENT

The annual revenue requirement levels in Section 4 may be adjusted, if needed, by an update as a result of changes to BVES' allocation of GSWC's (i) General Office cost, (ii) common plant cost or (iii) employee pension and benefit costs, each as approved by the Commission in GSWC water operations application filed before the Commission, or by some other appropriate proceeding that establishes a new BVES base rate revenue requirement or an addition to the BVES base rate revenue requirement shown in Section 4. The annual revenue requirement levels in Section 4 also may be adjusted, if needed, by an update as a result of the disposition of balances in the Pension Balancing Account, or advice letter filings regarding the completion and placement into commercial operation of the (i) Pineknoll Substation Project or (ii) the Grid Automation Project.

6. TRANSFERS AND ADJUSTMENTS TO THE BRRBA BALANCE

From time to time the Commission may find that an amortization of a base rate memorandum or balancing account it authorized has run for the required number of months but that there remains an unamortized over- or under- collected balance at the end of the amortization period. The unamortized balances for such accounts may be transferred to the balance in the BRRBA if the costs covered by the account are base rate related costs. Additionally, pursuant to Ordering Paragraph #11 of D.24-05-028, BVES will record any over- or under-collection of revenues by income-graduated fixed charges as a separate line-item.

(T)
(T)
(T)

7. ACCOUNTING PROCEDURES:

GSWC shall maintain the BRRBA by making entries at the end of each month as follow:

- a. Recorded monthly base rate revenues.
- b. Apportioned monthly allocation of the authorized annual base rate revenue requirement as described in Section 4.
- c. Total net BRRBA balance: 7.a. minus 7.b.
- d. GSWC shall apply interest to the average net balance in the BRRBA account at a rate equal to one-twelfth the interest rate on three-month Commercial Paper for the previous month as reported in the Federal Reserve Statistical Release, H.15, or its successor publication. Accumulated interest will be included in the amount on which interest is charged, but will be identified as a separate component of the BRRBA account.

8. EFFECTIVE DATE

As reflected in the Settlement Agreement approved by the Commission in D. 19-08-027, the revenue requirements for 2018, 2019, 2020, 2021 and 2022 are effective as of January 1, 2018, January 1 2019, January 1, 2020, January 1, 2021, and January 1, 2022, respectively.

9. ACCOUNT DISPOSITION

The disposition of the balance in the BRRBA at the close of each year, plus any transfers or adjustments authorized to be made to the BRRBA, will be addressed by GSWC in a Tier 2 Advice Letter filing if the amount of the under- or over-collection is equal to or greater than 5% of the revenue requirement established for the previous twelve months. Should such a trigger be met, GSWC may file the required advice letter with the necessary amortization charge expected to amortize the balance over the next twelve months.

Table of Contents

The following tariff sheets contain all effective rates and rules affecting rates and service of the utility, together with information relating thereto:

<u>Subject Matter of Sheet</u>	Sheet No.
Title Page	2845-E
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Tariff Area Map	1140-E (C)
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No. A-2 General Service	3448-E, 1838-E
No. A-3 General Service	3449-E, 1840-E
No. A-4 General Service- TOU	3450-E, 1842-E, 1843-E
No. A-5 TOU Primary	3451-E, 3297-E, 1846-E
No. A-5 TOU Secondary	3452-E, 3299-E, 1849-E
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No. DMS Domestic Service -Multi-family Accommodation Sub-metered	3457-E, 3458-E, 3331-E
No. DO Domestic Service - Other	3459-E, 3290-E
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No. NEM-S Net Energy Metering- Small	1936-E, 1937-E, 1938-E, 1939-E, 1940-E
No. GSD General Service Demand - Camp Oaks	3460-E, 1868-E
No. SL Street Lighting Service	3461-E, 2709-E
No. SSC Special Service Charges	3241-E, 2711-E
No. S Standby Standby Service	3068-E, 2160-E, 2161-E
No. SMO Smart Meter Opt-Out Residential Service	2445-E
No. PPC-LI Public Purpose Charge - Low Income	3404-E
No. PPC-OLI Public Purpose Charge - Other Than Low Income	3405-E
No. UF-E Surcharge to Fund PUC Utilities Reimbursement Account Fee	3430-E
No. TOU-EV-1 General Service Time of Use Electric Vehicle Charging	3334-E, 2606-E
No. TOU-EV-2 General Service Time of Use Electric Vehicle Charging	3335-E, 3336-E
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No. DGS Distributed Generation Service Program	3375-E, 2789-E, 2790-E
No. DGS NEM-L Distributed Generation Service Net Energy Metering-Large	2833-E, 2834-E, 2835-E
No. DGS NEM-S Distributed Generation Service Net Energy Metering-Small	2836-E, 2837-E, 2838-E

(Continued)

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CALIFORNIA PUBLIC UTILITIES COMMISSION

Service Lists

PROCEEDING: R2207005 - OIR ADVANCE DEMAND F
FILER: CPUC
LIST NAME: LIST
LAST CHANGED: JUNE 13, 2024

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