

EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST

P.S.C. MO. No. 1 ~~19th~~ Revised Sheet No. R-3
 Canceling P.S.C. MO. No. 1 ~~18th~~ Revised Sheet No. R-3
 For Missouri Retail Service Area

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RULES AND REGULATIONS
ELECTRIC

Sheet No.

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P.S.C. MO. No. 1

7th Revised Sheet No. R-63.01

Canceling P.S.C. MO. No. 1

6th Revised Sheet No. R-63.01

Evergy Missouri West, Inc. d/b/a Evergy Missouri West
KANSAS CITY, MO 64106

For Missouri Retail Service Area

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RULES AND REGULATIONS
ELECTRIC

10.01 BUSINESS DEMAND SIDE MANGEMENT

(continued)

DEFINITIONS:

Unless otherwise defined, terms used in tariff sheets or schedules in Section 10 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 West’s filing for demand-side programs approval in Case No. EO- 2019-0133.

Business Program- An energy efficiency program that is available to a customer receiving electric service under Service Classifications Small 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 Company 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, 2023, according to the terms and implementation of the MEEIA 2020-2023 Energy Efficiency Plan that will require until a date after December 31, 2023, but no later than December 31, 2024, 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 Company to provide program design, promotion, administration, implementation, and delivery of services.

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

Program Period – The period from January 1, 2020 through December 31, 2023, unless sooner terminated under the TERM provision of this tariff. Programs may have slightly earlier termination dates for certain activities, as noted on the Company website – www.evergy.com.

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

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EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST

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For Missouri Retail Service Area

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**RULES AND REGULATIONS
ELECTRIC**

10.01 BUSINESS DEMAND-SIDE MANAGEMENT (continued)

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 Company and Participant contributions), plus utility costs to administer, deliver and evaluate each demand-side program.

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.

TERM:

These tariff sheets and the tariff sheets reflecting each specific Business DSM program shall be effective until December 31, 2023, with the exception of the Business Process Efficiency and the Business Smart Thermostat Program which will terminate on December 31, 2022, unless another termination date is approved by the Commission.

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If the Programs are terminated prior to the end of the Program Period, only Incentives for qualifying Measures that have been 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 Demand Response

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

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Program details regarding the interaction between Company 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 by the Company website, www.evergy.com.

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CHANGE PROCESS:

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

- 1) Identify need for program detail change regarding the interaction between Company 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.);

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For Missouri Retail Service Area

RULES AND REGULATIONS
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10.01 BUSINESS DEMAND-SIDE MANAGEMENT (continued)

- 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 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 Company 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-2019-0133; and
- 11) Inform Customer, trade allies, etc.

Evergy Missouri West 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). [No targets were set for PY2023, only budgets.](#)

	Sum of Annual by Program			
	2020	2021	2022	Total (2020-2022)
Business Standard	13,647,812	16,447,377	16,551,009	46,646,198
Business Custom	2,663,601	3,676,320	3,676,320	10,016,241
Business Process Efficiency	3,618,889	7,639,682	9,212,103	20,470,674
Business Demand Response	0	0	0	0
Business Smart Thermostat	28,368	56,736	85,104	170,208
Total	19,958,670	27,820,115	29,524,536	77,303,321

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Earnings Opportunity targets are set forth in Evergy Missouri West's Schedule DSIM, Sheet No. 138.18, as approved in Case No. EO-2019-0133.

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KANSAS CITY, MO 64106

RULES AND REGULATIONS
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10.01 Business Demand-Side Management (continued)

	Expected Annual kW Demand Savings Target Customer Side of Meter			Sum of Annual by Program
	2020	2021	2022	
Business Standard	2,161	2,653	2,700	7,514
Business Custom	423	582	582	1,587
Business Process Efficiency	31	87	109	227
Business Demand Response	49,488	52,092	54,834	156,414
Business Smart Thermostat	207	415	622	1,244
Total	52,309	55,829	58,848	65,4065

Earnings Opportunity targets are set forth in Evergy Missouri West's Schedule DSIM, Sheet No. 138.18, as approved in Case No. EO-2019-0133.

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 GS, SGS, LGS or LPS 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 West may offer the Measures contained in Company's filing approved in Case No. EO-2019-0133. 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 Company's website, www.evergy.com. The Measures and Incentives being offered are subject to change. Customers must consult www.evergy.com for the list of currently available Measures. Should a Measure or Incentive offering shown on Company's website differ from the corresponding Measure or Incentive offering shown in the currently effective notice filed in Case No. EO-2019-0133, the stated Measure or Incentive offering as shown in the currently effective notice shall govern.

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RULES AND REGULATIONS
ELECTRIC

10.07 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 with the ability to call emergency events as needed from October 1 to May 30 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.

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The Company reserves the right to call curtailment for some or all Participants year-round if needed. This off-season curtailment would be utilized during emergency situations locally or regionally. Off-season participation is voluntary with participant payment at the discretion of the Company outlined in the Participation Agreements.

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.

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KANSAS CITY, MO 64106

For Missouri Retail Service Area

RULES AND REGULATIONS
ELECTRIC

10.07 **BUSINESS DEMAND RESPONSE (continued)**

PROGRAM PROVISIONS:

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

1) Manual Demand Response (DR)

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.

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- ~~15~~
- Minimum number of events per season- 1
- Maximum duration of an event- 8 hours
- Minimum notification prior to an event- 1 hour

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KANSAS CITY, MO 64106

RULES AND REGULATIONS
ELECTRIC

10.08 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 Company to provide program design, promotion, administration, implementation, and delivery of services.

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

Program Period – The period from January 1, 2020 through December 31, 2023, unless sooner terminated under the TERM provision of this tariff. Programs may have slightly earlier deadlines for certain activities, as noted on Evergy Missouri West website – www.evergy.com.

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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 Company 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 until December 31, 2023, with the exceptions of the Income-Eligible Multi-Family, which shall be effective until December 31, 2025, and the Home Energy Report and Income-Eligible Home Energy Report which will terminate on December 31, 2022, unless another termination date is approved by the Commission.

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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
- Online Home Energy Audit
- Income-Eligible Multi-Family
- Energy Saving Products
- Residential Thermostat
- [Income-Eligible Single Family](#)
- [Pay as you Save \(PAYS[®]\)](#)

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RULES AND REGULATIONS
 ELECTRIC

10.08 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). [No targets for savings were set for PY2023, only budgets.](#)

	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	13,038,632	10,416,978	8,079,124	0	0	0	31,534,734
Heating, Cooling & Home Comfort	7,236,542	7,767,640	8,338,188	0	0	0	23,342,370
Home Energy Report	20,355,375	20,355,375	20,355,375	0	0	0	61,066,125
Income-Eligible Multi-Family	1,388,947	1,181,931	1,181,931	923,401	963,321	1,010,700	6,650,231
Residential Demand Response	1,220,615	1,402,388	1,549,459	0	0	0	4,172,461
PAYS			3,003,433				3,003,433
Total	43,240,111	41,124,312	42,507,510	923,401	963,321	1,010,700	129,219,050

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	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	955	756	582	0	0	0	2,293
Heating, Cooling & Home Comfort	3,133	3,392	3,655	0	0	0	10,180
Home Energy Report	2,550	2,550	2,550	0	0	0	7,650
Income-Eligible Multi-Family	243	223	223	180	193	210	1,271
Residential Demand Response	9,221	10,609	11,774	0	0	0	31,604
PAYS			939	0			939
Total	16,102	17,530	19,723	180	193	210	53,937

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Earnings Opportunity targets are set forth in Evergy Missouri West's Schedule DSIM, Sheet No.138.8 as approved in Case No. EO-2019-0133.

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KANSAS CITY, MO 64106

RULES AND REGULATIONS
ELECTRIC

10.09 HEATING, COOLING & WEATHERIZATION

PURPOSE:

The Heating, Cooling & Weatherization Program (Program) is designed to provide educational and financial incentives to residential Customers to increase 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.

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PROGRAM PROVISIONS:

The Company 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:

Option1: Insulation & Air Sealing. Customers that have completed a comprehensive energy audit by a Program energy auditor are eligible to receive the installation of free energy savings items and rebates. This program will be delivered jointly with Spire Energy so that eligible customers utilizing both utilities' services, may receive benefits from each respective utility. Every program offerings are not contingent upon co-deliveries.

Option2: Energy Saving 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 delivered jointly with Spire Energy so that eligible customers, utilizing both utilities services, may receive benefits from each respective utility. Every offerings are not contingent upon co-deliveries.

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

ELIGIBLE MEASURES AND INCENTIVES:

Measures filed in Case No. EO-2019-0133 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/homecomfort.

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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~~Revised Sheet No. R63.24.1~~

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Evergy Missouri West, Inc. d/b/a Evergy Missouri West For Missouri Retail Service Area
KANSAS CITY, MO 64106

RULES AND REGULATIONS
ELECTRIC

10.13 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 [with the ability to call emergency demand response events as needed from October 1 to May 30.](#)

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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 Company or its assignees. Company may call a maximum of one curtailment event per day per Participant, lasting no longer than four (4) hours per Participant. 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 Company at any time prior to or during a curtailment event and requesting to be opted out. A Participant with a WiFi-enabled thermostat 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 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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STATE OF MISSOURI, PUBLIC SERVICE COMMISSION

P.S.C. MO. No. 1 ~~8th~~ Revised Sheet No. R-64.02
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KANSAS CITY, MO 64106

**RULES AND REGULATIONS
ELECTRIC**

10.16 RESIDENTIAL PAY AS YOU SAVE® PILOT PROGRAM (continued)

Service Charge – Monthly charge assigned to the location recovering Program costs for upgrades, fees, any required taxes, applicable cost of capital, or costs for customer-caused repairs as described in section 4.

AVAILABILITY:

The Pilot Program is available for participation to qualifying residential customers receiving services under Missouri Residential rates. The Service Charge for Participants will not exceed 12 years from the first Service Charge. The Program will be co-delivered with Spire to eligible customers of both utilities. Evergy offerings are not contingent upon co-delivery.

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In order to qualify as a Participant, customers must either own the home or the owner must sign an Owner Agreement agreeing to maintain the upgrades, and to not damage or remove the upgrades from the location. The owner must also agree to provide Property Notice of the benefits and obligations associated with the upgrades at the location to the next owner or customer before the sale or rental of the property.

Projects that address upgrades to existing homes deemed unlikely to be habitable or to serve their intended purpose for the duration of the Company's cost recovery term will not be approved unless repairs are made that will extend the life through the Company's cost recovery period. If a building is a manufactured home, it must be built on a permanent foundation and less than 25 years old.

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For homes with concerns identified in the initial Analysis, a referral process will be put in place to provide customers with other programs or organizations that can help resolve those concerns.

PROGRAM DESCRIPTION:

The Company will hire a Program Administrator to implement the Pilot Program. The Program Administrator will provide the necessary services to effectively implement the program.

The Program will include the following:

- **Tier 1** - Visual home inspection with direct install of energy saving measures
- **Tier 2** - Homes that do not have concerns which make the location unlikely to produce benefits for the lifetime of the energy efficiency upgrades will move forward with more in-depth data collection using blowing door and cut blaster/pressure pans to record actual home features and conditions.
- **Tier 3** - Custom project – the program analyzes usage history, assessment data, and Program Partner installation costs to determine each participant's unique qualifying scope of work. The qualifying scope of work ensures that 80% of the estimated post upgrade savings over 80% of the lifetime of the measures makes up the monthly tariff charge; while 20% of the estimated post upgrade savings immediately flow to the participant, capped at 12 years.
 - Co-Pay option: If a project is not cost-effective, customers may agree to pay the portion of a project's cost that prevents it from qualifying for the Program as an upfront payment to the Program Partner.
 - The first three Tiers of the process described above are completed in the initial home visit.

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Original Sheet No. R-64.06

Evergy Missouri West, Inc. d/b/a Evergy Missouri West

For Missouri Retail Service Area

**RULES AND REGULATIONS
ELECTRIC**

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10.17 RESIDENTIAL INCOME ELIGIBLE SINGLE FAMILY

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PURPOSE:

The Income Eligible Single-Family Program (Program) is designed to deliver long-term energy savings and bill reductions to residential single-family income eligible customers. This will be achieved through a variety of channels to educate customers about energy use in their homes and to offer information, products, and services to save energy wisely.

AVAILABILITY:

This program is available during the Program Period, and is available to qualifying single-family income eligible customer's receiving service under any generally available residential rate schedule offered by the Company.

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:

Free LEDs: Available through various channels, including but not limited to: targeted stores where income-eligible customers most prevalently shop, a Company online marketplace, and Company community events - including our Connect Center.

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CUSTOMER ELIGIBILITY:

Program will be targeted to income-eligible zip code residents.

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Income-eligible zip codes are defined as having at least 30% of Customers in a zip code at 200% of the federal poverty income level.

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1. Participation in federal, state, or local subsidized housing program.¶
2. Proof of resident income levels at or below 80% of area median income (AMI) or 200% of federal poverty level.¶

ELIGIBLE MEASURES AND INCENTIVES:

Measures filed in Case No. EO-2019-0133 are eligible for program benefits and may be offered during the Program Period. Eligible Measures can be found at 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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EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST

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For Missouri Retail Service Area

**DEMAND SIDE INVESTMENT MECHANISM RIDER (Cycle 3)
Schedule DSIM**

APPLICABILITY

This rider is applicable to all non-lighting kilowatt-hours (kWh) of energy supplied to customers under the Company's retail rate schedules, excluding kWh of energy supplied to "opt-out" customers. The Demand Side Investment Mechanism Rider will be calculated and applied separately to the following rate classes: (1) Residential and Non-Residential customers; (2) Small General Service (SGS), (3) Large General Service (LGS) and (4) Large Power Service (LPS).

Charges passed through this DSIM Rider reflect the charges approved to be collected from the implementation of the Missouri Energy Efficiency Investment Act (MEEIA) Cycle 3 Plan and any remaining unrecovered charges from the MEEIA Cycle 2 Plan DSIM. Those charges include:

- 1) Program Costs, Throughput Disincentive (TD), and Earnings Opportunity Award (EO) (if any) for the MEEIA Cycle 3 Plan, as well as Program Costs, TD and EO for commission approved business program projects completed by June 30, 2020 that will be counted under the MEEIA Cycle 2 Plan and any earned Earnings Opportunity earned (and ordered) attributable to MEEIA Cycle 2 Plan.
- 2) Reconciliations, with interest, to true-up for differences between the revenues billed under this DSIM Rider and total actual monthly amounts for:
 - i. Program Costs incurred in Cycle 3 and/or remaining unrecovered amounts for MEEIA Cycle 2.
 - ii. TD incurred in Cycle 3, and/or remaining unrecovered amounts for MEEIA Cycle 2.
 - iii. Amortization of any Earnings Opportunity ordered by the Missouri Public Service Commission (Commission), and/or remaining true-ups or unrecovered amounts for MEEIA Cycle 2.
- 3) Any Ordered Adjustments. Charges under this DSIM Rider shall continue after the anticipated ~~48~~-month plan period of MEEIA Cycle 3 (72 month plan period with regard to the Income-Eligible Multi-Family program) until such time as the charges described in items 1) and 2) above have been billed.

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Charges arising from the MEEIA Cycle 3 Plan that are the subject of this DSIM Rider shall be reflected in one "DSIM Charge" on customers' bills in combination with any charges arising from a rider that is applicable to post-MEEIA Cycle 3 Plan demand-side management programs approved under the MEEIA. This will include any unrecovered amounts for Program Costs, TD from MEEIA Cycle 2 and any Earnings Opportunity, etc. earned/remaining from MEEIA Cycle 2 that is expected to begin recovery in early 2020.

DEFINITIONS

As used in this DSIM Rider, the following definitions shall apply:

Company's "Throughput Disincentive" (TD) is meant to represent the utility's lost margins associated with the successful implementation of the MEEIA programs. The detailed methodology for calculating the TD is described beginning in Tariff Sheet No. 138.13.

"Effective Period" (EP) means the six (6) months beginning with January 2020, and each six month period thereafter.

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For Missouri Retail Service Area

**DEMAND SIDE INVESTMENT MECHANISM RIDER (Cycle 3)
Schedule DSIM (Continued)**

"Evaluation Measurement & Verification" (EM&V) means the performance of studies and activities intended to evaluate the process of the utility's program delivery and oversight and to estimate and/or verify the estimated actual energy and demand savings, utility lost revenue, cost effectiveness, and other effects from demand-side programs.

"Incentive" means any consideration provided by the Company, including buy downs, markdowns, rebates, bill credits, payments to third parties, direct installation, giveaways, and education, which encourages the adoption of program measures.

"MEEIA Cycle 3 Plan" consists of the demand-side programs and the DSIM described in the MEEIA Cycle 3 Filing, which became effective following Commission order and approval of the MEEIA Cycle 3 Plan under EO-2019-0133.

"Program Costs" means any prudently incurred program expenditures, including such items as program planning, program design; administration; delivery; end-use measures and incentive payments; advertising expense; evaluation, measurement, and verification; market potential studies; and work on a statewide technical resource manual.

"Cycle 3 Earnings Opportunity" (EO) means the annual incentive ordered by the Commission based on actual performance verified through EM&V against planned targets. The Company's EO for 2020-2022 will be \$9,065,667 if 100% achievement of the planned targets are met. EO is capped at \$14,511,690. Potential Earnings Opportunity adjustments are described on Sheet No. 138.16. The Earnings Opportunity Matrix outlining the payout rates, weightings, and caps can be found at Sheet No. 138.18. The Combined Companies' (Evergy Missouri Metro and Evergy Missouri West) EO for 2023 (Extension) will be \$4,733,030 if 100% achievement of the planned targets are met. The Combined Companies' EO is capped at \$4,926,305. Potential Earnings Opportunity adjustments are described on Sheet No. 138.19. The Combined Companies' EO will be allocated to each jurisdiction by respective program cost spend.

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"Short-Term Borrowing Rate" means the daily one month USD LIBOR rate, using the last actual rate for weekends and holidays or dates without an available LIBOR rate, plus the Applicable Margin for Eurodollar Advances as defined in the Pricing Schedule of the current Evergy Missouri West Revolving Credit Agreement until such as LIBOR ceases to be posted. At that time the Federal Reserve Secured Overnight Financing Rate (SOFR) using the last actual rate for weekends and holidays or dates without an available SOFR rate plus applicable term adjustment plus the Applicable Margin for SOFR as defined in the Pricing Schedule of the current Evergy Missouri West Revolving Credit Agreement will be utilized. A simple mathematical average of all the daily rates for the month is then computed.

"AFUDC Rate" means the Allowance for Funds Used During Construction rate computed in accordance with the formula prescribed in the Code of Federal Regulations Title 18, Part 101.

Recovery Period (RP) includes the day the DSIM Rider Tariff becomes effective through July 31, 2020 and each six month period thereafter.

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For Missouri Retail Service Area

DEMAND SIDE INVESTMENT MECHANISM RIDER (Cycle 3)
 Schedule DSIM (Continued)

CALCULATION OF TD

Monthly Throughput Disincentive = the sum of the Throughput Disincentive Calculation for all programs applicable to (1) Residential and Non-Residential customers: (2) Small General Service (SGS), (3) Large General Service (LGS) and (4) Large Power Service (LPS).

Throughput Disincentive Calculation

The Throughput Disincentive Calculation for each program shall be determined by the formula:

$$TD\$ = MS \times NMR \times NTGF$$

Where:

TD\$ = Throughput Disincentive Dollars to be collected for a given calendar month, for a given class.

NMR = Net Margin Revenue. Net Margin revenue values for each class are provided on Tariff Sheet No.138.18.

NTGF = Net to Gross Factors by MEEIA Cycle 3 programs are as follows:

Factors by MEEIA Cycle 3 program are as follows:

Program	NTG-PY1- PY2	NTG-PY3,
Business Standard	0.96	0.96
Business Custom	0.92	0.80
Business Process Efficiency	0.90	0.90
Business Demand Response	1.00	1.00
Business Smart Thermostat	1.00	1.00
Energy Saving Products	0.84	0.59
Heating, Cooling & Home Comfort	0.82	0.72
Home Energy Report	1.00	1.00
Income-Eligible Multi-Family	1.00	1.00
<u>Income-Eligible Single Family</u>	N/A	1.00
Residential Demand Response	1.00	1.00
<u>Pay As You Save</u>	1.00	1.00
Research & Pilot	1.00	1.00

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NTG Factor for Throughput Disincentive based on Extension kWh savings is 0.835 for all programs

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For Missouri Retail Service Area

**DEMAND SIDE INVESTMENT MECHANISM RIDER (Cycle 3)
 Schedule DSIM (Continued)**

CALCULATION OF TD (continued)

MS = The sum of all Programs' Monthly Savings in kWh, for a given month, for a given class. The Monthly Savings in kWh for each Program shall be determined by the formula:

$$MS = (MAS_{CM} + CAS_{PM} - RB) \times LS + HER^{(a)}$$

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RB = Rebasing Adjustment. The Rebasing Adjustment shall equal the CAS applicable as of the date used for the MEEIA normalization in any general rate case resulting in new rates becoming effective during the accrual and collection of TD\$ pursuant to MEEIA Cycle 3. In the event more than one general rate case resulting in new rates becoming effective during the accrual and collection of TD\$ pursuant to MEEIA Cycle 3, the Rebasing Adjustment shall include each and every prior Rebasing Adjustment calculation.

LS = Load Shape. The Load Shape is the monthly loadshape percent for each program as follows:

Program Name	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Total
Business Standard	8.59%	7.78%	8.61%	8.19%	8.62%	8.24%	8.46%	8.62%	8.02%	8.60%	8.12%	8.16%	100.00%
Business Custom	8.57%	7.74%	8.57%	8.20%	8.58%	8.23%	8.46%	8.62%	8.05%	8.62%	8.16%	8.19%	100.00%
Business Process Efficiency	8.57%	7.74%	8.57%	8.20%	8.58%	8.23%	8.46%	8.62%	8.05%	8.62%	8.16%	8.19%	100.00%
Business Demand Response	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	53.33%	46.67%	0.00%	0.00%	0.00%	0.00%	100.00%
Business Smart Thermostat	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	53.33%	46.67%	0.00%	0.00%	0.00%	0.00%	100.00%
Online Business Energy Audit	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Energy Saving Products	10.16%	9.18%	8.67%	8.39%	8.67%	6.81%	7.08%	7.12%	7.35%	8.35%	8.08%	10.16%	100.00%
Heating, Cooling & Home Comfort	6.73%	6.00%	7.14%	6.74%	7.72%	11.07%	13.48%	12.30%	8.22%	7.17%	6.77%	6.65%	100.00%
Home Energy Report	6.75%	5.96%	7.84%	7.59%	7.96%	10.26%	10.59%	10.53%	9.80%	8.24%	7.88%	6.59%	100.00%
Income-Eligible Multi-Family	7.42%	6.59%	8.02%	7.77%	8.10%	9.59%	9.91%	9.87%	9.28%	8.26%	7.93%	7.29%	100.00%
Income-Eligible Single Family	7.42%	6.59%	8.02%	7.77%	8.10%	9.59%	9.91%	9.87%	9.28%	8.26%	7.93%	7.29%	100.00%
Residential Demand Response	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	53.33%	46.67%	0.00%	0.00%	0.00%	0.00%	100.00%
Pay As You Save	6.73%	6.00%	7.14%	6.74%	7.72%	11.07%	13.48%	12.30%	8.22%	7.17%	6.77%	6.65%	100.00%
Online Home Energy Audit	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Research & Pilot	8.33%	8.33%	8.33%	8.33%	8.33%	8.33%	8.33%	8.33%	8.33%	8.33%	8.33%	8.33%	100.00%

^(a) HER savings are excluded from the Throughput Disincentive calculation effective August 1, 2022.

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DEMAND SIDE INVESTMENT MECHANISM RIDER (Cycle 3)
Schedule DSIM (Continued)

Earnings Opportunity Adjustments

The annual MEEIA Cycle 3 EO Award for 2020-2022 shall be calculated using the matrix in tariff Sheet No. 138.18. The cumulative EO will not go below \$0. The EO target at 100% is \$9,065,667. Before adjustments reflecting TD EM&V including NTG, the EO cannot go above \$14,511,690. The cap is based on current program levels. If Commission-approved new programs are added in the years 2021 and any program plan extensions through 2025, the Company may seek Commission approval to have the targets for the cap of the EO scale proportionately to the increase in savings targets

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The Earnings Opportunity Award for 2020-2022 shall be adjusted for the difference between the TD\$ billed and what the TD\$ billed would have been if:

- (1) The ME used in the calculation were the normalized savings for each measure at customer meter per measure determined through EM&V ex-post gross analysis for each program year, and,
- (2) The NTGFs used in the calculation was the net-to-gross values determined through EM&V, except that if the NTG value determined through EM&V is less than 0.80, the recalculation shall use 0.80 and if the NTG value determined through EM&V is greater than 1.0, the recalculation shall use 1.0.
- (3) If the above adjustments are negative in an amount greater than the otherwise applicable EO, these adjustments shall be limited to the value of the otherwise applicable EO.

The Combined Companies' (Evergy Missouri Metro and Evergy Missouri West) EO for 2023 (Extension) will be \$4,733,030 if 100% achievement of the planned targets are met. The Combined Companies' EO is capped at \$4,926,305. Potential Earnings Opportunity adjustments are described on Sheet No. 138.19. The Combined Companies' EO will be allocated to each jurisdiction by respective program cost spend.

Other DSIM Provisions

The Company shall file an update to NMR rates by month by class contemporaneous with filing any compliance tariff sheets in any general rate case reflecting the rates set in that case, and the billing determinants used in setting rates in that case.

Annual kWh savings per measure will be updated prospectively in the TRM no later than 24 months after the commencement of the Plan based on EM&V ex-post gross adjustments determined for Year 1 and annually thereafter upon finalization of each subsequent program year EM&V report.

MEEIA Cycle 3 NTG Factors by program will be updated prospectively no later than 24 months after the commencement of the Plan based on EM&V net-to-gross percentages for each program determined for Year 1 and annually thereafter upon finalization of each subsequent program year EM&V report.

Filing

After the initial DSIM Rider rate adjustment filing, the Company shall make a DSIM Rider rate adjustment filing to take effect each August and February under the Term of this MEEIA Rider. DSIM Rider rate adjustment filings shall be made at least sixty (60) days prior to their effective dates.

Prudence Reviews

A prudence review shall be conducted no less frequently than at twenty-four (24) month intervals in accordance with 20 CSR 4240-20.093(11). Any costs, which are determined by the Commission to have been imprudently incurred or incurred in violation of the terms of this DSIM Rider, shall be returned to customers through an adjustment in the next DSIM Rider rate adjustment filing and reflected in factor OA above.

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