

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

**P.S.C. MO. No.** 2 Ninth Revised Sheet No. 1.04B  
Canceling P.S.C. MO. No. 2 Eighth Revised Sheet No. 1.04B  
For Missouri Retail Service Area

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ELECTRIC**

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

P.S.C. MO. No. 2 First Revised Sheet No. 1.72

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For Missouri Retail Service Area

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## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE

### 22.01 BUSINESS DEMAND-SIDE MANAGEMENT

#### PURPOSE:

The Business Demand-Side Management (DSM) Programs (Programs), which consist of six programs, are designed to encourage Business customers to proactively use energy in such a way as to reduce consumption of electricity or to shift consumption from times of peak demand to times of non-peak demand.

These Programs are offered in accordance with Section 393.1075, RSMo. Supp. 2009 (the Missouri Energy Efficiency Investment Act or MEEIA) and the Commission's rules to administer MEEIA.

#### AVAILABILITY:

Except as otherwise provided in the terms governing a specific program, these Programs are available to any of Evergy's customers served under SGS, MGS, LGS, LPS, SGA, MGA, LGA, or TPP rate schedules.

The Programs (with the exception of Business Demand Response) are not available to customers electing to opt-out of DSM program funding under 4 CSR 240-20.094(7). Monetary incentives that otherwise would be payable under a program are not available to those that have received a state tax credit under sections 135.350 through 135.362, RSMo, or under sections 253.545 through 253.561, RSMo. As provided for in the Commission's rules, customers shall attest to non-receipt of any such tax credit and acknowledge that the penalty for a customer who provides false documentation is a class A misdemeanor.

A customer may elect not to participate (opt-out) in an electric utility's DSM programs under 4 CSR 240-20.094(7) if they:

- Have at least one account with a demand of 5,000 kW in the previous 12 months with that electric utility, or;
- Operate an interstate pipeline pumping station, or;
- Have multiple accounts with aggregate coincident demand of 2,500 kW in the previous 12 months with that utility and have a comprehensive demand-side or energy efficiency program with achieved savings at least equal to those expected from the utility-provided programs.

A customer electing to opt-out must provide written notice to the electric utility no earlier than September 1 and not later than October 30 to be effective for the following calendar year but shall still be allowed to participate in interruptible or curtailable rate schedules or tariffs offered by the electric utility.

Unless otherwise provided for in the tariff sheets or schedules governing a specific program, customers may participate in multiple programs, but may receive only one Incentive per Measure.

The Company reserves the right to discontinue the entire MEEIA cycle 3 portfolio, if the Company determines the implementation of such programs is no longer reasonable due to changed factors or circumstances that have materially, negatively impacted the economic viability of such programs as determined by the Company, upon no less than 30 days' notice to the Commission.

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Kansas City, MO

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## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE 22.01 BUSINESS DEMAND-SIDE MANAGEMENT

(continued)

### DEFINITIONS:

Unless otherwise defined, terms used in tariff sheets or schedules in Section 22 have the following meanings:

Applicant – A customer who has submitted a program application or has had a program application submitted on their behalf by an agent or trade ally.

Demand-Side Program Investment Mechanism (DSIM) – A mechanism approved by the Commission in Evergy Missouri Metro's filing for demand-side programs approval in Case No. EO-2019-0132.

Business Program- An energy efficiency program that is available to a customer receiving electric service under Service Classifications Small General Service Rate, Medium General Service Rate, Large General Service Rate, Large Power Service Rate.

Deemed Savings Table- A list of measures derived from the Company's filed TRM that characterizes associated gross energy and demand savings with specific measure parameters where available.

Energy Efficiency - Measures that reduce the amount of electricity required to achieve a given end use.

Incentive – Any consideration provided by Evergy directly or through the Program Administrator, including in the form of cash, bill credit, payment to third party, or public education programs, which encourages the adoption of Measures.

Long-Lead Project- A project committed to by a Customer, accepted by the Company, and a signed commitment offer received by the program administrator by December 31, 2022 according to the terms and implementation of the MEEIA 2020-2022 Energy Efficiency Plan that will require a date after December 31, 2022, but no later than December 31, 2023 to certify completion.

Measure – An end-use measure, energy efficiency measure, and energy management measure as defined in 4 CSR 240-22.020(18), (20), and (21).

Participant – An energy related decision maker who implements one or more end use measures as a direct result of a demand side program.

Program Administrator – The entity selected by Evergy to provide program design, promotion, administration, implementation, and delivery of services.

Program Partner – A retailer, distributor or other service provider that Evergy Missouri Metro or the Program Administrator has approved to provide specific program services through execution of a Evergy Missouri Metro approved service agreement.

Program Period – The period from January 1, 2020 through December 31, 2022, unless sooner terminated under the TERM provision of this tariff. Programs may have slightly earlier termination dates for certain activities, as noted on the Evergy Missouri Metro website – [www.evergy.com](http://www.evergy.com).

Project – One or more Measures proposed by an Applicant in a single application.

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## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE

### 22.01 BUSINESS DEMAND-SIDE MANAGEMENT (continued)

**Trade Ally-** An independent contractor that the Company or the Program Administrator has approved to provide specific program services through execution of a Company approved service agreement.

**Measure Benefit/Cost Test-** Each non-prescriptive Project must pass the Total Resource Cost Test by having a value of 1.0 or greater. Total Resource Cost Test value equals the present value of the benefits of each Measure over the useful life of each Measure divided by the incremental cost to implement the Project Measures. The benefits of the Measure include the Company's estimated avoided costs.

**Total Resource Cost (TRC) Test** – A test of the cost-effectiveness of demand-side programs that compares the avoided utility costs to the sum of all incremental costs of end-use measures that are implemented due to the program (including both Evergy Missouri Metro and Participant contributions), plus utility costs to administer, deliver and evaluate each demand-side program.

**TERM:** These tariff sheets and the tariff sheets reflecting each specific Business DSM program shall be effective for three years from the effective date of the tariff sheets, unless another termination date is approved by the Commission.

If the Programs are terminated prior to the end of the Program Period, only Incentives for qualifying Measures that have been preapproved or installed prior to the Programs' termination will be provided to the customer.

#### DESCRIPTION:

The reduction in energy consumption or shift in peak demand will be accomplished through the following Programs:

Business Energy Efficiency Rebates - Custom

- Business Energy Efficiency Rebates – Standard
- Business Energy Efficiency Rebates- Custom
- Business Smart Thermostat
- Business Process Efficiency Business Process Efficiency
- Business Demand Response
- 

In addition, Evergy Missouri Metro customers also have access to the Online Business Energy Audit.

In addition, Evergy customers also have access to the Online Business Energy Audit.

Program details regarding the interaction between Evergy or Program Administrators and Participants, such as Incentives paid directly to Participants, available Measures, availability of the Program, eligibility, and application and completion requirements may be adjusted through the change process as presented below. Those details, additional details on each Program, and other information such as process flows, application instructions, and application forms will be provided by the Evergy website, [www.evergy.com/custom](http://www.evergy.com/custom).

#### CHANGE PROCESS:

- 1) The change process is applicable to changes in program detail regarding the interaction between Evergy or Program Administrators and Participants, and excludes changes to the ranges of Incentive amounts for each Measure. Identify need for program detail change regarding the interaction between Evergy or Program Administrators and Participants;
- 2) Discuss proposed change with Program Administrator;
- 3) Discuss proposed change with Evaluator;
- 4) Analyze impact on program and portfolio (cost-effectiveness, goal achievement, etc.);
- 5) Inform the Staff, Office of the Public Counsel and the Department of Economic Development, Division of Energy, of the proposed change, the time within which it needs to be implemented, provide them the analysis that was done and consider recommendations from them that are received within the

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Vice President

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

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For Missouri Retail Service Area

## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE

### 22.01 BUSINESS DEMAND-SIDE MANAGEMENT (continued)

- 6) Take timely received recommendations into account and incorporate them where KCP&L believes it is appropriate to do so;
- 7) Notify and train customer contact personnel (Customer Service Representatives, Energy Consultants, Business Center) of the changes;
- 8) Make changes to forms and promotional materials;
- 9) Update program website;
- 10) File updated web pages and, if appropriate, updated list of Measures and Incentives amounts in Case No. EO-2019-0132; and
- 11) Inform Customer, trade allies, etc.

Evergy will also continue to discuss and provide information on ongoing Program and Portfolio progress at quarterly regulatory advisory group update meetings.

#### PROGRAMS' ANNUAL ENERGY AND DEMAND SAVINGS TARGETS:

Note that targeted energy and demand savings may be shifted between Programs depending on market response, changes in technology, or similar factors. These targets are based on savings at customer meters (excluding transmission and distribution line losses).

|                             | Expected Annual kWh Energy Savings Targets at Customer Side of Meter |            |            | Sum of Annual by Program |
|-----------------------------|--|------------|------------|--------------------------|
|                             | 2020   | 2021       | 2022       |                          |
| Business Standard           | 14,019,243   | 19,107,931 | 20,850,204 | 53,977,377               |
| Business Custom             | 5,216,973  | 11,114,231 | 13,908,599 | 30,239,803               |
| Business Process Efficiency | 3,273,111  | 7,191,746  | 8,989,682  | 19,454,539               |
| Business Demand Response    | 0  | 0          | 0          | 0                        |
| Business Smart Thermostat   | 29,156   | 58,312     | 87,468     | 174,936                  |
| Total                       | 22,538,482   | 37,472,221 | 43,835,953 | 103,846,656              |

Earnings Opportunity targets are set forth in Kansas City Power & Light Company's Schedule DSIM, Sheet No. 49Z, as approved in Case No. EO-2019-0132.

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

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For Missouri Retail Service Area

## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE

### 22.01 BUSINESS DEMAND-SIDE MANAGEMENT (continued)

|                                    | Expected Annual kW Demand Savings Targets at<br>Customer Side of Meter |               |               | Sum of Annual by<br>Program |
|------------------------------------|--|---------------|---------------|-----------------------------|
|                                    | 2020   | 2021          | 2022          |                             |
| <b>Business Standard</b>           | <b>2,181</b>   | <b>3,013</b>  | <b>3,328</b>  | <b>8,522</b>                |
| <b>Business Custom</b>             | <b>834</b>   | <b>1,777</b>  | <b>2,223</b>  | <b>4,834</b>                |
| <b>Business Process Efficiency</b> | <b>24</b>  | <b>70</b>     | <b>87</b>     | <b>181</b>                  |
| <b>Business Demand Response</b>    | <b>15,000</b>  | <b>15,000</b> | <b>15,000</b> | <b>45,000</b>               |
| <b>Business Smart Thermostat</b>   | <b>213</b>   | <b>426</b>    | <b>639</b>    | <b>1,278</b>                |
| <b>Total</b>                       | <b>18,252</b>  | <b>20,286</b> | <b>21,277</b> | <b>59,815</b>               |

Earnings Opportunity targets are set forth in Evergy Missouri Metro's Schedule DSIM, Sheet No. 490, as approved in Case No. EO-2019-0132.

#### PROGRAM COSTS AND INCENTIVES:

Costs of and Incentives for the Business DSM Programs reflected herein shall be identified in a charge titled "DSIM Charge" appearing as a separate line item on customers' bills and applied to customers' bills as a per kilowatt-hour charge as specified in the SGS, MGS, LGS, LPS, SGA, MGA, LGA, or TPP rate schedules. All customers taking service under said rate schedules shall pay the charge regardless of whether a particular customer utilizes a demand-side program available hereunder, unless they have opted-out as provided for previously.

#### PROGRAM DESCRIPTIONS:

The following pages contain other descriptions and terms for the Programs being offered under this tariff.

#### CHANGES IN MEASURES OR INCENTIVES:

Evergy Missouri Metro may offer the Measures contained in Evergy Missouri Metro's filing approved in Case No. EO-2019-0132. The offering of Measures not contained within the aforesaid filing must be approved by the Commission. Measures being offered and Incentives available to customers will be listed on Evergy Missouri Metro's website, [www.evergy.com](http://www.evergy.com). The Measures and Incentives being offered are subject to change. Customers must consult [www.evergy.com](http://www.evergy.com) for the list of currently available Measures. Should a Measure or Incentive offering shown on Evergy Missouri Metro's website differ from the corresponding Measure or Incentive offering shown in the currently effective notice filed in Case No. EO-2019-9-0132, the stated Measure or Incentive offering as shown in the currently effective notice shall govern.

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For Missouri Retail Service Area

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## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE

### 22.02 ONLINE BUSINESS ENERGY AUDIT PROGRAM

#### PURPOSE:

This Program provides small-to-medium business customers access to significant digital educational content available through their “My Account” portal. This content provides customers with the tools and resources they need to learn how their business is using energy, and how to better manage it to maximize efficiency and energy savings. Examples of digital pages or “widgets” available to business customers include: (1) Dashboard; (2) Energy Trends; (3) Ways to Save; (4) My Plan, and (5) a general settings page. Also embedded in content within this program is information on the Company’s other demand-side management programs and general offerings, so customers are not only presented with significant information on how to save energy, but also how they can partner with the Company to do so.

#### PROGRAM PROVISIONS:

This energy efficiency program is considered educational. Additional details are available at the Company website, [www.evergy.com](http://www.evergy.com).

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For Missouri Retail Service Area

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## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE 22.03 BUSINESS PROCESS EFFICIENCY

### PURPOSE:

The Business Process Efficiency program is designed to provide energy and demand savings from existing facilities by optimizing building energy management systems and overall consumption. The Company will provide energy assessment services and assistance in implementing identified solutions to customers to ensure that their systems are operating at optimal energy efficiency.

### AVAILABILITY:AVAILABILITY:

This program is available during the Program Period, and is voluntary and available to all customers receiving electric service under SGS, MGS, LGS, LPS, SGA, MGA, LGA or TPP rate schedules. Participants in this Program will be customers with a facility that meets all the following criteria:

1. At least one of the following conditions:
  - a. Higher than average electric energy intensities (kWh/ft<sup>2</sup>) based on business type;
  - b. Minimum of 100,000 ft<sup>2</sup>
  - c. Presence of an energy management system (EMS);
2. Mechanical equipment is operational; and
3. Will yield cost-effective energy savings according to a Process Efficiency Assessment Study.

### PROGRAM PROVISIONS:PROGRAM PROVISIONS:

Evergy Missouri Metro will hire a Program Administrator to implement this program and achieve energy and demand savings targets. Program benefits have been designed to provide cost effective Process Efficiency services to eligible facilities and include:

1. Recruitment and training of Process Efficiency Program Providers;
2. Benchmarking of candidate facilities using ENERGY STAR® Portfolio Manager or other comparable procedures to identify facilities with optimization opportunities;
3. Access to a group of certified Process Efficiency Service Providers that can provide studies performed by trained auditors to identify cost effective building system optimization Measures;
4. Assisting building owners with trade allies and management during the implementation process;
5. Building owner staff training on Process Efficiency operations;
6. Verification of operating results; or
7. Ongoing monitoring of Retro-Commissioned building systems to promote persistence of improvements.

### ELIGIBLE MEASURES AND INCENTIVES:

Measures filed in Case No. EO-2019-0132 are eligible for program benefits and incentives, and may be offered during the Program Period. Eligible Incentives directly paid to customers and Measures can be found at [www.evergy.com/process](http://www.evergy.com/process).

### EVALUATION:

The Company will hire a third- party evaluator to perform Evaluation, Measurement and Verification (EM&V) on this Program.

2.Strategic Energy Management Cohort which places companies into groups that work together for

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## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE

### 22.04 BUSINESS ENERGY EFFICIENCY REBATES – CUSTOM

#### PURPOSE:

The Business Energy Savings - Custom program is designed to encourage more effective utilization of electric energy through Energy Efficiency improvement opportunities which are available at the time of new equipment purchases, facility modernization, and industrial process improvement. This program provides rebates for Energy Efficiency measures that are not specifically covered under the Business EnergySavings– Standard program. A “Custom Incentive” is a direct payment or bill credit to a participant for installation of Measures that are part of projects that have been pre-approved by the Program Administrator.

#### AVAILABILITY:

This program is available during the Program Period, and is voluntary and available to all customers receiving electric service under SGS, MGS, LGS, LPS, SGA, MGA, LGA or TPP rate schedules that also meet Custom Rebate Program Provisions below.

#### PROGRAM PROVISIONS:

This program provides a rebate for installing qualifying high efficiency equipment or systems, or replacing or retrofitting HVAC systems, motors, lighting, pumps or other qualifying equipment or systems with higher energy efficiency equipment or systems. Both new construction projects and retrofit projects are eligible to apply. To become a Participant in the program customers must request a rebate for a project by submitting an application through the Evergy Missouri Metro website ([www.evergy.com/mybusiness](http://www.evergy.com/mybusiness)). Projects must be pre-approved by the Program Administrator before the project start date to be eligible for a rebate. Customer applications will be evaluated and the rebates will be distributed on a first-come basis according to the date of the customer’s application.

Rebate applications for different energy saving measures at the same facility may be submitted. An entity with multiple facilities may participate for each facility by submitting an application for each facility. The maximum amount of each rebate will be calculated as a flat rate in dollars per coincident peak kW or cents per kWh saved, up to the customer annual maximum. The total amount of program (Business EnergySavings– Custom and Standard) rebates that a Participant can receive during a program year is initially set and limited to a program cap of; 2 x the customers annual DSIM or \$1,000,000 per customer (\$250,000 per project) per program year. Participants that exceed the \$250,000 per project threshold will be eligible for a reduced rate incentive. The program cap can be adjusted for each program year during the Program Period by filing an updated tariff sheet. The rebate for the measure will be issued upon completion of the project’s final application process.

After Evergy Missouri Metro reviews projects approved and/or paid during the first six months of a program year, Evergy Missouri Metro may approve application for additional rebates if the customer has reached its maximum and if Program funds are available.

By applying for the Custom Rebate Program, the customer agrees that the project may be subject to random on-site inspections by the Program Administrator.

#### EVALUATION:

The Company will hire a third-party evaluator to perform an Evaluation, Measurement, and Verification (EM&V) on this Program.

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## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE

### 22.05 BUSINESS ENERGY EFFICIENCY REBATES – STANDARD

#### PURPOSE:

The Business Energy Efficiency Rebates - Standard program is designed to encourage installation of energy efficient measures in existing facilities. The primary objectives of this program are to provide pre-set incentives to facility owners and operators for the installation of high efficiency equipment and controls and to provide a marketing mechanism for electrical contractors, mechanical contractors, and their distributors to promote energy efficient equipment to end users.

#### AVAILABILITY:

This program is available during the Program Period, and is voluntary and available to all customers receiving electric service under SGS, MGS, LGS, LPS, SGA, MGA, LGA or TPP rate schedules that also meet the Standard Rebate Program Provisions below.

#### PROGRAM PROVISIONS:

Evergy Missouri Metro will hire a Program Administrator to implement this program. The Program Administrator will provide the necessary services to effectively implement the program and to strive to attain the energy and demand savings targets. Standard Measures and Incentives will be provided to qualifying customers that provide completed Standard Rebate Applications as indicated below:

- Participant must complete a Standard Rebate Application form, or purchase from pre-qualified equipment distributors, available at [www.evergy.com/standard](http://www.evergy.com/standard);
- Participant must provide proof of equipment purchase and installation;
- Measures must be purchased and installed after the effective date of this tariff;
- Measures which receive an Incentive under the Custom Rebate Program are not eligible for this Standard Rebate Program; and
- Standard Measures must be installed as a retrofit in an existing facility.

By applying for the Standard Rebate Program, the customer agrees that the project may be subject to random on-site inspections by the Program Administrator.

The total amount of program (Business Energy Efficiency Rebate – Custom and Standard) rebates that a Participant can receive during a program year of the Program Period is initially set and limited to a program cap of the greater of; 2x the customers annual DSIM or \$1,000,000 per customer, (\$250,000 per project per year) Customers that exceed the \$250,000 per project threshold are eligible for a reduced incentive rate. The program cap can be adjusted for each program year during the Program Period by filing an updated tariff sheet. The rebate for the measure will be issued upon completion of the project.

Small to Mid-Sized Business customers (<100 kW) that participate in the small business program track and receive a small business assessment are eligible for the small business incentive rates for qualifying measures.

#### ELIGIBLE MEASURES AND INCENTIVES:

- Standard Incentives filed in Case No. EO-2019-0132 are eligible for program benefits and Incentives and may be offered during the Program Period. These include, but are not limited to, the following equipment types: Lighting and Controls
- Motors, Pumps and Variable Frequency Drives
- HVAC (Heating, Ventilation and Air-Conditioning)
- Business Computing
- Food Service and Refrigeration

Eligible Incentives directly paid to customers and Measures can be found at [www.evergy.com/standard](http://www.evergy.com/standard).

#### EVALUATION:

The Company will hire a third-party evaluator to perform Evaluation, Measurement and Verification (EM&V) on this Program.

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## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE 22.06 BUSINESS DEMAND RESPONSE

### PURPOSE:

Business Demand Response ("Program" or "BDR") is designed to reduce Participant load during peak periods to improve system reliability, offset forecasted system peaks that could result in future generation capacity additions, and/or provide a more economical option to generation or purchasing energy in the wholesale market. Participant curtailment may be requested for any of these operational or economic reasons as determined by the Company.

### AVAILABILITY:

This Program is available during the Program Period, and is available to all customers in the classes identified in the Business Demand-Side Management section that also meet Program provisions. Participants must show economic and technical feasibility for measurable and verifiable load curtailment during the Curtailment Season of June 1 to September 30 and within designated Curtailment Hours of 12:00 p.m. to 8:00 p.m., Monday through Friday excluding Holidays. The Company reserves the right to limit the total Curtailable Load determined under this Program. The Company will determine the most beneficial timing and length of curtailment events during the curtailment season, is not required to curtail all Participants simultaneously, and may elect to only call individual participants and/or stagger Participants as deemed appropriate. The Company also reserves the right to apply minimum and/or maximum event performance requirements for incentive payment, to apply financial bonuses or penalties and to terminate Participation Agreements for non-compliance.

The Company will engage a third-party Administrator to implement all recruitment, enrollment and daily operations for the Program and manage Aggregators. A Customer may participate directly through the Program Administrator ("Administrator") or a Company-approved Aggregator ("Aggregator"). An aggregator is a curtailment service provider, appointed by a customer to act on behalf of said Customer with respect to all aspects of the Program, including but not limited to: a) the receipt of notices from the Company under this Program; and b) the receipt of incentive payments from the Company. The Aggregator will be responsible for establishing independent business to business (B:B) contracts and administering the participation of said customer. The Aggregator is fully responsible for fulfillment of these B:B customer contracts. Contracts between Aggregator and their enrolled customers are not limited to Program provisions.

For the purpose of this program only, and at the Company's option, a Participant with multiple accounts may request that some or all of its accounts be aggregated in one Participation Agreement. The aggregated Participant account will be treated as a single account for purposes of calculating potential Program incentive payments. The Aggregator is responsible for all of their independent B:B customer contracts; no minimum customer account requirements apply. Aggregator must maintain a minimum aggregated load as stated in their Aggregator Participation Agreement to maintain Program eligibility.

### PROGRAM PROVISIONS:

This Program may be executed by manual and/or automated demand response methods:

#### Demand Response (DR)

1)A Customer with load curtailment potential during the Curtailment Season and designated Curtailment hours enrolls directly with the Company Program Administrator or Aggregator to participate. The Company or Program Administrator evaluates a Customer's metered usage data from the most recent Curtailment Season and gathers site specific information from the Participant to establish their curtailment plan and estimated associated curtailable load (kW). The Participant/Aggregator enrolls this curtailable load in the Program by executing their Participation Agreement. The Participant receives an event notice from the Company in advance of scheduled curtailment events and they manually execute their facility curtailment plan to curtail at least their enrolled curtailable load for the duration of the curtailment event.

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ISSUED BY: Darrin R. Ives  
Vice President

Kansas City, MO

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

P.S.C. MO. No. 2 First Revised Sheet No. 1.82

Cancelling P.S.C. MO. No. 2 Original Sheet No. 1.82

For Missouri Retail Service Area

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## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE

### 22.06 BUSINESS DEMAND RESPONSE

(continued)

#### **2) Automated Demand Response (ADR)**

A Customer with load curtailment potential during the Curtailment Season and designated Curtailment hours enrolls with the Administrator or Aggregator. But, rather than manual execution of their load curtailment plan, the Participant's building/energy management system (BMS/EMS) or facility automation system is used to execute their curtailment plan. The Participant or Aggregator receives the curtailment event notice from the Company and signals the automated controls to modify facility loads to successfully curtail enrolled kW load.

#### **Participation Agreements**

There will be two versions of Program Participation Agreements ("Agreement"). Customers enrolling with the Administrator will have a customer Agreement between the customer and the Program. Aggregators will have an aggregator Agreement between the Program and the Aggregator. Multi-year participation Agreements will be re-evaluated annually or at any time the Company has data indicating the terms of the participation Agreement cannot be fulfilled by the Participant.

#### **Event Performance and Incentives**

The Company will employ a calculated baseline load (CBL) methodology to determine participant demand savings associated with a demand response curtailment event. A CBL approach applies a model or algorithm to develop a customer-specific baseline for each day from historic metered usage data that is then used to forecast load impacts for each hour of the event absent a curtailment event. This baseline is calibrated to best match recent operational and/or weather patterns. This baseline is then compared to the actual metered average hourly demand during the curtailment event. The difference between the forecasted hourly baseline and the actual metered hourly usage during the event equals the hourly kW impact of the event. All kW will be calculated as a whole number. The Seasonal hourly average kW achieved divided by the kW enrolled is the Participant's % kW achieved. The Company will pay the Participant or Aggregator for their achieved Seasonal average percent of their enrolled Curtailable load within the established floor and cap as detailed in their Agreement.

The Company will communicate with Participants and Aggregators in advance of a curtailment event to increase their ability to successfully participate. Customer and Aggregator Agreements will contain specific information for curtailment specifications that fall within the following limits.

Maximum number of events per season- 10

Minimum number of events per season- 1

Maximum duration of an event- 8 hours

Minimum notification prior to an event- 1 hour

#### **Evaluation**

The Company will hire a third-party evaluator to perform Evaluation, Measurement and Verification (EM&V) on this Program.

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

P.S.C. MO. No. 2 Original Sheet No. 1.82A  
Canceling P.S.C. MO. No. \_\_\_\_\_ Revised Sheet No. \_\_\_\_\_  
For Missouri Retail Service Area

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**22.06 BUSINESS DEMAND RESPONSE**

**(continued)**

**ADDITIONAL PROGRAM OPTION:**

Market Based Demand Response (MBDR)

MBDR is offered as a separate Tariff outside of MEEIA. MBDR offers only qualified Business Demand Response Participants an additional opportunity to reduce their electric costs through participation with the Company in the wholesale Southwest Power Pool (SPP) energy market by receiving payment for providing their load reduction during high energy price periods. MBDR is available to Program Participants whose DR Resources are compliant with the SPP Tariff and SPP Marketplace Protocol requirements and can provide sustainable load reduction during market participation. An MBDR Participant has the option of committing their DR Resources to the SPP energy market unless the company has scheduled a potential Business Demand Response Curtailment Event for the same time period. Participation in MBDR authorizes the Company to offer the Customer's curtailment amount in the SPP Market and Participant compensation is based on any SPP settlement payments less MBDR fees. All SPP registration and technical requirements, market operating and settlement procedures, MBDR fees, etc. are details in Participants individual BMDR contract.

**ADDITIONAL PROGRAM DETAILS:**

Additional Program information and documents can be found at [www.evergy.com/businessdr](http://www.evergy.com/businessdr)









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

P.S.C. MO. No. 2 First Revised Sheet No. 1.83

Cancelling P.S.C. MO. No. 2 Original Sheet No. 1.83

For Missouri Retail Service Area

## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE 22.07 BUSINESS THERMOSTAT PROGRAM

### PURPOSE:

The voluntary Business Thermostat Program is designed to reduce Participant load during peak periods to improve system reliability, offset forecasted system peaks that could result in future generation capacity additions, and/or provide a more economical option to generation or purchasing energy in the wholesale market. Participant curtailment may be requested for any of these operational or economic reasons as determined by the Company. The Program accomplishes this by deploying various demand response technologies to Participants' WiFi-enabled thermostats to modify the run-time of air conditioning unit(s) or heat pump(s) for a specified period of time in a Company coordinated effort to limit overall system peak load.

### AVAILABILITY:

The Program is available for the Program Period to any customer currently receiving service under any small general service or medium general service rate schedule. Customers must maintain a secure Wi-Fi enabled internet service and have a working central air conditioning system or heat pump. If a WiFi-enabled thermostat is provided to customers at a discounted price, customers must agree to install the thermostat at their premise receiving electric service within fourteen (14) days of receiving the device, and keep it installed, operational, and connected to a secure Wi-Fi network for the duration of the program. Customers must agree to not sell the device for the duration of the program. If it is found that they do, a debit will be issued on their utility bill for the Manufacturer Suggested Retail Price (MSRP) of the WiFi-enabled thermostat or the value of incentive provided to the customer. Payment of that debit will be the customer's responsibility. Property owner's (owner occupant or landlord for a rental property) permission is required to receive a smart thermostat and/or participate in the demand response program with an existing eligible thermostat. Tenant permission is required to receive a thermostat and/or participate in the demand response program with an existing eligible thermostat if the landlord is requesting participation. The Company reserves the right to limit program participation. The Company also reserves the right to apply minimum and/or maximum event performance requirements for incentive payment, to apply financial bonuses or penalties and to terminate participation for non-compliance.

### PROGRAM PROVISIONS:

The Company will hire a Program Administrator to implement this Program. The Program Administrator will provide the necessary services to effectively implement the Program and strive to attain the energy and demand savings targets. The Company and the Program Administrator will follow a multi-faceted approach to marketing the Program.

### CONTROLS AND INCENTIVES:

Participants will receive enrollment and participation incentives at a level determined by the Company. If customers have an existing Wi-Fi enabled eligible thermostat, the customer may elect to enroll and participate in the demand response program. If customers had received a Program device from the previous Program (MEEIA Cycle 2), they will not be eligible for a new Program device. However, if the existing MEEIA Cycle 2 device fails, the customer is eligible to continue participation with a new Program device. During a curtailment event, the Company or its assignee will deploy various demand response technologies to Participants' thermostats to modify the run-time of air conditioning unit(s) or heat pump(s) for a specified period of time in a Company coordinated effort to limit overall system peak load. The Company reserves the right to set and modify incentive levels at any point during the program.

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

**P.S.C. MO. No.** 2

Original Sheet No. 1.83A

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Revised Sheet No. \_\_\_\_\_

For Missouri Retail Service Area

**RULES AND REGULATIONS  
ELECTRIC**

**22.07 BUSINESS THERMOSTAT (continued)**

**CYCLING METHODS:**

The Company may elect to deploy various types of demand response technologies including, but not limited to: (1) cycling the compressor unit(s); (2) deploying stand-alone pre-cooling strategies; (3) deploying a combination of pre-cooling and cycling strategies; (4) deploying pre-cooling and temperature modification strategies. The Company reserves the right to test new residential thermostat demand response technologies at any point during the program.

**NOTIFICATION:**

The Company will notify Participants of a curtailment event via various communication channels, including, but not limited to: (1) SMS; (2) email; (3) push notifications; (4) in-app notifications; (5) device notifications. The notification can occur prior to or at the start of a curtailment event.

**CURTAILMENT SEASON:**

The Curtailment Season will extend from June 1 to September 30.

**EVALUATION:**

The Company will hire a third-party evaluator to perform an Evaluation, Measurement, and Verification (EM&V) on this Program.

**CURTAILMENT LIMITS:**

The Company may call a curtailment event any weekday, Monday through Friday, excluding Independence Day and Labor Day, or any day officially designated as such. A curtailment event occurs whenever the thermostat is being controlled by KCP&L or its assignees. KCP&L may call a maximum of one curtailment event per day per Participant lasting no longer than four (4) hours per Participant. KCP&L is not required to curtail all Participants simultaneously and may stagger curtailment events across participating Participants.

**CURTAILMENT OPT OUT PROVISION:**

A Legacy Participant may opt out of any curtailment event during the Curtailment Season by notifying The Company at any time prior to or during a curtailment event. A New Participant may opt out of an ongoing event via their smart phone or by the thermostat itself.

**NEED FOR CURTAILMENT:**

Curtailments may be requested for operational or economic reasons. Operational curtailments may occur when any physical operating parameter(s) approaches a constraint on the generation, transmission or distribution systems or to maintain Company's capacity margin requirement. Economic reasons may include any occasion when the marginal cost to produce or procure energy or the price to sell the energy in the wholesale market is greater than a customer's retail price. A minimum of one (1) demand response event per season will be dispatched to eligible participants

**CONTRACT TERM:**

Initial contracts will be for a period of three years, terminable thereafter on 90 days written notice. At the end of the initial term the thermostat becomes the Participant's property. The customer will remain subject to curtailment unless they make a request with Company or its assignees to be removed from the program. However, so long as the agreement to participate in the Program is in force, Company will provide maintenance and repair to the programmable thermostat as may be required due to normal use. If the Participant has the Company provided thermostat and leaves the program prior to the end of the initial contract, Company will have 60 days thereafter to remove the thermostat and/or other control equipment. Company will also have a separate Customer Program Participation Agreement outlining Customer and Company responsibilities, and additional information concerning data privacy and Program termination for customers who participate in any studies that will analyze and evaluate customers' behavior and usage of thermostat, and associated software.

**EVALUATION:**

The Company will hire a third-party evaluator to perform Evaluation, Measurement and Verification (EM&V) on this Program.

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

P.S.C. MO. No. 2 First Revised Sheet No. 1.84

Cancelling P.S.C. MO. No. 2 Original Sheet No. 1.84

For Missouri Retail Service Area

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## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE

### 22.08 RESIDENTIAL DEMAND-SIDE MANAGEMENT

#### PURPOSE:

The Residential Demand-Side Management (DSM) Programs (Programs), are designed to encourage residential customers to proactively use energy in such a way as to reduce consumption of electricity or to shift consumption from times of peak demand to times of non-peak demand.

These Programs are offered in accordance with Section 393.1075, RSMo. Supp. 2009 (the Missouri Energy Efficiency Investment Act or MEEIA) and the Commission's rules to administer MEEIA.

#### AVAILABILITY:

Except as otherwise provided in the terms governing a particular program, these Programs are available to residential customers in Evergy's Missouri service area being served under any residential rate schedule.

Monetary incentives are not payable to customers that have received a state tax credit under sections 135.350 through 135.362, RSMo, or under sections 253.545 through 253.561, RSMo. As provided for in the Commission's rules, customers shall attest to non-receipt of any such tax credit and acknowledge that the penalty for a customer who provides false documentation is a class A misdemeanor.

Unless otherwise provided for in the tariff sheets or schedules governing a particular program, customers may participate in multiple programs, but may receive only one Incentive per Measure.

The Company reserves the right to discontinue the entire MEEIA cycle 3 portfolio, if Company determines that implementation of such programs is no longer reasonable due to changed factors or circumstances that have materially negatively impacted the economic viability of such programs as determined by the Company, upon no less than thirty days' notice to the Commission.

#### DEFINITIONS:

Unless otherwise defined, terms used in tariff sheets or schedules in Section 22 have the following meanings:

Applicant – A customer who has submitted a program application or has had a program application submitted on their behalf.

Demand-Side Program Investment Mechanism (DSIM) – A mechanism approved by the Commission in Evergy's filing for demand-side program approval in Case No. EO-2019-0132.

Energy Efficiency - Measures that reduce the amount of electricity required to achieve a given end use.

Incentive – Any consideration provided by KCP&L directly or through the Program Administrator and Program Partners, including buydowns, markdowns, rebates, bill credits, payment to third parties, direct installations, giveaways and education, which encourages the adoption of Measures.

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Vice President

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

P.S.C. MO. No. 2 First Revised Sheet No. 1.85

Cancelling P.S.C. MO. No. 2 Original Sheet No. 1.85

For Missouri Retail Service Area

## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE 22.08 RESIDENTIAL DEMAND-SIDE MANAGEMENT

(continued)

Measure – An end-use measure, energy efficiency measure, and energy management measure as defined in 4 CSR 240-22.020(18), (20), and (21).

Participant – An energy related decision maker who implements one or more end use measures as a direct result of a demand side program.

Program Administrator – The entity selected by Evergy Missouri Metro to provide program design, promotion, administration, implementation, and delivery of services.

Program Partner – A retailer, distributor or other service provider that Evergy Missouri Metro or the Program Administrator has approved to provide specific program services through execution of a Evergy Missouri Metro approved service agreement.

Program Period – The period from January 1, 2020 through December 31, 2022, unless sooner terminated under the TERM provision of this tariff. Programs may have slightly earlier deadlines for certain activities, as noted on the Evergy website – [www.evergy.com](http://www.evergy.com).

Total Resource Cost (TRC) Test – A test of the cost-effectiveness of demand-side programs that compares the avoided utility costs to the sum of all incremental costs of end-use measures that are implemented due to the program (including both Evergy and Participant contributions), plus utility costs to administer, deliver and evaluate each demand-side program.

### TERM:

These tariff sheets and the tariff sheets reflecting each specific residential DSM program shall be effective for three years from the effective date of the tariff sheets, with the exception of the Income-Eligible Multi-Family, which shall be effective for six years, unless another termination date is approved by the Commission.

If the Programs are terminated prior to the end of the Program Period, only Incentives for qualifying Measures that have been pre-approved or installed prior to the Programs' termination will be provided to the customer.

### DESCRIPTION:

The reduction in energy consumption or shift in peak demand will be accomplished through the following Programs:

- Heating, Cooling & Home Comfort
- Home Energy Report
- Income-Eligible Home Energy Report
- Energy Saving Products
- Online Energy Audit
- Income-Eligible Multi-Family
- Residential Smart Thermostat

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

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For Missouri Retail Service Area

## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE

### 22.08 RESIDENTIAL DEMAND-SIDE MANAGEMENT

(continued)

In addition, Evergy Missouri Metro residential customers have access to the Online Home Energy Audit.

Program details regarding the interaction between Evergy Missouri Metro or Program Administrators and Participants, such as Incentives paid directly to Participants, available Measures, availability of the program, eligibility, and application and completion requirements may be adjusted through the change process as presented below. Those details, additional details on each program, and other details such as process flows, application instructions, and application forms will be provided on the Evergy Missouri Metro website, [www.evergy.com](http://www.evergy.com).

#### CHANGE PROCESS:

The change process is applicable to changes in program detail regarding the interaction between Evergy Missouri Metro or Program Administrators and Participants in the Programs, and excludes changes to the ranges of Incentive amounts for each Measure.

- 1) Identify need for program detail change regarding the interaction between Evergy Missouri Metro or Program Administrators and Participants in the Programs;
- 2) Discuss proposed change with Program Administrator;
- 3) Discuss proposed change with Evaluator;
- 4) Analyze impact on program and portfolio (cost-effectiveness, goal achievement, etc.);
- 5) Inform the Staff, Office of the Public Counsel and the Department of Economic Development, Division of Energy, of the proposed change, the time within which it needs to be implemented, provide them the analysis that was done and consider recommendations from them that are received within the implementation timeline (the implementation timeline shall be no less than five business days from the time that the Staff, Office of the Public Counsel and the Department of Economic Development, Division of Energy, are informed and provided the above-referenced analysis);
- 6) Take timely received recommendations into account and incorporate them where Evergy Missouri Metro believes it is appropriate to do so;
- 7) Notify and train customer contact personnel (Customer Service Representatives, Energy Consultants, Business Center) of the changes;
- 8) Make changes to forms and promotional materials;
- 9) Update program website;
- 10) File updated web pages and, if appropriate updated list of Measures and Incentive amounts in Case No. EO-2019-0132; and
- 11) Inform Customers, trade allies, Program Partners, etc.

Evergy Missouri Metro will also continue to discuss and provide information on ongoing program and portfolio progress at quarterly regulatory advisory group update meetings.

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Kansas City, MO

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

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For Missouri Retail

Service Area

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| <p><b>RULES AND REGULATIONS<br/>ELECTRIC</b></p> |
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**22.08 RESIDENTIAL DEMAND-SIDE MANAGEMENT**

**(continued)**

**PROGRAMS' ANNUAL ENERGY AND DEMAND SAVINGS TARGETS:**

Note that targeted energy and demand savings may be shifted between programs depending on market response, changes in technology, or similar factors. These targets are based on savings at customer meters (excluding transmission and distribution line losses).

|                                 | Expected Incremental Annual kWh Energy Savings Targets at Customer Side of Meter |                   |                   |                |                |                | Sum of Annual by Program |
|---------------------------------|--|-------------------|-------------------|----------------|----------------|----------------|--------------------------|
|                                 | 2020   | 2021              | 2022              | 2023           | 2024           | 2025           |                          |
| Energy Saving Products          | 12,153,179   | 9,722,590         | 7,555,117         | 0              | 0              | 0              | 29,430,886               |
| Heating, Cooling & Home Comfort | 3,346,358  | 4,814,841         | 5,426,432         | 0              | 0              | 0              | 13,587,631               |
| Home Energy Report              | 9,579,000  | 9,579,000         | 9,579,000         | 0              | 0              | 0              | 28,737,000               |
| Income-Eligible Energy Report   | 2,928,146  | 2,928,146         | 2,928,146         | 0              | 0              | 0              | 8,784,438                |
| Income-Eligible Multi-Family    | 1,368,009  | 1,160,994         | 1,160,994         | 906,913        | 945,949        | 992,465        | 6,535,323                |
| Residential Demand Response     | 1,171,048  | 1,329,516         | 1,466,157         | 0              | 0              | 0              | 3,966,721                |
| <b>Total</b>                    | <b>30,545,741</b>  | <b>29,535,087</b> | <b>28,115,846</b> | <b>906,913</b> | <b>945,949</b> | <b>992,465</b> | <b>91,042,000</b>        |

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

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For Missouri Retail Service Area

**RULES AND REGULATIONS  
ELECTRIC**

**22.08 RESIDENTIAL DEMAND-SIDE MANAGEMENT**  
(continued)

|                                 | Expected Incremental Annual kW Demand Savings Targets at Customer Side of Meter |               |               |            |            |            | Sum of Annual by Program |
|---------------------------------|---|---------------|---------------|------------|------------|------------|--------------------------|
|                                 | 2020  | 2021          | 2022          | 2023       | 2024       | 2025       |                          |
| Energy Saving Products          | 889   | 725           | 558           | 0          | 0          | 0          | 2,172                    |
| Heating, Cooling & Home Comfort | 1,607   | 2,225         | 2,480         | 0          | 0          | 0          | 6,312                    |
| Home Energy Report              | 1,200   | 1,200         | 1,200         | 0          | 0          | 0          | 3,600                    |
| Income-Eligible Energy Report   | 366   | 366           | 366           | 0          | 0          | 0          | 1,098                    |
| Income-Eligible Multi-Family    | 248   | 228           | 228           | 183        | 197        | 214        | 1,297                    |
| Residential Demand Response     | 8,679   | 9,957         | 11,135        | 0          | 0          | 0          | 29,772                   |
| <b>Total</b>                    | <b>12,989</b>   | <b>14,701</b> | <b>15,967</b> | <b>183</b> | <b>197</b> | <b>214</b> | <b>44,251</b>            |

Earnings Opportunity targets are set forth in Evergy Missouri Metro Schedule DSIM Sheet 49Z as approved in Case No. EO-2019-0132.

**PROGRAM COSTS AND INCENTIVES**

Costs of and incentives for the Residential DSM Programs reflected herein shall be reflected in a charge titled "DSIM Charge" appearing as a separate line item on customers' bills and applied to customers' bills as a per kilowatt-hour charge as specified in the residential rate schedules. All customers taking service under said rate schedule shall pay the charge regardless of whether a particular customer utilizes a demand-side program available hereunder.

**PROGRAM DESCRIPTIONS:**

The following pages contain other descriptions and terms for the Programs being offered under this tariff.

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

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For Missouri Retail Service Area

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**22.08 RESIDENTIAL DEMAND-SIDE MANAGEMENT**

**(continued)**

**PROGRAM COSTS AND INCENTIVES**

Costs of and incentives for the Residential DSM Programs reflected herein shall be reflected in a charge titled "DSIM Charge" appearing as a separate line item on customers' bills and applied to customers' bills as a per kilowatt-hour charge as specified in the residential rate schedules. All customers taking service under said rate schedule shall pay the charge regardless of whether a particular customer utilizes a demand-side program available hereunder.

**PROGRAM DESCRIPTIONS:**

The following pages contain other descriptions and terms for the Programs being offered under this tariff.

**CHANGES IN MEASURES OR INCENTIVES:**

Evergy may offer the Measures contained in the Company's filing approved in Case No. EO-2019-0132. The offering of Measures not contained within the aforesaid filing must be approved by the Commission. Measures being offered and Incentives available to customers will be listed on Evergy's website, [www.evergy.com](http://www.evergy.com). The Measures and Incentives being offered are subject to change. Customers must consult [www.evergy.com](http://www.evergy.com) for the list of currently available Measures. Should a Measure or Incentive offering shown on Evergy's website differ from the corresponding Measure or Incentive offering shown in the currently effective notice filed in Case No. EO-2019-0132 the stated Measure or Incentive offering as shown in the currently effective notice shall govern.



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

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For Missouri Retail Service Area

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## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE

### 22.09 HEATING, COOLING & HOME COMFORT

#### PURPOSE:

The Heating, Cooling & Home Comfort Program (Program) is designed to provide educational and financial incentives to residential customers, increasing their awareness and incorporation of energy efficiency into their homes.

#### AVAILABILITY:

This program is available during the Program Period, and is available to any Customer receiving service under any generally available residential rate schedule offered by the Company in a structure containing four units or less.

#### PROGRAM PROVISIONS:

Evergy Missouri Metro will hire a Program Administrator to implement this program and provide the necessary services to effectively manage the program and strive to attain the energy and demand savings targets. The program consists of three sub-programs:

Option 1: Insulation & Air Sealing.. Customers that have completed a comprehensive energy audit by an Program authorized energy auditor are eligible to receive the installation of a free energy savings items and rebates.

This option will be delivered jointly with Spire Energy so that eligible customers, utilizing both utilities services, may receive benefits from each respective utility. Evergy offerings are not contingent upon co-delivery.

Option 2: Energy Savings Kits or Kit components. Energy efficient measures provided to residential customers by the Company to include discretionary energy assessments to targeted low income residents.

This option will be co-delivered with Spire to eligible customers for both utilizes. Evergy offerings are not contingent upon co-delivery.

Option 3: HVAC Rebate. Customers are eligible to receive incentives for improving the efficiency of a homes' HVAC equipment.

#### ELIGIBLE MEASURES AND INCENTIVES:

Measures filed in Case No. EO-2019-0132 are eligible for program benefits and incentives and may be offered during the Program Period. Eligible Incentives and Measures can be found at [www.evergy.com](http://www.evergy.com).

#### EVALUATION:

The Company will hire a third-party evaluator to perform an Evaluation, Measurement and Verification (EM&V) on this Program.

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1200 Main, Kansas City, MO 64105

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

P.S.C. MO. No. 2 Second Revised Sheet No. 1.89

Cancelling P.S.C. MO. No. 2 First Revised Sheet No. 1.89

For Missouri Retail Service Area

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## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE

### 22.10 RESIDENTIAL HOME ENERGY REPORT PROGRAM

#### PURPOSE:

The Residential Home Energy Report Program is a behavioral energy efficiency and educational program that provides a comparison of the household energy usage information with similar types of customers, or “neighbors”. The Home Energy Report shall be delivered in paper, and/or email format, and is composed of several modules of information to help customers understand and manage their energy use. A few examples of modules included are: (1) neighbor/similar home comparison; (2) energy comparisons over time; (3) energy efficiency tips; and (4) utility program promotional material. The Home Energy Report provides information designed to influence customers’ behavior to lower energy usage.

#### AVAILABILITY:

The program is directed to customers currently receiving service under any residential rate schedule. This Program will operate as an opt-out only program, meaning the Company will select customers for participation in the program and will allow opt-out if desired. More details on program provisions and description may be found at; [www.evergy.com/homereport](http://www.evergy.com/homereport).

#### PROGRAM PROVISIONS:

The Company will assign a program administrator to manage the Program internally. The Company will hire a third-party implementer to deliver this turn-key program with responsibility for all aspects of report generation, energy and demand savings quantification, customer communications and reporting.

#### EVALUATION:

The Company will hire a third-party evaluator to perform an Evaluation, Measurement, and Verification (EM&V) on the Home Energy Report Program.

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

P.S.C. MO. No. 2 First Revised Sheet No. 1.90

Cancelling P.S.C. MO. No. \_\_\_\_\_ Original Sheet No. 1.90

For Missouri Retail Service Area

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## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE

### 22.11 RESIDENTIAL INCOME-ELIGIBLE HOME ENERGY REPORT PROGRAM

#### PURPOSE:

The Residential Income-Eligible Home Energy Report Program is a behavioral energy efficiency and educational program that provides a comparison of the household energy usage information with similar types of customers, or “neighbors”. The Income-Eligible Home Energy Report shall be delivered in paper, and/or email format, and is composed of several modules of information to help customers understand and manage their energy use. A few examples of modules included are: (1) neighbor/similar home comparison; (2) energy comparisons over time; (3) energy efficiency tips; and (4) utility program promotional material. The Home Energy Report provides information designed to influence customers’ behavior to lower energy usage.

#### AVAILABILITY:

The Program is directed to customers currently receiving electric service under any residential rate schedule. This Program will operate as an opt-out only program, meaning the Company will select customers for participation in the program and will allow opt-out if desired.

#### PROGRAM PROVISIONS:

The Company will assign a program administrator to manage the Program internally. The Company will hire a third-party implementer to deliver this turn-key program with responsibility for all aspects of report generation, energy and demand savings quantification, customer communications and reporting.

#### ELIGIBLE MEASURES AND INCENTIVES:

Home Lighting Rebate Measures filed in Case No. EO-2019-0132 are eligible for program benefits and Incentives and may be offered for promotion during the Program Period. Eligible lighting products and Incentives paid directly to customers or Program Partners may be found at [www.evergy.com/homereport..](http://www.evergy.com/homereport..)

#### EVALUATION:

The Company will hire a third-party evaluator to perform an Evaluation, Measurement, and Verification (EM&V) on the Home Energy Report Program.

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Kansas City, MO

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

P.S.C. MO. No. 2 First Revised Sheet No. 1.91

Cancelling P.S.C. MO. No. 2 Original Sheet No. 1.91

For Missouri Retail Service Area

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## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE

### 22.12 ENERGY SAVING PRODUCTS

#### PURPOSE:

This program will feature point of purchase discounts on a variety of energy efficiency items.

#### AVAILABILITY:

The Energy Saving Products Program is available during the Program Period and customers may participate in the program by purchasing qualifying products from participating retailers or alternate sales channels. Customers receive an instant incentive at the point-of-purchase. Evergy Missouri Metro will employ the proper protocols to verify customer eligibility. More details on the program can be found at; [www.evergy.com/homeproducts](http://www.evergy.com/homeproducts).

#### PROGRAM PROVISIONS:

Evergy Missouri Metro will hire a Program Administrator to implement this program. The Program Administrator will provide the necessary services to effectively manage the program and strive to attain the energy and demand savings targets.

A Program Administrator may be responsible for items such as incentive and rebate processing, communication with the customer/retailer to resolve application issues and status reporting associated with the program, as directed by Evergy Missouri Metro.

The program uses a two-pronged approach:

1. Increasing supply of qualifying products through partnerships with retailers, manufacturers and distributors; and
2. Creating demand through consumer awareness and understanding the benefits of energy efficient products.

Program promotions will be made available at participating retailers within Evergy Missouri Metro's electric service territory. Participating Program Partners will be listed on Evergy Missouri Metro's website, [www.evergy.com/homeproducts](http://www.evergy.com/homeproducts), with store name and location listed.

#### ELIGIBLE MEASURES AND INCENTIVES:

Energy Saving Products measures as filed in Case No. EO-2019-0132 are eligible for program incentives and may be offered for promotion during the Program Period. Eligible products and incentives may be found at [www.evergy.com](http://www.evergy.com). The Company and Program Administrator will closely monitor the products being offered and adjust accordingly, in the agreed upon process as needed.

#### EVALUATION:

The Company will hire a third-party evaluator to perform an Evaluation, Measurement, and Verification (EM&V) on this Program.

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

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Cancelling P.S.C. MO. No. 2 Original Sheet No. 1.92

For Missouri Retail Service Area

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## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE

### 22.13 ONLINE HOME ENERGY AUDIT PROGRAM

#### PURPOSE:

This Program provides residential customers access to significant digital educational content available through their "My Account" portal. This content provides customers with the tools and resources they need to learn how their home is using energy, and how to better manage it to maximize efficiency and energy savings. Examples of digital pages or "widgets" available to customers include: (1) Home Energy Audit; (2) Compare to Neighbor; (3) Energy Trends; (4) Ways to Save; (5) My Plan, and (6) a general settings page. Also embedded in content within this program is information on the Company's other demand-side management programs and general offerings, so customers are not only presented with significant information on how to save energy, but also how they can partner with the Company to do so.

#### PROGRAM PROVISIONS:

This energy efficiency program is considered educational. Additional details are available at the Company website, [www.evergy.com/homeaudit](http://www.evergy.com/homeaudit).

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Cancelling P.S.C. MO. No. 2 First Revised Sheet No. 1.93

For Missouri Retail Service Area

## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE

### 22.14 INCOME-ELIGIBLE MULTI-FAMILY

#### PURPOSE:

The objective of Income-Eligible Multi-Family Program (Program) is to deliver long-term energy savings to income-qualifying customers, specifically those in multi-family housing. This will be achieved through increasing the awareness and educational outreach to property managers and owners about their energy usage, installing energy savings measures and prescriptive and custom rebate offerings for in-unit and common area upgrades.

#### AVAILABILITY:

The Program is available for the Program Period to customers receiving service from Evergy Missouri Metro under any residential or business rate, meeting one of the following eligibility requirements:

- Participation in an affordable housing program. Documented participation in a federal, state or local affordable housing program, including LIHTC, HUD, USDA, State HFA and local tax abatement for low-income properties.
- Location in a low-income census tract. Location in a census tract we identify as low-income, using HUD's annually published "Qualified Census Tracts" as a starting point.
- Rent roll documentation. Where at least 50 percent of units have rents affordable to households at or below 80% of area median income, as published annually by HUD.
- Tenant income information. Documented tenant income information demonstrating at least 50 percent of units are rented to households meeting one of these criteria: at or below 200 percent of the Federal poverty level or at or below 80% of area median income.
- Participation in the Weatherization Assistance Program. Documented information demonstrating the property is on the waiting list for, currently participating in, or has in the last five years participated in the Weatherization Assistance Program.

#### PROGRAM PROVISIONS:

Where possible, Evergy Missouri Metro will seek to partner with the natural gas and water companies for co-delivery. The Company will jointly deliver the Program with Spire Energy so that eligible customers utilizing both services may receive energy savings from each respective utility.

The Program Administrator will provide the necessary services to effectively implement the program, including but not limited to outreach, recruitment, providing energy assessments/reports and direct installation of low-cost measures. Rebates will be available as prescriptive or custom incentives, for building, and individual improvements. Evergy Missouri Metro program offering is not contingent upon co-deliveries.

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Canceling P.S.C. MO. No. \_\_\_\_\_

Original Sheet No. 1.93A  
Sheet No. \_\_\_\_\_

For Missouri Retail Service Area

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## 22.14 INCOME-ELIGIBLE MULTI-FAMILY

(continued)

Additional program provisions may be found at [www.evergy.com](http://www.evergy.com).

### ELIGIBLE MEASURES AND INCENTIVES:

Income-Eligible Measures filed in File No. EO-2019-0132 are eligible for program benefits and incentives and may be offered for promotion during the Program Period. Eligible Measures and Incentives may be found at [www.evergy.com/iemf](http://www.evergy.com/iemf).

### EVALUATION:

The Company will hire a third-party evaluator to perform an Evaluation, Measurement, and Verification (EM&V) on this Program.

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

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Canceling P.S.C. MO. No. 2 First Revised Sheet No. 1.94

For Missouri Retail Service Area

## RULES AND REGULATIONS ELECTRIC

### 22.15 RESIDENTIAL THERMOSTAT PROGRAM

#### PURPOSE:

The voluntary Residential Thermostat Program is designed to reduce Participant load during peak periods to improve system reliability, offset forecasted system peaks that could result in future generation capacity additions, and/or provide a more economical option to generation or purchasing energy in the wholesale market. Participant curtailment may be requested for any of these operational or economic reasons as determined by the Company. The Program accomplishes this by deploying various demand response technologies to Participants' WiFi-enabled thermostats to modify the run-time of air conditioning unit(s) or heat pump(s) for a specified period of time in a Company coordinated effort to limit overall system peak load.

#### AVAILABILITY:

The Program is available for the Program Period to any customer currently receiving service under any residential rate schedule. Customers must maintain a secure home WiFi-enabled internet service and have a working central air conditioning system or heat pump. If a WiFi-enabled thermostat is provided to customers at a discounted price, customers must agree to install the thermostat at their premise receiving electric service within fourteen (14) days of receiving the device, and keep it installed, operational, and connected to a secure home WiFi network for the duration of the program. Customers must agree to not sell the device for the duration of the program. If it is found that they do, a debit will be issued on their utility bill for the Manufacturer Suggested Retail Price (MSRP) of the WiFi-enabled thermostat or the value of incentive provided to the customer. Payment of that debit will be the customer's responsibility. Residential property owner's (owner occupant or landlord for a rental property) permission is required to receive a smart thermostat and/or participate in the demand response program with an existing eligible thermostat. Tenant permission is required to receive a thermostat and/or participate in the demand response program with an existing eligible thermostat if the landlord is requesting participation. The Company reserves the right to limit program participation. The Company also reserves the right to apply minimum and/or maximum event performance requirements for incentive payment, to apply financial bonuses or penalties and to terminate participation for non-compliance.

#### PROGRAM PROVISIONS:

The Company will hire a Program Administrator to implement this Program. The Program Administrator will provide the necessary services to effectively implement the Program and strive to attain the energy and demand savings targets. The Company and the Program Administrator will follow a multi-faceted approach to marketing the Program.

#### CONTROLS AND INCENTIVES:

Participants will receive enrollment and participation incentives at a level determined by the Company, which can be found at [evergy.com/residentialdr](http://evergy.com/residentialdr). If customers have an existing Wi-Fi enabled eligible thermostat, the customer may elect to enroll and participate in the demand response program. If customers had received a Program device from the previous Program (MEEIA Cycle 2), they will not be eligible for a new Program device. However, if the existing MEEIA Cycle 2 device fails, the customer is eligible to continue participation with a new Program device. During a curtailment event, the Company or its assignee will deploy various demand response technologies to Participants' Wi-Fi enabled thermostats to modify the run-time of air conditioning unit(s) or heat pump(s) for a specified period of time in a Company coordinated effort to limit overall system peak load. The Company reserves the right to set and modify incentive levels at any point during the program.

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Canceling P.S.C. MO. No. \_\_\_\_\_ Revised Sheet No. \_\_\_\_\_  
For Missouri Retail Service Area

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## 22.15 RESIDENTIAL THERMOSTAT PROGRAM

(continued)

### CYCLING METHODS:

The Company may elect to deploy various types of demand response technologies including, but not limited to: (1) cycling the compressor unit(s); (2) deploying stand-alone pre-cooling strategies; (3) deploying a combination of pre-cooling and cycling strategies; (4) deploying pre-cooling and temperature modification strategies. The Company reserves the right to test new devices at any point during the program.

### NOTIFICATION:

The Company will notify Program Participants of a curtailment event via various communication channels, including, but not limited to: (1) SMS; (2) email; (3) push notifications; (4) in-app notifications; (5) device notifications. The notification can occur prior to or at the start of a curtailment event.

### CURTAILMENT SEASON:

The Curtailment Season will extend from June 1 to September 30.

### CURTAILMENT LIMITS:

The Company may call a curtailment event any weekday, Monday through Friday, excluding Independence Day and Labor Day, or any day officially designated as such. A curtailment event occurs whenever the thermostat is being controlled by the Company or its assignees. The Company may call a maximum of one curtailment event per day per Participant, lasting no longer than four (4) hours per Participant. The Company is not required to curtail all Participants simultaneously and may stagger curtailment events across participating Participants.

### CURTAILMENT OPT OUT PROVISION:

A Legacy Participant may opt out of any curtailment event during the Curtailment Season by notifying the Company at any time prior to or during a curtailment event and requesting to be opted out. A New Participant may opt out of an ongoing event via their smart phone or the thermostat itself.

### NEED FOR CURTAILMENT:

Curtailments may be requested for operational or economic reasons. Operational curtailments may occur when any physical operating parameter(s) approaches a constraint on the generation, transmission or distribution systems or to maintain the Company's capacity margin requirement. Economic reasons may include any occasion when the marginal cost to produce or procure energy or the price to sell the energy in the wholesale market is greater than a customer's retail price. A minimum of one (1) demand response event per season will be dispatched to eligible participants.

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

P.S.C. MO. No. 2 Original Sheet No. 1.94B  
Canceling P.S.C. MO. No. \_\_\_\_\_ Revised Sheet No. \_\_\_\_\_  
For Missouri Retail Service Area

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## 22.15 RESIDENTIAL THERMOSTAT PROGRAM

(continued)

### CONTRACT TERM:

Initial contracts will be for a period of three years, terminable thereafter on 90 days written notice. At the end of the initial term, the thermostat becomes the Participant's property. The customer will remain subject to curtailment unless they make a request with the Company or its assignees to be removed from the program. However, so long as the agreement to participate in the Program is in force, the Company will provide maintenance and repair to the thermostat as may be required due to normal use. If the Participant has the Company provided thermostat and leaves the program prior to the end of the initial contract, the Company will have 60 days thereafter to remove the thermostat and/or other control equipment.

Company will also have a separate Customer Program Participation Agreement outlining Customer and Company responsibilities, and additional information concerning data privacy and Program termination for customers who participate in any studies that will analyze and evaluate customers' behavior and usage of thermostat, and associated software.

### EVALUATION:

The Company will hire a third-party evaluator to perform an Evaluation, Measurement, and Verification (EM&V) on this Pilot Program.

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

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Cancelling P.S.C. MO. No. 2 First Revised Sheet No. 1.95

For Missouri Retail Service Area

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## GENERAL RULES AND REGULATIONS APPLYING TO ELECTRIC SERVICE

### 22.16 RESEARCH & PILOT PROGRAM

#### **PURPOSE:**

The Research & Pilot program is designed to focus on research and innovation of new programs, measures and concepts and improving current programs to drive better results. The program will provide the Company with a screening and evaluation mechanism to accomplish this and allow the Company flexibility to explore and research various ideas and concepts outside of the traditional DSM model to roll out for customer commercialization as deemed appropriate.

#### **AVAILABILITY:**

This program is available to any Customer receiving service under any generally available residential or commercial rate schedules; SGS, MGS, LGS, SGA, MGA, LGA or TPP offered by the Company. More information on program details and description may be found at; [www.evergy.com/pilot](http://www.evergy.com/pilot)

#### **PROGRAM PROVISIONS:**

The Company will hire a Program Administrator to implement this program and provide the necessary services to effectively manage the program and achieve energy and demand savings targets.

#### **EVALUATION:**

The Company will hire a third-party evaluator to perform an Evaluation, Measurement, and Verification (EM&V) on this pilot Program.

#### **ELIGIBLE MEASURES AND INCENTIVES:**

Measures filed in Case No. EO-2019-0132 are eligible for program benefits and Incentives and may be offered during the Program Period. Eligible Incentives directly paid to customers and Measures can be found at [www.evergy.com](http://www.evergy.com).

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