

Exhibit No.:
Issues: MEEIA programs

Witness: Cynthia M. Tandy
Sponsoring Party: MoPSC Staff
Type of Exhibit: Surrebuttal Testimony
Case No.: EO-2020-0227

Date Testimony Prepared: October 14, 2020

MISSOURI PUBLIC SERVICE COMMISSION

INDUSTRY ANALYSIS DIVISION

ENERGY RESOURCES DEPARTMENT

SURREBUTTAL TESTIMONY

OF

CYNTHIA M. TANDY

**EVERGY METRO, INC.,
d/b/a EVERGY MISSOURI METRO**

CASE NO. EO-2020-0227

*Jefferson City, Missouri
October 2020*

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SURREBUTTAL TESTIMONY**

OF

CYNTHIA M. TANDY

**EVERGY METRO, INC. and EVERGY MISSOURI WEST, INC.,
d/b/a EVERGY MISSOURI METRO and EVERGY MISSOURI WEST
CASE NO. EO-2020-0227 (Consolidated with Case No. EO-2020-0228)**

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1 **SURREBUTTAL TESTIMONY**

2 **OF**

3 **CYNTHIA M. TANDY**

4 **EVERGY MISSOURI METRO**

5 **and**

6 **EVERGY MISSOURI WEST**

7 **CASE NO. EO-2020-0227 (Consolidated with Case No. EO-2020-0228)**

8 Q. Please state your name and business address.

9 A. Cynthia M. Tandy, 200 Madison Street, Jefferson City, MO 65102.

10 Q. By whom are you employed and in what capacity?

11 A. I am employed by the Missouri Public Service Commission (“Commission”
12 or “PSC”) as a Utility Regulatory Auditor.

13 Q. Are you the same Cynthia M. Tandy that filed Direct Testimony in this case?

14 A. Yes, I am.

15 Q. Did you participate in the Commission Staff’s audit of Evergy Metro, Inc.,
16 d/b/a Evergy Missouri Metro ("Evergy Missouri Metro") and Evergy Missouri West, Inc.,
17 d/b/a/ Evergy Missouri West (“Evergy Missouri West”) (collectively “Evergy”), concerning
18 the Staff’s prudence reviews in this proceeding?

19 A. Yes, I did, with the assistance of other members of the Staff.

20 **EXECUTIVE SUMMARY**

21 Q. Please summarize your surrebuttal testimony in this proceeding.

22 A. The purpose of my surrebuttal testimony is to address the rebuttal testimony
23 of both Evergy and OPC witnesses as it relates to administrative costs. Since the filing of

1 Staff's direct testimony, Evergy has provided additional detail and information on certain
2 administrative costs that Staff had recommended disallowance of in its direct testimony. Please
3 refer to the summaries below for Staff's updated recommended disallowances. Also, OPC
4 witness Dr. Geoff Marke filed rebuttal testimony in regard to certain issues with administrative
5 costs in this case which I will also address.

6 **RESPONSE TO OPC WITNESS DR. GEOFF MARKE'S REBUTTAL TESTIMONY**

7 Q. What does Dr. Marke recommend regarding administrative costs in his
8 rebuttal testimony?

9 A. In addition to Staff's recommended disallowances, Dr. Marke further
10 recommends a disallowance of \$1,930,392 for Evergy Missouri West.

11 Q. What does Dr. Marke provide as support for this recommendation?

12 A. Dr. Marke takes issue with the incentive vs. non-incentive spending of Evergy
13 Missouri West. Dr. Marke's recommendation would result in an even split of incentive and
14 non-incentive costs.

15 Q. Does Dr. Marke make any additional recommendation in regard to
16 administrative costs?

17 A. Yes. To prevent what Dr. Marke characterizes as "inefficient behavior",
18 Dr. Marke also recommends the Commission order the utilities participating in
19 ratepayer-funded energy efficiency programs to have no more than a 5% excess
20 non-incentive budget expenditure deviation from the three-year national average, and any
21 amount above that should be considered imprudent as a general framework for utilities and
22 stakeholders to be aware of in the near future.¹

¹ *Rebuttal Testimony of Geoff Marke*, page. 13.

1 Q. What is Staff's response to Dr. Marke's recommendations concerning
2 administrative costs, specifically the incentive vs. non-incentive costs?

3 A. Staff reviews all administrative costs, including incentives and non-incentives,
4 in its MEEIA prudency reviews. Staff acknowledges this is a valid concern and will continue
5 to closely monitor this issue going forward. However, Staff does not agree the additional
6 recommended disallowance of \$1,930,392 for Evergy Missouri West is warranted for the
7 review period. Dr. Marke's additional recommended disallowance is simply premised on
8 arbitrarily reducing non-incentive costs to achieve a "50/50 split" of incentive and
9 non-incentive costs. Staff is of the opinion that this is a policy issue that deserves a more robust
10 discussion, prospectively, outside of a prudence review, to more appropriately determine how
11 to address it. Additionally, though, Staff would support any requirement the Commission may
12 order that better encourages Evergy to decrease its non-incentive costs.

13 **RESPONSE TO EVERGY WITNESS MR. BRIAN FILE'S REBUTTAL TESTIMONY**

14 Q. Do you agree with the rebuttal testimony of Mr. File regarding not including
15 interest on the Cycle 3 expenses that both Staff and Evergy have agreed should be deferred to
16 Cycle 3?

17 A. Staff agrees with Mr. File and has removed the interest on the Cycle 3 expenses
18 from Staff's recommended disallowances.

19 Q. Does Staff agree with the rebuttal testimony of Mr. File regarding
20 Staff's recommended disallowance of administrative costs (before interest) concerning
21 conference/meeting expenses?

22 A. Staff has reviewed the expenses for conferences, trainings, and meetings.
23 Additional information provided by Evergy on the recommended disallowed expenses in this

Surrebuttal Testimony of
Cynthia M. Tandy

1 category was reviewed and allowed Staff to remove some of them from the previously
2 recommended disallowed expenses. There are still conferences and meetings that Staff is of the
3 opinion are too general to be specifically considered MEEIA related or there has still been no
4 documentation provided to support inclusion in MEEIA.

5 Q. Do you agree with the rebuttal testimony of Mr. File regarding
6 Staff's recommended disallowance of membership/sponsorship?

7 A. Not completely. Mr. File only agrees that a very small portion of the expense
8 should be disallowed. However, these expenses, similar to conferences and meetings, can often
9 provide a benefit for non-MEEIA areas of the utility business as well and are often difficult to
10 specifically associate with only MEEIA programs.

11 Q. Does Staff have a recommendation for how the conference and membership
12 expenses should be recovered?

13 A. Yes, Staff is of the opinion those expenses should be sought for recovery in a
14 general rate case.

15 Q. Has the issue of the conference and membership expenses been addressed with
16 any other utility?

17 A. Yes, in its most recent MEEIA prudence review, Ameren Missouri agreed, on a
18 going forward basis, that it would seek to recover those type of expenses in a general rate case
19 instead of through MEEIA.²

20 Q. Do you agree with the rebuttal testimony of Mr. File regarding the
21 "Other Expenses" for which Staff recommended disallowance?

² *Stipulation and Agreement Regarding Adjustments to Ameren Missouri's EEIR, Case No. EO-2019-0376.*

A. Staff has carefully reviewed each expense it recommended be disallowed in the “Other Expenses” category and does agree certain expenses Staff originally recommended be disallowed should be allowed. The remaining expenses Staff is still recommending disallowance of personal expenses, non-essential items, litigation expenses and a going-away party for a contractor’s employee.

UPDATED CHARTS ON RECOMMENDED DISALLOWANCES

Following are updated charts on Staff’s recommended disallowances:

EVERGY MISSOURI METRO

| Costs | Original Recommended Disallowance | Updated Recommended Disallowance | Interest | Total Recommended Disallowance |
|---|-----------------------------------|----------------------------------|------------------|--------------------------------|
| Conference and Meetings | \$ 2,456.86 | \$ 1,400.99 | \$ 52.13 | \$ 1,453.12 |
| Cycle 3 Expenses | \$ 1,786.42 | \$ 1,786.42 | \$ 0.00 | \$ 1,786.42 |
| Memberships/Sponsorships/Assn Fees | \$ 14,559.00 | \$ 11,559.00 | \$ 374.49 | \$ 11,933.49 |
| Other Expenses | \$ 1,526.08 | \$ 1,137.22 | \$ 20.69 | \$ 1,157.91 |
| Total Recommended Disallowed Costs | \$ 20,328.36 | \$ 15,883.63 | \$ 447.31 | \$ 16,330.94 |

EVERGY MISSOURI WEST

| Costs | Original Recommended Disallowance | Updated Recommended Disallowance | Interest | Total Recommended Disallowance |
|---|-----------------------------------|----------------------------------|------------------|--------------------------------|
| Conferences and Meetings | \$ 2,610.38 | \$ 671.75 | \$ 30.50 | \$ 702.25 |
| Cycle 3 Expenses | \$ 673.75 | \$ 673.75 | \$ 0.00 | \$ 673.75 |
| Memberships/Sponsorship/Assn Fees | \$ 7,059.00 | \$ 7,059.00 | \$ 217.04 | \$ 7,276.04 |
| Other Expenses | \$ 954.52 | \$ 954.52 | \$ 21.96 | \$ 976.48 |
| Total Recommended Disallowed Costs | \$ 11,297.65 | \$ 9,359.02 | \$ 269.50 | \$ 9,628.52 |

Surrebuttal Testimony of
Cynthia M. Tandy

1 Q. Are you providing any additional information with your surrebuttal testimony
2 regarding the updates to administrative costs that Staff recommended disallowed?

3 A. Yes, attached hereto as Schedules CMT-S1 and CMT-S2 are work sheets that
4 provide more detail on Staff's updated recommended disallowed administrative costs.

5 Q. Does this conclude your surrebuttal testimony in this proceeding?

6 A. Yes, it does.

BEFORE THE PUBLIC SERVICE COMMISSION
OF THE STATE OF MISSOURI

In the Matter of the Second Prudence)
Review of the Missouri Energy Efficiency) Case No. EO-2020-0227
Investment Act (MEEIA) Cycle 2 Energy)
Efficiency Programs of Evergy Metro, Inc.)
d/b/a Evergy Missouri Metro)

AFFIDAVIT OF CYNTHIA M. TANDY

STATE OF MISSOURI)
) ss.
COUNTY OF COLE)

COMES NOW CYNTHIA M. TANDY and on her oath declares that she is of sound mind and lawful age; that she contributed to the foregoing *Supplemental Testimony of Cynthia M. Tandy*; and that the same is true and correct according to her best knowledge and belief, under penalty of perjury.

Further the Affiant sayeth not.

/s/ Cynthia M. Tandy
CYNTHIA M. TANDY

Evergy Missouri Metro
Case No. EO-2020-0227

DISALLOWED EXPENSES

Table with columns: Date, Mfr, Description, MEEIA purpose, Addtl Description. Rows include conferences like SNACK - Annual MEEIA Conference - Louisville, KY, Annual MEEIA Conference - Louisville, KY, and various meals and travel expenses.

SCHEDULE C

Table with columns: Description, Amount, Status, Comment. Rows include FUEL OTHER, LODGING, BUSINESS MEALS, PARKING FEES, AIRFARE AIRLINE BAGG, OFCEQUIPSUPP LESS T, and Total Cycle 3.

CYCLE III EXPENSES

Table with columns: Date, Mfr, Description, MEEIA purpose, Addtl Description. Rows include MEEIA 3 Check In Meeting, MEEIA Lunch Mtg, MEEIA Cycle III Mtg, and various other cycle-related expenses.

**Evergy Missouri Metro
Case No. EO-2020-0227**

| MEMBERSHIPS/SPONSORSHIPS | | | | | | | | | | | | | |
|--|----------|-----------------------------|-------------------------------|---|---|---|--|---------------------------|----------------------|---------------------|-----------|--|--|
| May-19 | M7123585 | Delatorre, ChristopheAshrae | 404-636-8400, GA | ASHRAE Membership - New Associate - Education through Courses, Events, etc. | 2019 ASHRAE Handbook - HVAC Application ; access to educational events specific to HVAC Industry | | 1299 OFFICE EXPENSES OTH | \$ 259.00 | \$ 259.00 | \$ | - | Still Recommend Disallowed-Staff's position is these should run through base rates | |
| Nov-18 | M6713552 | Boone, Angela | Association Of EnrAtlanta, GA | Certified Energy Manager certification renewal with AEE | | | 1260 INDIV TECHPROF DUES | \$ 300.00 | \$ 300.00 | \$ | - | Still Recommend Disallowed-Every agrees these should run through base rates | |
| May-18 | | Theresa / Natalie | | Missouri Work Force Housing Assn. | Sponsorship of member based organization to drive EE awareness for policy makers, implementation partners, govt agencies and utilities | | | \$ 500.00 | \$ 500.00 | \$ | - | Still Recommend Disallowed-Staff's position is these should run through base rates | |
| Nov 18 | | Brian File | event sponsor | MEEA Sponsorship | Sponsorship of member based organization to drive EE awareness for building owners, architectural and construction firms | Allowed for free attendance to conference and speaking engagement | | \$ 3,000.00 | \$ 3,000.00 | \$ | - | Still Recommend Disallowed-Staff's position is these should run through base rates | |
| Dec 18 & Jul 19 | | Chris | membership | US Green Building Council | Marketing expense which included newsletter banner ads and speaking engagement at Industrial Summit allowing Evergy to present Business Energy Savings program to industrial customers and architectural firms. Invoice detail is attached in Shared Drive 574 Prods & Svcs - Expense Receipts - Delatorre, Christopher | | | \$ 5,000.00 | \$ 5,000.00 | \$ | - | Still Recommend Disallowed-Staff's position is these should run through base rates | |
| May-19 | | Chris | marketing | MetroWire Media | Training hosted by an Energy Star/BPI Certified professional with Green Training USA for MEEIA Trade Allies | Included 13 banner ads on Metrowire bi-weekly newsletter from August to December 2019; banner ads promoted program with link to Business Energy Savings website; invoice detail attached in folder. | | \$ 2,500.00 | \$ 2,500.00 | \$ | - | Still Recommend Disallowed-Staff's position is these should run through base rates | |
| Mar-19 | | natalie | contractor training | Green Training USA | Membership & Sponsorships should be in base rates and not in addition | Training content included: Upgrade program cross-promotion between Trade Ally groups, Insulation & Air Sealing, HVAC updates and home comfort and health opportunities | | \$ 3,000.00 | \$ - | \$ | 3,000.00 | Agree-Related to MEEIA | |
| | | | | | | | | Total Memb/Spon | \$ 14,559.00 | \$ 11,559.00 | | Total Membership/Sponsorships-Still Disallowed After Review | |
| OTHER EXPENSES | | | | | | | | | | | | | |
| Oct-19 | M7490832 | Willim, Corrine | Lyft Ride Sat 10 | Lyft.Com, CA | Accidentally used business card for personal expense | Not in final charges | A subsequent journal entry removed this cost from DSIM Rider | 1425 | PARKING FEES | \$ 13.89 | \$ - | \$ 13.89 | Agree was reversed |
| Aug-18 | M6424663 | Carriilo, Andrea | Starbucks Store 0 | Kansas City, MO | Gift Cards for 4DX awards mid-year celebration (3 Starbucks \$15 each) | Celebration of awards for achievement in Cycle 2 | | 1405 | BUSINESS MEALS | \$ 45.00 | \$ 45.00 | \$ - | Still Recommend Disallowed |
| Aug-18 | M6434573 | Carriilo, Andrea | Starbucks Store 0 | Kansas City, MO | Gift Cards for 4DX awards mid-year celebration (Starbucks) | Celebration of awards for achievement in Cycle 2 | | 1405 | BUSINESS MEALS | \$ 15.00 | \$ 15.00 | \$ - | Still Recommend Disallowed |
| Receipts do not indicate purpose of Gift Cards | | | | | | | | | | | | | |
| Apr-19 | M7050120 | Carriilo, Andrea | Stpaumagst2607 | Saint Paul, MN | Water and Gum at the airport (MN Pencil, MN Sugar Skull, Fruit & Water-1 receipt snacks for travel | | | 1240 | SUBSCRIPTIONS PUBLIC | \$ 6.94 | \$ 6.94 | \$ - | Still Recommend Disallowed-See receipt-not all snacks |
| This looked like souvenirs along with water | | | | | | | | | | | | | |
| Aug-19 | M7361561 | Carriilo, Andrea | Sq Made In Kc | Kansas City, MO | Coffee and going away gift for Amy Bartak | relationship building with contractor working on DERMS project | | 1405 | BUSINESS MEALS | \$ 33.23 | \$ 33.23 | \$ - | Still Recommend Disallowed-Going away party |
| Sep-19 | M7436831 | Carriilo, Andrea | Downtown Market | Kansas City, MO | Amy Bartak going away gathering | relationship building with contractor working on DERMS project | | 1405 | BUSINESS MEALS | \$ 5.00 | \$ 5.00 | \$ - | Still Recommend Disallowed-Going away party |
| Sep-19 | M7436761 | Carriilo, Andrea | Bristol #162 | Kansas City, MO | Amy Bartak going away Lunch | relationship building with contractor working on DERMS project | | 1405 | BUSINESS MEALS | \$ 35.33 | \$ 35.33 | \$ - | Still Recommend Disallowed-Going away party |
| Sep-19 | M7440177 | Carriilo, Andrea | Nothing Bundt Cakes | https://www.h. MO | Amy Bartak going away gathering | relationship building with contractor working on DERMS project | | 1405 | BUSINESS MEALS | \$ 36.89 | \$ 36.89 | \$ - | Still Recommend Disallowed-Going away party |
| Sep-19 | M7440223 | Carriilo, Andrea | Downtown Market | Kansas City, MO | Amy Bartak going away gathering | relationship building with contractor working on DERMS project | | 1405 | BUSINESS MEALS | \$ 15.99 | \$ 15.99 | \$ - | Still Recommend Disallowed-Going away party |
| Going away parties should not run through the MEEIA Program | | | | | | | | | | | | | |
| Apr-18 | OOP | Boone, Angela | | | Halbrook Law Firm - deposition prep 3500 W 75th Street, Prairie village (no receipt)deposition cost for EE project litigation | | 46 | 0.541420 | MILEAGE | \$ 25.07 | \$ 25.07 | \$ - | Still Recommend Disallowed-litigation is not part of program |
| May-18 | OOP | Boone, Angela | | | lawyers office deposition - 3500 W 75th St, Prairie Village, KS RT (no receipts) deposition cost for EE project litigation | | 46 | 0.541420 | MILEAGE | \$ 25.07 | \$ 25.07 | \$ - | Still Recommend Disallowed-litigation is not part of program |
| May-18 | OOP | Boone, Angela | | | lawyers office - deposition n Sanders Warren Russell, Scheer, 9401 Indian Creek fdeposition cost for EE project litigation | | 44 | 0.541420 | MILEAGE | \$ 23.98 | \$ 23.98 | \$ - | Still Recommend Disallowed-litigation is not part of program |
| No Receipts and Purpose Listed | | | | | | | | | | | | | |
| Mar-19 | M6989615 | Delatorre, ChristopheQ 39 | | Kansas City, MO | Building Operator Certification Graduation Lunch | BOC Level I Course final class and graduation celebration; list of students attached in folder. BOC provides education and awareness of energy efficiency measures and initiatives to facility managers | | 1405 | BUSINESS MEALS | \$ 374.97 | \$ - | \$ 374.97 | Agree Allowed |
| General Certification not Specific to MEEIA | | | | | | | | | | | | | |
| Sep-19 | M7457968 | Carriilo, Andrea | In Cherry | 816-2465420, MO | DERMS shirts for PLMA conference (has no indication what is on the shirts and wh | Promotional materials for speaking engagement at industry conference (PLMA) | | 1226 | OFCEQUIPSUPP LESS T | \$ 155.90 | \$ 155.90 | \$ - | Still Recommend Disallowed-not needed |
| Sep-18 | | Davidson Prom | | | Nika Shirts | Materials for team to wear at promotional seminars | | | \$ 172.36 | \$ 172.36 | \$ - | Still Recommend Disallowed-not needed | |
| Sep-19 | | Davidson Prom | | | Work Shirts | Shirts for field representatives to have visiting with customers | | | \$ 117.95 | \$ 117.95 | \$ - | Still Recommend Disallowed-not needed | |
| Nov-19 | | Davidson Prom | | | Shirts & Table Clothes | Materials for team to wear at promotional seminars | | | \$ 423.51 | \$ 423.51 | \$ - | Still Recommend Disallowed-not needed | |
| Not Related to MEEIA Specific | | | | | | | | | | | | | |
| | | | | | | | | Total Other | \$ 1,526.08 | \$ 1,137.22 | | Total Other Expenses-Still Disallowed After Review | |
| | | | | | | | | Current Disallowed | \$ 20,328.36 | \$ 15,883.63 | | Total Admin Cost Disallowed After Review | |

**Energy Missouri West
Case No. EO-2020-0228**

DISALLOWED EXPENSES

| CONFERENCES/MEETINGS | | MEEIA Purpose | Additional Details | | | | | | |
|--|--------------------------------------|---|---|----------|------------------------|----------------------------|--------------------|---|--|
| Jun-18 M6310307 File, Brian | Fairfield Inn & Su Mt. Vernon, IL | Annual MEEA Conference | MW Energy Efficiency conference to discuss EE with peer u Annual meeting | 1410 | LODGING | \$ 164.40 | \$ - | \$ 164.40 | Allowed-Explanation Provided |
| Jun-18 M6316384 File, Brian | Jack In The Box -Warrenton, MO | DINNER - Coming back from MEEA Conference | MW Energy Efficiency conference to discuss EE with peer u Drive to KY as flights were not desirable to arrive at destination for the | 1405 | BUSINESS MEALS | \$ 8.37 | \$ - | \$ 8.37 | Allowed-Explanation Provided |
| Jun-18 OOP File, Brian | | Snacks in route to MEEA Conference | MW Energy Efficiency conference to discuss EE with peer u Annual meeting | 0 | BUSINESS MEALS | \$ 9.95 | \$ - | \$ 9.95 | Allowed-Explanation Provided |
| Jun-18 OOP File, Brian | | R.T. Kansas City, MO to Mt. Vernon, IL to Louis | MW Energy Efficiency conference to discuss EE with peer u Drive to KY as flights were not desirable to arrive at destina | 1,030.54 | MILEAGE | \$ 563.53 | \$ - | \$ 563.53 | Allowed-Explanation Provided |
| <p align="center">Why drive to KY???</p> <p align="center">Flyer indicates conference was February 20-22, 2019--thl Prior dates are in error - annual conference was in June 2018 in Louisville, KY Flyer indicates this conference was in Chicago, IL, but costs are from Mt. Vernon, IL (255 miles away)</p> | | | | | | | | | |
| Jun-18 M6287226 Carrillo, Andrea | Red Robin 605 Independence, MO | Lunch before Flight Nexant Conference | Nexant primary MEEIA tracking system vendor | 1405 | BUSINESS MEALS | \$ 10.05 | \$ - | \$ 10.05 | Allowed-Information Provided |
| Jun-18 M6290591 Carrillo, Andrea | Desert Cab Las Vegas, NV | Taxi to hotel Nexant Conference | Nexant primary MEEIA tracking system vendor | 1499 | TRAVEL OTHER | \$ 18.01 | \$ - | \$ 18.01 | Allowed-Information Provided |
| Jun-18 M6290591 Carrillo, Andrea | Cosmopolitan Sk Las Vegas, NV | Dinner Nexant Conference | Nexant primary MEEIA tracking system vendor | 1405 | BUSINESS MEALS | \$ 36.50 | \$ - | \$ 36.50 | Allowed-Information Provided |
| Jun-18 M6282945 Carrillo, Andrea | Cosmopolitan Eg Las Vegas, NV | Breakfast day of Conference | Nexant primary MEEIA tracking system vendor | 1405 | BUSINESS MEALS | \$ 7.66 | \$ - | \$ 7.66 | Allowed-Information Provided |
| Jun-18 M6298195 Carrillo, Andrea | Taxi Svc Las Veg Las Vegas, NV | Taxi to airport Nexant Conference | Nexant primary MEEIA tracking system vendor | 1499 | TRAVEL OTHER | \$ 10.46 | \$ - | \$ 10.46 | Allowed-Information Provided |
| Jun-18 M6298195 Carrillo, Andrea | Blondies Sports E Las Vegas, NV | Dinner after conference Nexant Conference | Nexant primary MEEIA tracking system vendor | 1405 | BUSINESS MEALS | \$ 10.49 | \$ - | \$ 10.49 | Allowed-Information Provided |
| Jun-18 M6298195 Carrillo, Andrea | Kci Airport 877-3323901, MO | Parking at airport Nexant Conference | Nexant primary MEEIA tracking system vendor | 1425 | PARKING FEES | \$ 11.25 | \$ - | \$ 11.25 | Allowed-Information Provided |
| Jun-18 M6298195 Carrillo, Andrea | Cosmopolitan Frc Las Vegas, NV | Hotel Credit Nexant Conference | Nexant primary MEEIA tracking system vendor | 1499 | TRAVEL OTHER | \$ (13.53) | \$ - | \$ (13.53) | Allowed-Information Provided |
| Jun-18 M6300433 Carrillo, Andrea | Cinnabon A Las Las Vegas, NV | Breakfast before flight home Nexant Conference | Nexant primary MEEIA tracking system vendor | 1405 | BUSINESS MEALS | \$ 6.57 | \$ - | \$ 6.57 | Allowed-Information Provided |
| Jun-18 M6300433 Carrillo, Andrea | Cosmopolitan Frc Las Vegas, NV | Hotel while at Nexant Conference | Nexant primary MEEIA tracking system vendor | 1499 | TRAVEL OTHER | \$ 219.31 | \$ - | \$ 219.31 | Allowed-Information Provided |
| <p align="center">No information on Conference</p> | | | | | | | | | |
| Apr-18 M6143190 Hill, Elena | B And S Bar At T Coronado, CA | PLMA meal, Elena Hill (Hotel Del Coronado) Di | Industry specific conference on demand resonse - PLMA | 1405 | BUSINESS MEALS | \$ 45.41 | \$ 45.41 | \$ - | Still Recommend Disallowed-no information provided |
| Apr-18 M6143190 Hill, Elena | Starbucks Store (San Diego, CA | PLMA meal, Elena Hill (no receipt) | Industry specific conference on demand resonse - PLMA | 1405 | BUSINESS MEALS | \$ 6.90 | \$ 6.90 | \$ - | Still Recommend Disallowed-no information provided |
| Apr-18 M6152920 Hill, Elena | Hotel Del Corona Coronado, CA | PLMA lodging expense (Hotel Del Coronado-1 | Industry specific conference on demand resonse - PLMA | 1410 | LODGING | \$ 344.91 | \$ 344.91 | \$ - | Still Recommend Disallowed-no information provided |
| Apr-18 M6140180 Boone, Angela | Hotel Del Corona Coronado, CA | refund for cancelled PLMA conference hotel - o | Industry specific conference on demand resonse - PLMA | 1410 | LODGING | \$ (322.41) | \$ (322.41) | \$ - | Still Recommend Disallowed-no information provided |
| <p align="center">No information on Conference</p> | | | | | | | | | |
| Oct-18 M6573861 Hill, Elena | Southwes 5261 800-435-9792, TX | Chartwell Energy Marketing and Customer Ser | Chartwell conference (EMACS) accepting Thermostat program award | 1400 | AIRFARE AIRLINE BAGGAC | \$ 197.48 | \$ 197.48 | \$ - | Still Recommend Disallowed-overall more customer than MEEI/ don't pay to accept awards |
| Oct-18 M6573861 Hill, Elena | Swa Earlybrd526 800-435-9792, TX | Chartwell Energy Marketing and Customer Ser | Chartwell conference (EMACS) accepting Thermostat program award | 1400 | AIRFARE AIRLINE BAGGAC | \$ 25.00 | \$ 25.00 | \$ - | Still Recommend Disallowed-overall more customer than MEEI/ don't pay to accept awards |
| Oct-18 M6573861 Hill, Elena | Agent Fee 8900 Acendas Trave, KS | Chartwell Energy Marketing and Customer Ser | Chartwell conference (EMACS) accepting Thermostat program award | 1400 | AIRFARE AIRLINE BAGGAC | \$ 10.00 | \$ 10.00 | \$ - | Still Recommend Disallowed-overall more customer than MEEI/ don't pay to accept awards |
| Oct-18 M6578114 Hill, Elena | Residence Inn Bj Tampa, FL | Chartwell Energy Marketing and Customer Ser | Chartwell conference (EMACS) accepting Thermostat program award | 1410 | LODGING | \$ 272.54 | \$ 272.54 | \$ - | Still Recommend Disallowed-overall more customer than MEEI/ don't pay to accept awards |
| Oct-18 M6620975 Hill, Elena | Uber Trip Lgvdv Help.Uber.Com, CA | Chartwell Energy Marketing and Customer Ser | Chartwell conference (EMACS) accepting Thermostat program award | 1425 | PARKING FEES | \$ 19.44 | \$ 19.44 | \$ - | Still Recommend Disallowed-overall more customer than MEEI/ don't pay to accept awards |
| Oct-18 M6622718 Hill, Elena | First Watch Rest Tampa, FL | Chartwell Energy Marketing and Customer Ser | Chartwell conference (EMACS) accepting Thermostat program award | 1405 | BUSINESS MEALS | \$ 13.22 | \$ 13.22 | \$ - | Still Recommend Disallowed-overall more customer than MEEI/ don't pay to accept awards |
| Oct-18 M6626374 Hill, Elena | Starbucks B/G30 Kansas City, MO | Chartwell Energy Marketing and Customer Ser | Chartwell conference (EMACS) accepting Thermostat program award | 1405 | BUSINESS MEALS | \$ 10.49 | \$ 10.49 | \$ - | Still Recommend Disallowed-overall more customer than MEEI/ don't pay to accept awards |
| Oct-18 M6627978 Hill, Elena | Uber Trip Iq26c Help.Uber.Com, CA | Chartwell Energy Marketing and Customer Ser | Chartwell conference (EMACS) accepting Thermostat program award | 1425 | PARKING FEES | \$ 13.77 | \$ 13.77 | \$ - | Still Recommend Disallowed-overall more customer than MEEI/ don't pay to accept awards |
| <p align="center">Related to customers, but not MEEIA related</p> | | | | | | | | | |
| Jul-18 M6366663 Gray, Natalie | Agent Fee 8900 Acendas Trave, KS | Agent Fee - Flight Fee to attend ENERGY Star Partners Conference to support MEEIA programs, specifically Home Lighting, LED technologies. | Energy Star Partners Conference Flight Booking Fee. Agenda linked in next column K 'Additional Details'. Topics included Energy Star: Lighting, Retail Products, HVAC, thermostats, Effective Customer Segmentation, and others. Conference Agenda: https://www.energystar.gov/sites/default/files/asset/document/IES_2018_PartnerMeeting_Agenda_v17_WebRelease_508_0.pdf | 1400 | AIRFARE AIRLINE BAGGAC | \$ 10.00 | \$ 10.00 | \$ - | Still Recommend Disallowed-no need for agent fees |
| Aug-18 M6448846 Gray, Natalie | Agent Fee 8900 Acendas Trave, KS | Acendas Travel Agent Fee - Flight to Energy St | thermostats, Effective Customer Segmentation, and others. Conference Agenda: https://www.energystar.gov/sites/default/files/asset/document/IES_2018_PartnerMeeting_Agenda_v17_WebRelease_508_0.pdf | 1499 | TRAVEL OTHER | \$ 25.00 | \$ 25.00 | \$ - | Still Recommend Disallowed-no need for agent fees |
| <p align="center">Product Sales Sponsored-not independent</p> | | | | | | | | | |
| Aug-18 M6413580 File, Brian | Hyatt Lodge @ M Oak Brook, IL | MEEA Board Mtg (IL) | Board member of MW Energy Efficiency Alliance - peer lear Annual board meeting to review strategic priorities for following year e | 1410 | LODGING | \$ 351.20 | \$ - | \$ 351.20 | Approves with explanation |
| <p align="center">No information Provided</p> | | | | | | | | | |
| May-19 M7097875 Spale, Randal | City Cab Of Ori Orlando, FL | Nexant Annual User Consortium In Orlando, FL | Nexant primary MEEIA tracking system vendor | 1425 | PARKING FEES | \$ 24.84 | \$ - | \$ 24.84 | Approved-Information Provided |
| May-19 M7102556 Spale, Randal | Kci Airport 877-3323901, MO | Nexant Annual User Consortium In Orlando, FL | Nexant primary MEEIA tracking system vendor | 1425 | PARKING FEES | \$ 34.50 | \$ - | \$ 34.50 | Approved-Information Provided |
| May-19 M7103812 Spale, Randal | Mariott Orlando I Orlando, FL | Nexant Annual User Consortium In Orlando, FL | Nexant primary MEEIA tracking system vendor | 1410 | LODGING | \$ 201.38 | \$ - | \$ 201.38 | Approved-Information Provided |
| <p align="center">No information Provided</p> | | | | | | | | | |
| Sep-18 M6498621 Gray, Natalie | Sheraton Grand f Phoenix, AZ | MEEIA Supporting/Training Conference in AZ | Energy Star Partners Conference Meals. Agenda linked in next column K 'Additional Details'. Topics included Energy Star: Lighting, Retail Products, HVAC, thermostats, Effective Customer Segmentation, and others. Conference Agenda: https://www.energystar.gov/sites/default/files/asset/document/IES_2018_PartnerMeeting_Agenda_v17_WebRelease_508_0.pdf | 1405 | BUSINESS MEALS | \$ 84.71 | \$ - | \$ 84.71 | Approved-Information Provided |
| Sep-18 M6502596 Gray, Natalie | Kci Airport 877-3323901, MO | MEEIA Supporting/Training Conference in AZ | Energy Star Partners Conference Airport Parking Fees. Agenda linked in next column K 'Additional Details'. Topics included Energy Star: Lighting, Retail Products, HVAC, thermostats, Effective Customer Segmentation, and others. Conference Agenda: https://www.energystar.gov/sites/default/files/asset/document/IES_2018_PartnerMeeting_Agenda_v17_WebRelease_508_0.pdf | 1425 | PARKING FEES | \$ 22.50 | \$ - | \$ 22.50 | Approved-Information Provided |
| Sep-18 M6499746 Gray, Natalie | Sheraton Grand f Phoenix, AZ | MEEIA Supporting/Training Conference in AZ | Energy Star Conference Lodging. Agenda linked in next column K 'Additional Details'. Topics included Energy Star: Lighting, Retail Products, HVAC, thermostats, Effective Customer Segmentation, and others. Conference Agenda: https://www.energystar.gov/sites/default/files/asset/document/IES_2018_PartnerMeeting_Agenda_v17_WebRelease_508_0.pdf | 1410 | LODGING | \$ 156.48 | \$ - | \$ 156.48 | Approved-Information Provided |
| <p align="center">No information Provided</p> | | | | | | | | | |
| CYCLE III EXPENSES | | | | | | Total Conf/Meetings | \$ 2,610.38 | \$ 671.75 | Total Conferences/Meetings Expenses-Still Disallowed After Review |
| Dec-18 M6753425 Delatorre, Christoph | Starbucks Store (Kansas City, MO | Marketing Meeting - Review GTM plans for Cyc | To be moved to Cycle 3 | 1405 | BUSINESS MEALS | \$ 8.20 | \$ 8.20 | \$ - | Still Recommend Disallowed-Energy agrees |
| Jun-19 M7236174 File, Brian | Jimmy Johns 139 Jefferson Cit, MO | LUNCH - MEEIA Cycle 3 Negotiations - B. File | To be moved to Cycle 3 | 1405 | BUSINESS MEALS | \$ 64.37 | \$ 64.37 | \$ - | Still Recommend Disallowed-Energy agrees |
| Jun-19 OOP Brannan, Kevin | | Travel to and from Lockheed Martin HQ for MEI | To be moved to Cycle 3 | 498 0.58 | MILEAGE | \$ 288.84 | \$ 288.84 | \$ - | Still Recommend Disallowed-Energy agrees |
| Jun-19 M7185325 Delatorre, Christoph | Holiday Inn 314-421-4000, MO | Lockheed Martin Cycle 3 Design Sprint in St. L | To be moved to Cycle 3 | 1410 | LODGING | \$ 16.29 | \$ 16.29 | \$ - | Still Recommend Disallowed-Energy agrees |
| Jun-19 OOP Delatorre, Christopher | | Travel Expense for Lockheed Martin Cycle 3 R | To be moved to Cycle 3 | 496 0.58 | MILEAGE | \$ 287.68 | \$ 287.68 | \$ - | Still Recommend Disallowed-Energy agrees |
| Sep-19 M7455295 File, Brian | Phillips 66 - Mcca Jefferson Cit, MO | SNACK - MEEIA Cycle 3 Hearing | To be moved to Cycle 3 | 6099 | FUEL OTHER | \$ 8.37 | \$ 8.37 | \$ - | Still Recommend Disallowed-Energy agrees |
| <p align="center">Should be prepaid or deferred</p> | | | | | | | | | |
| Total Cycle 3 | | | | | | \$ 673.75 | \$ 673.75 | Total Cycle 3 Expenses-Energy Agrees | |

**Evergy Missouri West
Case No. EO-2020-0228**

| MEMBERSHIPS/SPONSORSHIPS | | | | | | | | | | | | |
|--------------------------|---------------------------|------------------------------------|--|------|------------------------|----|---------------------------|----|---------------------|--|------|--|
| Nov-18 | | | MEAAA Sponsorship in Review Period (Bronze Sponsorship of member based organization to drive EE awc Allowed for free attendance to conference and speaking engagement | | | \$ | 3,000.00 | | | | | |
| May-18 | | | Sponsorship of member based organization to drive EE awc Invests in policy related items and best practices across the MW | | | \$ | 3,000.00 | | \$ - | | | Still Recommend Disallowed-Staff's position is these expense should run through base rates |
| Dec-19 | M7639902 Boone, Angela | Association Of Er Atlanta, GA | Association of Energy Engineers - DSIIM certification renewal | 1260 | INDIV TECH/PROF DUES/M | \$ | 300.00 | \$ | 300.00 | | \$ - | Still Recommend Disallowed-Evergy agrees on Metro side |
| Aug-18 | | | Industry specific association - demand response | | | | | | | | | |
| Jun-19 | | | Sponsorship of member based organization to drive EE awc Invests in policy related items and best practices across the MW | | | | | | | | | |
| Apr-19 | Chris | | Building Operator Certification Level I Course charged held | | | | | | | | | |
| Various | Chris | | St. Joseph Construction Association (number of C&I - New construction | | | \$ | 759.00 | \$ | 759.00 | | \$ - | Still Recommend Disallowed-Staff's position is these should run through base rates |
| | | | Marketing expense - membership includes participation in events with construction and architectural firms in S | | | | | | | | | |
| | | | Membership in St. Joseph's residential home construction association to keep engaged with policies related to energy standards and networks that engage in this space. | | | \$ | 500.00 | \$ | 500.00 | | \$ - | Still Recommend Disallowed-Staff's position is these should run through base rates |
| Dec-18 | Natalie | | Midland Empire Home Builders Association Residential - New construction/rehabs | | | \$ | 500.00 | \$ | 500.00 | | \$ - | Still Recommend Disallowed-Staff's position is these should run through base rates |
| May-19 | Delatorre, Christopher | | Metro Wire Media (Platinum Sponsor-2019 Ind. Marketing expense which included newsletter banner ads ai Included 13 banner ads on Metrowire bi-weekly newsletter from August to December 2019; banner ads promo | | | \$ | 2,500.00 | \$ | 2,500.00 | | \$ - | Still Recommend Disallowed-Staff's position is these should run through base rates |
| | | | Membership & Sponsorships should be in base rates and not in addition | | | | | | | | | |
| | | | | | | | Total Memb/Spon | | \$ 7,059.00 | | | Total Membership/Sponsorships-Still Disallowed After Review |
| OTHER EXPENSES | | | | | | | | | | | | |
| Aug-18 | M6424663 Carrillo, Andrea | Starbucks Store (Kansas City, MO | Gift Cards for 4DX awards mid-year celebration Celebration of awards for achievement in Cycle 2 | 1405 | BUSINESS MEALS | \$ | 45.00 | \$ | 45.00 | | \$ - | Still Recommend Disallowed-Awards not needed |
| Aug-18 | M6434573 Carrillo, Andrea | Starbucks Store (Kansas City, MO | Gift Cards for 4DX awards mid-year celebration Celebration of awards for achievement in Cycle 2 | 1405 | BUSINESS MEALS | \$ | 15.00 | \$ | 15.00 | | \$ - | Still Recommend Disallowed-Awards not needed |
| Apr-19 | M7050120 Carrillo, Andrea | Stpaulmagst2607 Saint Paul, MN | Receipts do not indicate purpose of Gift Cards Water and Gum at the airport (MN Pencil, MN Ssnacks for trave This looked like souvenirs along with water | 1240 | SUBSCRIPTIONS PUBLICA | \$ | 6.94 | \$ | 6.94 | | \$ - | Still Recommend Disallowed-See receipt--not all snacks |
| Aug-19 | M7361561 Carrillo, Andrea | Sq Made In Kc Kansas City, MO | Coffee and going away gift for Amy Bartak relationship building with contractor working on DERMES project | 1405 | BUSINESS MEALS | \$ | 33.23 | \$ | 33.23 | | \$ - | Still Recommend Disallowed-Going away party |
| Sep-19 | M7436831 Carrillo, Andrea | Downtown Marke Kansas City, MO | Amy Bartak going away gathering relationship building with contractor working on DERMES project | 1405 | BUSINESS MEALS | \$ | 5.03 | \$ | 5.03 | | \$ - | Still Recommend Disallowed-Going away party |
| Sep-19 | M7438761 Carrillo, Andrea | Bristol #162 Kansas City, MO | Amy Bartak going away Lunch relationship building with contractor working on DERMES project | 1405 | BUSINESS MEALS | \$ | 35.33 | \$ | 35.33 | | \$ - | Still Recommend Disallowed-Going away party |
| Sep-19 | M7440177 Carrillo, Andrea | Nothing Bundt Cc Htpps://Www.N. MO | Amy Bartak going away gathering relationship building with contractor working on DERMES project | 1405 | BUSINESS MEALS | \$ | 36.90 | \$ | 36.90 | | \$ - | Still Recommend Disallowed-Going away party |
| Sep-19 | M7440223 Carrillo, Andrea | Downtown Marke Kansas City, MO | Amy Bartak going away gathering relationship building with contractor working on DERMES project | 1405 | BUSINESS MEALS | \$ | 16.00 | \$ | 16.00 | | \$ - | Still Recommend Disallowed-Going away party |
| May-19 | M7162741:English, Theresa | New Horizons Ka 512-3499565, TX | Excel Part 2 training in Overland Park, KS. (no receipt) Excel Part 2 is General Training, not specific to MEEIA | 1299 | OFFICE EXPENSES OTHE | \$ | 295.00 | \$ | 295.00 | | \$ - | Evergy Agrees to Disallow |
| Jul-18 | M6336681:Hill, Elena | Kia Video Toll Wichita, KS | Tumpike fee - Topeka meeting - Should be PERSONAL. Payroll contacted and 19.88 will be deducted from Elenas September 7th payroll check automatically. Paperwork is att:1435 Personal | | FUEL OTHER | | 19.88 | \$ | 19.88 | | \$ - | Still Recommend Disallow-Personal Expense |
| Sep-19 | M7457968 Carrillo, Andrea | In Cherry 816-2465420, MO | DERMS shirts for PLMA conference (has no inc conference (PLMA) | 1226 | OFCEQUIPSUPP LESS TH | \$ | 155.90 | \$ | 155.90 | | \$ - | Still Recommend Disallowed-not needed |
| Sep 18 | R1111649 | Davidson Prom | Nike Shirts Materials for team to wear at promotional seminars | | | \$ | 172.36 | \$ | 172.36 | | \$ - | Still Recommend Disallowed-not needed |
| Sep 19 | R1111649 | Davidson Prom | Work Shirts Shirts for field representatives to have visiting with customers | | | \$ | 117.95 | \$ | 117.95 | | \$ - | Still Recommend Disallowed-not needed |
| | | | Not Related to MEEIA Specific | | | | | | | | | |
| | | | | | | | Total Other | | \$ 954.52 | | | Total Other Expenses-Still Disallowed After Review |
| | | | | | | | Current Disallowed | | \$ 11,297.65 | | | Total Admin Cost Disallowed After Review |