

## Exhibit No. 22

CONFIDENTIAL  
Evergy Missouri Metro – Exhibit 22  
Charles A. Caisley  
Surrebuttal Testimony  
File Nos. ER-2022-0129 & ER-2022-0130

Exhibit:

Issues: AMI meters, customer  
issues, Clean Charge  
Network, TOU

Witness: Charles A: Caisley

Type of Exhibit: Surrebuttal Testimony

Sponsoring Party: Evergy Missouri Metro and  
Evergy Missouri West

Case No. ER-2022-0129 / 0130

Date Testimony Prepared: August 16, 2022

**MISSOURI PUBLIC SERVICE COMMISSION**

**CASE NO.: ER-2022-0129 / 0130**

**SURREBUTTAL TESTIMONY**

**OF**

**CHARLES A: CAISLEY**

**ON BEHALF OF**

**EVERGY MISSOURI METRO and EVERGY MISSOURI WEST**

**Kansas City, Missouri  
August 2022**

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**SURREBUTTAL TESTIMONY**

**OF**

**CHARLES A. CAISLEY**

**Case No. ER-2022-0129 / 0130**

1

**I. INTRODUCTION**

2 **Q: Please state your name and business address.**

3 A: My name is Charles A. Caisley. My business address is 1200 Main, Kansas City, Missouri  
4 64105.

5 **Q: Are you the same Charles A. Caisley who submitted direct and rebuttal testimony in**  
6 **these dockets?**

7 A: Yes.

8 **Q: On whose behalf are you testifying?**

9 A: I am testifying on behalf of Evergy Metro, Inc. d/b/a Evergy Missouri Metro (“Evergy  
10 Missouri Metro”) and Evergy Missouri West, Inc. d/b/a Evergy Missouri West (“Evergy  
11 Missouri West”) (collectively, the “Company” or “Evergy”).

12 **Q: What is the purpose of your surrebuttal testimony?**

13 A: The purpose of my surrebuttal testimony is to respond to several witnesses’ rebuttal  
14 testimonies on the following subject matters:

- 15
- Clean Charge Network
  - 16 • Customer Experience
  - 17 • Time of Use (“TOU”) rates and Customer Rate Choice
  - 18 • Critical Needs and Rehousing Pilot Programs
  - 19 • Advanced Metering Infrastructure (“AMI”)

- Alleged Conflict of Interest

## II. CLEAN CHARGE NETWORK

**Q: Do you agree with the Office of Public Counsel (“OPC”) witness Marke’s rebuttal testimony stating the Clean Charge Network is “a textbook case for failed adoption”<sup>1</sup>?**

**A:** Not at all. My rebuttal testimony detailed both the fatal errors in Dr. Marke’s analysis and the ongoing role of Evergy’s Clean Charge Network to support Evergy customers.

**Q: Why does OPC witness Marke refer to Evergy’s proposed Commercial EV Charger Rebate Program (“CRP”) as an expansion of the Clean Charge Network (“CCN”)?**

**A:** I cannot say. Dr. Marke’s characterization is particularly inexplicable given that Evergy and OPC actively engaged in discussions related to this very program for much of last year. At one point, Dr. Marke’s testimony describes the CRP as “rebates to third-party electric vehicle (“EV”) charge station providers”<sup>2</sup>. While this description suggests that Dr. Marke understands the CRP will generate charging stations that are not part of Evergy’s owned and operated CCN and Evergy is not requesting that any part of the CRP be rate based, Dr. Marke’s testimony nevertheless refers to the proposed rebate program repeatedly as an “expansion” of the CCN.

To be clear, this filing does not include a proposal to expand the CCN by raising the jurisdictional caps on the number of stations allowed within the Clean Charge Network. Such a request was included in File Nos. ET-2021-0151/0269 and was approved by the Commission as detailed in my rebuttal testimony.

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<sup>1</sup> Marke Rebuttal, Page 41, Line 15

<sup>2</sup> Marke Rebuttal, Page 41, Line 10

1 **III. CUSTOMER EXPERIENCE**

2 **Q: How do you respond to OPC witnesses’ (Dr. Marke and Ms. Kremer) view of**  
3 **customer experience and the difference between customer need and choice?**

4 A: Evergy agrees that customers need safe, reliable, and affordable power. In addition,  
5 customers need a way to engage with their utility to start service, consume the bill, make  
6 payments and arrangements, and get questions answered on usage, rates, etc. Interaction  
7 with their utility is an example of how customers can have choice with their utility. Both  
8 Dr. Marke and Ms. Kremer mention customer use of Interactive Voice Response (“IVR”)  
9 technology and online interactions and the concern that customers prefer the human touch.

10 There is value in providing a variety of ways to interact with a business to meet the  
11 many needs of different types of customers. For example, through July 2022, over 60% of  
12 our customer calls were handled daily via the Intelligent Voice Assistant (“IVA”), which  
13 is not mandated by Evergy, but is by customer choice. In addition, approximately 79% of  
14 our customer payments are through digital channels and thanks to new functionality on  
15 both the web and IVA since the Customer Forward implementation, approximately 80%  
16 of payment arrangement enrollments happen through self-service channels. Even with the  
17 rise in self-serve adoption, Evergy realizes there are some customers and even certain  
18 situations when customers want to speak to a customer service representative (“CSR”). As  
19 noted in previous testimony, speaking with a CSR will always be an option for Evergy  
20 customers.

21 In addition, Evergy was an industry leader in realizing the importance of working  
22 with customers one-on-one and face-to-face. In 2018, it opened Connect, which provides  
23 customers the opportunity to meet face-to-face with Evergy to resolve a myriad of issues.

1 The Connect team has helped thousands of customers avoid disconnections and enroll in  
2 energy efficiency, payments assistance programs and medical programs. The Kansas City  
3 Connect has impacted many customers through:

- 4 • Helping more than 31,000 customers with direct and customized service
- 5 • Stopping more than 1,000 disconnections with proactive assistance.
- 6 • Enrolling nearly 2,000 customers in energy efficiency, payments assistance and  
7 medical programs.
- 8 • Functioning as a venue for nearly a hundred community events/meetings,  
9 workshops, assistance outreach and workforce/career events.

10 Our customer representatives work with customers to establish payment plans and  
11 direct them to payment resources.

12 I stress the point that there is not just one way to work with customers – completing  
13 transactions digitally, speaking directly with a CSR on phone, working through an IVA or  
14 meeting with an Evergy team member face-to-face are all important and meaningful ways  
15 to engage.

16 **Q: In Dr. Marke’s rebuttal testimony he claims to be puzzled by your testimony that**  
17 **customers prefer choice and judge customer service through a broader lens than just**  
18 **comparable utility service. Can you assist Dr. Marke by clarifying your comments**  
19 **and assist in his comprehension of your point?**

20 **A:** I will certainly try. First, I never claimed Evergy was not a “natural monopoly.” In fact,  
21 that monopoly status is exactly the reason why that it is important for us to give customers  
22 a choice. Our rate case filing and our customer service guiding principles are replete with  
23 efforts to offer customers choices. If a customer cannot choose its utility provider, then a

1 utility provider should do its utmost to provide its customers with choices around service  
2 within the context of its monopoly status. A customer that can tailor its electrical service  
3 in areas that are important to him or her are generally more satisfied. Evergy offers choices  
4 in multiple areas, to name a few key areas:

- 5 • Billing: a customer can receive mailed, emailed, or portal and text alerts.
- 6 • Rates: we are proposing a myriad of rates for residential customers in optimize their  
7 rate to best fit their lifestyle.
- 8 • Customer service: we offer online portals, are developing a next generation mobile  
9 app for release later in 2022, we have an IVA, a customer call center, social media,  
10 email and text options, and we have a walk-in Connect center for those who prefer  
11 in-person interactions. This is all to allow customers to choose how they want to  
12 interact, communicate with and receive their customer service from us.
- 13 • Energy efficiency and demand response programs: these provide customers a  
14 choice in how they actually use and manage their energy usage.
- 15 • Renewable energy programs: these allow customers choice in their level of  
16 sustainability and increased ability to choose where their energy comes from and  
17 how it is made.

18 What I find puzzling is why a senior member of the state entity with the  
19 responsibility for representing residential consumers does not understand why customers  
20 of a “natural monopoly” would not feel better served if they had choices from that service  
21 provider and were not just forced into a one size fits all, the state of Missouri knows best  
22 customer service rubric. Yet, that is exactly what Dr. Marke and OPC witnesses advocate  
23 for in this case. They want to restrict and prohibit choice in rates. They offer no substantive



1 analysis, peer findings or evidence other than their “expert” opinion that rate choice would  
2 harm customers. They just make that unsupported assertion and advocate for not allowing  
3 choice in rates. Rather, they would substitute their own judgment on rates and not only  
4 prevent customers from having a choice, but mandate all residential customers without an  
5 opt-out into mandatory TOU rates.

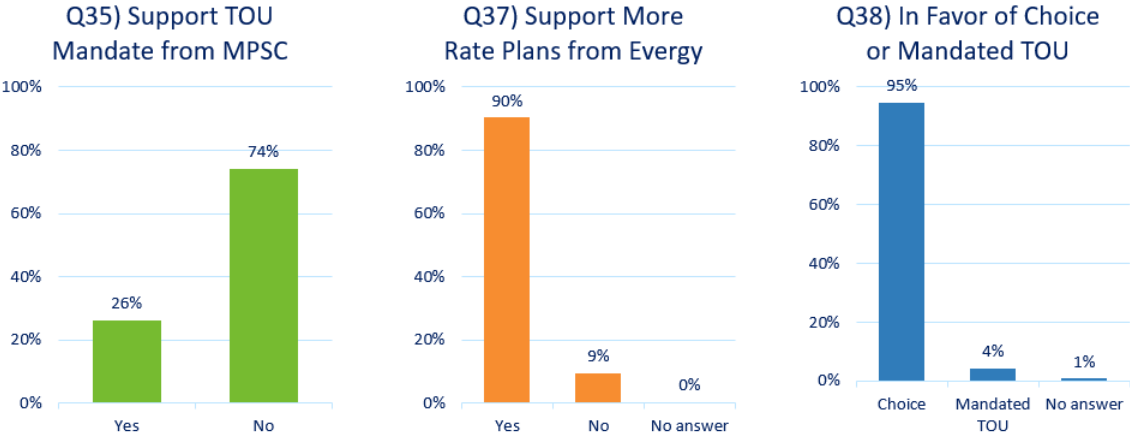
6 In this way, OPC is acting more like a natural state monopoly than Evergy.  
7 Evergy’s rate choice options are mostly pilots. Customers can choose to try them out.  
8 And, they can choose to withdraw from them. OPC’s recommendation is to force  
9 customers into a one-size-fits all rate that requires more effort not less, more financial risk  
10 and without almost any evidence to support that it would be beneficial for customers or  
11 that customers are in favor of it.

12 Conversely, Evergy favors giving customers more choice generally and more  
13 choice with respect to the rates. This is supported by voluminous research and study  
14 conducted over more than a year by Evergy and filed as part of this case. It is supported  
15 by industry research conducted by J.D. Power & Associates, the Cogent Trusted Brand &  
16 Customer Engagement study, and by eSource. And, it is augmented by ongoing customer  
17 research conducted by Evergy.

18 In June of 2022, Evergy conducted a survey of its online panel of customers to  
19 update our rate choice research. This survey is attached to my Direct Testimony as  
20 **Confidential Schedule CAC-5**. This was an online panel of nearly one thousand Missouri  
21 residential customers. Results show that customers are interested in more rate options.  
22 90% said Evergy should offer more rate plans (just 9% said no), and 52% said if more rate  
23 options were available, they would very likely consider changing rate plans. In addition,

1 this survey also gauged residential customer perspectives of the possibility of mandating  
2 TOU for all Missouri customers by the Missouri Public Service Commission (“MPSC”).  
3 Nearly three-quarters of all respondents said they did not support this move by the MPSC,  
4 and fully 95% said they preferred that customers have the ability to choose the rate plan  
5 that is best for them. If all Missouri customers were required to switch to a TOU plan,  
6 satisfaction with both Evergy and the MPSC would fall.

*Most would not support mandated TOU rate, want choice of rates*



7  
8 In addition, Dr. Marke gratuitously states with no corresponding evidence to  
9 support, “If customers did judge Evergy’s customer service relative to other utilities they  
10 would likely be very disappointed.” This statement is augmented with the footnote: One  
11 can draw their own conclusions as to whether or not customers would stay with Evergy if  
12 they had a choice for other options like what is commonplace in “the market.” Luckily for  
13 Dr. Marke, we do not have to draw our own conclusions, there is third-party empirical  
14 evidence directly on point. According to the full year Cogent Trusted Brand & Customer  
15 Engagement study for 2021, Evergy residential customers are no more likely to switch  
16 electric utility providers than the average Midwest utility. This study reports that if Evergy  
17 customers had the ability to choose another viable electric provider only 46% would

1 consider doing so, with just 6% stating they would be very likely to switch to another  
2 provider. The same study reports that the Midwest average for switching to another  
3 provider is 46%, with 8% stating they would be very likely to switch providers. In the  
4 same study, 38% of Ameren Missouri customers and 45% of Ameren Illinois customers  
5 reported they would potentially switch providers, with 8% of Ameren Missouri customers  
6 very likely to switch. For Spire West Missouri, the comparable number is 44% and for  
7 Spire East Missouri it is 46%, with 8% and 7% respectively very likely to switch. In other  
8 words, despite Dr. Marke's conjecture that Evergy customers would be likely to switch  
9 providers if they had a choice, that is not the case for the majority of Evergy customers.  
10 Further, Evergy's performance in this area is not out of line with our Midwest peers and  
11 does not materially differ from our Missouri peers.

12 Dr. Marke predicates this unfounded assertion on Evergy's J.D. Power scores.  
13 However, his rebuttal testimony on J.D. Power is outdated and incorrect. In addition, in  
14 the areas of customer service and experience, both J.D. Power and Cogent score Evergy  
15 above the Midwest utility average. I will address this further later in my testimony.

16 Moreover while, I agree that Evergy holds a monopoly on the generation and sale  
17 of electricity within its regulated jurisdictions, as Missouri is not a deregulated state,  
18 customers do have a growing choice in how they choose to use electricity, how they engage  
19 with us and how they may receive energy.

20 Over the past decade, electricity has increasingly become more competitive. There  
21 are many factors that contribute to that. For example, large customers are seeking ways to  
22 meet their sustainability goals; solar and storage are becoming more cost competitive with  
23 the cost of electricity and increasing customer options; or companies are approaching

1 customers to partner with them on bidding energy into the wholesale market, providing  
2 renewable energy credits, or managing their electric bill. These are only a few examples  
3 of how customers are faced with choice but are not regulated directly by a commission.  
4 Evergy must provide choice to its customers to stay relevant and meet customer needs.  
5 Customers do have options to replace Evergy; just not in the myopic and traditional sense  
6 that Dr. Marke refers.

7 Finally, I would like to clarify my testimony regarding the context through which  
8 customers judge customer service. When I stated that customers judge customer service,  
9 not just by their experience with utility service providers, but by what they experience in  
10 the broader marketplace, it was meant to simply convey that customers don't have a  
11 separate set of expectations for utilities and banks and retailers and auto dealerships. They  
12 don't categorize their customer experience by industry. They have a general perception of  
13 what good customer service looks like informed by all their interactions with companies.  
14 Therefore, while it is important to know how Evergy is performing relative to its peers,  
15 that should not be the only frame of reference when deciding how best to approach and  
16 improve customer experience. Rather, we should look to a broader set of industries and  
17 companies to understand what our customers expect and value.

18 In fact, most of our industry best-practices for customer experience and service  
19 today, originated in other industries first. Authenticated portals, social media used for  
20 communication and customer service, chat, text and a myriad of other practices all  
21 originated in other industries first, became increasingly commonplace and were adopted  
22 by utilities because customers began to expect them from their experience outside of  
23 utilities.

1 **Q: What is your response to Dr. Marke’s rebuttal testimony regarding J.D. Power and**  
2 **customer experience?**

3 A: As stated previously in my testimony, Dr. Marke’s testimony in this area is not current and  
4 it is not informed. First, historically, KCP&L has had solid performance (first and second  
5 quartile performance) in J.D. Power surveys. However, Evergy is a newly formed  
6 company, comprised of two neighboring electric utilities. Since that merger, Evergy J.D.  
7 Power performance has not been as good. This is not because customer service has  
8 declined. In fact, Evergy customer service has enhanced capabilities and platforms relative  
9 to KCP&L. Rather, it is for a host of reasons originating with the merger that have  
10 significantly and negatively put Evergy’s performance on J.D. Power in a hole. These  
11 factors include:

- 12 • **Merger process:** Both legacy company brands suffered reputational damage as a result  
13 of a long, protracted and contentious process for transaction approval. For more than  
14 two years there was significant media coverage, often negative during the process to  
15 obtain regulatory approval.
- 16 • **Brand equity:** KCP&L had more than 130 years of customer recognition and brand  
17 equity in its name. And, Westar had more than 25 years of brand equity behind its  
18 name. When the new company was named all of that equity was erased. Evergy spent  
19 very little in advertising to drive new brand equity. Rather, Evergy spent just enough  
20 on advertising to ensure that customers would not mistakenly throw away their Evergy  
21 bills. J.D. Power surveys repeatedly show significant decreased performance when a  
22 company changes its name.

- 1       • **Differential in J.D. Power performance:** Historically, there was a significant  
2 differential in performance on J.D. Power between KCP&L and Westar. At the time  
3 the merger was announced, KCP&L was in the top half of the first quartile and Westar  
4 was ranked next to last. Now, those scores are averaged under the Evergy brand and  
5 that had an immediate negative effect on the overall company score simply through  
6 averaging the legacy company's performance. This was an immediate change despite  
7 the fact that day one the two companies became Evergy and there was no day one  
8 change in service. That performance variance remains to this day, however, the  
9 differential has narrowed considerably.
- 10       • **Multiple jurisdictions:** Evergy has four service territories operating under one brand  
11 in the same media market. This exaggerates the perceived frequency of rate increases.  
12 Every time there is a rate increase for an individual service territory, the resulting media  
13 coverage creates the perception it is an increase for everyone. The same can be said  
14 for adjustments to the fuel adjustment clause and in Kansas, the transmission delivery  
15 charge adjustments. Price is one of the major six components in the J.D. Power  
16 Customer Satisfaction Index and this attribute is significantly and negatively impacted  
17 by customer perceptions of multiple and ongoing adjustments to rates.
- 18       • **Implementing new Customer Information Systems (“CIS”):** During the past four  
19 years, both legacy KCP&L and Westar completed CIS projects which drove change for  
20 both customers and employees alike. As anticipated, contact center service levels were  
21 impacted during the early phases of these projects, when customer contact volumes  
22 were high, and teams were acclimating to new technology and consolidated business  
23 processes. However, as noted in previous testimony, these technology improvements

1 led to enhanced customer interactions and new self-serve functionality which will  
2 continue to improve our overall customer experience.

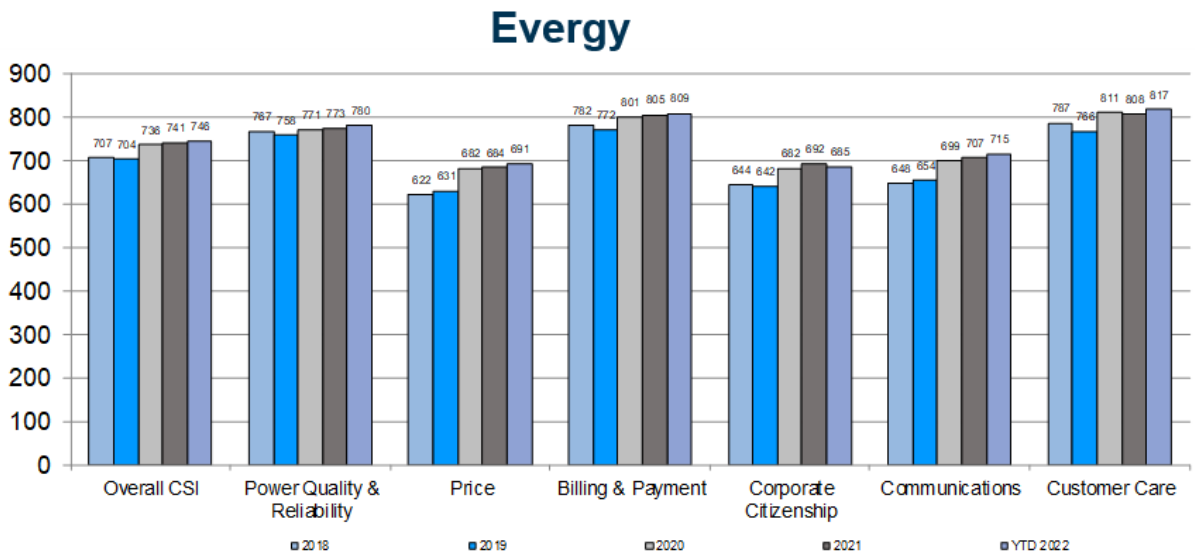
- 3 • **Advertising:** Outside of awareness advertising around rebranding to Evergy, the  
4 company spends very little on brand advertising. Evergy spends much less than almost  
5 every peer in this area and continues to underspend. One of J.D. Power's annual  
6 recommendations is to significantly increase brand advertising and communication if  
7 Evergy would like to see scores improve significantly. While brand advertising might  
8 improve scores, it does not in and of itself improve customer experience, so Evergy  
9 prioritizes other meaningful activities.

- 10 • **Energy Efficiency:** A component of J.D. Power is energy efficiency programs and  
11 energy efficiency program awareness. More than 60% of Evergy customers do not  
12 have access to those types of programs, since those programs are not available to our  
13 Kansas customers.

- 14 • **Evergy is a member of the SPP:** All of Evergy's peers in the Midwest Large section  
15 of the J.D. Power Customer Satisfaction Index survey are members of MISO. As such,  
16 in 2021, when the SPP required member companies to reduce load and run temporary  
17 forced power interruptions, this had a significant impact reputationally and on customer  
18 service scores for reliability for Evergy. Customers did not know that we had enough  
19 generation capacity to meet our customer demand and were being required to shut off  
20 power to preserve reliability in the 15-state region of the SPP. None of our peer  
21 companies in the Midwest Large section had a similar occurrence as members of  
22 MISO.

1           Despite having material justification for lower J.D. Power scores, Evergy is not  
 2           using them as an excuse for perpetually lower scores. Rather, as Dr. Marke references  
 3           from my rebuttal testimony, our goal is to steadily improve customer service and  
 4           experience and “to be top quartile among utilities nationwide and to see continual  
 5           improvement” to our customer service scores in J.D. Power and other metrics. And, that  
 6           is EXACTLY what we have done since the merger.

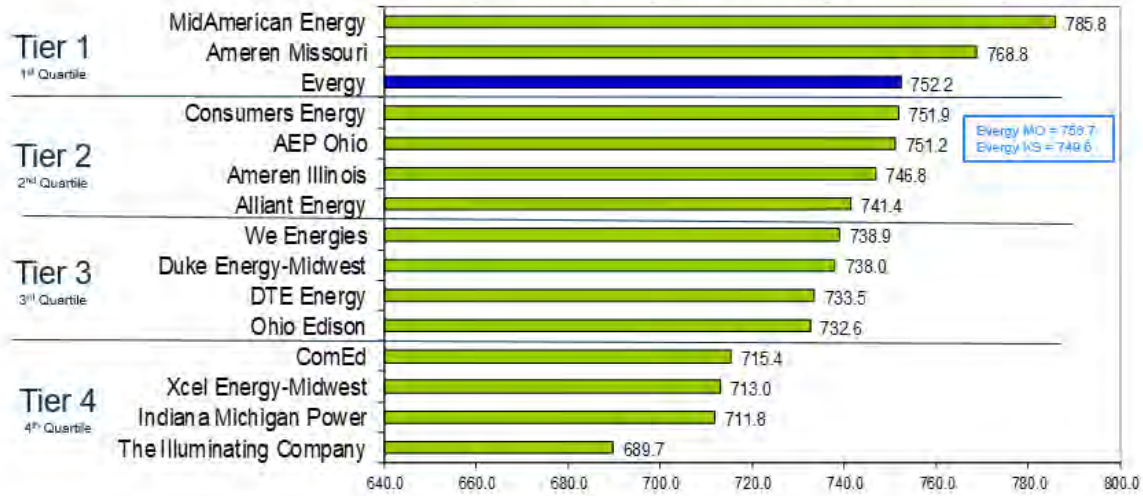
7           According to the most recent J.D. Power Electric Utility Residential Customer  
 8           Satisfaction Study, released for the second quarter of 2022, Evergy has been steadily  
 9           improving its customer satisfaction scores in every component of their Customer  
 10          Satisfaction Index (CSI).



11  
 12           In addition, in the most recent survey, Evergy scored in the top quartile for the  
 13           Midwest Large section for the first time since the merger. Year to date, that puts Evergy  
 14           in the second quartile.

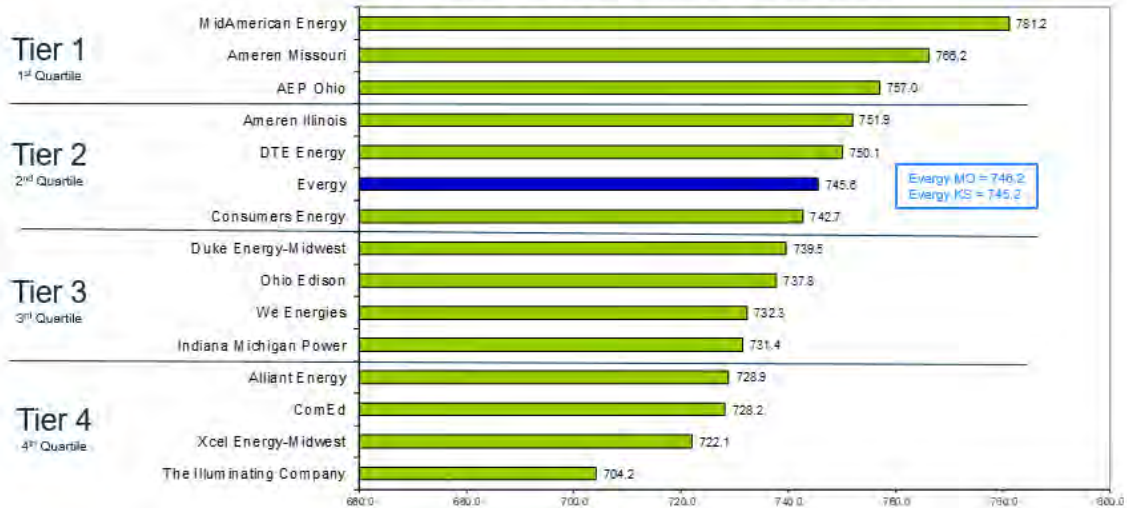


### 2Q22 – Overall Customer Satisfaction



1

### YTD 2022 – Overall Customer Satisfaction



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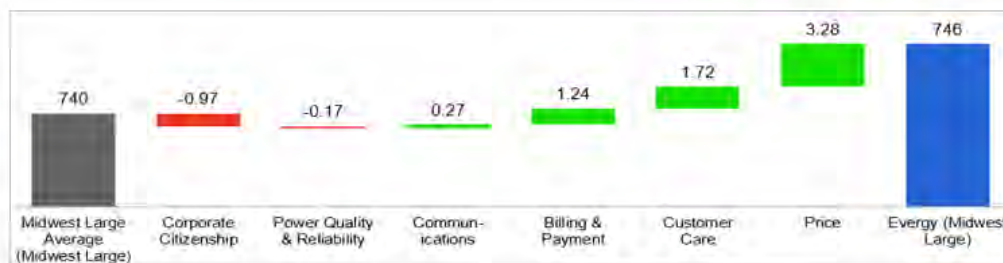
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Further, Eversource is scoring above the Midwest Large average in key components relative to customer service and the customer experience enhancements that we have added as a part of the rate case and continue to work on implementing now and in the future. Note that Customer Care, Billing and Payment and Customer Communications are all above the average in Eversource's section.

YTD 2022



1  
2 In every area of customer service, Evergy scores above the Midwest Large average  
3 and in many cases in the first quartile in J.D. Power’s second quartile of the 2022 survey.  
4 For in-person customer care, Evergy is 31 points year-to-date above the Midwest average  
5 and in the second quartile. For customer service by phone (which includes the much-  
6 maligned by Dr. Marke IVA), Evergy scores 33 points year-to-date above the Midwest  
7 average and in the first quartile. And, for digital customer care, Evergy scores 20 points  
8 above the Midwest average and is in the first quartile. Further, the Cogent Trusted Brand  
9 & Customer Engagement study for the second quarter of 2022 places Evergy six points  
10 above the Electric Midwest average in Customer and Field Service, scoring materially  
11 above peers in customer service through: social media, mobile app, email, text, website  
12 (both desktop and mobile) and text messaging. These are all part of the enhancements,  
13 enabled through CIS and AMI implementations, and part of our customer roadmap that are  
14 adding value for customers and improving customer service.

15 **Q: Dr. Marke recommends Evergy file its five-year road map of executable increments**  
16 **until the Company’s next rate case. How do you feel about this recommendation?**

17 **A:** Building a customer experience road map is an ever-evolving activity. Keeping up with  
18 customer expectations as well as implementing new technology for both customer and  
19 employee benefit is a high priority of our digital and customer delivery teams as well as

1 other customer operations areas. I do not believe that filing our five-year plan is necessary  
2 as we are in continuous conversations with Staff and OPC related to new technology, etc.  
3 In addition, it is frequently updated as we balance resources whether it is time or money to  
4 execute new projects. These projects could mean new customer facing technologies such  
5 as a mobile app or new functionality on our web sites, or it could be changes within our  
6 billing or phone systems that make back-office processes more efficient. All these projects  
7 benefit the customer through improved customer interactions or cost savings.

8 Finally, Dr. Marke's recommendation that we should file a five-year plan customer  
9 service roadmap, like many of his recommendations, exceeds regulatory oversight and gets  
10 into management of the company. Despite that, we do have a roadmap. It is  
11 comprehensive. It looks at required resources and budgets. And, it is continually refined  
12 to better meet the changing customer service needs of our customers. The current version  
13 of that roadmap is attached to my Direct Testimony as **Confidential Schedule CAC-6**. It  
14 is a draft and subject to continual evolution.

15 **Q: In Ms. Kremer's testimony, she recommends that Evergy file its "Universal Service"**  
16 **plan with the MPSC. What is your response to this recommendation?**

17 A: My response to Universal Customer Service plans was covered in detail in my Rebuttal  
18 testimony. However, as it relates to the need to file such a plan, I don't believe it is  
19 necessary to file operational plans for Evergy to execute daily business.

1                                    **IV. TOU RATES AND CUSTOMER RATE CHOICE**

2 **Q: How do you respond to Dr. Marke’s statement that Evergy’s rate choice options**  
3 **proposed in this case “are meant to distract the Commission from ordering**  
4 **mandatory TOU rates”<sup>3</sup>?**

5 **A:** It is not surprising to me that Dr. Marke continues to beat this drum. The Company has  
6 done an extreme amount of work on TOU rates, as evidenced by the various studies that  
7 the Company has undertaken and in fact referenced by Dr. Marke.

8                    The Company described its Rate Modernization plan in great detail in this case  
9 through my, Ms. Winslow, Mr. Lutz, and Mr. Ives testimonies. In addition, the Company  
10 presented its Rate Modernization plan to the Commissioners on September 28, 2021, in an  
11 on the record presentation<sup>4</sup> that also included our research on TOU, which we believe is a  
12 key element in our overall rate choice plan. Our Rate Modernization plan is not meant to  
13 “distract” the Commission or offered as a “red herring”<sup>5</sup> to negate the benefits of AMI  
14 meters. Evergy has offered a robust portfolio of rates in this case that are optional for  
15 customers to consider based on customer preferences and changing customer needs. We  
16 have provided customer research to support this portfolio and have provided testimony that  
17 our customers have received benefits of the AMI investment above solely offering  
18 mandatory or default TOU rates.

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<sup>3</sup> Marke Rebuttal, Page 7 , Line 21

<sup>4</sup> “Time of Use Rate Design Plan On The Record MPSC Presentation”, September 28, 2021

<sup>5</sup> Marke Rebuttal, Page 8, Lines 10-13

1 **Q: OPC witness Marke supports Staff’s “training wheels approach” and**  
2 **recommendation for TOU rates agreed upon by Ameren Missouri and Empire**  
3 **District Electric.<sup>6</sup> Please address the status of Ameren’s default TOU rates.**

4 A: I refer to Ameren witness Steven M. Wills testimony in File No. ER-2022-0337. From  
5 my understanding, Ameren began to implement default TOU rates following its 2019 rate  
6 case<sup>7</sup>. Residential customers are defaulted to a low peak/off peak differential TOU rate, or  
7 the Evening/Morning Savers rate (~1.04 differential<sup>8</sup>), within 6 months following the  
8 installation of an AMI meter. The default rate has “low load shift savings potential”<sup>9</sup>.  
9 Additionally, a customer does have the option of returning to a non-TOU rate, if they so  
10 elect.

11 Based on my review of Mr. Wills’ Table 2<sup>10</sup> that summarizes its four TOU rates  
12 and one non-TOU rate for those customers who have an AMI meter installed, I conclude  
13 that:

- 14 • Approximately 13% of Ameren customers who were defaulted to the Evening/Morning  
15 Savers rate after having received an AMI meter elected to return to a non-TOU rate.
- 16 • Approximately 87% of Ameren customers are on the TOU rate with the lowest  
17 potential to shift peak load (Evening/Morning Savers rate).
- 18 • Less than 0.3% of customers elected for a moderate or high TOU off peak/peak  
19 differential.

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<sup>6</sup> Marke Rebuttal, Page 13, Lines 6-8

<sup>7</sup> Steven Wills Direct testimony, File No. ER-2022-0337

<sup>8</sup> Ibid.

<sup>9</sup> Ibid.

<sup>10</sup> Ibid.

1 As stated by Ms. Winslow in her Rebuttal testimony<sup>11</sup>, Evergy has consistently  
2 emphasized the purpose of TOU rates and industry perspective and learnings on the  
3 shortcomings of implementing a low differential rate.

4 **Q: Do you have any further concerns with Staff’s proposed default TOU rates after your**  
5 **review of Mr. Wills’ testimony?**

6 A: Yes, I’d like to reinforce Ms. Winslow’s rebuttal testimony in that the Commission should  
7 consider the risk of selling customers on the benefits of TOU rates when Staff’s slightly  
8 greater than 1X differential TOU design provides virtually no opportunity for bill savings.  
9 Mr. Wills further emphasizes my concern in his footnote on Page 8 of his direct testimony:  
10 “The Anytime User rate plan and the Evening/Morning Saver rate plan produce very  
11 similar bills for customers, so savings associated with these more advanced TOU rate plans  
12 relative to the new AMI default rate would be very similar to the levels reported relative to  
13 the legacy rate.” In addition, the very purpose of TOU rates is customer peak demand shift  
14 – Ameren identifies that the peak load shift for its Evening/Morning Savers rate is  
15 estimated to be less than 0.3%. Considering participation from the Evening/Morning  
16 Savers rate and those customers who elected to return to a non-TOU rate, Ameren’s AMI  
17 enabled customers barely contribute to any peak demand reduction from default TOU  
18 rates.<sup>12</sup> While Staff and OPC can criticize Evergy’s TOU opt-in plan, approximately 1%  
19 of our customers have verified peak demand shift of 14% in Missouri Metro and 4% in  
20 Missouri West.<sup>13</sup>

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<sup>11</sup> Winslow Rebuttal, Pages 2-11

<sup>12</sup> Steven Wills Direct testimony, File No. ER-2022-0337

<sup>13</sup> Winslow Direct, Page 9, Lines 21-25

1 **Q: Has Evergy performed any additional research on rate choice since its 2021**  
2 **qualitative and quantitative research?**

3 A: Yes. In June 2022, the Company conducted an additional quantitative survey with nearly  
4 1,000 responses from its Missouri residential customers. The purpose of the research was  
5 to further explore and confirm findings from the qualitative customer research done in late  
6 2021 regarding electric rate plans and offerings from Evergy. I have attached a summary  
7 of that research as **Confidential Schedule CAC-5**.

8 **Q: What are some of the key findings of the research?**

9 A: The insights are highly relevant to the discussion at hand in this case and confirm at scale  
10 the prior results on the same topics. The bottom-line key insight is that (1) customers  
11 appreciate choice in rate plans, (2) there are at least two rate plans that customers gravitate  
12 more towards, and (3) customers responded adversely to mandatory electric rates. Some  
13 points highlighting these insights are as follows:

- 14 • More (90%) think Evergy should offer more rate plans than not (9%), but nearly  
15 half (46%) don't know.
- 16 • The top two plans respondents thought Evergy should offer were Flat Pricing  
17 (57%) and TOU-3 Period (45%).
- 18 • When asked which one rate plan they would be most likely to enroll in, Flat  
19 Pricing (40%) and TOU-3 Period (30%) were most selected.
- 20 • As described, most respondents do not support a Commission mandate for TOU  
21 (74%), do support more rate plans from Evergy (90%), and would prefer a  
22 choice of rates (95%) over mandated TOU (4%).

- 1           • A mandate for TOU from the MPSC would result in lower satisfaction for both  
2           Eversource (58%) and the Commission (69%).

3 **Q: The insight on the impact to Eversource customer satisfaction that would result if the**  
4 **Commission ordered mandatory rates is strongly unfavorable. Do you have any other**  
5 **supporting information from other mandatory TOU deployments?**

6 A: The mandatory approach to TOU rates has been tried in a few different jurisdictions across  
7 the country to a similar negative customer reception as found in the Missouri customer  
8 survey. One meta-study that points to the same issue has been provided in this case related  
9 to Ontario, Canada's experience<sup>14</sup>. Ontario started with mandatory default TOU in 2011-  
10 12 and have since rolled back to provide rate options in 2020 based on many factors,  
11 including negative customer feedback. California is not always relatable to Missouri based  
12 on climate and policies, but we should learn from their failings of their approach to  
13 mandatory TOU rates and implications as well.

14 **Q: Did the survey get into more insights in regards Subscription Pricing (Flat Pricing)**  
15 **and Advance Easy Pay?**

16 A: Yes, those were two additional options explained to customers that had positive insights  
17 about the attributes and features of the potential options. Company witnesses Winslow and  
18 File will offer additional insights in their surrebuttal testimony on Subscription Pricing and  
19 Advance Easy Pay, respectively, from the June 2022 customer research.

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<sup>14</sup> <https://www.oeb.ca/sites/default/files/report-RPP-Pilot-Meta-Analysis-20211110.pdf>



1 **Q: How do you respond to OPC witness Marke’s recommendation that the “Commission**  
2 **order Evergy to submit an open-source competitive RFP within thirty days following**  
3 **rates going into effect in which the Company will request a third-party consulting**  
4 **firm to develop and execute a marketing campaign to educate Evergy Missouri**  
5 **customers on the overall value proposition of TOU rates and to inform customers that**  
6 **larger differential rates will be going into effect for all customers following the**  
7 **conclusion of Evergy’s next rate case.<sup>15</sup>”**

8 A: This is an absurd recommendation. Evergy has educated its customers effectively on TOU  
9 – especially given the budget that it expended. Evergy has presented evidence with  
10 stakeholders and the Commission since the 2018 Rate Case and through this filing on the  
11 success of our marketing and education plans for TOU rates. OPC or Staff has not  
12 demonstrated in this case that Evergy did not follow any piece of the Rate Design S&A  
13 with respect to TOU.

#### 14 **V. CRITICAL NEEDS AND REHOUSING PILOT PROGRAMS**

15 **Q: Has the Company’s position on the Critical Needs or Rehousing Pilot Programs**  
16 **changed?**

17 A: No. I addressed these programs in my Rebuttal testimony<sup>16</sup>. Evergy does not recommend  
18 that the Commission approve these programs based on (1) Dr. Marke’s lack of research to  
19 support these proposed programs; (2) Dr. Marke fails to demonstrate how these programs  
20 differ from other programs that Evergy offers; and (3) Dr. Marke has not demonstrated that  
21 Evergy’s current programs and services do not meet the needs of the targeted customers  
22 for his two proposed programs.

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<sup>15</sup> Marke Rebuttal, Page 15, Lines 17-25

<sup>16</sup>Caisley Rebuttal, Pages 30-38

1 **VI. AMI METERS**

2 **Q: OPC witness Marke and Staff witness Eubanks make various assertions concerning**  
3 **AMI meters in their rebuttal testimony. How do you respond?**

4 A: As their assertions are very similar to the same assertions made in direct testimony, I  
5 believe my Rebuttal testimony responds to their rebuttal testimony. However, I will also  
6 add that Dr. Marke repeatedly and gratuitously asserts, again with no evidence to support  
7 his claims, that customers have received no benefit from Evergy's CIS and AMI  
8 investments. He further asserts the only remedy for this is to impose mandatory TOU rates  
9 on all residential customers. Our testimony and evidence clearly shows that customers are  
10 opposed to a mandatory TOU rate. Our testimony and evidence clearly show that across a  
11 wide variety of customer service metrics the different projects and enhancements we have  
12 put in place as a direct result of our investments in AMI and CIS or enabled by those  
13 investments have produced steady improvement in customer service. But, just to make sure  
14 that it is clear where value has been created, the following areas are all direct results of or  
15 enabled by Evergy's AMI and CIS investments: remote and automated reconnections;  
16 enhanced customer portals for residential and business customers; enhanced energy usage  
17 and analysis, enhanced natural language IVA with steadily increasing functionality; a new  
18 mobile app; enhanced call center knowledge management and tools to serve customers;  
19 proposed rate modernization and choice; enhanced alerts and notifications; and, significant  
20 sustainable cost reductions to help reduce customer rates.

1 **VII. ALLEGED CONFLICT OF INTEREST**

2 **Q: Witness Kremer alleges that you have an inherent conflict of interest as a result of**  
3 **being the executive responsible for both regulated and non-regulated products and**  
4 **programs at Evergy. What is your response to that allegation?**

5 A: I categorically deny there is any conflict. In fact, I believe this dual role actually helps me  
6 better serve regulated customers. First, I have had responsibility for non-regulated products  
7 and services as well as customer experience for nearly ten years. It has never been raised  
8 by any party as an issue before in any proceeding before the Commission during that time  
9 period. In addition, Ms. Kremer does not offer one scintilla of evidence that there is the  
10 perception of a conflict with Evergy's customers or key stakeholders or any evidence that  
11 customers have suffered any damage or negative ramifications from this dual role. Second,  
12 non-regulated products and services is a tiny part of my responsibilities and no part of the  
13 corporate scorecard or the division scorecard incentivizes me to place non-regulated  
14 activities before regulated ones. In fact, it is just the opposite, that nearly all of my  
15 compensation at risk is directly tied to and impacted by regulated responsibilities and  
16 customer service. Third, the primary reason for my having this dual role is to protect our  
17 brand equity and regulated customer service. We have a clear rule at Evergy with respect  
18 to non-regulated activities: it is not enough for an activity to be profitable, it must be  
19 compliant with affiliate transaction rules, allocate cost pursuant to our cost allocation  
20 manual and ensure that customer service and experience is improved and not hurt. By  
21 having a dual responsibilities, I am in the best position to ensure those requirements are  
22 followed. Fourth, having a role in non-regulated products, services and divisions of Evergy,  
23 I have early access to new trends, technology and companies that could positively add to

1 regulated customer service. Finally, if having dual role or responsibility for regulated and  
2 non-regulated business activities at a utility is a conflict of interest, then most senior utility  
3 executives in the United States would have the same conflict.

4 **Q: Does that conclude your testimony?**

5 A: Yes, it does.

**BEFORE THE PUBLIC SERVICE COMMISSION  
OF THE STATE OF MISSOURI**

In the Matter of Evergy Metro, Inc. d/b/a Evergy )  
Missouri Metro’s Request for Authority to ) Case No. ER-2022-0129  
Implement A General Rate Increase for Electric )  
Service )

In the Matter of Evergy Missouri West, Inc. d/b/a )  
Evergy Missouri West’s Request for Authority to ) Case No. ER-2022-0130  
Implement A General Rate Increase for Electric )  
Service )

**AFFIDAVIT OF CHARLES A. CAISLEY**

**STATE OF MISSOURI** )  
 ) ss  
**COUNTY OF JACKSON** )

Charles A. Caisley, being first duly sworn on his oath, states:

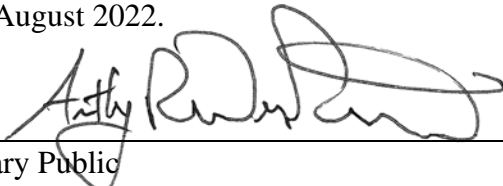
1. My name is Charles A. Caisley. I work in Kansas City, Missouri, and I am employed by Evergy Metro, Inc. as Senior Vice President – Public Affairs and Chief Customer Officer.

2. Attached hereto and made a part hereof for all purposes is my Surrebuttal Testimony on behalf of Evergy Missouri Metro and Evergy Missouri West consisting of twenty-five (25) pages, having been prepared in written form for introduction into evidence in the above-captioned docket.

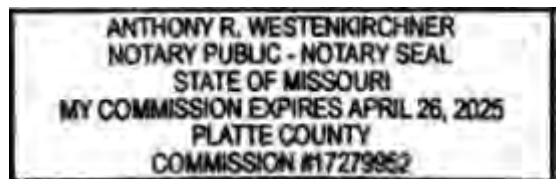
3. I have knowledge of the matters set forth therein. I hereby swear and affirm that my answers contained in the attached testimony to the questions therein propounded, including any attachments thereto, are true and accurate to the best of my knowledge, information and belief.

  
\_\_\_\_\_  
Charles A. Caisley

Subscribed and sworn before me this 16<sup>th</sup> day of August 2022.

  
\_\_\_\_\_  
Notary Public

My commission expires: 4/26/2025





# Rate Options

*Residential customer survey*

*(22-0025)*

*June 2022*





# Methodology

## Survey to Evergy's Residential Customers

- Online survey to Missouri customers only
- Data collection: June 20 - 27, 2022
- 40 questions (maximum)
- 958 respondents



# Executive Summary

*Customers are interested in optional rate plans, especially Flat Pricing and TOU-3 Period, and want a choice in rate plans*

Customers do not have a choice of electricity providers in Evergy's territory. Evergy has long recognized that this lack of choice can frustrate some customers, leading to reduced customer satisfaction. With its Time of Use Pilot in 2019, Evergy increased its optional rate plans but still offers fewer than other best in class electric utilities. Now, Evergy is working to further expand its slate of optional rate plans. This research tested interest in six different optional rate plans through an online survey to Missouri residential customers.

Results show that customers are interested in more rate options. **90% said Evergy should offer more rate plans** (just 9% said no), and 52% said if more rate options were available, they would very likely consider changing rate plans.

**Among the six rate plans shown, respondents consistently selected two as the most promising: Flat Pricing Plan and TOU-3 Period.** After reading a brief description respondents thought Evergy should offer Flat Pricing Plan (57%) and TOU-3 Period (45%). After reading a more detailed description of each plan and its features, **respondents still found TOU-3 Period and Flat Pricing Plan most interesting (61% and 56%, respectively).**

This survey also gauged perceptions of the possibility of mandating TOU for all Missouri customers by the MPSC. **Three-quarters of all respondents said they did not support this move by the MPSC, and fully 95% said they preferred that customers have the ability to choose the rate plan that is best for them.** If all Missouri customers were required to switch to a TOU plan, satisfaction with both Evergy and the MPSC would fall.





# Key Findings

## *Customers are interested in optional rate plans, especially Flat Pricing and TOU-3 Period*

- Background:
  - Most (51%) Evergy customers are “somewhat” satisfied with the rate plan options that Evergy offers
  - More (45%) think Evergy should offer more rate plans than not (9%) , but nearly half (46%) don’t know
  - Half (52%) are very likely to explore options and consider changing their rate plan, while just 7% are very unlikely
- Interest in Optional Rate Plans:
  - Based on brief descriptions of six rate plans:
    - The top two plans respondents thought Evergy should offer were Flat Pricing (57%) and TOU-3 Period (45%)
    - When asked which plan(s) they would likely contact Evergy for more details, the same two were the most selected: Flat Pricing (46%) and TOU-3 Period (39%)
  - Based on more detailed descriptions of the rate plans they expressed interest in:
    - More than half of respondents said they were very interested in the TOU-3 Period (61%), Flat Pricing (56%), and TOU-2 Period (54%) rate plans
    - When asked which one rate plan they would be most likely to enroll in, Flat Pricing (40%) and TOU-3 Period (30%) were most selected
- Mandates and the Missouri Public Service Commission
  - As described, most respondents do not support a Commission mandate for TOU (74%), do support more rate plans from Evergy (90%), and would prefer a choice of rates (95%) over mandated TOU (4%)
  - A mandate for TOU from the MPSC would result in lower satisfaction for both Evergy (58%) and the Commission (69%)

# Background

- *Customers' thoughts on rate plans*

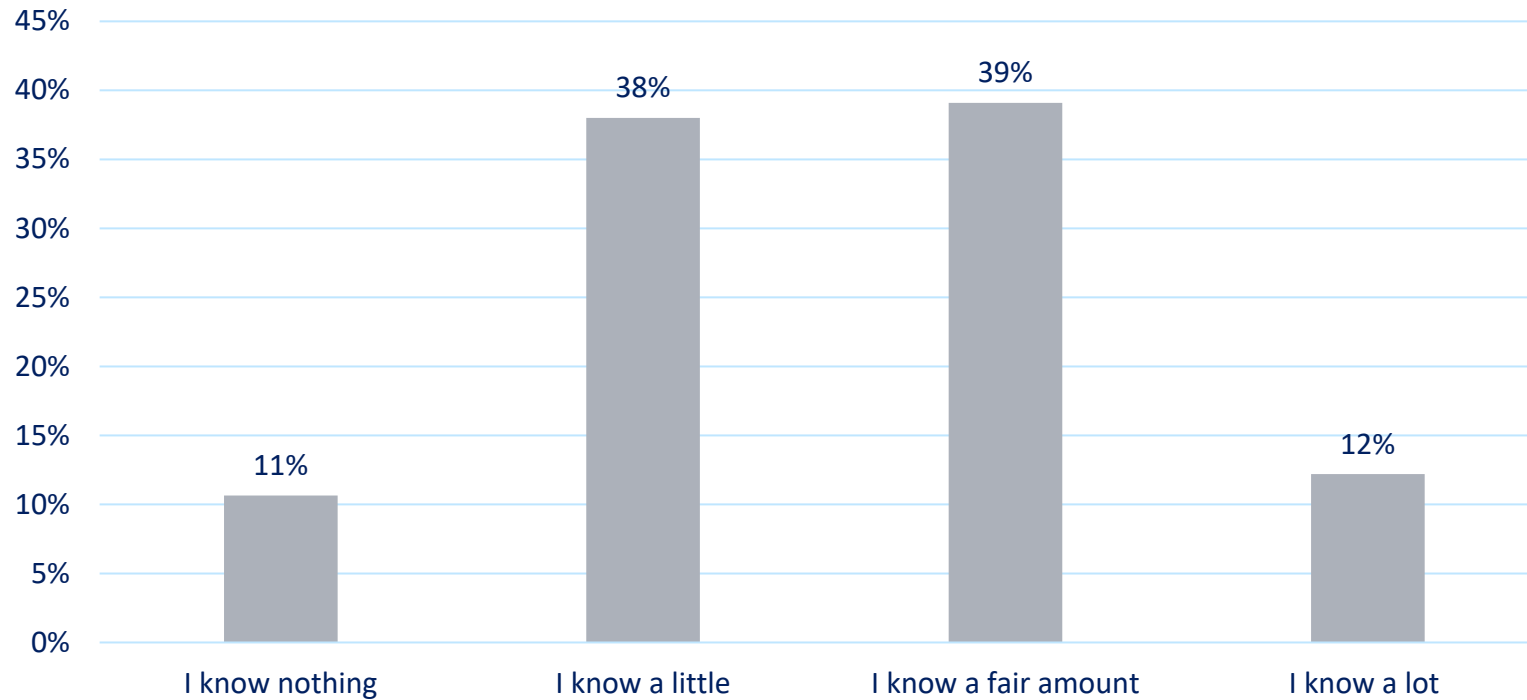




# Knowledge of Current Rate Plan

*Nearly all know something about their current rate plan, but few know a lot*

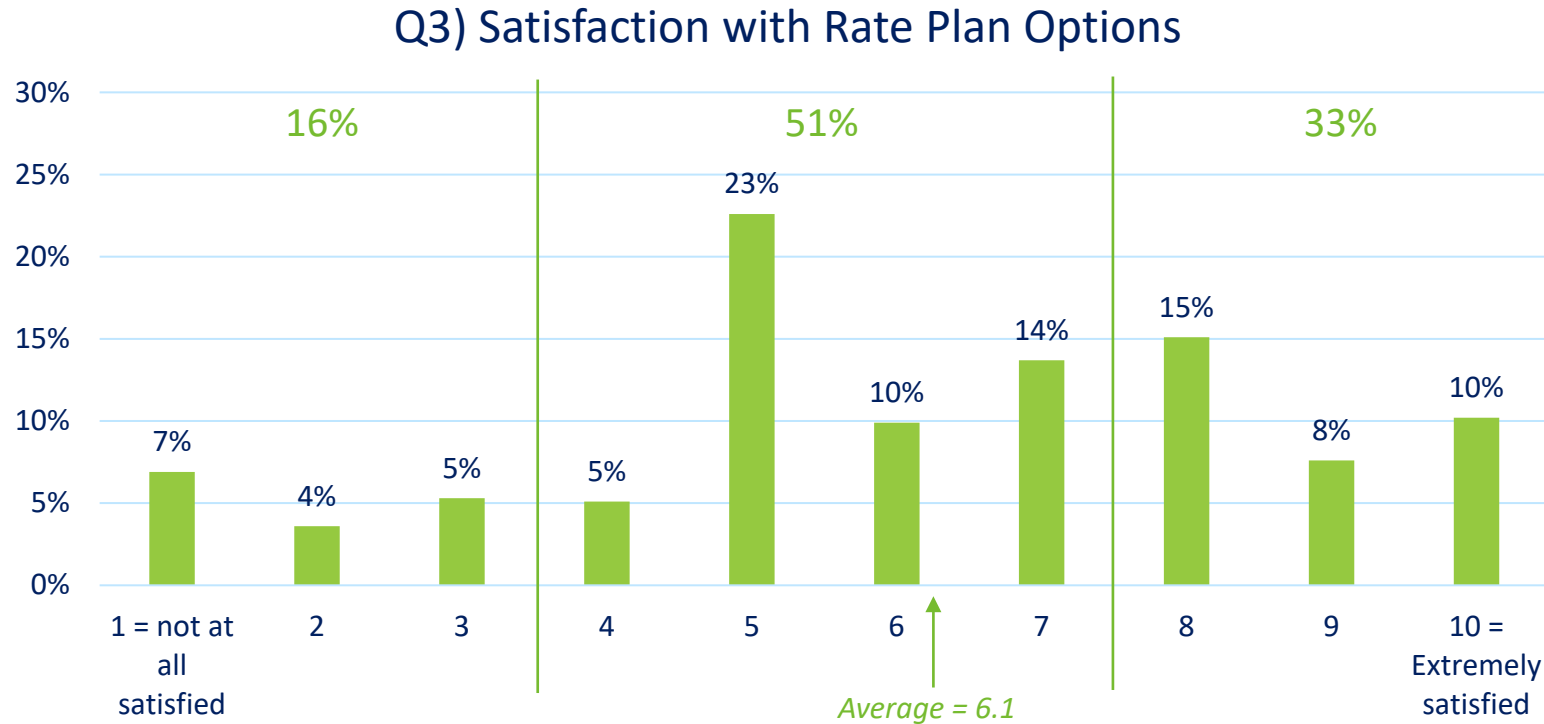
Q2) Knowledge of Current Plan





# Satisfaction with Rate Plan Options that Evergy Offers

*More are satisfied (33%) than not (16%), but half are in the middle*

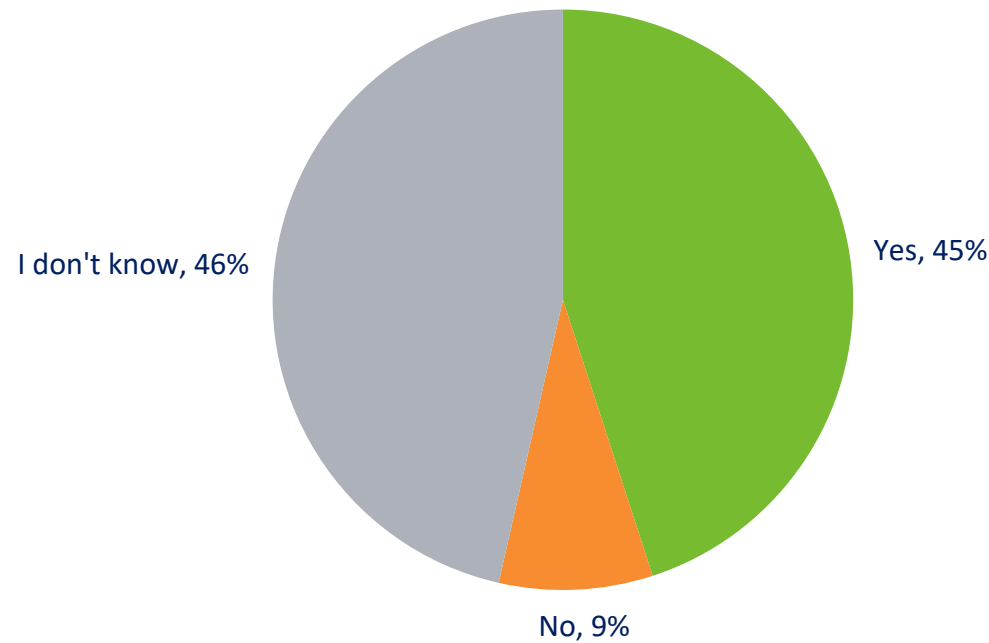




# Evergy Offering Additional Rate Plans

*Nearly half are in favor, nearly half don't know, and just 9% say no*

Q4) Offer Additional Rate Plan Options



Note:

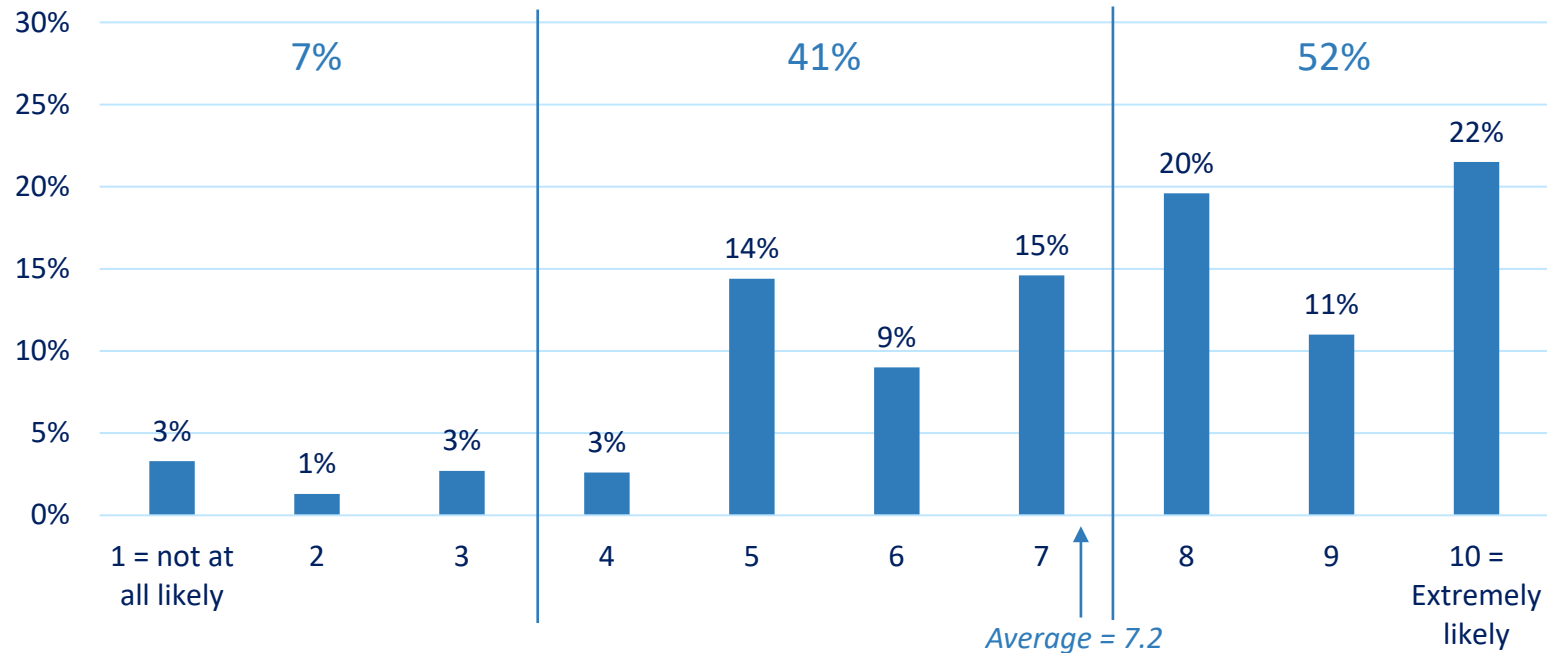
- 82 respondents who said “No” were skipped to Q35
- 876 respondents continued the survey



# Likelihood of Exploring Options, Considering Changing

*Half (52%) are very likely to explore options and consider changing*

Q5) Likely To Consider Changing Current Rate Plan



# Interest in Optional Rate Plans

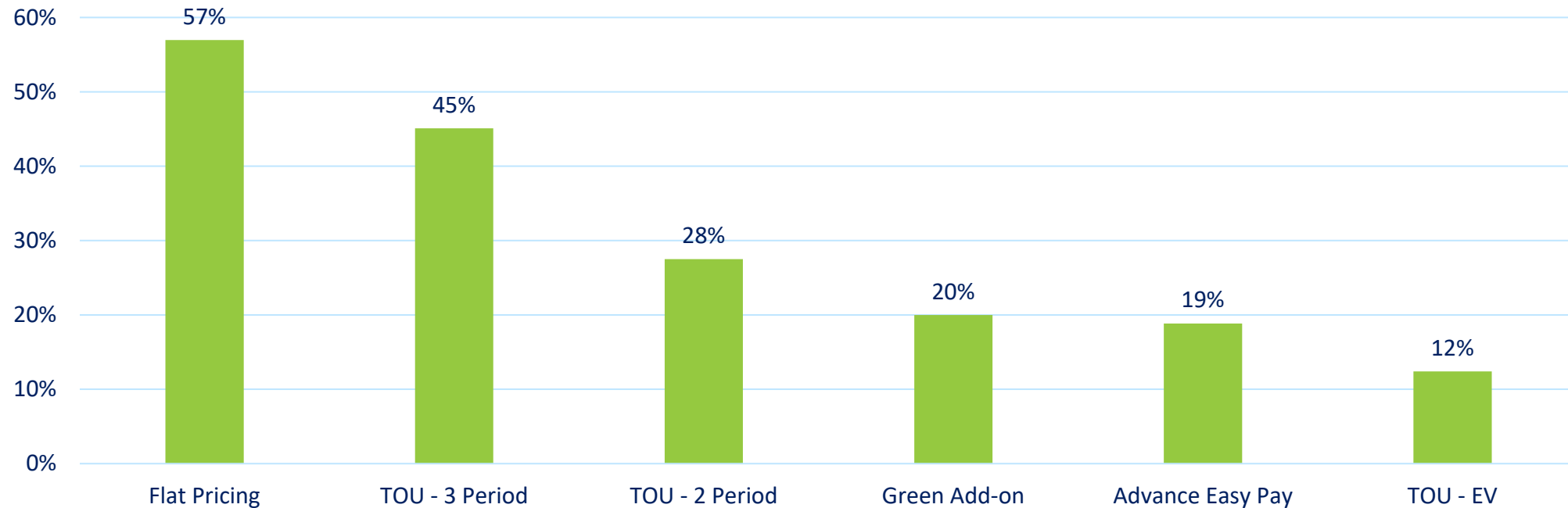




# Optional Rate Plans Evergy Should Offer

*After reading brief descriptions, Flat Pricing and TOU - 3 Period most popular*

Q6) Which Optional Rate Plans Evergy Should Offer



\* Please see the Appendix for brief rate descriptions

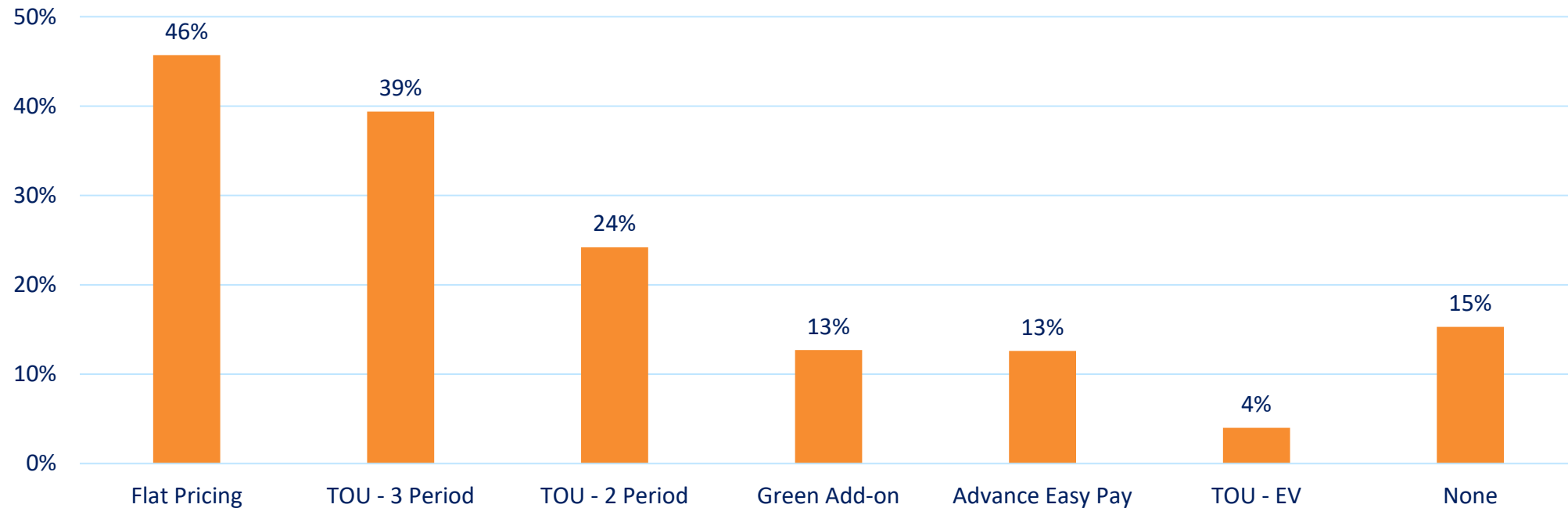




# Optional Rate Plans I'd Want more Information About

*Flat Pricing and TOU-3 Period remain most popular*

Q7) Which Optional Rate Plans I'd Want More Details



\* Please see the Appendix for brief rate descriptions

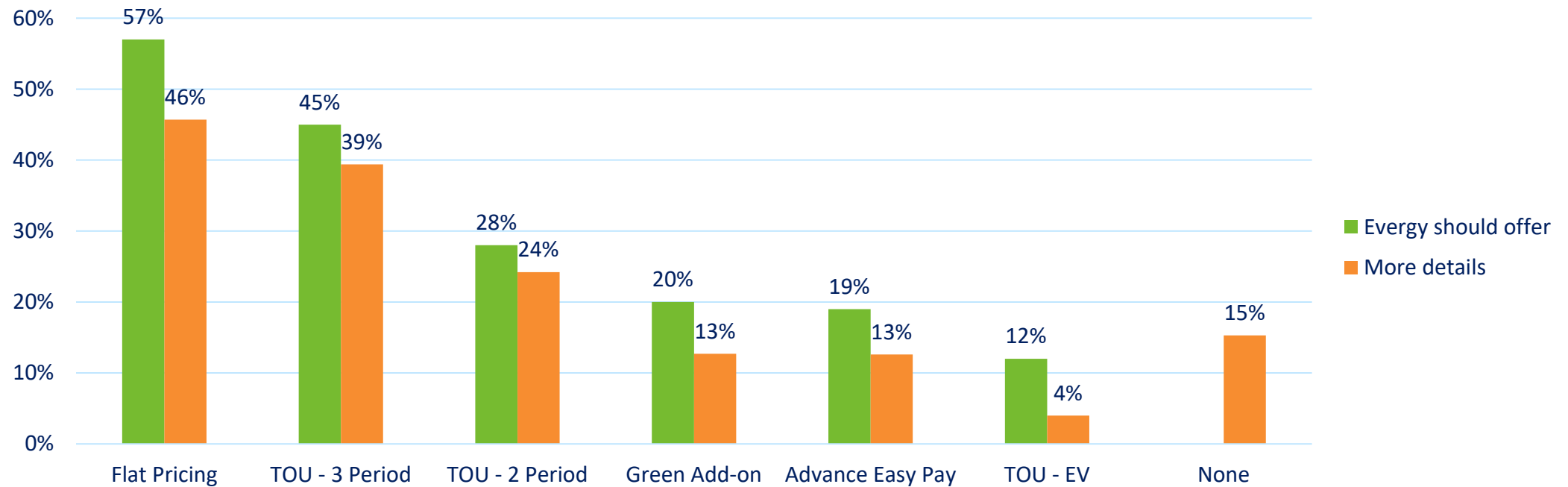




# Optional Rate Plans I'd Want more Information About

*Flat Pricing and TOU-3 Period remain most popular*

Q6) Which Rate Plans Evergy Should Offer, Q7) Which I'd Want More Details



\* Please see the Appendix for brief rate descriptions

Project 22-0025: Rates Research\_Q6 - Most utilities offer multiple rate plan options that allow customers to choose a plan that best fits their lifestyle. After reading these brief descriptions\*, which of these optional rate plans do you think Evergy should offer customers? Select all that apply.

Q7 - Based on the brief description of these potential new rate plans, which rate plan(s) would you be likely to contact Evergy for more details? Select all that apply.

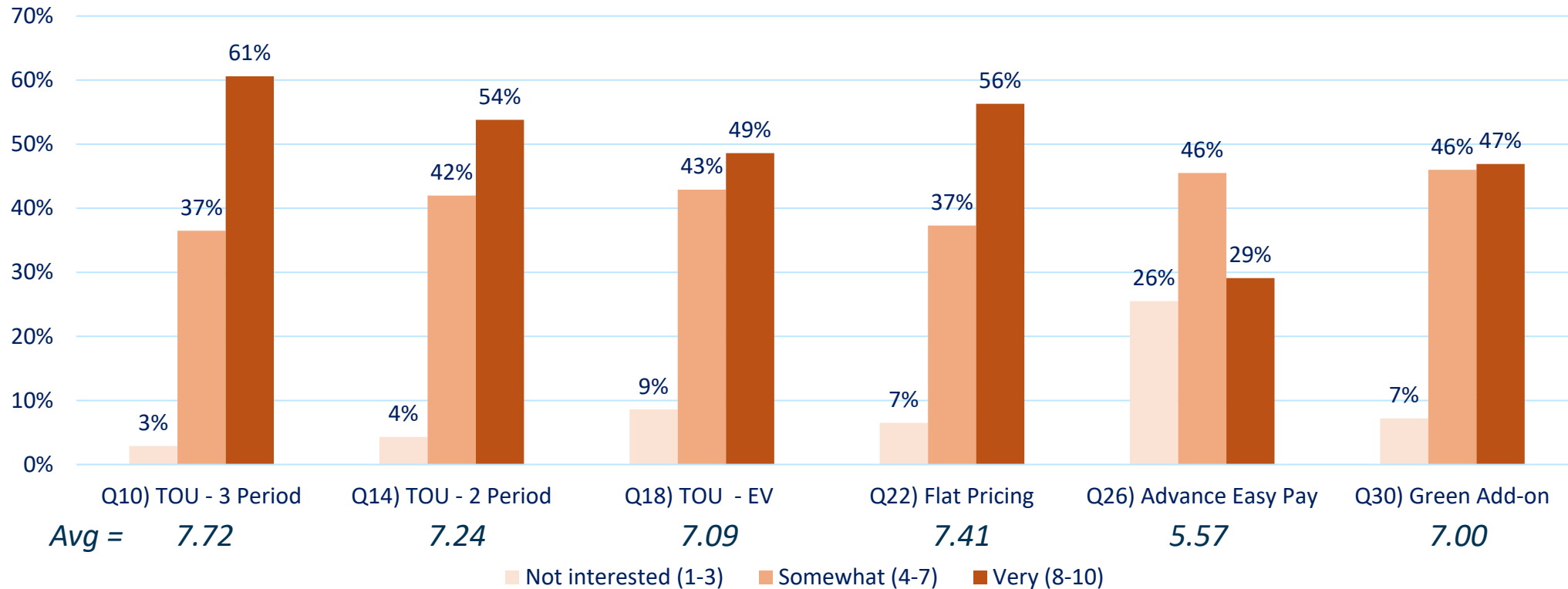




# Interest, After Reading More Details

*More than half still very interested in TOU-3 Period, Flat Pricing, and TOU-2 Period*

QR) Interest In Rate Plans with More Details\*



\* Please see the Appendix for detailed descriptions

Please see Appendix for detailed data findings

14

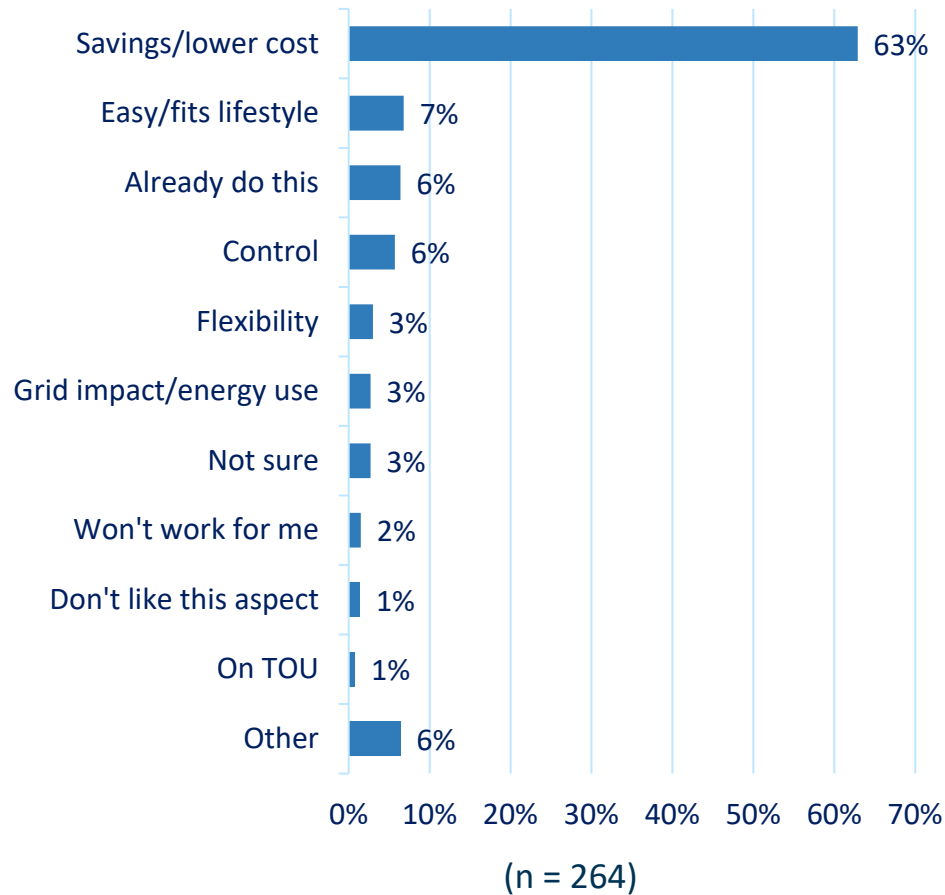
Project 22-0025: Rates Research\_ Next, we would like you to read a more detailed description\* of the rate plan(s) that you chose based on the brief descriptions. Please read through the detailed description before answering the next set of questions. Q10, Q14, Q18, Q22, Q26, Q30 - How would you rate your interest in this rate plan after reading the details?



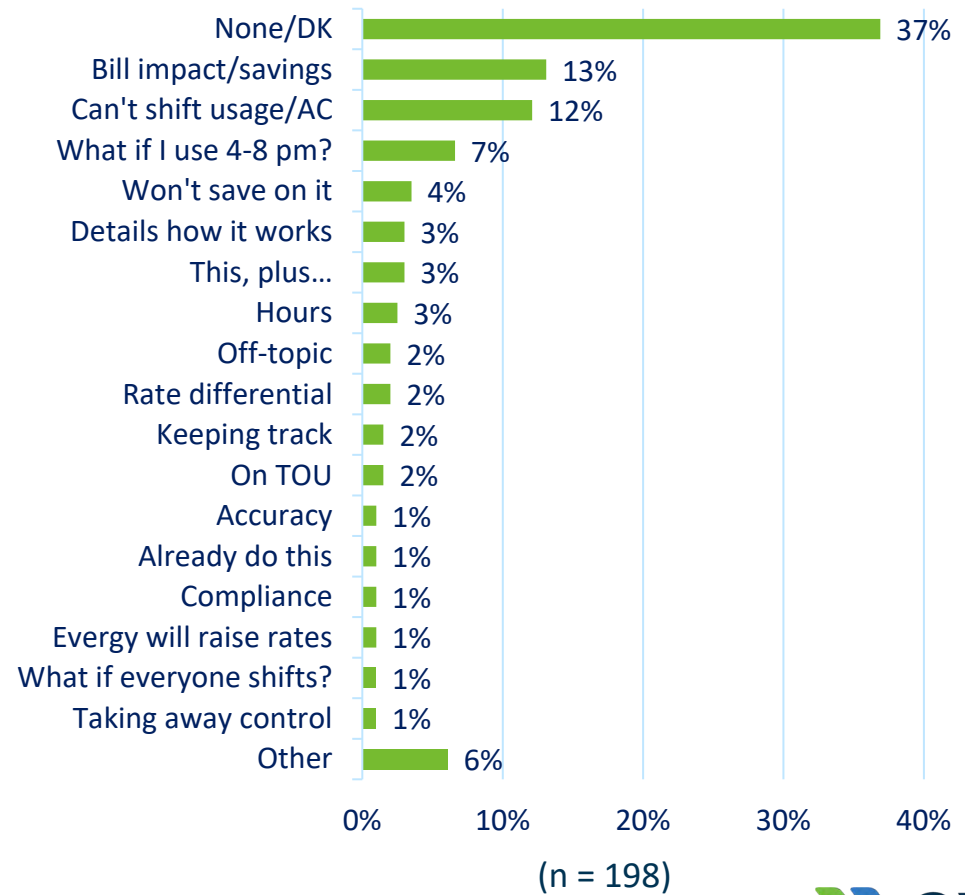
# TOU - 3 Period: What Appeals, What Questions

*Appeals focused on cost; Questions focused on bill impact, shifting usage*

Q11) Appeals



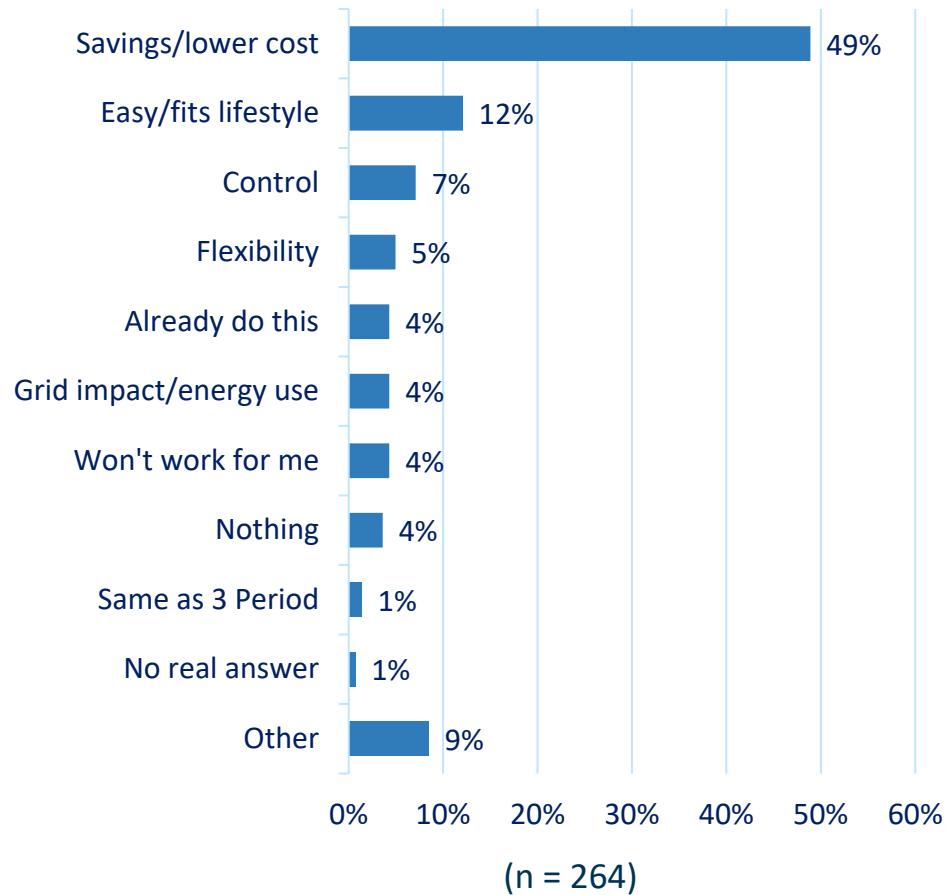
Q12) Questions or Concerns



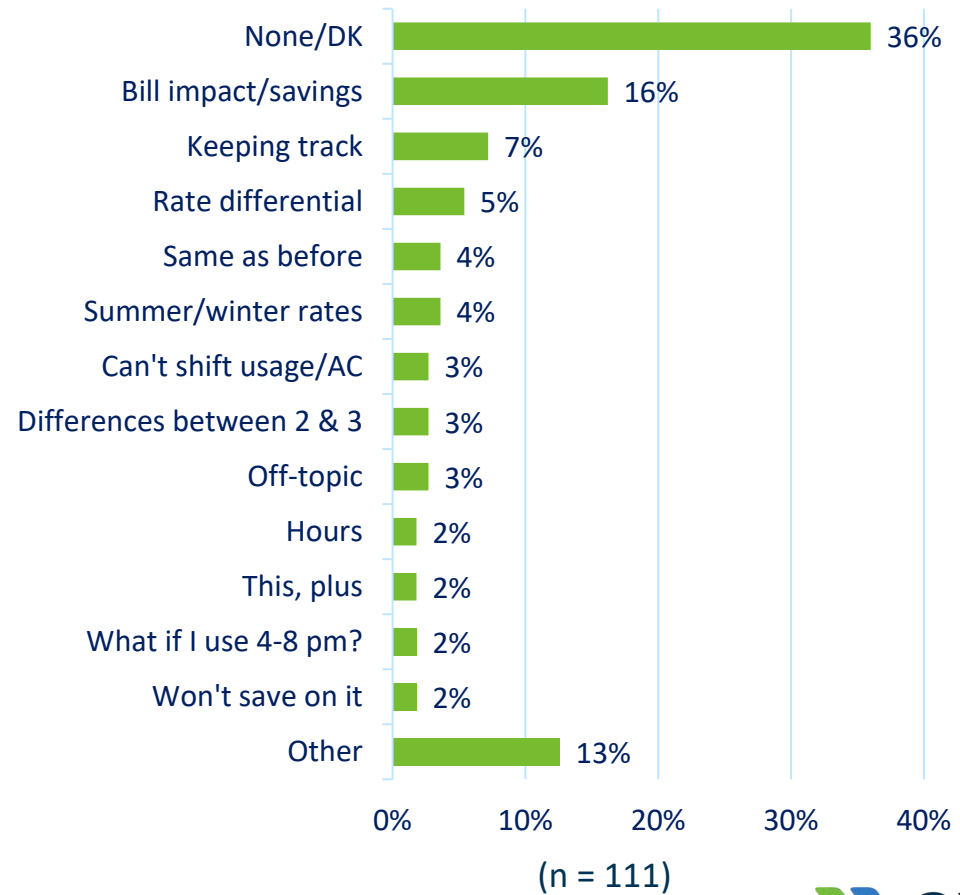
# TOU - 2 Period: What Appeals, What Questions

*Appeals focused on cost; Questions focused on bill impact, keeping track*

Q15) Appeals



Q16) Questions or Concerns

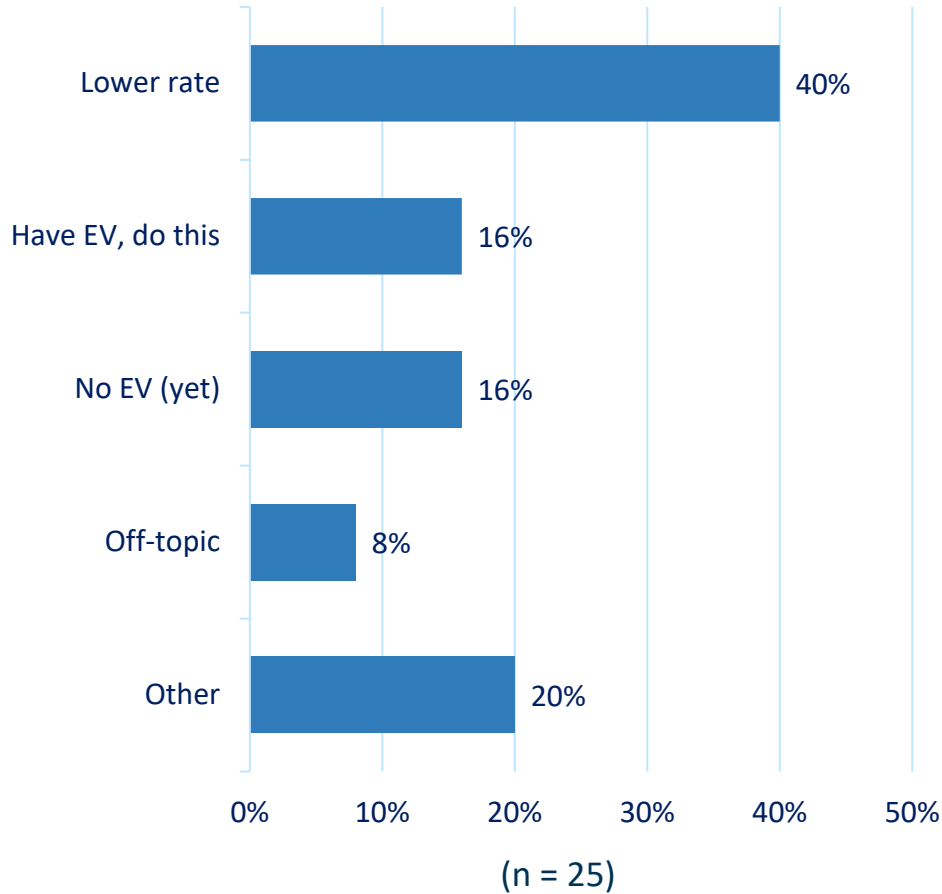




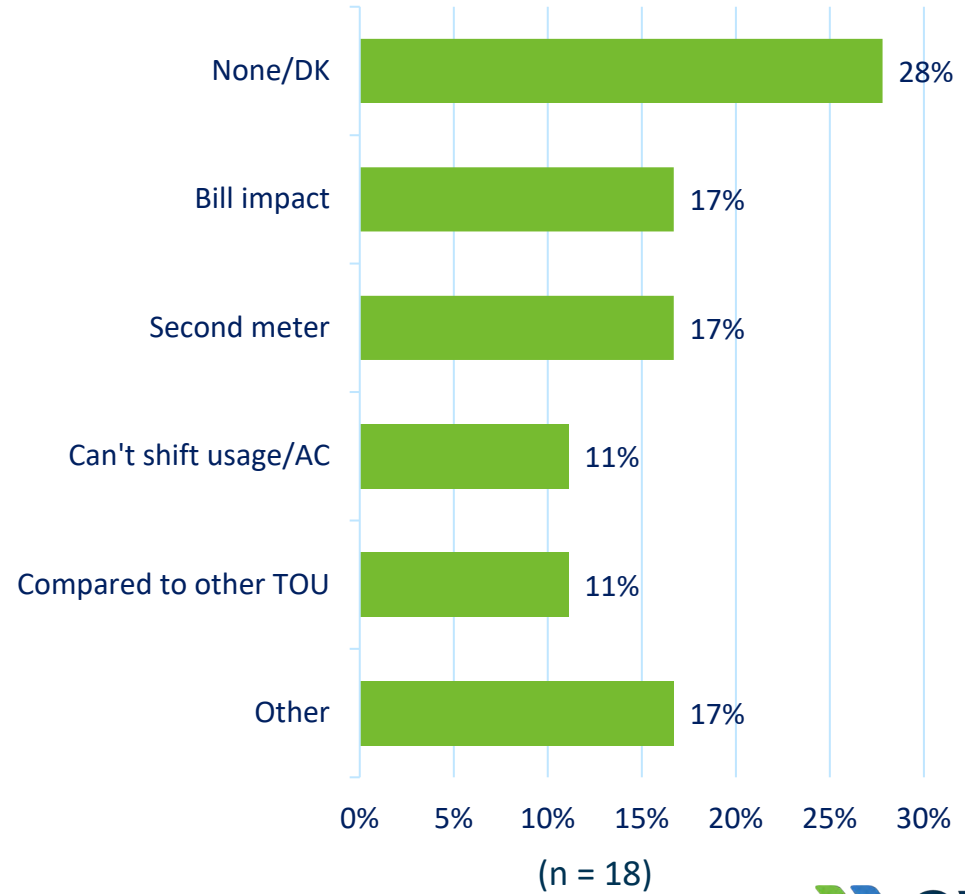
# TOU - Electric Vehicle: What Appeals, What Questions

*Appeals focused on lower rate; Questions varied*

### Q19) Appeals



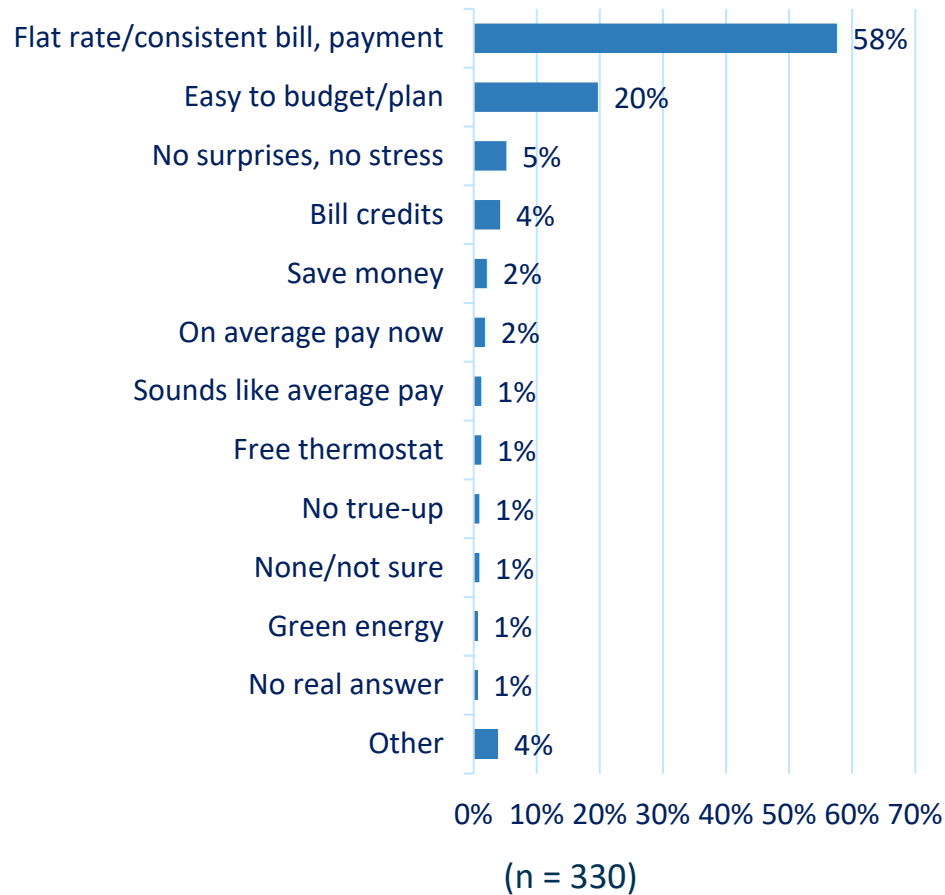
### Q20) Questions or Concerns



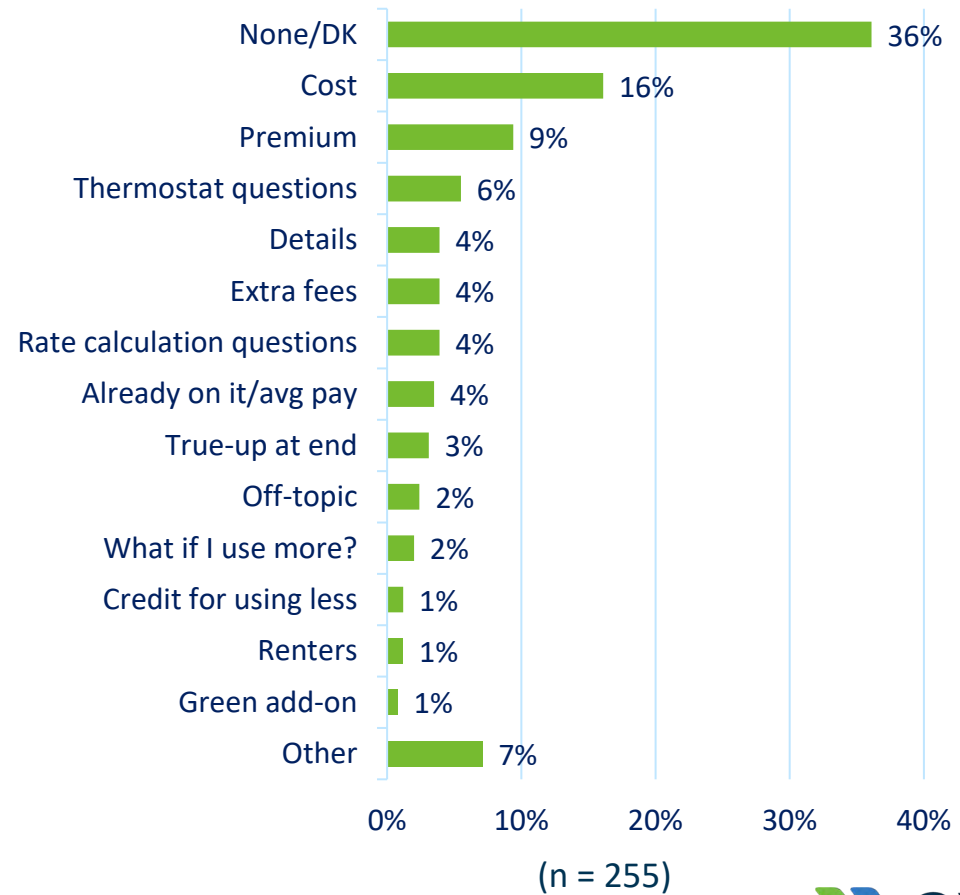
# Flat Pricing: What Appeals, What Questions

*Appeals focused on bill consistency; Questions focused on cost, premium*

Q23) Appeals



Q24) Questions or Concerns

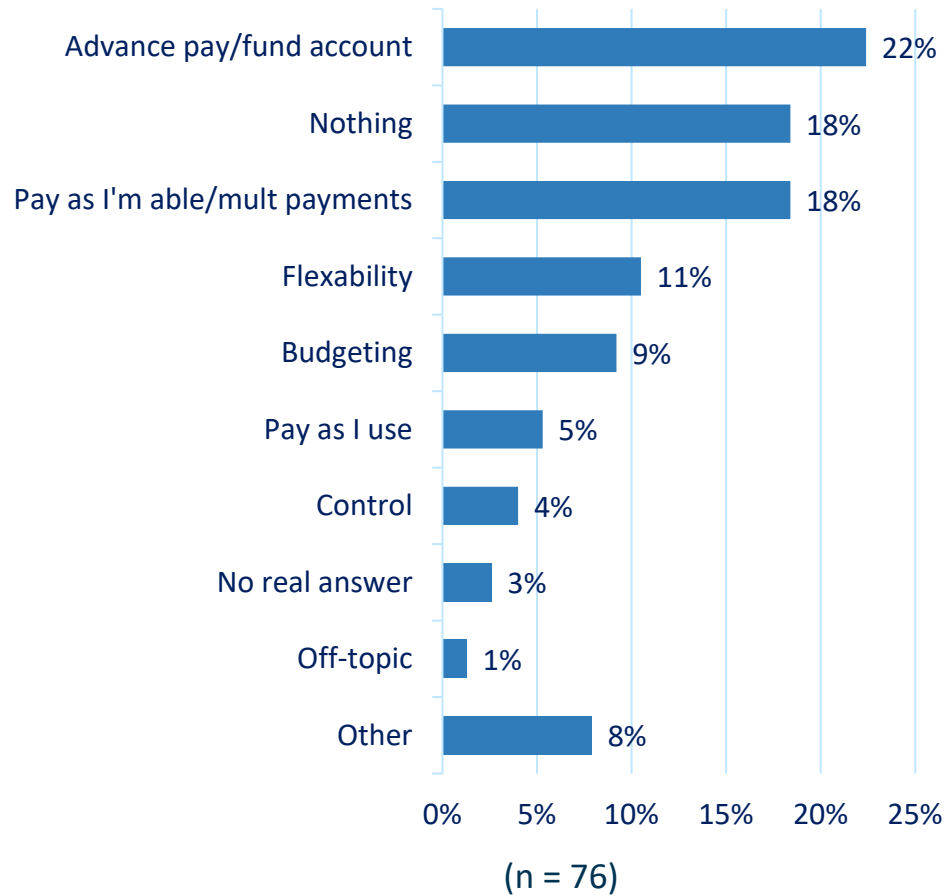




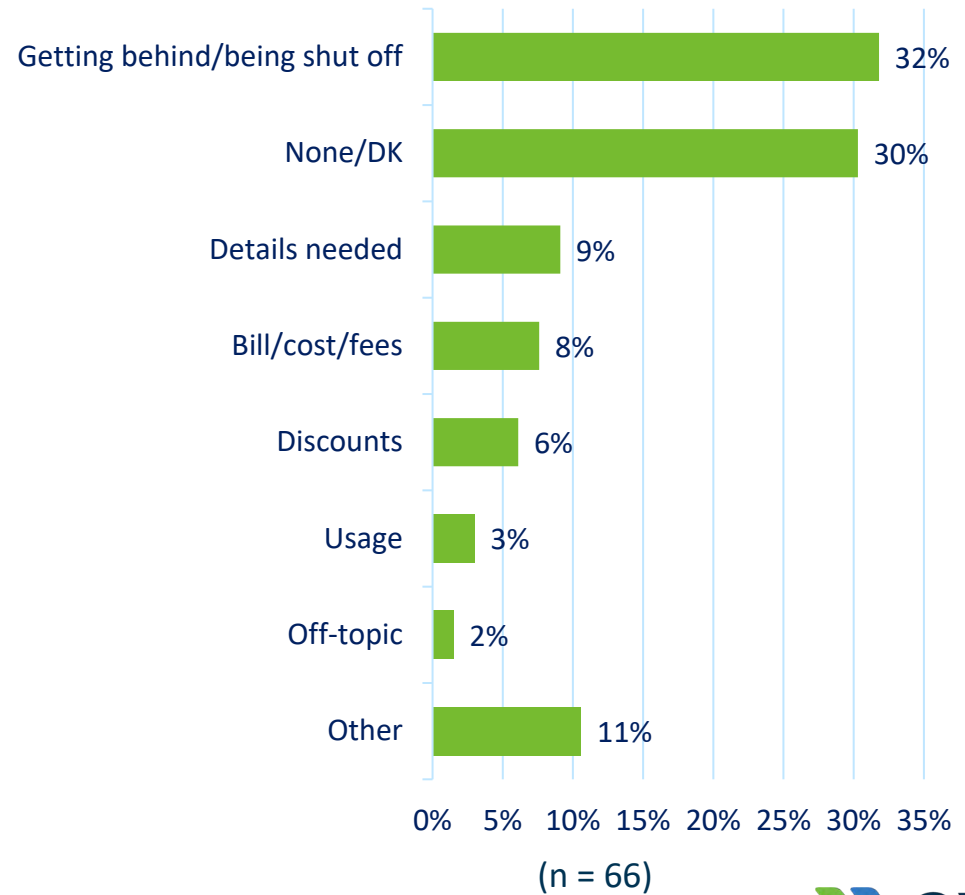
# Advance Easy Pay: What Appeals, What Questions

*Appeals focused on advance funding; Questions focused on getting behind*

### Q27) Appeals



### Q28) Questions or Concerns

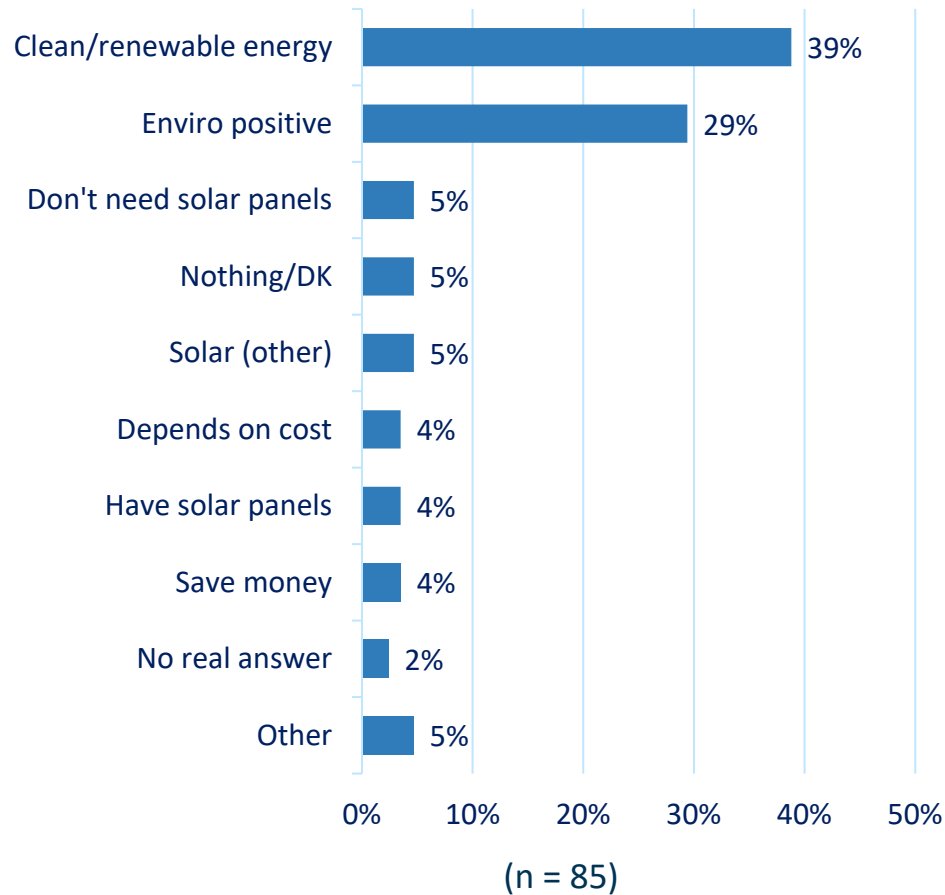




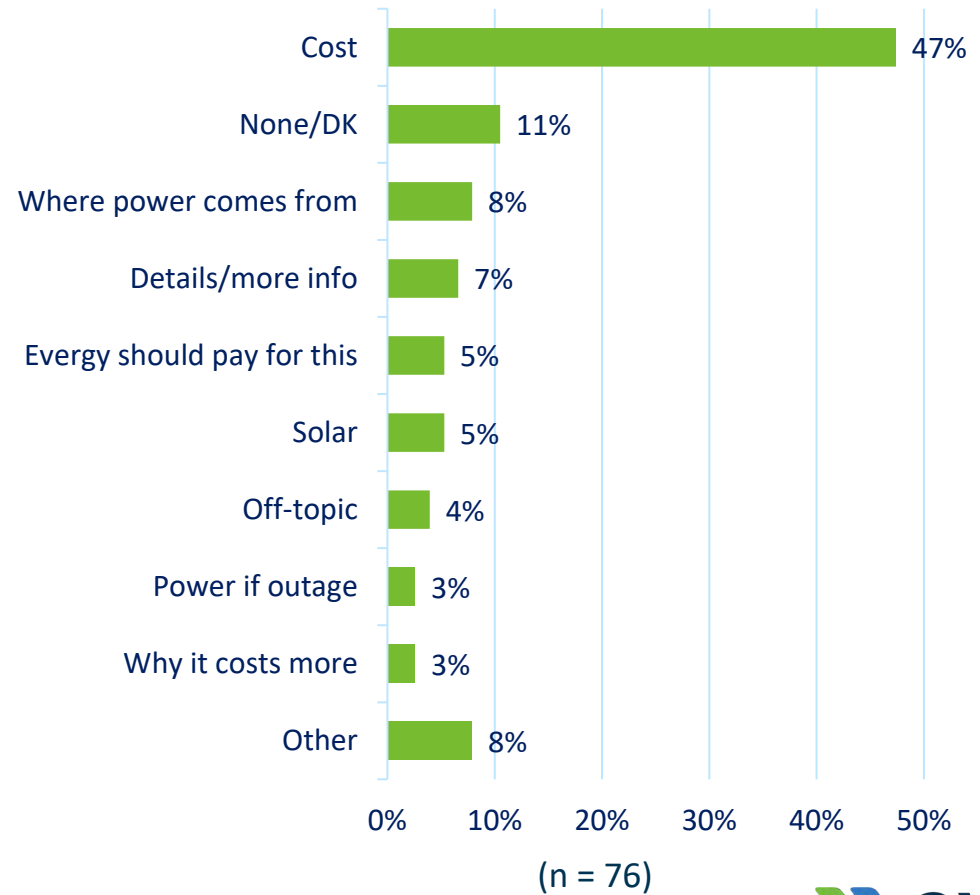
# Green Add-on: What Appeals, What Questions

*Appeals focused on renewable and environmental; Questions focused on cost*

Q31) Appeals



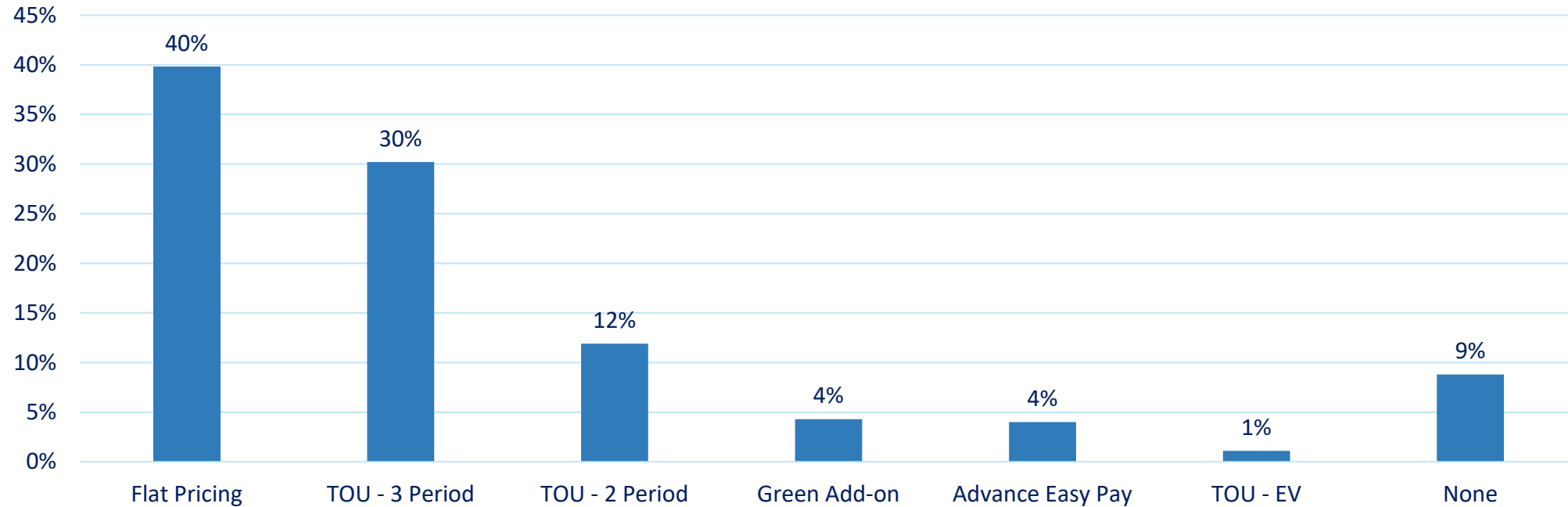
Q32) Questions or Concerns



# Which One Rate Plan Most Likely to Enroll In

*Flat Pricing and TOU-3 Period most popular*

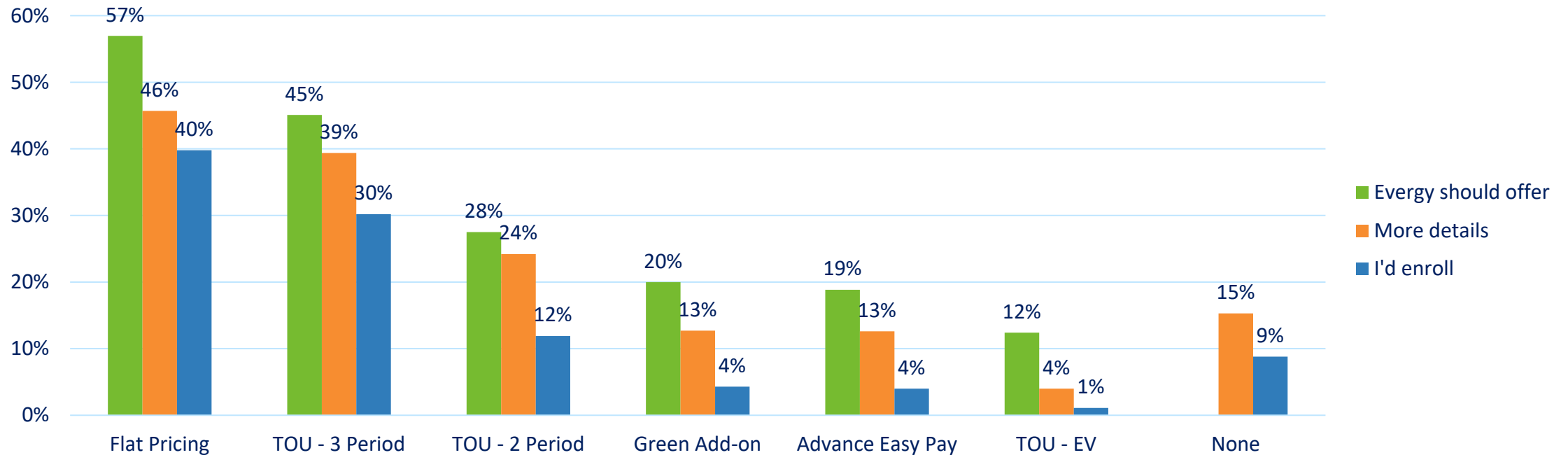
Q33) Which Rate Plan Most Likely to Enroll In



# Optional Rate Plan I'd be Most Likely to Enroll In

*Flat Pricing and TOU-3 Period remain most popular*

Q6) Rate Plans Evergy Should Offer, Q7) I'd Want More Details, Q33) One I'd Enroll In



Project 22-0025: Rates Research\_Q6 - Most utilities offer multiple rate plan options that allow customers to choose a plan that best fits their lifestyle. After reading these brief descriptions, which of these optional rate plans do you think Evergy should offer customers? Select all that apply.  
 Q7 - Based on the brief description of these potential new rate plans, which rate plan(s) would you be likely to contact Evergy for more details? Select all that apply.  
 Q33 - After reading the detailed descriptions of these rate plans, which one would you be MOST LIKELY to enroll in based on your family's lifestyle and electric usage?



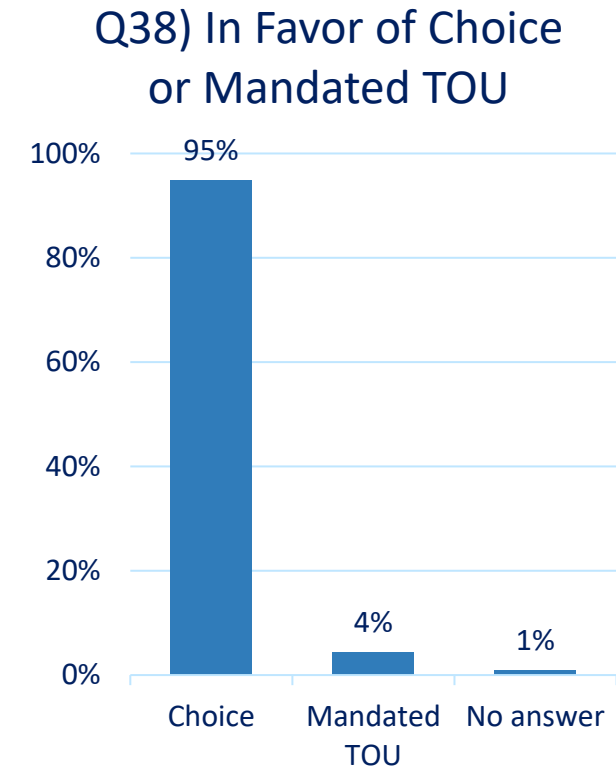
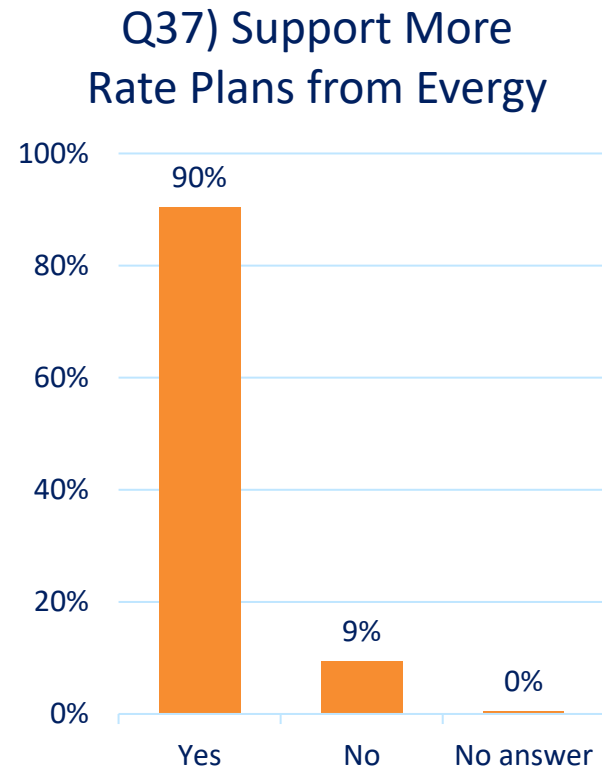
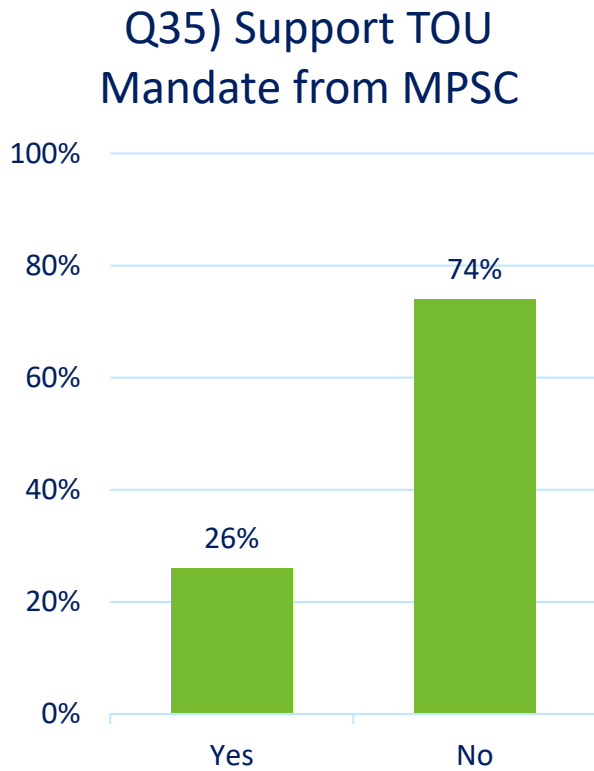
# Mandates and the Missouri Public Service Commission





# Support TOU Mandate from MPSC, or Choice from Evergy

*Most would not support mandated TOU rate, want choice of rates*



*Project 22-0025: Rates Research\_Q35 - Currently the Missouri Public Service Commission, which regulates Evergy and sets Evergy's rates and rate plans, is considering mandating that Evergy put all of our residential customers on a time of use plan. Would you be in support of the Missouri Public Service Commission's desire to mandate all Evergy residential customers to be on a time of use rate plan?*

*Q37 - In the current rate review, Evergy is asking for the Missouri Public Service Commission to approve multiple new rate plans that would allow customers to choose the rate plan that best fits their lifestyle. Do you support Evergy's request to provide customers with more rate plan options?*

*Q38 - Those who support mandating all residential customers be on a time of use rate plan, argue that putting everyone on the same time of use plan will help keep electric costs low and is the most fair solution for all customers. However, Evergy supports giving customers a choice in their rate plan because customer lifestyles vary. This would allow customers who own electric vehicles, or generate a portion of their electricity from solar, or who are single or part of a large family to choose a plan that best fits them. Knowing this, are you more in favor of mandating all residential customers to be on a time of use rate or giving customers a choice in what rate plan is best for them?*

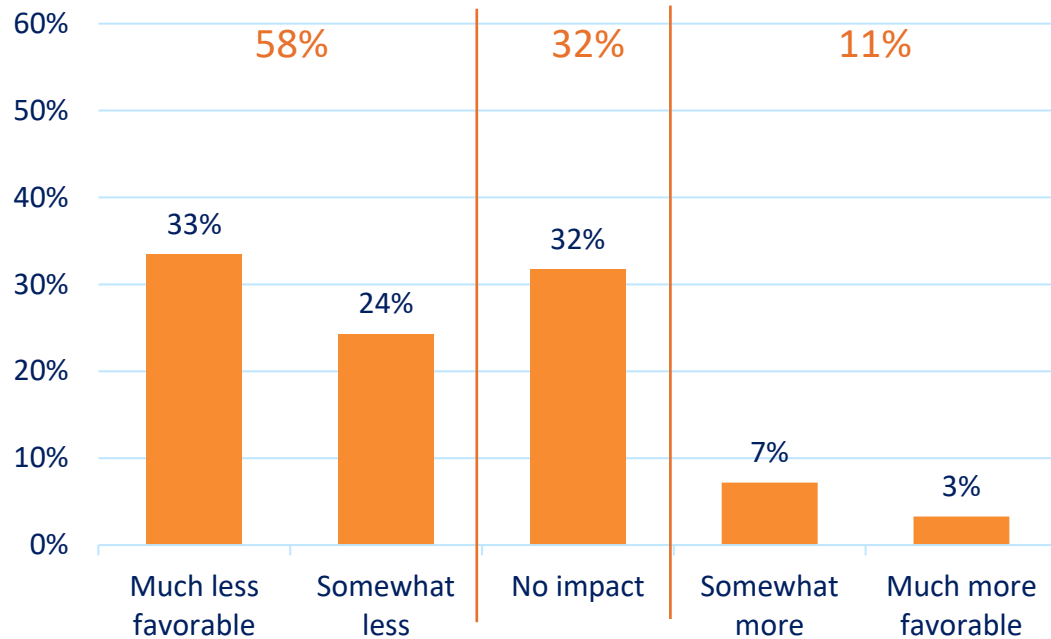




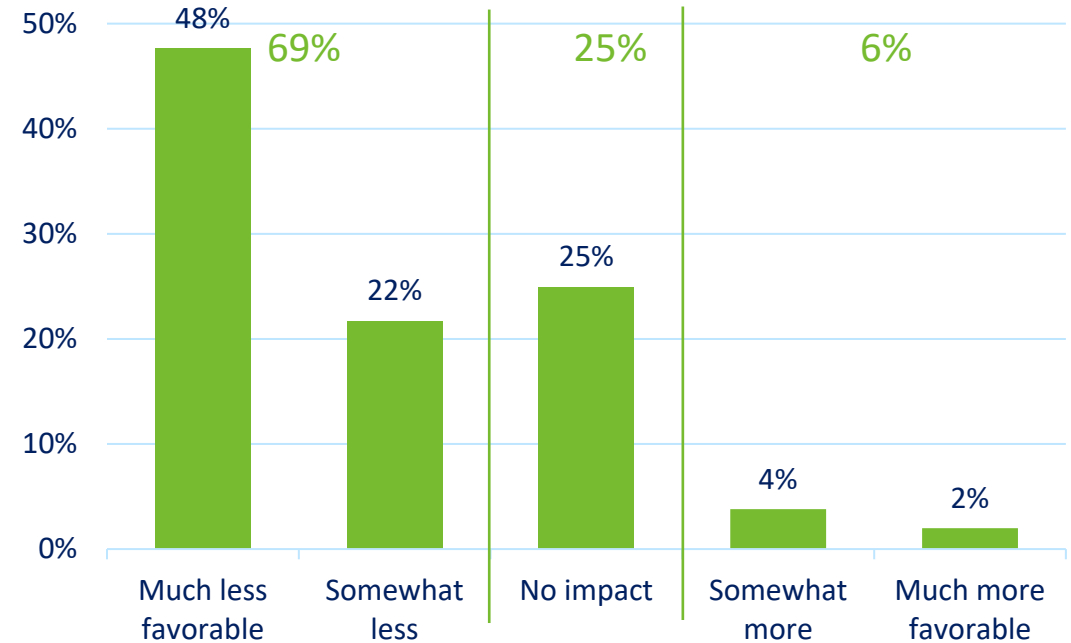
# Impact on Satisfaction with Evergy, MPSC if Mandated

*For both Evergy and the MPSC, satisfaction would slide if TOU is mandated*

Q36) Satisfaction with Evergy  
if MPSC Mandated TOU



Q39) Satisfaction with MSPC  
if MPSC Mandated TOU



Project 22-0025: Rates Research\_Q36 - How would your satisfaction with Evergy be impacted if the Missouri Public Service Commission mandated Evergy to put all residential customers on a time of use rate plan?

Q39 - If the state regulators (Missouri Public Service Commission) required that all of Evergy's Missouri residential customers switch to a time of use rate plan, how would that impact your satisfaction with Missouri Public Service Commission?



# Flat Rate, TOU EV Rate

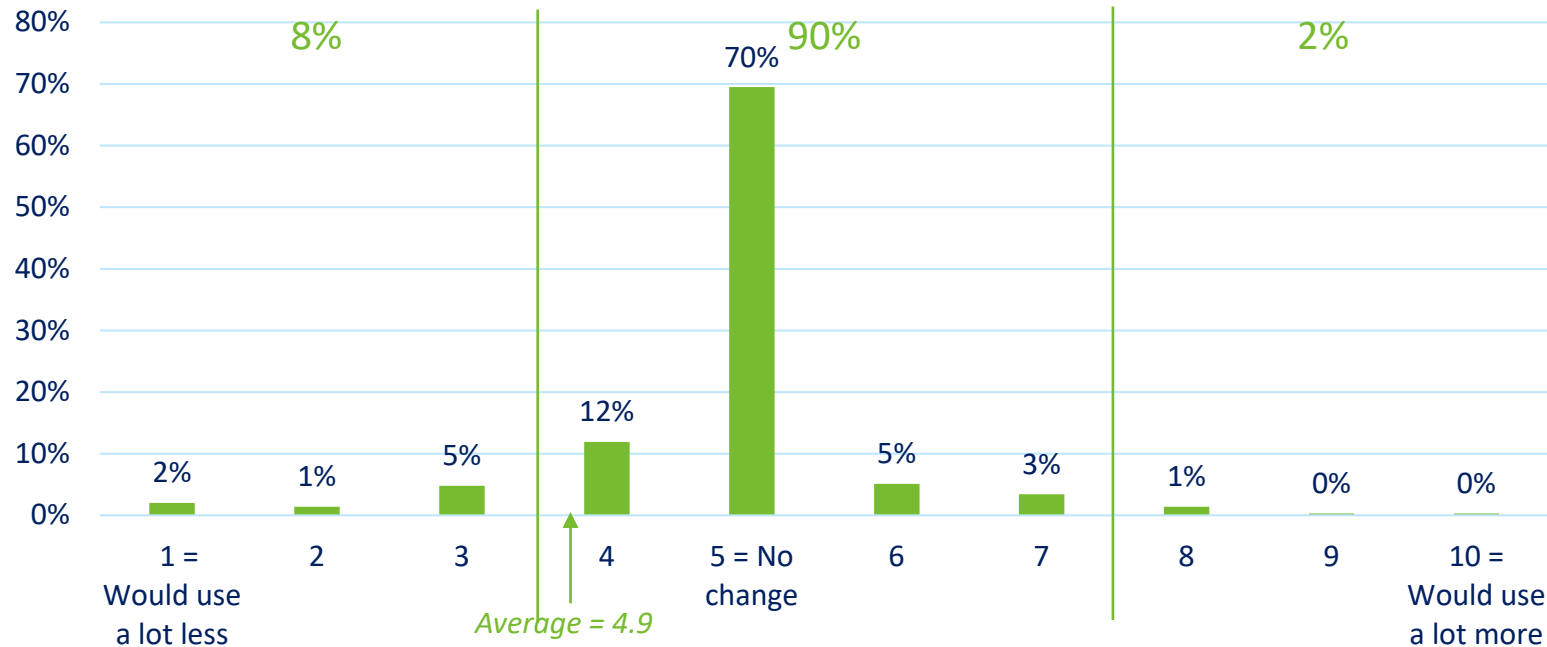
- *Follow-up questions*



# Likely Impact of Flat Pricing Rate on Energy Use

*Very few say they would materially change their energy use, either way*

Q34) Impact of Flat Pricing on Likely Energy Use

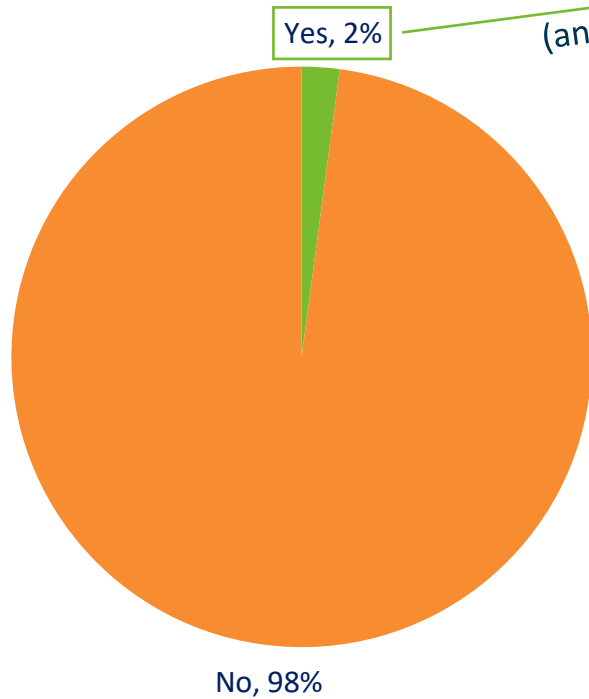




# EV and TOU EV Rate?

*For these few EV drivers, cost and charging habits impact interest*

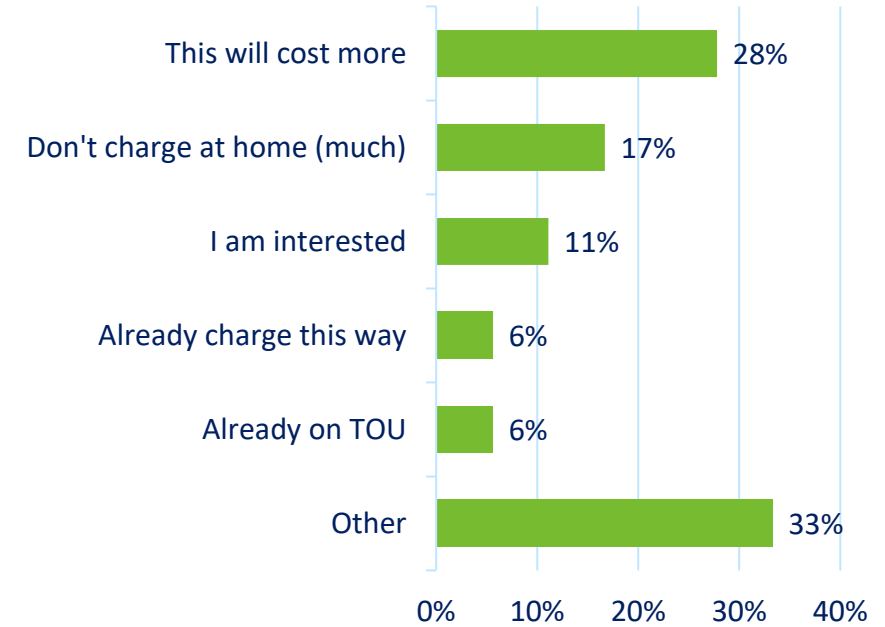
Q40) Own EV, charge at home



Yes, 2%

(and not interested in TOU EV rate)

Q41) Why Not Interested in TOU EV Rate



(n = 18)

Project 22-0025: Rates Research\_Q40 - Do you currently own an all-electric vehicle that you charge at home?  
Q41 - We noticed you are not interested in the Time of Use (Electric Vehicle) plan and you own an electric car that you charge at home, can you please tell us why you are not interested in it?



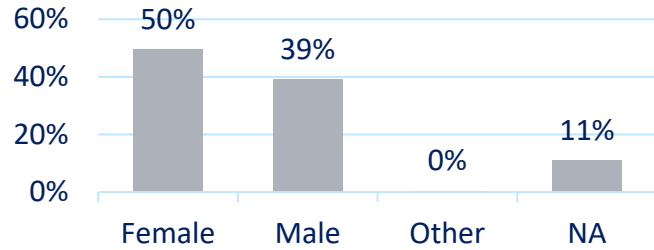
# Respondent Demographics

- *Basic characteristics*
- *Housing characteristics*

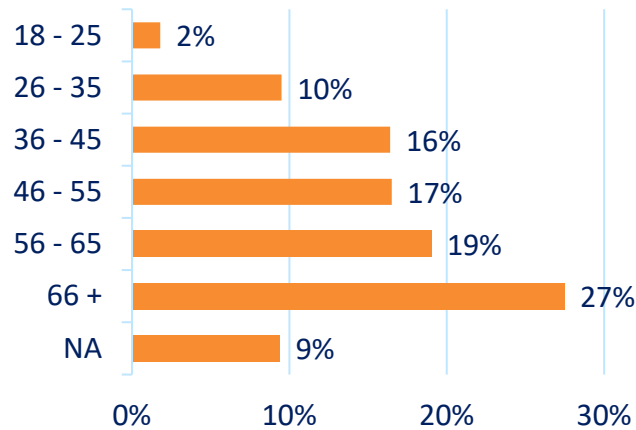


# Basic Characteristics

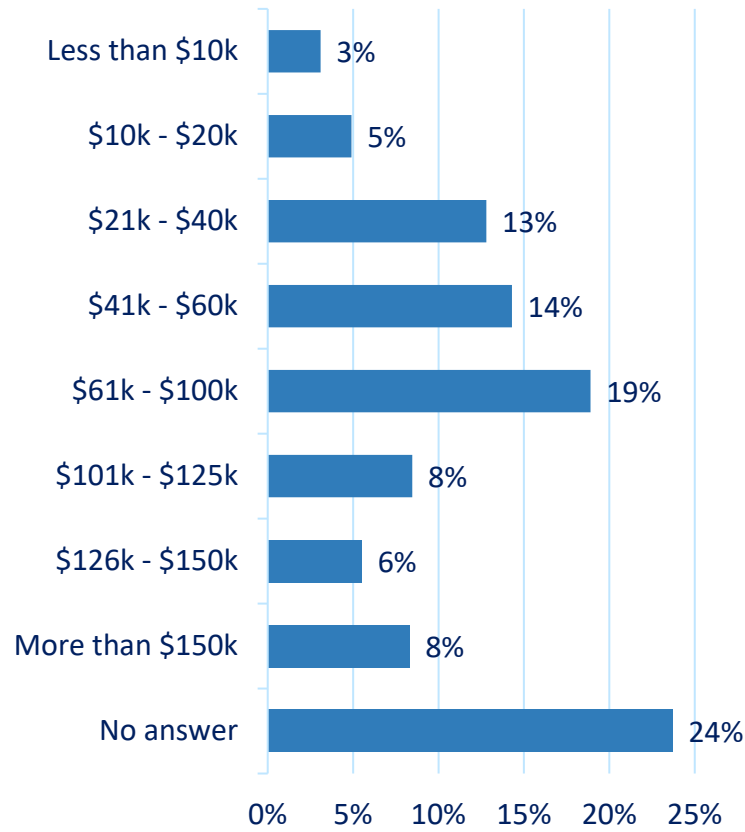
Q42) Gender



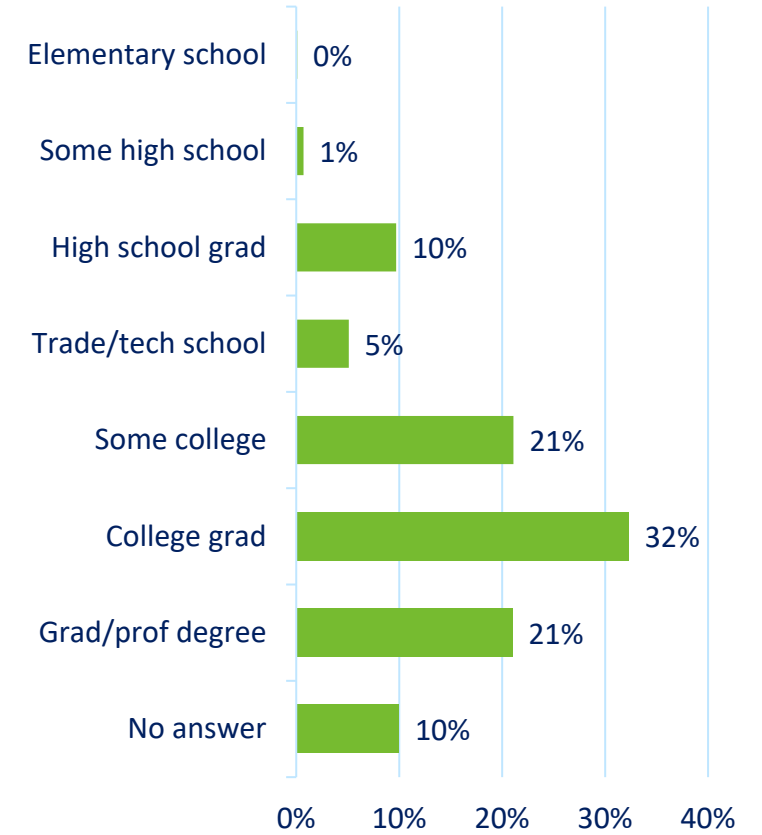
Q43) Age Group



Q44) Income

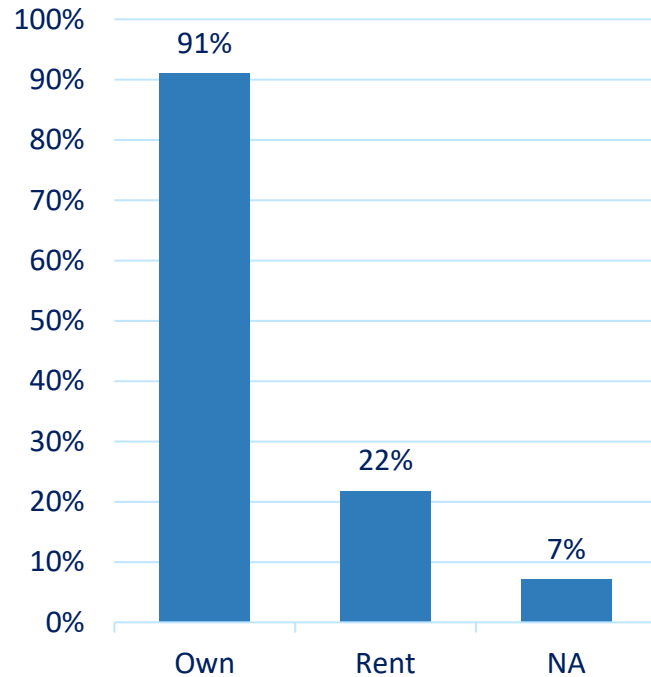


Q45) Education

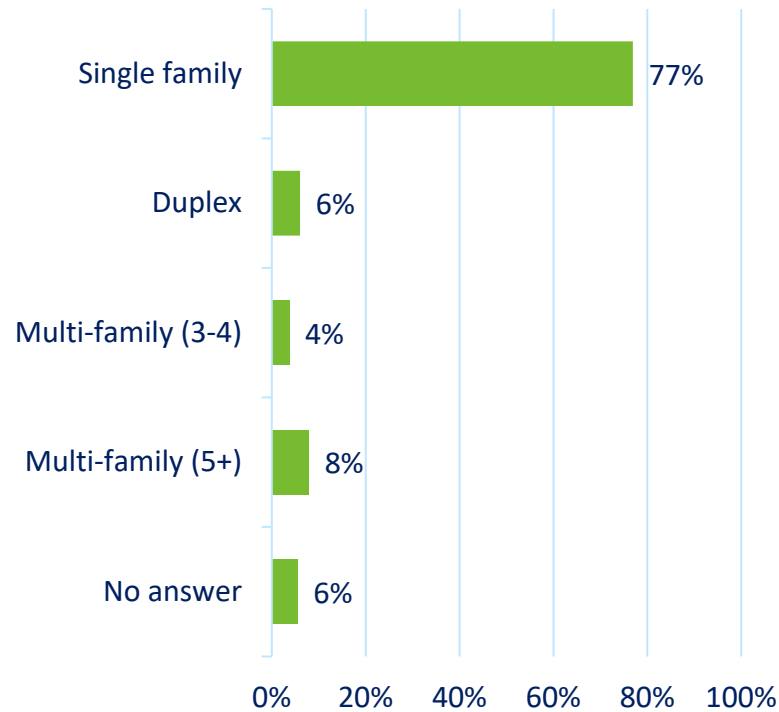


# Housing Characteristics

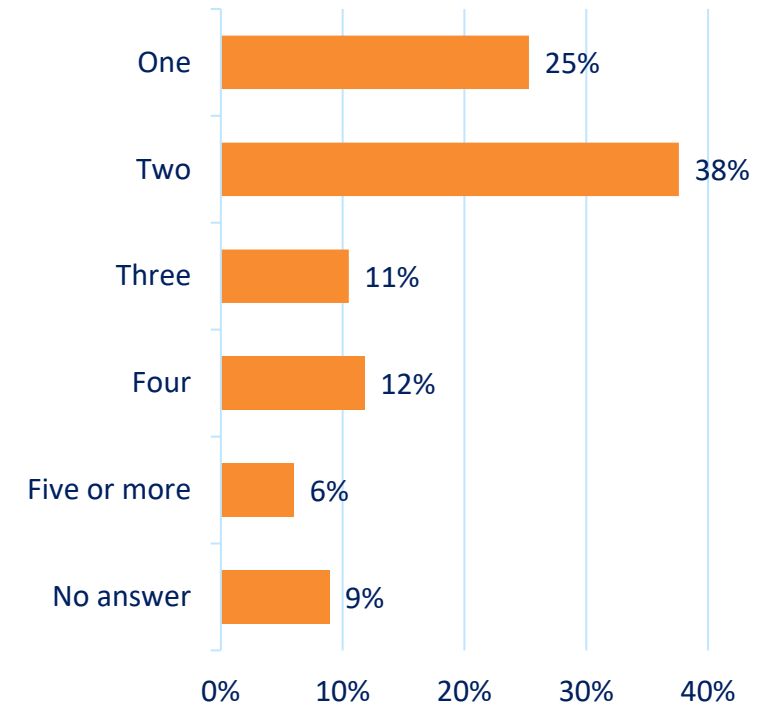
### Q46) Housing Ownership



### Q47) Housing Type



### Q48) Household Size



# Appendix

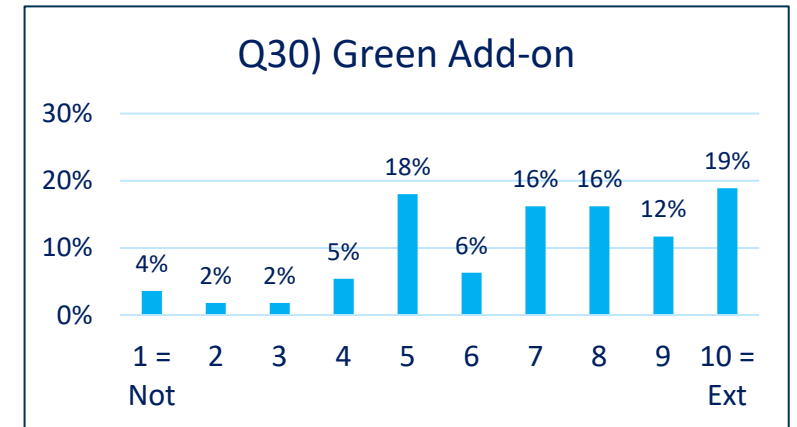
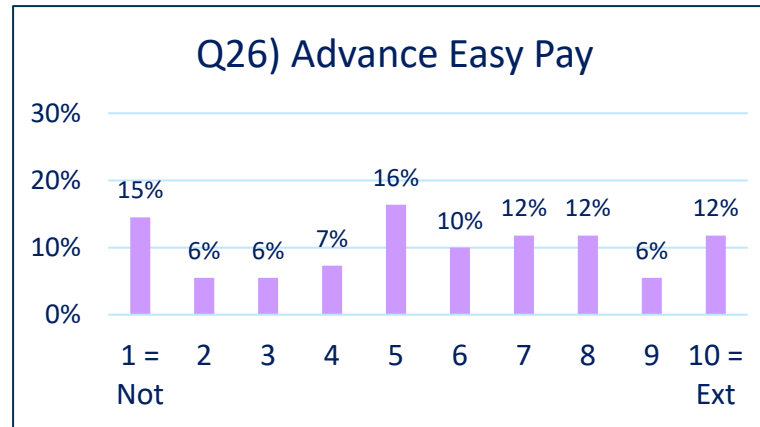
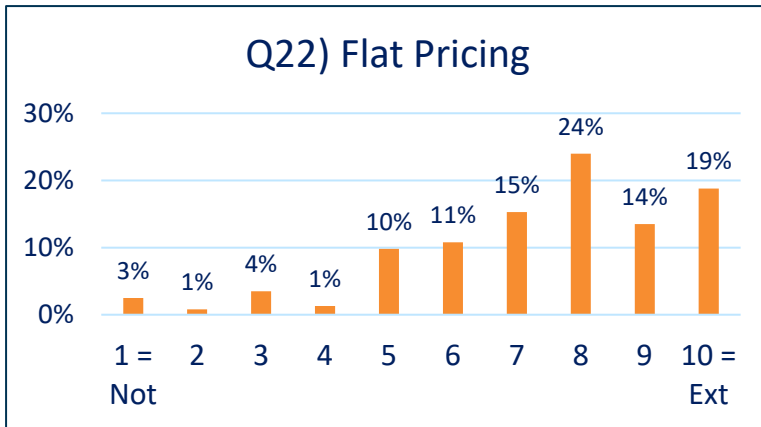
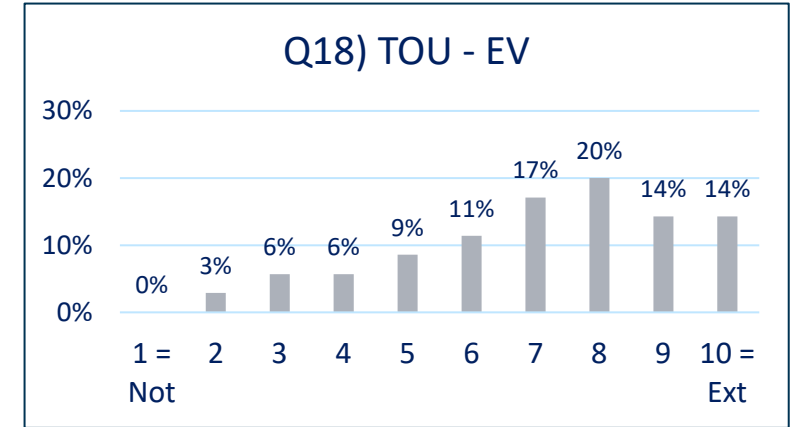
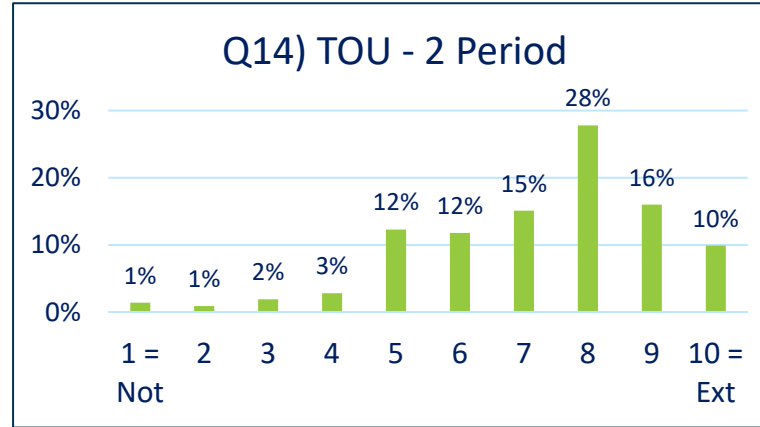
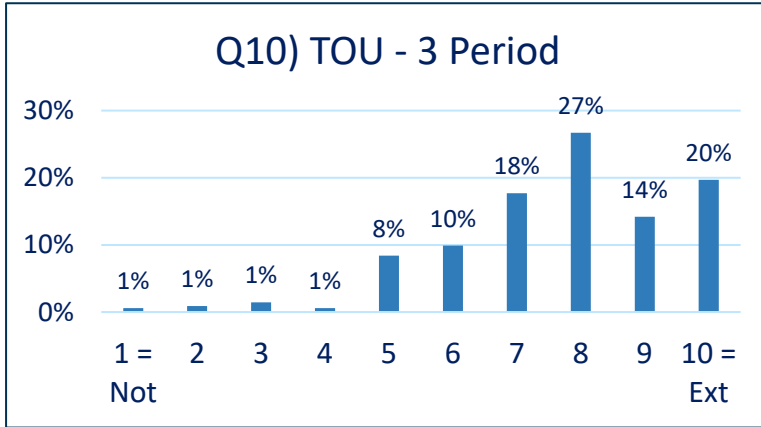
- *Details Q10, Q14, Q18, Q22, Q26, Q30*
- *Survey flow through questionnaire*
- *Brief descriptions*
- *Detailed descriptions*





# Interest, After Reading More Details

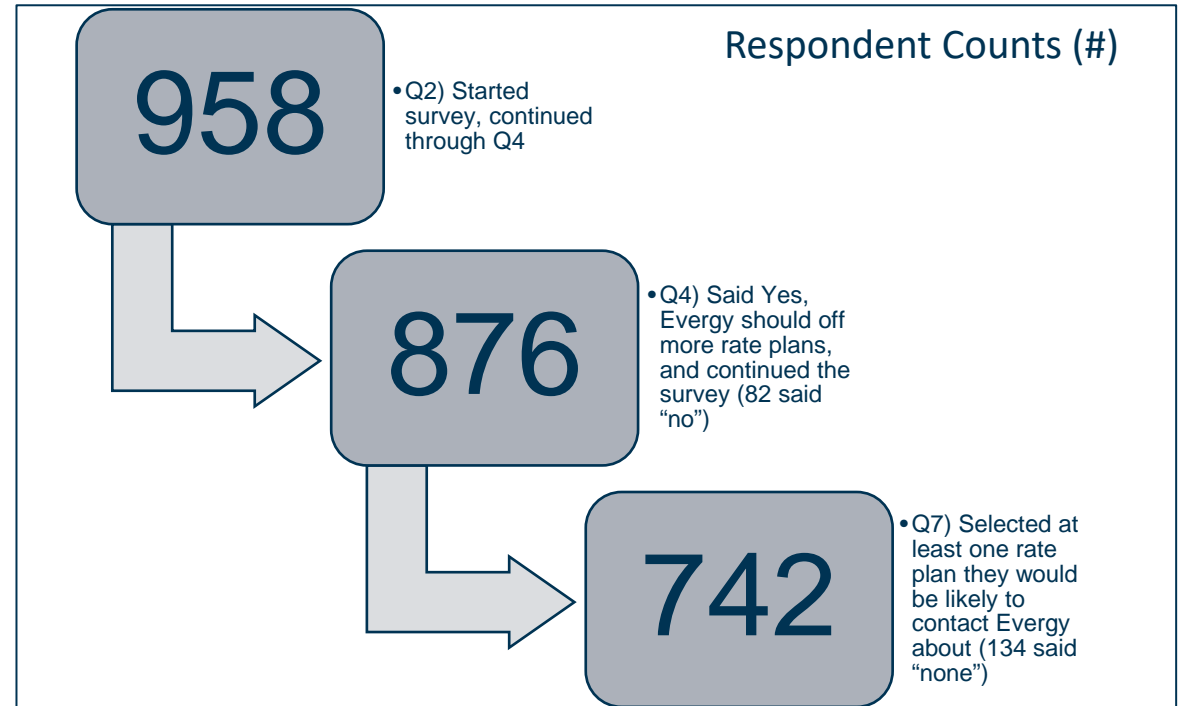
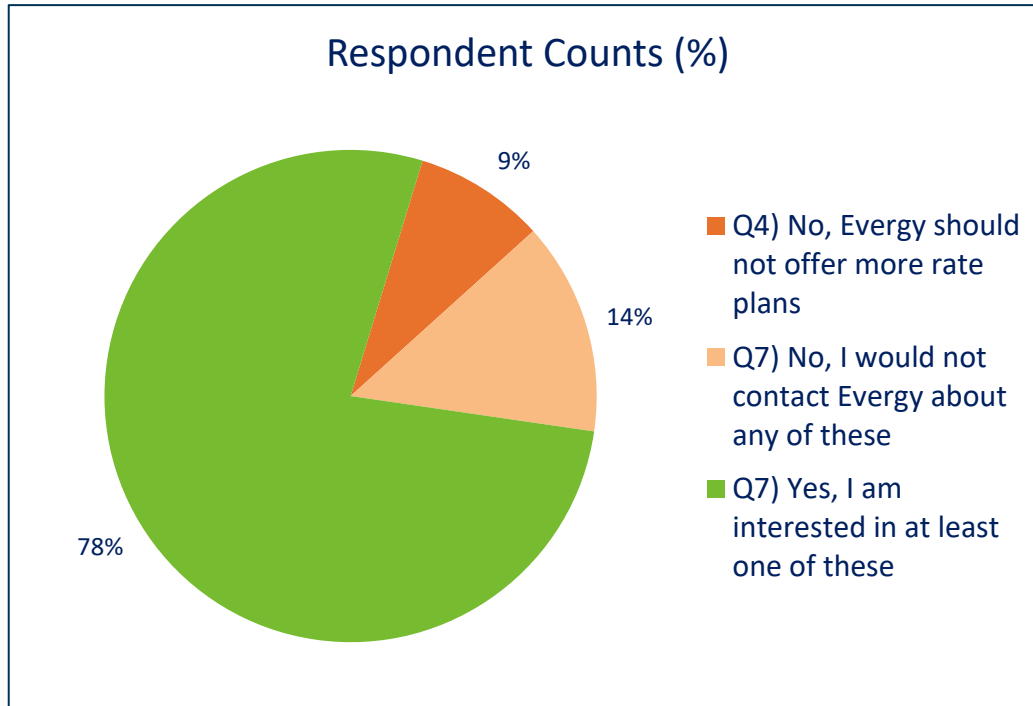
*Detailed ratings of interest, after seeing more detailed descriptions*





# Survey Flow through Questionnaire

*Of total respondents, 78% were interested in at least one rate plan*





# Brief Descriptions of Optional Rate Plans

## Used for Question 6

Q6 - Most utilities offer multiple rate plan options that allow customers to choose a plan that best fits their lifestyle. After reading these brief descriptions, which of these optional rate plans do you think Evergy should offer customers? *Select all that apply*

**Time of Use Plan (3-Period)** - *Designed for those who have the most flexibility throughout the year and day to shift energy use to lower their bill.* Get rewarded with the lowest rates when you shift your weekday energy use to times when the cost of energy is lower. If you can run your large appliances, like the dishwasher or dryer, before 4 pm or after 8pm on Monday through Friday, this plan can help you lower your energy bill. Energy cost on this rate is highest between 4 pm and 8 pm on weekdays. You can also get an even greater discount on your energy from midnight to 6am during the summer and the winter. Three easy periods to decide when you want to use energy.

**Time of Use Plan (2-Period)** - *Designed for those with flexibility on when they use energy, especially in the summer.* This rate plan provides low energy cost for customers who can shift their weekday energy use before 4 pm or after 8pm on weekdays during the summer. In the winter, you will always save with low energy costs, but you get an even greater discount on your energy from midnight to 6am during the winter only. Two periods to decide when you want to use energy.

**Time of Use Plan (Electric Vehicle)** - *Designed for electric vehicle drivers who can charge after 8 pm on weekdays.* Designed with the electric vehicle driver in mind, this plan gives drivers a discounted rate when you charge your electric vehicle (or use other household appliances) after 8pm. This plan has two options, giving electric vehicle owners the flexibility to apply this plan to their whole home energy usage or just their electric vehicle charger.

**Flat Pricing Plan** - *Designed for those who want convenience and predictability.* Avoid fluctuating monthly bills by getting the same monthly bill for all your energy needs, without any yearly true-up. Take the guesswork out of your energy bill and pay a small premium for a predictable bill. Similar to an unlimited cell-phone plan, this option offers you a fixed monthly bill for all your energy and allows you to earn a credit if your energy use is less than expected.

**Advance Easy Pay** - *Designed for those who want payment flexibility.* Pay as little or as much as you want, when you want, by paying for your energy needs ahead of time. Simply add funds to your Evergy account and as you use energy, your balance will be reduced. You'll get notices when your account is low on funds and it's time to add more, helping you to better manage your budget and energy bill.

**Green Add-on** - *Designed for those who want up to 100% renewable energy.* Get green energy for your home by purchasing renewable energy credits to cover part or all of your energy usage. For a small additional monthly fee, Evergy will make sure your energy is certified renewable to help meet your carbon and sustainability interests.



# Lengthy Description: Time of Use Plan (3-Period)

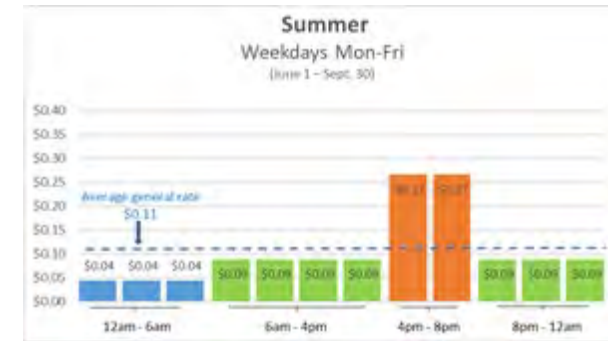
*Used for Questions 10 - 12*

## Q9 Time of Use Plan (3-Period)

Get rewarded with rate discounts when you shift weekday (Monday-Friday) energy use to times when the cost of energy is lower, like after 8 pm. Evergy's rate comparison tool makes it easy to see how you might have performed on the Time of Use Plan over the last 12 months. Compare My Plan Change My Plan

How does it work?

The cost of generating energy varies by time of the day, day of the week and by season. Because energy costs are lower during certain parts of the day, Evergy would pass the savings on to you. You'll pay a lower charge during Saver and Super Saver times when you remember to "wait 'til 8." Plus, you always save on weekends and holidays.



# Lengthy Description: Time of Use Plan (2-Period)

## Used for Questions 14 - 16

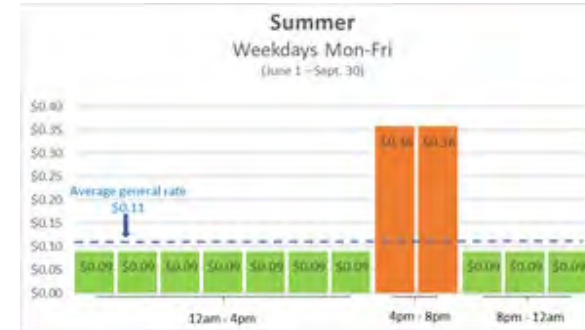
### Q13 Time of Use Plan (2-Period)

Get rewarded with rate discounts when you shift your summer energy use to times when the cost of energy is lower, like after 8pm. If you can run your large appliances, like the dishwasher or clothes dryer, outside of the weekday hours of Monday-Friday from 4pm- 8pm in the summer, this plan can help you lower your energy bill.

This rate plan is designed to provide cheaper rates for customers who can shift their electric usage to times when the cost of energy is lower. The plan provides a cheaper rate for energy most of the day but has a high rate for electricity used during the summer hours of Monday – Friday between 4-8pm (June 1 – Sept. 30). In the winter, you will always save with lower rates every day, plus get an extra discount on energy used from midnight to 6am.

### How does it work?

The cost of generating energy varies by time of the day, day of the week and by season. Providing that power costs less during certain times, so Evergy would pass the savings on to you. You will pay a lower per-kilowatt hour charge most of the time, especially in the winter, but you'll need to shift your energy usage in the summer to avoid the hours of 4-8pm Monday-Friday, which have a high cost. But don't worry, on weekends and holidays you will always save with lower energy cost.



# Lengthy Description: Time of Use Plan (Electric Vehicle)

*Used for Questions 18 - 20*

## Q17 Time of Use Plan (Electric Vehicle)

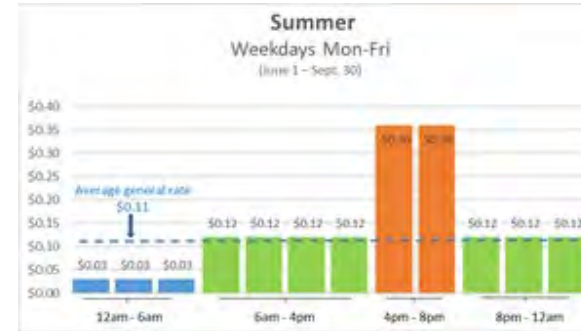
Save on the cost of charging your electric vehicle with our Time of Use (Electric Vehicle) plan. To encourage off-peak electric vehicle charging, the plan provides a cheaper rate for energy most of the day and at night but has a high price for electricity used during the summer hours of Monday – Friday between 4-8pm (June 1 – Sept. 30). In the winter, you will always save with reduced rates every day, plus get an extra discount on energy used from midnight to 6am year-round.

**Whole Home or Charger Only\* Options:** You have the option to apply the Time of Use (Electric Vehicle) plan to just the energy usage from your electric vehicle charger (installing a second power meter is required) or to all your home’s energy usage (no additional meter required). If using the Whole Home option, it will be important to shift all your homes usage, not just charging, away from the hours of weekdays from 4-8pm.

**Tip:** most electric vehicle cars or home chargers have the ability to schedule when your electric vehicle starts to charge. Set your car or charger to avoid charging during the hours of Monday-Friday, 4-8pm.

### How does it work?

The cost of generating energy varies by time of the day, day of the week and by season. Providing that power costs less during certain times, so Evergy would pass the savings on to you. You will pay a lower per-kilowatt hour charge most of the time, especially in the winter, but you’ll need to shift your energy usage in the summer to avoid the hours of 4-8pm Monday-Friday, which have a high cost. But don’t worry, on weekends and holidays you will always save with lower energy cost.





# Lengthy Description: Flat Pricing Plan

*Used for Questions 22 - 24*

## Q21 Flat Pricing Plan

Take the guesswork out of your energy bill and avoid surprises with our Flat Pricing Plan. Using your historical usage, Evergy will develop a personalized monthly energy fee for your home. If you select the personalized pricing plan, which includes a small premium, you will pay the same amount each month, no matter how much energy you use, without any true-up at the end of the year. Plus, Evergy will reward you with bill credits if your energy use is less than Evergy expected.

### Additional Add-On Options:

1. **Smart Thermostat:** Get a free smart thermostat to help improve comfort and access to your heating and cooling from your mobile device.
2. **Green Energy:** For an additional small fee, Evergy will purchase renewable energy credits on your behalf to offset your usage with renewable energy.

How does it work?

Evergy looks at your historical usage and adapts for upcoming rates and fluctuations expected in the upcoming year and then provides you with an offer of a fixed monthly price for 1 year. This price considers weather adjustments and expected future energy costs. Again, you will not need to true-up at the end of the year.

If you can save energy compared to your expected usage, you can earn credits towards your bill at the end of the year as well. Each year, Evergy will develop an updated pricing plan for your home and give you the option to renew your plan for another 12-months or you can choose another Evergy plan option.



# Lengthy Description: Advance Easy Pay Plan

*Used for Questions 26 - 28*

## **Q25 Advance Easy Pay**

Take more control of your energy bills by setting up your account on Advance Easy Pay. This pre-pay option provides additional monthly budget control and flexibility on how much you pay, allowing you to pay in multiple smaller amounts or even around your payday.

How does it work?

Your current rate plan does not change, just when and how much you need to pay. Start your Advance Easy Pay account by adding as little as \$40 and then as you use energy, the cost for that electricity will be deducted from your account balance. Add additional money once your account balance is approaching zero, or sooner if you would like.

To help you keep up with your account balance, Evergy will provide tools including text and email communication alerts, real-time energy usage information, and historical and projected energy usage. In addition, with multiple ways to add funds to your account, Evergy makes it easy to keep control of your account balance.

If your account balance reaches zero, power will be turned off until funds are added back onto your pre-paid account. Email and text reminders will help you keep track of your overall account.



# Lengthy Description: Green Add-on

*Used for Questions 30 - 32*

## Q29 **Green Add-on**

Interested in supporting renewable energy but don't have the roof space or upfront money to invest in solar? Evergy's Green Add-on program allows environmentally conscious customers to support renewable energy at their home at a low cost. Participants pay an additional, low monthly fee for certified renewable energy.

How does it work?

The Green Add-on Program is a simple solution for Evergy residential customers who want to offset some or all their energy consumption utilizing locally sourced Renewable Energy Certificates (RECs) to meet their sustainability needs.

Electricity enters the grid from many different sources, ranging from wind power and solar to natural gas and nuclear power. If you want to ensure you are using 100 percent renewable energy, you can purchase RECs along with your energy use. RECs are certificates that transfer the "renewable" aspects of renewable energy to the owner. In other words, renewable energy credits, paired with electricity from the grid, are renewable energy that is being generated on your behalf.





# CX Roadmap and Delivery Status

*July, 2022*



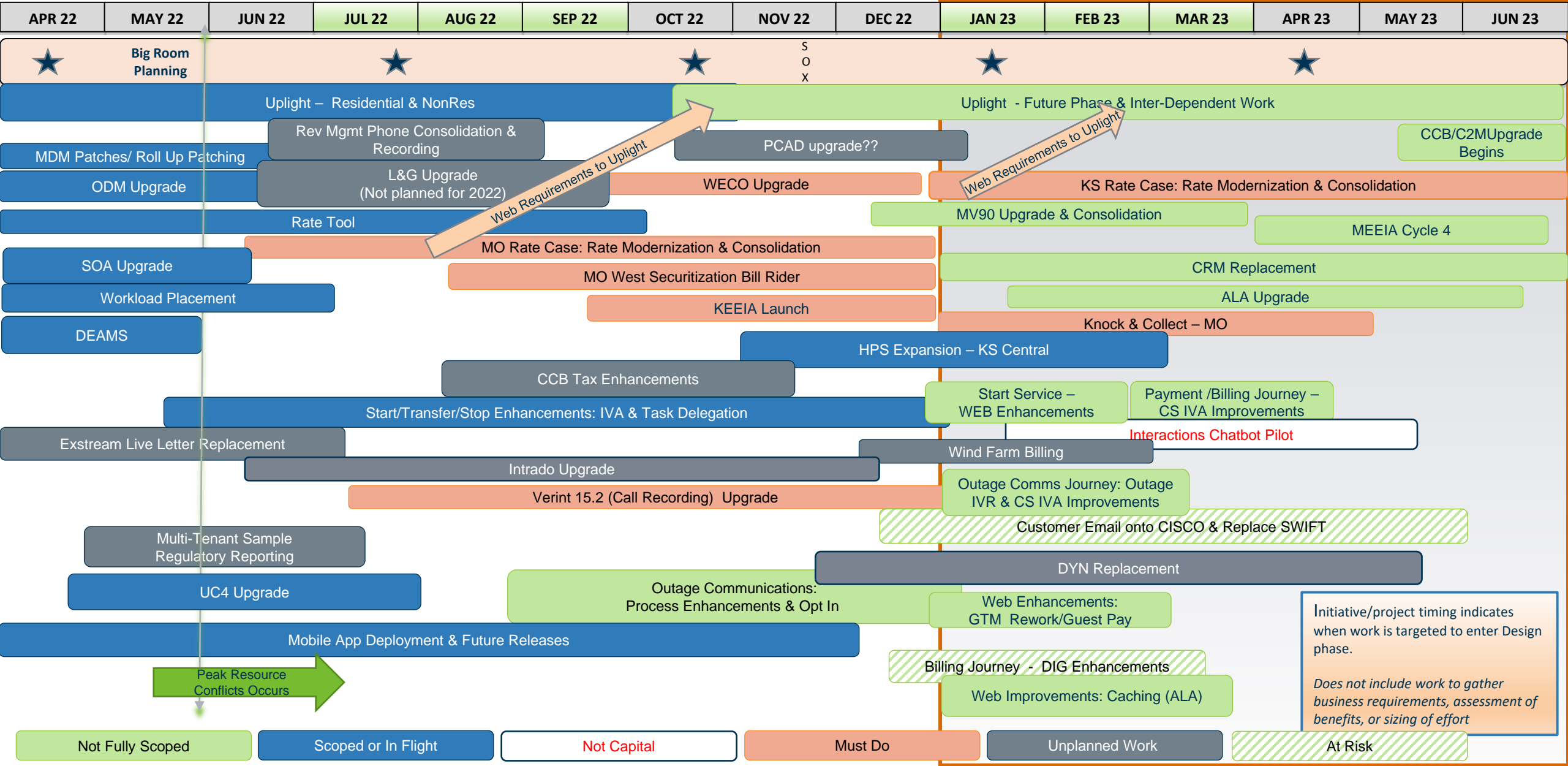


# Projects / Initiatives Current Status





# Customer Planning 2022 – 2023 (July 22, 2022)



# Project Goal Mapping



2022 COMPLETED PROJECTS	JD POWER RESIDENTIAL CUSTOMER SATISFACTION	TIER 1 BUSINESS CUSTOMER SATISFACTION	ONLINE ACCTS	OUTAGE NOTIFICATION ENROLLMENTS	CALL CENTER SURVEY	REGULATORY /COMPLIANCE REQUIRED	NEW/ UPGRADED TECHNOLOGY	DIVISIONAL BUDGET GOAL
Uplight: Connect Phase I						X		X
Uplight: Marketplace Phase I	X							
Billing Journey (Paper vs. Paperless)	X				X			X
Payment Journey (Align Balances)	X				X			
Kansas Merger Credits	X					X		
Tax Credits (Kansas Central)	X					X		
Electrification Rates & Rebates	X	X						
Ben Upgrade					X		X	
Metro Contact Center Payroll Integration							X	X
<b>New KS Residential Non-CWR Long-Term Pay Arrangement *</b>	X					X		
<b>Streetlight Outage Reporting (Web) *</b>	X							
MDM Patching/Rollup & ODM Upgrade							X	

\* Indicates Unplanned/Unbudgeted Work

2022 ACTIVE PROJECTS	JD POWER RESIDENTIAL CUSTOMER SATISFACTION	TIER 1 BUSINESS CUSTOMER SATISFACTION	ONLINE ACCTS	OUTAGE NOTIFICATION ENROLLMENTS	CALL CENTER SURVEY	REGULATORY /COMPLIANCE REQUIRED	NEW/ UPGRADED TECHNOLOGY	DIVISIONAL BUDGET GOAL
Rate Modernization (MO New Rates & Consolidation)	X					X		
Rate Modernization (Rate Tool)								X
<b>OpenText Upgrade *</b> (Live Letters to Empower Editor)							X	
Verint Upgrade (Call Recording & CSR Scorecard)							X	
<b>Web Forms Enhancements *</b> (Meter Pull Request and Scam Report)	X							X
Uplight: Residential Behavior	X		X		X			
Uplight: Non-Residential Behavior	X		X		X			
Mobile App	X		X	X	X		X	X
<b>Multi-Tenant Meter Audit *</b>						X		X
HPS Expansion (KS Central)	X							X
Start Service Process Enhancements: IVA (Task Orchestration)	X				X			X
<b>L&amp;G Command Center Upgrade *</b>							X	
<b>Revenue Management Phone Consolidation &amp; Recording *</b>							X	
<b>Customer Marketing Preference *</b> (CSS Update in Eloqua)	X					X		

\* Indicates Unplanned/Unbudgeted Work

2022 PLANNED/ NOT STARTED	JD POWER RESIDENTIAL CUSTOMER SATISFACTION	TIER 1 BUSINESS CUSTOMER SATISFACTION	ONLINE ACCTS	OUTAGE NOTIFICATION ENROLLMENT S	CALL CENTER SURVEY	REGULATORY /COMPLIANCE REQUIRED	NEW/ UPGRADED TECHNOLOGY	DIVISIONAL BUDGET GOAL
Outage Notification Enhancements * Outage Notification Opt In	X		X	X	X			X
Intrado DB Upgrade * (Outage IVR)							X	
CCB Tax Enhancements *						X		X
WECO Upgrade							X	
KEEIA Launch	X							X
<b>Wind Farms Billing *</b>								X
MO Knock & Collect	X							X
Billing Journey (Digital Enhancements)	X		X					X
Uplight: Marketplace Phase II & More	X					X		
MV90 Upgrade & Consolidation							X	
ECE (Customer Email on to CISCO/Replace SWIFT)							X	
CS IVA Improvements	X				X			X
Outage Communication Enhancements – IVR/IVA				X	X			
<b>Chatbot – Interactions *</b>	X				X		X	X
Social Media Chatbots								
Guest Pay – Web Enhancements	X				X			
GTM Rework – Web Enhancements	X							

\* Indicates Unplanned/Unbudgeted Work

2022 REQUESTED /UNPLANNED	JD POWER RESIDENTIAL CUSTOMER SATISFACTION	TIER 1 BUSINESS CUSTOMER SATISFACTION	ONLINE ACCTS	OUTAGE NOTIFICATION ENROLLMENTS	CALL CENTER SURVEY	REGULATORY /COMPLIANCE REQUIRED	NEW/ UPGRADED TECHNOLOGY	DIVISIONAL BUDGET GOAL
Agency Link Enhancements								
Apartment Link Enhancements (8 Intakes)								
CCB Data Cleanse (2 Intakes)								
CCB Enhancements <ul style="list-style-type: none"> <li>• Pay Arrangement with Overpay SA</li> <li>• Medical Extension Process</li> </ul>								
Experian Platform Change								
Field Activity Completion and Routing								
MO Collection Call Failures (2 Intakes)								
Open Text (Live Letters) New & Enhancements								
PWR Form Enhancements (11 Intakes)								
Revert to Owner Enhancements <ul style="list-style-type: none"> <li>• CCB</li> <li>• Website Form</li> </ul>								
Website Form Enhancements (3 Intakes) <ul style="list-style-type: none"> <li>• Lineman Rodeo Volunteer</li> <li>• SURF</li> </ul>								
Website (CSS) Enhancements <ul style="list-style-type: none"> <li>• Correct Autopay Messaging</li> </ul>								

2023 KNOWN CAPITAL ROADMAP CUSTOMER PROJECTS	JD POWER RESIDENTIAL CUSTOMER SATISFACTION	TIER 1 BUSINESS CUSTOMER SATISFACTION	ONLINE ACCTS	OUTAGE NOTIFICATION ENROLLMENTS	CALL CENTER SURVEY	Confidential REGULATORY /COMPLIANCE REQUIRED	Schedule CAC-6 - NEW/ UPGRADED TECHNOLOGY	Page 9 of 12 DIVISIONAL BUDGET GOAL
New CRM								
DYN Replacement								
ALA Redesign								
Uplight								
KS Rate Case (Rate Options & Rate Modernization)								
CCB Upgrade								
Metering Prod Updates (MV90 Consolidation & Upgrade)								
CSS – Customer Self Serve Enhancements								
Next Gen Contact Center Solution(s) (ECE: Email to CISCO/Replace SWIFT)								
Unauthenticated Web Enhancements								
Marketing Content System								
Proactive SMS for Marketing								
(DERMS /DER Pre/Post Messaging Enhancements)								
MEEIA Cycle 4 (MO Energy Efficiency Investment Act)								
Non -Traditional Work Management System (Contact Center)								
IVA/IVR Improvements								
Social Login								
Workforce Mgmt Software Upgrade								
Wallboard Software Upgrade								
GTS Generator Transfer Switch / HPS								





# Resource Profile





# Resource Planning – Project Phase Schedule

Project	Focus Area	PM	CX Delivery	PI	Build Start Date	Deploy End Date	APR '22	MAY '22	JUN '22	JUL '22	AUG '22	SEP '22	OCT '22	NOV '22	DEC '22	JAN '23	FEB '23	MAR '23
Uplight:	Digital Experience	Anthony T	Alex W	PI22.1	1/1/2022	11/2/2022	BBBB	BBBB	BBBB	BTTT	TTTT	TTTD	TTTT	DDDD	DDDD			
Mobile App Deployment & Future Releases	Digital Experience	Pauly L	Brennan S	PI22.1	1/15/2022	8/31/2022	TTTT	TTTT	TTTT	TTTT	TTTT	DDDD						
Rate Tool	Regulatory	Kathy U	Carmen E	PI22.1	2/1/2022	9/30/2022	BBBB	BBBB	TTTT	TTTT	TTTT	TTTT	DDDD					
MO Rate Case:Consolidation/Modernization	Regulatory	Claudio S	Carmen E	PI22.1	7/1/2022	12/6/2022				BBBB	BBBB	TTTT	TTTT	TTTT	DDDD			
MDM Patching/Rollup & ODM Upgrade	Measurement Tech	Brennan S	Brennan S	PI22.1	2/17/2022	6/4/2022	TTTT	TTTT	DDDD									
UC 4 Upgrade	Information Tech			PI22.2	4/18/2022	6/15/2022	TT	TTTT	TTDD	DD								
SOA Upgrade	Information Tech			PI22.2	4/11/2022	7/13/2022	TTT	TTTT	TTTT	TTDD								
Workload Placement	Information Tech			PI22.2	4/11/2022	7/13/2022	TTT	TTTT	TTTT	TTDD								
Multi Tenant Meter Audit	Regulatory	Paul F	Carmen E	PI22.2	4/26/2022	7/22/2022	B	BBBB	BTTT	TTDD								
Meter Pull Request (Electrician Hotline Form)	Rev Mgmt	Paul F	Carmen E	PI22.2	5/20/2022	7/27/2022		BB	BBTT	TTTT	DD							
Scam Report - Web Form	Marketing	Paul F	Carmen E	PI22.2	5/20/2022	8/31/2022		BB	BBTT	TTTT	DD							
L & G AMI Command Center Upgrade	Measurement Tech	Brennan S	Brennan S	PI22.2	6/23/2022	8/13/2022			BB	TTTT	TTDD							
Marketing preferences update to Eloqua	Marketing	Brennan S	Brennan S	PI22.2	7/14/2022	8/24/2022				BB	TTTT							
HPS Expansion (KS Central)	Products & Services	Richa J	Judy M	PI22.2	5/12/2022	9/12/2022		BB	BBBB	TTTT	TTTT	TTDD						
Upgrade OpenText (ExStream Live Letters)	Rev Mgmt	Ryan G	Alex W	PI22.1	3/31/2022	9/21/2022	BBBB	BBBB	BTTT	TTTT	TTTT	DDDD						
Verint Upgrade (Call Recording)	Contact Center	Michelle M	Michelle M	PI22.2	6/23/2022	10/15/2022			BB	BBBB	BBTT	TTTT	TTDD					
Rev Mgmt Phone Consolidation	Rev Mgmt	Paul F	Michelle M	PI22.3	8/4/2022	10/15/2022					BBBB	TTTT	TTDD					
Bill Labette County Franchise Fees	Tax	Kathy U	Carmen E	PI22.3	8/4/2022	10/31/2022					BBBB	TTTT	TTDD	D				
Billing Journey - Wind Farms Billing	Rev Mgmt		Brennan S	PI22.3	8/4/2022	11/30/2022					BBBB	BBTT	TTDD	TTTT	D			
Start Service Enhancements: IVA & Web	Digital Experience	Kairo H	Michelle M	PI22.2	6/12/2022	12/6/2022			BB	BBBB	BBTT	TTTT	TTTT	TTDD				
MO West Securitization Bill Rider	Regulatory			PI22.3	8/4/2022	12/6/2022					BBBB	BBBB	TTTT	TTTT	TTDD			
Outage Communication: Notification Enhancements & Opt In	Digital Experience		Carmen E	PI22.3	8/25/2022	12/7/2022					BB	BBBT	TTTT	TTTT	TTDD			
WECO Upgrade	Measurement Tech	Ryan G	Brennan S	PI22.3	8/25/2022	12/15/2022					B	BBBT	TTTT	TTTT	TTDD			
Intrado Platform Upgrade	Information Tech	Darcy D	Brennan S	PI22.3	8/4/2022	12/31/2022					BBBB	BBTT	TTTT	TTTT	TTDD	D		
KEEIA Launch	Products & Services			PI22.3	8/4/2022	3/31/2023					BBBB	BBBB	TTTT	TTTT	TTTT	TTTT	TTTT	TTTD
Billing Journey – DIG Enhancements	Digital Experience			PI22.4	10/27/2022	TBD							B	BBBB	BBBB	BBBB	TTTT	TTTT
Contact Center Improvements: move email to CISCO & replace SWIFT/ ECE	Contact Center	Kale W	Michelle M	PI22.4	11/17/2022	3/31/2023								BB	TTTT	TTTT	TTTT	TTTD
MV90 Upgrade & Consolidation	Measurement Tech		Brennan S	PI22.4	11/17/2022	3/31/2023								BB	BBTT	TTTT	TTTT	TTTD
Web Improvements Guest Pay, GTM Rework,	Digital Experience			PI22.4	12/8/2022	3/31/2023									BBBB	BBTT	TTTT	TTTD
Interactions Chatbot Pilot	Digital Experience			PI22.4	12/29/2022	3/31/2023									B	BBBB	TTTT	TTTD
Knock & Collect – MO	Rev Mgmt	Richa J	Alex W	PI22.4	10/27/2022	TBD							B	BBBB	BBTT	TTTT	TTTT	TTTT
Outage Comms Journey - Outage IVR & CS IVA	Digital Experience			PI23.1	1/19/2023	3/31/2023										BB	BTTT	TTTD
CS IVA Improvements	Digital Experience			PI23.1	1/19/2023	3/31/2023										BB	BBTT	TTDD