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April 1, 2024

VIA ELECTRONIC FILING

Rosemary Chiavetta, Secretary
Pennsylvania Public Utility
Commission Commonwealth Keystone
Building
400 North Street
Harrisburg, PA 17120

**Re: UGI Utilities, Inc.’s Universal Service and Energy Conservation Plan for
January 1, 2020 – December 31, 2025; Docket No. M-2019-3014966**

**UGI Utilities, Inc.’s Petition to Amend Universal Service and Energy
Conservation Plan for 2020 – 2025; Docket No. P-2020-3019196**

Dear Secretary Chiavetta:

Enclosed please find UGI Utilities, Inc.’s (“UGI” or the "Company") CAP Credit
Evaluation Report for 2023, which is being filed in the above-referenced docket.

If you have any questions, please contact me directly at (610) 992-3763.

Very truly yours,

/s/ Michael S. Swerling
Michael S. Swerling
Counsel for UGI

Enclosure

cc: Certificate of Service (parties to the USECP Proceeding)
Joseph Magee, Bureau of Consumer Services, *via email*, jmagee@pa.gov
Jennifer Johnson, Bureau of Consumer Services, *via email*,
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Allison Kaster, Bureau of Investigation & Enforcement, *via email*, akaster@pa.gov

**BEFORE THE
PENNSYLVANIA PUBLIC UTILITY COMMISSION**

UGI Utilities, Inc. – Gas Division and	:	
UGI Utilities, Inc. – Electric Division	:	Docket No. M-2019-3014966
Universal Service and Energy	:	
Conservation Plan for 2020-2025	:	
	:	
UGI Utilities, Inc. – Gas Division and	:	
UGI Utilities, Inc. – Electric Division	:	
Petition to Amend Universal Service	:	Docket No. P-2020-3019196
and Energy Conservation Plan for	:	
2020-2025	:	

CERTIFICATE OF SERVICE

I hereby certify that I have, this 1st day of April 2024, served a true and correct copy of the foregoing document in the manner and upon the persons listed below in accordance with requirements of 52 Pa. Code § 1.54 (relating to service by a participant):

VIA ELECTRONIC MAIL:

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/s/ Michael S. Swerling

Michael S. Swerling

CAP Credit Evaluation Report - 2023

CY 2023	FPIG 0%-50%	FPIG 51%-100%	FPIG 101%-150%	Total	Average Annual
Actual Annual Residential Customers as of 12/31	N/A	N/A	N/A	678,880	671,961
UGI South	N/A	N/A	N/A	389,353	385,032
- Heating	N/A	N/A	N/A	364,946	360,896
- Non Heating	N/A	N/A	N/A	24,407	24,136
UGI North	N/A	N/A	N/A	158,725	157,166
- Heating	N/A	N/A	N/A	152,875	151,374
- Non Heating	N/A	N/A	N/A	5,850	5,792
UGI Central	N/A	N/A	N/A	75,829	74,896
- Heating	N/A	N/A	N/A	73,071	72,172
- Non Heating	N/A	N/A	N/A	2,758	2,724
UGI Electric	N/A	N/A	N/A	54,973	54,867
- Heating	N/A	N/A	N/A	9,158	9,140
- Non Heating	N/A	N/A	N/A	45,815	45,727
Annual CAP Enrollments as of 12/31	FPIG 0%-50%	FPIG 51%-100%	FPIG 101%-150%	Total	Average Annual¹
UGI South	4,862	5,883	3,589	14,334	11,796
- Heating	4,557	5,514	3,364	13,435	11,057
- Non Heating	305	369	225	899	739
UGI North	2,875	4,255	2,954	10,084	8,394
- Heating	2,769	4,098	2,845	9,712	8,085
- Non Heating	106	157	109	372	309
UGI Central	715	1,416	1,025	3,156	2,654
- Heating	689	1,365	988	3,042	2,557
- Non Heating	26	51	37	114	97
UGI Electric	1,077	1,230	2,264	4,571	3,700
- Heating	179	205	377	761	616
- Non Heating	898	1,025	1,887	3,810	3,084
Annual Non-CAP Residential Customers as of 12/31	FPIG 0%-50%	FPIG 51%-100%	FPIG 101%-150%	Total	Average Annual
UGI South	N/A	N/A	N/A	375,019	373,236
- Heating	N/A	N/A	N/A	351,511	349,839
- Non Heating	N/A	N/A	N/A	23,508	23,397
UGI North	N/A	N/A	N/A	148,641	148,772
- Heating	N/A	N/A	N/A	143,163	143,289
- Non Heating	N/A	N/A	N/A	5,478	5,483
UGI Central	N/A	N/A	N/A	72,673	72,242
- Heating	N/A	N/A	N/A	70,029	69,615
- Non Heating	N/A	N/A	N/A	2,644	2,627
UGI Electric	N/A	N/A	N/A	50,402	51,167
- Heating	N/A	N/A	N/A	8,397	8,524
- Non Heating	N/A	N/A	N/A	42,005	42,643
CAP Participation Rate	FPIG 0%-50%	FPIG 51%-100%	FPIG 101%-150%	Total	
UGI South	N/A	N/A	N/A	4%	
- Heating	N/A	N/A	N/A	4%	
- Non Heating	N/A	N/A	N/A	4%	
UGI North	N/A	N/A	N/A	6%	
- Heating	N/A	N/A	N/A	6%	
- Non Heating	N/A	N/A	N/A	6%	
UGI Central	N/A	N/A	N/A	4%	
- Heating	N/A	N/A	N/A	4%	
- Non Heating	N/A	N/A	N/A	4%	
UGI Electric	N/A	N/A	N/A	8%	
- Heating	N/A	N/A	N/A	8%	
- Non Heating	N/A	N/A	N/A	8%	

Total Annual CAP Costs

	FPIG 0%-50%	FPIG 51%-100%	FPIG 101%-150%	Total
Admin (All Areas)²	\$294,942.93	\$395,871.06	\$299,565.31	\$990,379.30
UGI South	\$153,202.08	\$185,373.89	\$113,089.73	\$451,665.70
- Heating	\$143,591.50	\$173,746.66	\$105,999.96	\$423,338.12
- Non Heating	\$9,610.58	\$11,627.23	\$7,089.77	\$28,327.58
UGI North	\$90,304.25	\$133,650.29	\$92,785.66	\$316,740.20
- Heating	\$86,974.77	\$128,718.90	\$89,361.95	\$305,055.62
- Non Heating	\$3,329.48	\$4,931.40	\$3,423.71	\$11,684.58
UGI Central	\$21,593.54	\$42,764.28	\$30,955.78	\$95,313.60
- Heating	\$20,808.32	\$41,224.04	\$29,838.35	\$91,870.71
- Non Heating	\$785.22	\$1,540.24	\$1,117.43	\$3,442.89
UGI Electric	\$29,843.06	\$34,082.60	\$26,734.15	\$126,659.80
- Heating	\$4,959.99	\$5,680.43	\$10,446.45	\$21,086.88
- Non Heating	\$24,883.07	\$28,402.16	\$52,287.69	\$105,572.92

Arrearage Forgiveness

	FPIG 0%-50%	FPIG 51%-100%	FPIG 101%-150%	Total
UGI South	\$634,573.30	\$600,574.24	\$364,748.08	\$1,599,895.62
- Heating	\$619,693.13	\$585,929.12	\$358,584.13	\$1,564,206.38
- Non Heating	\$14,880.17	\$14,645.12	\$6,163.95	\$35,689.24
UGI North	\$462,465.07	\$480,008.58	\$286,942.52	\$1,229,416.17
- Heating	\$448,140.57	\$469,740.71	\$283,065.71	\$1,200,946.99
- Non Heating	\$14,324.50	\$10,267.87	\$3,876.81	\$28,469.18
UGI Central	\$81,347.57	\$101,147.49	\$79,778.35	\$262,273.41
- Heating	\$80,791.57	\$100,577.25	\$79,202.35	\$260,571.17
- Non Heating	\$556.00	\$570.24	\$576.00	\$1,702.24
UGI Electric	\$225,683.61	\$185,208.95	\$392,230.92	\$803,123.48
- Heating	\$91,799.47	\$62,441.01	\$113,367.17	\$267,607.65
- Non Heating	\$133,884.14	\$122,767.94	\$278,863.75	\$535,515.83

CAP Credits

	FPIG 0%-50%	FPIG 51%-100%	FPIG 101%-150%	Total
UGI South	\$3,720,557.72	\$2,694,249.88	\$1,053,571.41	\$7,468,379.01
- Heating	\$3,684,434.22	\$2,680,990.56	\$1,050,401.60	\$7,415,826.38
- Non Heating	\$36,123.50	\$13,259.32	\$3,169.81	\$52,552.63
UGI North	\$2,931,894.39	\$2,770,812.07	\$1,270,408.13	\$6,973,114.59
- Heating	\$2,866,387.95	\$2,736,542.41	\$1,263,110.81	\$6,866,041.17
- Non Heating	\$65,506.44	\$34,269.66	\$7,297.32	\$107,073.42
UGI Central	\$565,165.32	\$732,307.12	\$403,753.30	\$1,701,225.74
- Heating	\$564,510.87	\$731,671.71	\$403,168.01	\$1,699,350.59
- Non Heating	\$654.45	\$635.41	\$585.29	\$1,875.15
UGI Electric	\$2,009,244.73	\$1,738,138.53	\$1,818,025.23	\$5,565,408.49
- Heating	\$915,281.09	\$654,669.88	\$553,276.01	\$2,123,226.98
- Non Heating	\$1,093,963.64	\$1,083,468.65	\$1,264,749.22	\$3,442,181.51

of CAP Credits

	FPIG 0%-50%	FPIG 51%-100%	FPIG 101%-150%	Total
UGI South	30,549	29,692	16,565	76,806
- Heating	29,748	28,887	16,157	74,792
- Non Heating	801	805	408	2,014
UGI North	19,407	23,312	14,155	56,874
- Heating	18,840	22,853	13,933	55,626
- Non Heating	567	459	222	1,248
UGI Central	4,712	7,320	4,858	16,890
- Heating	4,694	7,276	4,831	16,801
- Non Heating	18	44	27	89
UGI Electric	8,188	9,630	12,931	30,749
- Heating	3,154	3,075	3,532	9,761
- Non Heating	5,034	6,555	9,399	20,988

Average Annual CAP Credits

	FPIG 0%-50%	FPIG 51%-100%	FPIG 101%-150%	Total
UGI South	\$121.79	\$90.74	\$63.60	\$97.24
- Heating	\$123.85	\$92.81	\$65.01	\$99.15
- Non Heating	\$45.10	\$16.47	\$7.77	\$26.09
UGI North	\$151.07	\$118.86	\$89.75	\$122.61
- Heating	\$152.14	\$119.75	\$90.66	\$123.43
- Non Heating	\$115.53	\$74.66	\$32.87	\$85.80
UGI Central	\$119.94	\$100.04	\$83.11	\$100.72
- Heating	\$120.26	\$100.56	\$83.45	\$101.15
- Non Heating	\$36.36	\$14.44	\$21.68	\$21.07
UGI Electric	\$245.39	\$180.49	\$140.59	\$180.99
- Heating	\$290.20	\$212.90	\$156.65	\$217.52
- Non Heating	\$217.31	\$165.29	\$134.56	\$164.01

Gross Residential Write-Offs

	FPIG 0%-50%	FPIG 51%-100%	FPIG 101%-150%	Total
All Natural Gas	N/A	N/A	N/A	\$26,765,815.00
Electric	N/A	N/A	N/A	\$2,685,993.00

Gross Residential Write-Offs Confirmed Low Income Customers

	FPIG 0%-50%	FPIG 51%-100%	FPIG 101%-150%	Total
All Natural Gas	N/A	N/A	N/A	\$284,375.00
Electric	N/A	N/A	N/A	\$26,075.00

Pre & Post CAP Usage YOY Change (Stated as avg yearly %) ^{3,4}	FPIG 0%-50%	FPIG 51%-100%	FPIG 101%-150%	Total
UGI South	-21%	-17%	-23%	-20%
- Heating	-21%	-17%	-23%	-20%
- Non Heating	N/A	N/A	N/A	N/A
UGI North	-20%	-18%	-20%	-19%
- Heating	-20%	-24%	-16%	-20%
- Non Heating	N/A	N/A	N/A	N/A
UGI Central	-21%	-29%	-23%	-24%
- Heating	-21%	-29%	-23%	-24%
- Non Heating	N/A	N/A	N/A	N/A
UGI Electric	-29%	-20%	-30%	-26%
- Heating	-27%	-21%	-36%	-28%
- Non Heating	-31%	-19%	-22%	-24%

¹Heating and Non-Heating breakdown by division is based upon % of Heat vs Non-Heating customers.

²Admin cost by FPIG and heating vs. non heating was calculated based on enrollment data by FPIG and heating vs. non heating.

³Column E does not represent the sum of columns B through D. Formula to calculate YOY % Change is sum of Post Usage Less Pre Usage divided by Pre Usage.

⁴N/A for UGI South, UGI North, UGI Central as there were no non-heating customers that met the high usage threshold.

Max Credit Data - Response to Sub-parts C through E - All FPIG Levels

2023 - All

Company	Account Type	Previous Maximum Shortfall Amount	Number of accounts above previous maximum shortfall	Total dollars above previous maximum shortfall	Average of CAP credits above previous maximum shortfall
UGI South	Heating	\$ 950.00	2,763	\$ 1,536,958.21	\$556
	Non Heating	\$ 560.00	14	\$ 7,810.76	\$558
UGI North	Heating	\$ 950.00	2,818	\$ 1,844,651.46	\$655
	Non Heating	\$ 560.00	66	\$ 52,705.26	\$799
UGI Central	Heating	\$ 950.00	592	\$ 326,727.39	\$552
	Non Heating	\$ 560.00	None	None	None
UGI Electric	Heating	\$ 1,200.00	655	\$ 975,010.22	\$1,489
	Non Heating	\$ 700.00	1,550	\$ 1,907,316.37	\$1,231

Max Credit Data - Response to Sub-parts C through E - Level 1 (0 - 50% FPL)

2023 - FPIG Level 1

Company	Account Type	Previous Maximum Shortfall Amount	Number of accounts above previous maximum shortfall	Total dollars above previous maximum shortfall	Average of CAP credits above previous maximum shortfall
UGI South	Heating	\$ 950.00	1,589	\$ 957,668.60	\$603
	Non Heating	\$ 560.00	11	\$ 7,419.26	\$674
UGI North	Heating	\$ 950.00	1,316	\$ 1,007,167.47	\$765
	Non Heating	\$ 560.00	39	\$ 33,678.03	\$864
UGI Central	Heating	\$ 950.00	235	\$ 148,590.95	\$632
	Non Heating	\$ 560.00	None	None	None
UGI Electric	Heating	\$ 1,200.00	286	\$ 501,493.03	\$1,753
	Non Heating	\$ 700.00	482	\$ 686,164.61	\$1,424

Max Credit Data - Response to Sub-parts C through E - Level 2 (51 - 100% FPL)

2023 - FPIG Level 2

Company	Account Type	Previous Maximum Shortfall Amount	Number of accounts above previous maximum shortfall	Total dollars above previous maximum shortfall	Average of CAP credits above previous maximum shortfall
UGI South	Heating	\$ 950.00	920	\$ 455,178.22	\$495
	Non Heating	\$ 560.00	3	\$ 391.50	\$131
UGI North	Heating	\$ 950.00	1,107	\$ 628,559.64	\$568
	Non Heating	\$ 560.00	24	\$ 15,589.65	\$650
UGI Central	Heating	\$ 950.00	242	\$ 121,507.34	\$502
	Non Heating	\$ 560.00	None	None	None
UGI Electric	Heating	\$ 1,200.00	214	\$ 295,623.10	\$1,381
	Non Heating	\$ 700.00	488	\$ 629,480.93	\$1,290

Max Credit Data - Response to Sub-parts C through E - Level 3 (101 - 150% FPL)

2023 - FPIG Level 3

Company	Account Type	Previous Maximum Shortfall Amount	Number of accounts above previous maximum shortfall	Total dollars above previous maximum shortfall	Average of CAP credits above previous maximum shortfall
UGI South	Heating	\$ 950.00	254	\$ 124,111.39	\$489
	Non Heating	\$ 560.00	None	None	None
UGI North	Heating	\$ 950.00	395	\$ 208,924.35	\$529
	Non Heating	\$ 560.00	3	\$ 3,437.58	\$1,146
UGI Central	Heating	\$ 950.00	115	\$ 56,629.10	\$492
	Non Heating	\$ 560.00	None	None	None
UGI Electric	Heating	\$ 1,200.00	155	\$ 177,894.09	\$1,148
	Non Heating	\$ 700.00	580	\$ 591,670.83	\$1,020