



# 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) #: 512-E

Tier Designation: 1

Subject of AL: 2025-2026 CARE and ESA Eligibility Income Levels Update

Keywords (choose from CPUC listing): Compliance, Tariffs

AL Type: ☐ Monthly ☐ Quarterly ☒ Annual ☐ One-Time ☐ Other:

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

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL: No

Summarize differences between the AL and the prior withdrawn or rejected AL:

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: 6/1/25

No. of tariff sheets: 4

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: Schedule DLI, Form No. 17 English, Form No. 17 Spanish, Table of Contents

Service affected and changes proposed<sup>1</sup>: See Advice Letter

Pending advice letters that revise the same tariff sheets:

<sup>1</sup>Discuss 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](mailto:EDTariffUnit@cpuc.ca.gov)

Name: Jeff Linam  
Title: Regulatory Affairs Manager  
Utility Name: Bear Valley Electric Service, Inc  
Address: 630 E. Foothill Blvd  
City: San Dimas State: California  
Telephone (xxx) xxx-xxxx: (909) 394-3600 x664  
Facsimile (xxx) xxx-xxxx:  
Email: [RegulatoryAffairs@bvesinc.com](mailto:RegulatoryAffairs@bvesinc.com);

Name: Alicia Menchaca  
Title: Rate Analyst, Regulatory Affairs  
Utility Name: Bear Valley Electric Service, Inc  
Address: 630 E. Foothill Blvd  
City: San Dimas State: California  
Telephone (xxx) xxx-xxxx: (909) 394-3600 x497  
Facsimile (xxx) xxx-xxxx:  
Email: [RegulatoryAffairs@bvesinc.com](mailto:RegulatoryAffairs@bvesinc.com); [alicia.menchaca@bvesinc.co](mailto:alicia.menchaca@bvesinc.co)

Clear Form



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

April 11, 2025

Advice Letter No. 512-E

(U 913 E)

## California Public Utilities Commission

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

**SUBJECT:** 2025-2026 CARE and ESA Eligibility Income Levels

### **PURPOSE**

This advice letter updates BVES's Form No. 17 English, Form No. 17 Spanish, and Rate Schedule No. DLI to reflect the 2025-2026 eligibility income guidelines for low-income programs<sup>1</sup>.

This Advice Letter is in compliance with Energy Division notice as ordered by Decision No. 12-08-044<sup>2</sup>.

### **BACKGROUND**

On March 26, 2025 the California Public Utilities Commission ("CPUC"), in accordance with Decision No. 12-08-044, issued its annual notice to Investor-Owned and Small Multi-Jurisdictional Utilities regarding updated qualifying income guidelines California Alternative Rates for Energy ("CARE"), Family Electric Rate Assistance ("FERA") and Energy Savings Assistance ("ESA") programs for 2025-2026.

The annual income guidelines are compliant with Public Utilities Code Sections 739.1 (a) and 2790 (f)(g).

Utilities are requested to file revised applicable tariffs reflecting the new income levels by May 1, 2025.

### **2025-2026 INCOME GUIDELINES**

In compliance with the notice from the Energy Division, BVES is filing this advice letter to acknowledge, make effective and reflect the CARE and ESA programs eligibility income levels for 2025-2026.

BVES has updated the new guidelines information on applicable tariffs.

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<sup>1</sup> California Alternate Rates for Energy ("CARE") Program and the Energy Savings Assistance Program ("ESA").

<sup>2</sup> D.12-08-044, Ordering Paragraph 119

- **CARE**

BVES revises tariffs Form No. 17 and Rate Schedule No. DLI to reflect the new CARE Program eligibility income levels for 2025-2026 as follows (from “Table 1: CARE Income Guidelines” of the notice):

<b>Effective June 1, 2025 to May 31, 2026</b>	
No. of Person In Household	Income Eligibility Upper Limit*
1-2	\$42,300
3	\$53,300
4	\$64,300
5	\$75,300
6	\$86,300
7	\$97,300
8	\$108,300
Each Additional Person	\$11,000
*Upper Limit Calculation = 200% of Federal Poverty Guidelines	

- **ESA**

BVES acknowledges the 2025-2026 ESA program income guidelines and will begin using the new guidelines beginning June 1, 2025. BVES does not have applicable tariffs to update.

The ESA Program eligibility income levels for 2025-2026 will be as follows (from “Table 2: ESA Income Guidelines” of the notice):

<b>Effective June 1, 2025 to May 31, 2026</b>	
No. of Person In Household	Income Eligibility Upper Limit*
1	\$39,125
2	\$52,875
3	\$66,625
4	\$80,375
5	\$94,125
6	\$107,875
7	\$121,625
8	\$135,375
Each Additional Person	\$13,750
*Upper Limit Calculation = 250% of Federal Poverty Guidelines	

- **FERA**

BVES acknowledges the 2025-2026 FERA program income guidelines. BVES does not participate in FERA. Therefore, the 2025-2026 FERA program income guidelines are not applicable to BVES.

**COMPLIANCE**

This advice letter requests approval in compliance with the March 26, 2025 notice from Energy Division.

**ATTACHMENT**

Attachment A: 2025-2026 CARE ESA and FERA Annual Income Guideline Letter.

**TIER DESIGNATION**

This advice letter is submitted with a Tier 1 designation.

**EFFECTIVE DATE**

BVES respectfully requests this advice letter becomes effective on June 1, 2025.

**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](http://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 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](mailto: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](mailto: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](mailto: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.

c: Jenny Au, Energy Division  
Michael Campbell, California Public Advocates Office  
Scott Logan, California Public Advocates Office  
BVES General Order 96-B Service List

<b>Cal P.U.C. Sheet No.</b>	<b>Title of Sheet</b>	<b>Cancelling Cal P.U.C. Sheet No.</b>
3597-E	Form No. 17 NOTICE AND APPLICATION FOR CALIFORNIA ALTERNATE RATES FOR ENERGY (CARE) PROGRAM Sheet 1	3465-E
3598-E	Form No. 17 AVISO Y SOLICITUD PARA EL PROGRAMA DE CALIFORNIA PARA TARIFAS ALTERNAS (CARE) Sheet 1	3467-E
3599-E	Schedule No. DLI CALIFORNIA ALTERNATE RATES FOR ENERGY (CARE) DOMESTIC SERVICE - SINGLE FAMILY ACCOMMODATION Sheet 2	3469-E
3600-E	Table of Contents Sheet 1	3590-E
3601-E	Table of Contents Sheet 3	3471-E

Form No. 17  
NOTICE AND APPLICATION FOR CALIFORNIA  
ALTERNATE RATES FOR ENERGY (CARE) PROGRAM

**YOU MAY QUALIFY FOR A DISCOUNT ON YOUR ENERGY BILL**

To apply for a 20% discount at your residence, please fill out this application and mail it to Bear Valley Electric Service, P.O. Box 1547, Big Bear Lake, CA 92315. You will receive the discount on the next bill after the utility receives and approves your completed and signed application. If you need help filling out the application, or would like more information about the program, call (800) 808-BVES (2837) or visit our office at 42020 Garstin Drive, Big Bear Lake, California 92315.

Other California utilities offer similar bill discounts. Contact your gas utility to receive an application for a discount on your gas bill.

Effective June 1, 2025 to May 31, 2026	
No. of Person In Household	Income Eligibility Upper Limit*
1-2	\$42,300
3	\$53,300
4	\$64,300
5	\$75,300
6	\$86,300
7	\$97,300
8	\$108,300
Each Additional Person	\$11,000
*Upper Limit Calculation = 200% of Federal Poverty Guidelines	

**WHAT ARE THE QUALIFICATIONS?**

To qualify for the discount, I understand:

- The energy utility bill will be in my name.
- I may not be claimed as a dependent on another person's tax return.
- My total annual income cannot exceed the chart above. *Total income means the gross income of ALL persons living in my home.*
- I will reapply each time I move.
- I will renew my application every two (2) years, or sooner, if requested.
- I will renew my application every year if I am a sub-metered tenant, or sooner, if requested.
- I will notify the utility within 30 days when I become ineligible for CARE.
- I will provide verification of my household income.

For the purpose of the CARE program the "gross household income" means all money and non cash benefits, available for living expenses, from all sources, both taxable and non taxable, before deductions for all people who live in my home. This includes, but is not limited to:

- |  |   |  |
|--|---|--|
| <input type="radio"/> Wages or salaries  | <input type="radio"/> Social Security, SSI, SSP                                   | <input type="radio"/> Rental or royalty income                                   |
| <input type="radio"/> Interest or dividends from Savings accounts, stocks or bonds | <input type="radio"/> Scholarships, grants, or other aid used for living expenses | <input type="radio"/> Profit from self-employment (IRS form Schedule C, Line 29) |
| <input type="radio"/> Unemployment benefits  | <input type="radio"/> Disability payments   | <input type="radio"/> Worker's Compensation                                      |
| <input type="radio"/> TANF(AFDC)   | <input type="radio"/> Food Stamps   | <input type="radio"/> Child Support  |
| <input type="radio"/> Pensions   | <input type="radio"/> Insurance settlements                                       | <input type="radio"/> Spousal Support  |
| <input type="radio"/> Gifts  | <input type="radio"/> Legal settlements   | <input type="radio"/> Other Income   |

Proof of income acceptable to the utility will be provided when applying for or renewing application.

(Continued)

Advice Letter No. 512-E  
Decision No. D.12-08-044

Issued By  
**Paul Marconi**  
President

Date Filed  
Effective June 1, 2025  
Resolution No.



Form No. 17  
AVISO Y SOLICITUD PARA EL PROGRAMA  
DE CALIFORNIA PARA TARIFAS ALTERNAS (CARE)

**USTED PODRIA CALIFICAR PARA UN DESCUENTO EN SU FACTURA DE ENERGIA ELECTRICA**

Para solicitar un descuento del 20% en su residencia, por favor llene esta solicitud y envíela a Bear Valley Electric Service, P.O. Box 1547, Big Bear Lake, CA 92315. Usted recibirá el descuento en su próxima factura después de haber recibido y aprobado su solicitud completamente llena y firmada. Si usted necesita ayuda para llenar la solicitud; o le gustaría recibir mas información sobre este programa, sírvase llamar al (800) 808-BVES (2837) o visite nuestra oficina localizada en el 42020 Garstin Drive, Big Bear Lake, California 92315.

Otras compañías de servicios publicos de California ofrecen descuentos similares. Contacte su compañía de gas para recibir una solicitud para un descuento en su factura de gas.

**REQUISITOS DE INGRESOS ANUALES**

Efectivo junio 1, 2025 hasta mayo 31, de 2026	
Numero de Personas Viviendo en mi casa	Ingresos total anual combinado
1-2	\$42,300
3	\$53,300
4	\$64,300
5	\$75,300
6	\$86,300
7	\$97,300
8	\$108,300
Para cada persona adicional, agregar	\$11,000
*Cálculos de Limite Superior = 200% de Directrices Federales de Nivel de Pobreza	

(T)

(T)

**CUALES SON LOS REQUISITOS?**

Para calificar para el descuento yo entiendo que:

- La factura de energía esta bajo mi nombre
- No soy reportado como dependiente en los impuestos de otra persona.
- Mi ingreso anual total no puede exceder los de la tabla citada arriba. *Ingreso total significa el ingreso bruto de TODAS las personas viviendo en mi casa.*
- Solicitoré de nuevo cada vez que me mude de casa.
- Renovaré mi solicitud cada dos (2) años, o antes si es requerido.
- Renovaré mi solicitud cada (1) año si soy inquilino con un sub-medidor, o antes si es requerido.
- Notificaré a la compañía de agua dentro de 30 días si pierdo mi elegibilidad para CARE.
- Proveeré verificación de ingresos de mi hogar.

Para propósitos de CARE "ingreso bruto familiar" significa todo ingreso sea en efectivo o no, disponible para gastos de vivienda, de todas las personas, sea que dichos ingresos sean sujetos a impuestos o no, previo a las deducciones, de todas las personas viviendo en su hogar. Esto incluye, pero no se limita a:

- |  |   |   |
|--|---|---|
| <input type="radio"/> Sueldos  | <input type="radio"/> Seguro Social, SSI, SSP                             | <input type="radio"/> Ingresos de alquiler o regalías                   |
| <input type="radio"/> Interés o dividendos de: Cuentas de ahorros, acciones, bonos | <input type="radio"/> Becas, préstamos de escuela y otra ayuda financiera | <input type="radio"/> Ganancias de autoempleo (IRS Forma C, Renglón 29) |
| <input type="radio"/> Beneficios de Jubilación                                     | <input type="radio"/> Beneficios por incapacidad                          | <input type="radio"/> Compensación al trabajador                        |
| <input type="radio"/> TANF(AFDC)   | <input type="radio"/> Estampillas para comida                             | <input type="radio"/> Apoyo para los niños                              |
| <input type="radio"/> Pensiones  | <input type="radio"/> Indemnizaciones de seguro                           | <input type="radio"/> Apoyo cónyuge                                     |
| <input type="radio"/> Regalos en efectivo  | <input type="radio"/> Indemnizaciones legales                             | <input type="radio"/> Otra ayuda  |

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Advice Letter No. 512-E  
Decision No. D.12-08-044

Issued By  
**Paul Marconi**  
President

Date Filed  
Effective June 1, 2025  
Resolution No.

Schedule No. DLI  
CALIFORNIA ALTERNATE RATES FOR ENERGY (CARE)  
DOMESTIC SERVICE - SINGLE FAMILY ACCOMMODATION

**SPECIAL CONDITIONS**

1. A permanent resident of Bear Valley is one who maintains only one residence and that residence receives electric service from the Bear Valley Electric Service (BVES) and who regularly receives mail, including bills by this utility, through the United States Post Office located at Big Bear City, Big Bear Lake, Fawnskin or Sugarloaf.
2. A customer applying for service under schedule "DLI" will be required to show proof of satisfying Special Condition #1 above and may be required to sign a form that declare that they are not receiving a baseline allowance at any other location (whether inside BVES territory or outside BVES territory).
3. Low-Income Household: A Low-Income Household is a household where the total gross annual income from all sources is no more than shown on the table below based on the number of persons in the household. Total gross income shall include income from all sources, both taxable and nontaxable.

Effective June 1, 2026 to May 31, 2026	
No. of Person In Household	Total Gross Annual Income*
1-2	\$42,300
3	\$53,300
4	\$64,300
5	\$75,300
6	\$86,300
7	\$97,300
8	\$108,300
Each Additional Person	\$11,000
*Upper Limit Calculations = 200% of Federal Poverty Guidelines	

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4. Application and Eligibility Declaration: An Application and eligibility declaration on a form authorized by the Commission is required for each request for service under this schedule. Renewal of a customer's eligibility declaration will be required every two years and may be required at the Company's discretion.
5. An applicant for new service shall pay a service establishment charge as shown on Schedule No. SSC.

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Advice Letter No. 512-E  
Decision No. D.12-08-044

Issued By  
**Paul Marconi**  
President

Date Filed  
Effective June 1, 2025  
Resolution No. \_\_\_\_\_

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:

**Subject Matter of Sheet**

Title Page	Sheet No.	
Table of Contents	2845-E	
Preliminary	3600-E, 3544-E, 3601-E, 3339-E	(T)
Statements	935-E, 1590-E*, 1591-E*, 2381-E*, 2382-E*, 1594-E*, 1595-E*, 1596-E*, 1597-E*, 3209-E, 2177-E, 3477-E, 2985-E, 2986-E, 2602-E, 2603-E*, 1604-E*, 1605-E*, 1606-E*, 1611-E*, 2201-E, 3591-E, 3592-E, 2865-E, 1929-E, 2028-E, 2034-E, 2817-E, 2818-E, 2483-E, 2485-E, 2487-E, 2174-E, 2175-E, 2443-E, 2444-E, 2554-E, 2565-E, 2768-E, 2633-E, 2653-E, 3539-E, 2866-E, 3134-E, 3091-E, 3092-E, 3093-E, 3095-E*, 3224-E, 3343-E, 3364-E, 3365-E, 3367-E, 3368-E, 3377-E, 3378-E, 3388-E, 3474-E, 3538-E	
Tariff Area Map	1140-E	
<b>Rate Schedules:</b>		
No. A-1 General Service	3560-E, 3319-E	
No. A-2 General Service	3561-E, 1838-E	
No. A-3 General Service	3562-E, 1840-E	
No. A-4 General Service- TOU	3563-E, 1842-E, 1843-E	
No. A-5 TOU Primary	3564-E, 3297-E, 1846-E	
No. A-5 TOU Secondary	3565-E, 3299-E, 1849-E	
No. D Domestic Service - Single-family Accommodation	3566-E, 3321-E, 3322-E	
No. DE Domestic Service to Company Employees	3567-E, 3324-E	
No. DLI Domestic Service - CARE Rate	3568-E, 3599-E, 1857-E, 3284-E	(T)
No. DM Domestic Service - Multi-family Accommodation	3569-E, 3328-E, 3286-E	
No. DMS Domestic Service -Multi-family Accommodation Sub-metered	3529-E, 3570-E, 3331-E	
No. DO Domestic Service – Other	3571-E, 3290-E	
No. NEM-L Net Energy Metering- Large	1931-E, 1932-W, 1933-E, 1934-E, 1935-E	
No. NEM-S Net Energy Metering- Small	1936-E, 1937-E, 1938-E, 1939-E, 1940-E	
No. GSD General Service Demand – Camp Oaks	3572-E, 1868-E	
No. SL Street Lighting Service	3573-E, 2709-E	
No. SSC Special Service Charges	3241-E, 2711-E	
No. S Standby Standby Service	3542-E, 2160-E, 2161-E	
No. SMO Smart Meter Opt-Out Residential Service	2445-E	
No. PPC-LI Public Purpose Charge - Low Income	3491-E	
No. PPC-OLI Public Purpose Charge - Other Than Low Income	3492-E	
No. UF-E Surcharge to Fund PUC Utilities Reimbursement Account Fee	3517-E	
No. TOU-EV-1 General Service Time of Use Electric Vehicle Charging	3534-E, 2606-E	
No. TOU-EV-2 General Service Time of Use Electric Vehicle Charging	3535-E, 3336-E	
No. TOU-EV-3 General Service Time of Use Electric Vehicle Charging	3536-E, 3338-E	
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)

Advice Letter No. 512-E

Decision No. D.12-08-044

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Date Filed  
Effective June 1, 2025  
Resolution No.

Table of Contents

<u>Subject Matter of Sheet</u>	Sheet No.
<b>Sample Forms</b>	
No. 1 - Application for Electric Service	267-E
No. 2 - Customer's Deposit Receipt	520-E
No. 3 - Bill for Service	2770-E
No. 4 - Delinquent Notice	2562-E
No. 5 - Reminder Notice	271-E
No. 11 - Underground Electric Line Extension Contract New Residential Sub-division	301-E, 302-E, 303-E, 304-E
No. 12 - Underground Electric Line Extension Contract New Commercial/Industrial Development	305-E, 306-E, 307-E
No. 13 - Underground Electric Line Extension Contract for Extension to a Residential Subdivision or Commercial/Industrial Development	308-E, 309-E, 310-E, 311-E
No. 14 - Underground Electric Line Extension Contract to Serve One or a Group of Applicants	338-E, 339-E, 340-E, 341-E
No. 15 - Income Tax Component of Contribution Agreement	2630-E*, 2631-E*
No. 17 - California Alternate Rates for Energy (CARE) Notice/Application (English)	3597-E, 3466-E (T)
No. 17 - California Alternate Rates for Energy (CARE) Notice/Application (Spanish)	3598-E, 3468-E (T)
No. 19 - Non-Domestic Service CARE Program Application – Group Living Housing	3472-E
No. 20 - Non-Domestic Service CARE Program Application - Employee Housing	3473-E
No. 21 - Direct Access Implementation Form	1072-E
No. 22 - Net Metering and Interconnection Agreement	1179-E, 1180-E, 1181-E, 1182-E, 1183-E
No. 23 - Parallel Operation Inadvertent Export Interconnection Agreement	1506-E, 1507-E, 1508-E, 1509-E, 1510-E, 1511-E, 1512-E, 1513-E, 1514-E, 1515-E, 1516-E, 1517-E, 1518-E, 1519-E, 1520-E, 1521-E, 1522-E, 1523-E, 1524-E, 1525-E, 1526-E
No. 28 - Contract Demand Agreement for Customers Served Under Schedule A-5 TOU	1787-E, 1788-E
No. 29 - FIRM/NON-FIRM Service Agreement for Customers Served Under Schedule A-5 TOU	1789-E, 1790-E, 1791-E, 1792-E, 1793-E
No. 30 - Net Energy Metering Surplus Electricity Compensation Selection Form	1804-E
No. 31 - Interconnection and Net Energy Metering Agreement for Large Commercial Customers of a Solar, Wind or Hybrid of Both Generating Facility Having a Capacity of 30KW to 1,000 KW	1805-E, 1806-E, 1807-E, 1808-E, 1809-E, 1810-E, 1811-E, 1812-E, 1813-E, 1814-E
No. 32 - Application for the Interconnection of a Large Solar or Wind Turbine Electrical Generating Facility	1815-E, 1816-E, 1817-E
No. 33 - Application for the Interconnection of a Small Solar or Wind Turbine Electrical Generating Facility	1818-E, 1819-E, 1820-E
No. 34 - Interconnection and Net Energy Metering Agreement for Small Commercial Customers of a Solar, Wind or Hybrid of Both Generating Facility Having a Capacity of less than 30KW	1821-E, 1822-E, 1823-E, 1824-E, 1825-E, 1826-E, 1827-E, 1828-E, 1829-E, 1830-E
No. 40 - Application As Small Business Customer Under Government Code Section 14837	1881-E*

# **ATTACHMENT A**

**2025-2026 CARE ESA and FERA Annual Income Guideline Letter**

## PUBLIC UTILITIES COMMISSION

505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3298



March 26, 2025

Chris McRoberts  
Pacific Gas and Electric Company  
77 Beale St., Mail Code B13U  
P.O. Box 770000  
San Francisco, CA 94177

Michael Lamond  
Alpine Natural Gas Operating  
Company No. 1, LLC  
15 St Andrews Rd # 7  
Valley Springs, CA 95252

Valerie Ontiveroz  
Southwest Gas Corporation  
10682 Pioneer Trail  
Truckee, CA 96161

Joni Key  
Southern California Edison  
Company  
8631 Rush Street  
Rosemead, CA 91770

Ronald Moore  
Bear Valley Electric Service, Inc.  
42020 Garstin Dr.  
Big Bear Lake, CA 92315

Cynthia Morris  
West Coast Gas Company  
9203 Beatty Dr.  
Sacramento, CA 95826

Alan Salazar  
San Diego Gas & Electric Company  
8330 Century Park Court, CP32F  
San Diego, CA 92123

Dan Marsh  
Liberty Utilities LLC  
9750 Washburn Road  
Downey, CA 90241

Kristine Huliganga  
Southern California Gas Company  
P.O. Box 1626  
Monterey Park, CA 91754-8626

Charity Spires  
PacifiCorp d.b.a Pacific Power  
P.O. Box 26000  
Portland, OR 97256-0001

RE: 2025-2026 Annual Income Limits for the California Alternative Rates for Energy (CARE), Family Electric Rate Assistance (FERA), and Energy Savings Assistance (ESA) Programs and the Implementation of Assembly Bill (AB) 2672 and Senate Bill (SB) 1130

Dear Representatives:

Pursuant to Decision (D.) 12-08-044,<sup>1</sup> this letter ("Letter") provides information on updating the income limits for the CARE, FERA, and ESA Programs to Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), San Diego Gas & Electric Company (SDG&E), and Southern California Gas Company (SoCalGas) (collectively, the investor-owned utilities or IOUs); and Alpine Natural Gas Operating Company No. 1, LLC, Bear Valley Electric Service, Inc., Liberty Utilities LLC, PacifiCorp d.b.a Pacific Power, Southwest Gas Corporation, and West Coast Gas Company (collectively, the Small and Multi-Jurisdictional Utilities or SMJUs) (collectively, the Utilities). The Utilities should file revised tariffs with the California Public Utilities Commission (CPUC or Commission) reflecting the income levels specified below by May 1, 2025.

This Letter also provides information on implementing AB 2672 for CARE to the Utilities and SB 1130 for FERA to PG&E, SCE, and SDG&E (collectively, FERA IOUs).

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<sup>1</sup>D.12-08-044, Ordering Paragraph 119.

## **CARE and ESA Program Income Guideline Updates:**

The 2025–2026 CARE and ESA Programs’ income limits have been updated in accordance with Public Utilities (P.U.) Code Section 739.1 (a) and 2790 (f)-(g).<sup>2</sup> Federal Poverty Guidelines values and household size are used to determine the revised annual CARE, ESA, and FERA Programs’ income limits. The Federal Poverty Guidelines are updated annually in January in the Federal Register by the U.S. Department of Health and Human Services under the authority of 42 U.S.C. 9902(2). In 2021, SB 756 updated P.U. Code Section 2790 by changing the income limits of ESA program eligibility from referencing P.U. Code 739.1 (which defined low-income as households with income no greater than 200 percent of the Federal Poverty Guidelines) to establishing the ESA Programs’ income limits at or below 250 percent of the Federal Poverty Guidelines beginning July 1, 2022.

The 2025-2026 income limits for CARE and ESA are provided below for household sizes of 1-8 persons.

Effective June 1, 2025 to May 31, 2026, CARE Programs’ income limits are as follows:

**Table 1: CARE Income Guidelines**

Household Size	Income Eligibility Upper Limit *
1-2	\$42,300
3	\$53,300
4	\$64,300
5	\$75,300
6	\$86,300
7	\$97,300
8	\$108,300
Each Additional Person	\$11,000
*Upper Limit Calculation = 200% of Federal Poverty Guidelines	

Effective June 1, 2025 to May 31, 2026, ESA Programs’ income limits are as follows:

**Table 2: ESA Income Guidelines**

Household Size	Income Eligibility Upper Limit *
1	\$39,125
2	\$52,875
3	\$66,625
4	\$80,375
5	\$94,125
6	\$107,875
7	\$121,625

<sup>2</sup>PU Code Section 739.1(a)states: *The commission shall continue a program of assistance to low-income electric and gas customers with annual household incomes that are no greater than 200 percent of the federal poverty guideline levels, the cost of which shall not be borne solely by any single class of customer.*

PU Code Section 2790 states: (f)(1) *For purposes of this section, “low-income customers” means persons and families whose household income is at or below 250 percent of the federal poverty level...* (g) *This section shall become operative on July 1, 2022.*



8	\$135,375
Each Additional Person	\$13,750
*Upper Limit Calculation = 250% of Federal Poverty Guidelines	

### **Family Electric Rate Assistance (FERA) Program Income Guideline Updates:**

The CPUC authorized FERA, also known as the Lower Middle Income Large Household Program, in D.04-02-057 on February 26, 2004. In that decision, the CPUC stated that the use of CARE procedures for annual income eligibility is also reasonable for the FERA program.<sup>3</sup> D.05-10-044, dated October 27, 2005, raised the lower income limits of the FERA program to 200%+\$1 of the Federal Poverty Guideline levels, which corresponds to the upper limits of the CARE program. In 2024, SB 1130 updated P.U. Code Section 739.12 by eliminating the household size requirement of three or more people for the FERA program, expanding eligibility to one and two person households (see SB 1130 section below for a full summary).

Effective June 1, 2025 to May 31, 2026, FERA income limits are as follows:

**Table 3: FERA Income Guidelines**

Household Size	Income Eligibility Lower Limit *	Income Eligibility Upper Limit **
1-2	\$42,301	\$52,875
3	\$53,301	\$66,625
4	\$64,301	\$80,375
5	\$75,301	\$94,125
6	\$86,301	\$107,875
7	\$97,301	\$121,625
8	\$108,301	\$135,375
Each Additional Person	\$11,000	\$13,750
*Lower Limit Calculation = 200% of Federal Poverty Guidelines (CARE) + \$1		
** Upper Limit Calculation = 250% of Federal Poverty Guidelines <sup>4</sup>		

Note: The income limits set forth herein are effective for all new FERA, CARE, and ESA Program enrollments as well as CARE and FERA post-enrollment verifications and re-certifications. The existing list of programs that render ratepayers categorically eligible for the programs is retained unless updated per the direction of D.21-06-015. The Director of the Energy Division will continue to communicate new income levels annually and require energy utilities to file revised tariffs effective June 1st of each year.

The Utilities should file revised tariffs with the CPUC reflecting the income levels specified above by May 1, 2025. They need only file the revised tariff sheets but should ensure that all tariffs, internet sites and printed materials about the CARE, FERA, and ESA programs display the current income eligibility guidelines and their effective dates, up through a household of eight, as shown in the above tables. All

<sup>3</sup>D.04-02-057. Finding of Fact 22.

<sup>4</sup>*Ibid.*, at 2.



tariffs, internet sites, and printed materials about the CARE program should also indicate that unacceptable energy usage levels could result in removal from the program.<sup>5</sup>

### **Implementation of AB 2672 (CARE)**

On September 27, 2024, Governor Newsom signed into law AB 2672,<sup>6</sup> which amended Section 739.1 of the P.U. Code. AB 2672 expands CARE eligibility to people living in Homekey housing facilities who are experiencing homelessness. P.U. Code Section 739.1(i) states:

The CARE program shall, as soon as practicable, include public housing authority owned or administered Homekey housing facilities, as described in Section 50675.1.1 of the Health and Safety Code, where the residents of the facility substantially meet the CARE program's income eligibility requirements, as determined by the commission, and the account is in the name of Homekey, a nonprofit funded by Homekey, or the public housing authority that owns or administers the facility. The commission shall authorize electrical corporations and gas corporations to offer discounts to those identified facilities and to establish feasible processes for certifying that the assistance is used for the direct benefit of the residents of those facilities.

Homekey, administered by the California Department of Housing and Community Development (HCD), is a statewide initiative aimed at sustaining and rapidly increasing housing for people experiencing homelessness or at risk of homelessness.<sup>7</sup> HCD provides grant funding to local public entities, including cities, counties, Tribal entities, or other local public entities, such as housing authorities within California to develop and convert housing for the targeted population.<sup>8</sup>

Based on the 2021–2026 authorized CARE budgets and expenditures through the end of 2024,<sup>9</sup> the Utilities should use their existing CARE authorized budgets for 2025 and 2026 to implement AB 2672 by June 1, 2025. The Utilities have confirmed that their CARE-authorized budgets for 2025 and 2026 are sufficient to implement AB 2672.

For Homekey customers, the Utilities should use the existing enrollment processes for the CARE Expansion Program adopted in D.21-06-015 and D.21-10-023, which target nonprofit group living facilities, and modify specific requirements for AB 2672 to ensure consistent implementation across the state. Those Homekey eligibility processes should include the following documentation:

1. Copy of a valid Federal 501(c)(3) tax exemption form or Government Agency Taxpayer ID Form with the same name as the utility account(s); and
2. Copy of a valid California state tax exemption form; and

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<sup>5</sup> D.12-08-044 at 124 and PU code 739.1 (i)(1).

<sup>6</sup> AB 2672, [https://leginfo.ca.gov/faces/billNavClient.xhtml?bill\\_id=202320240AB2672](https://leginfo.ca.gov/faces/billNavClient.xhtml?bill_id=202320240AB2672).

<sup>7</sup> Homekey, <https://www.hcd.ca.gov/grants-and-funding/homekey>.

<sup>8</sup> *Id.*

<sup>9</sup> IOUs, *see* D.21-06-015, Attachment 1, and SCE Advice Letter 4358-E, July 21, 2021. SMJUs, *see* D.21-10-023.

3. Proof of the Homekey award (i.e., Standard Agreement and published list of the award from HCD's website).
4. Attestation from the applicant or owner of the facility on behalf of all residents stating that at least 70% of the energy supplied to each account, including common areas, is used for residential purposes and that the total gross annual income of residents/households meets the current CARE income eligibility requirements.
5. Once enrolled, the Utilities may ask the applicant or owner of the facility to recertify the CARE eligibility of the resident/household to continue benefits.

The Utilities should regularly monitor HCD's website for updates on new grants awarded for Homekey facilities. Homekey facilities may not currently exist in each service territory, but the Utilities should plan to implement AB 2672, as noted above, once awards are announced in their service territory. Additionally, the Utilities should use their marketing, education, and outreach campaigns to increase CARE awareness to qualified Homekey facilities and track and report implementation of AB 2672 in their existing monthly and annual reports. The enrollment goals for CARE, as outlined in D.21-06-015 for the IOUs and D.21-10-023 for the SMJUs, remain unchanged.<sup>10</sup>

### **Implementation of SB 1130 (FERA)**

On September 27, 2024, Governor Newsom also signed into law SB 1130,<sup>11</sup> which amended P.U. Code Section 739.12. SB 1130 removes the household income eligibility requirement of three or more persons and requires the FERA IOUs to expand and report enrollment efforts. Section 739.12 states:

- (a) The commission shall continue a program of assistance to residential customers of the state's three largest electrical corporations consisting of households with total household annual gross income levels between 200 percent and 250 percent of the federal poverty guideline level. The program shall continue to be referred to as the Family Electric Rate Assistance or FERA program.
- (b) The FERA program discount shall be an 18-percent line-item discount applied to an eligible customer's bill calculated at the applicable rate for the billing period.
- (c) The commission shall authorize the state's three largest electrical corporations to increase or expand marketing and outreach efforts beyond those in effect as of December 31, 2018, to increase eligible customer participation in the FERA program.
- (d) (1) The commission, by March 1, 2025, and each year thereafter, shall require the state's three largest electrical corporations to report on their efforts to enroll customers in the FERA program.

<sup>10</sup> IOUs, *see* D.21-06-015, Attachment 1. SMJUs, *see* D.21-10-023 at 18.

<sup>11</sup> SB 1130, [https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill\\_id=202320240SB1130](https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=202320240SB1130).

(2) The commission, by June 1, 2025, and each year thereafter, shall review each electrical corporation's report to ensure it has made reasonable efforts to enroll eligible households in the FERA program commensurate with the proportion of households the commission determines to be eligible within the electrical corporation's service territory.

(3) If the commission, in its review of an electrical corporation's report, determines the electrical corporation has not made reasonable efforts to enroll eligible households in the FERA program commensurate with the proportion of households the commission determines to be eligible within the electrical corporation's service territory, the commission shall require the electrical corporation to develop a strategy and plan to sufficiently enroll eligible households within three years of the adoption of the strategy and plan.

(4) An electrical corporation may market enrollment for the FERA program separately from the CARE program and provide a separate FERA program-only application form.

SB 1130 removed the FERA household size requirement, allowing income-eligible households of any household size to enroll in FERA. Although P.U. Section 739.1(f)(2) mandates that the Utilities provide a single application form for both the CARE and FERA programs, P.U. Code Section 739.12(d)(1)(4) now allows the FERA IOUs the option to offer a separate application form specifically for FERA-only applicants.

The FERA IOUs should use their existing authorized FERA administrative budgets for 2025 and 2026 to implement SB 1130 by June 1, 2025. PG&E and SCE have confirmed that their FERA administrative budgets for 2025 and 2026 are sufficient to implement SB 1130.<sup>12</sup>

SDG&E has indicated that it anticipates it may require an additional \$135,391 to implement SB 1130 by June 1, 2025. According to SDG&E, additional funding is needed specifically for IT development and testing due to the changes in the FERA income limits and the optional development of a separate FERA application, including translation costs.<sup>13</sup> To seek this funding, SDG&E may submit a Tier 3 advice letter requesting additional FERA administrative funding for Program Year 2025 to implement SB 1130. SDG&E should submit the Tier 3 advice letter within 30 days of the issuance of this Letter.

If you have any questions regarding the income limits, please contact Jennifer Gordon at [jennifer.gordon@cpuc.ca.gov](mailto:jennifer.gordon@cpuc.ca.gov). For questions regarding the implementation of AB 2672 or SB 1130, please contact Cheryl Wynn at [cheryl.wynn@cpuc.ca.gov](mailto:cheryl.wynn@cpuc.ca.gov).

Sincerely,

Leuwam Tesfai  
Deputy Executive Director, Energy and Climate Policy /  
Director of Energy Division

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<sup>12</sup> Responses to Energy Division Staff data requests submitted on January 24, 25, and 27, 2025, by PG&E, SCE, SDG&E, and SoCalGas.

<sup>13</sup> Responses to Energy Division Staff data requests submitted on January 27, 2025, February 7, and 24, 2025.

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