

P.S.C. MO No. 3	Cancelling	2 <sup>nd</sup> Revised 1 <sup>st</sup> Revised	Sheet No. 92 Sheet No. 92
All Towns and Communities For: <u>Within SNG-MO Certificated Service Areas</u> Name of Issuing Company                      Community, Town or City			
<b><u>EQUIPMENT REBATE PROGRAM PILOT</u></b>			
<b>PURPOSE</b> The purpose of the Equipment Rebate Program (ERP) Pilot is to (1) promote the installation of high efficiency natural gas equipment within Summit Natural Gas of Missouri's (SNGMO or Company) service territories by offering rebates that are expected to be cost effective and (2) to perform an evaluation of the program implementation and results.			
<b>DEFINITIONS</b> <u>Administrator</u> – SNGMO will administer the program  <u>Participant</u> – A customer that submits a rebate application to the Administrator after the installation and commissioning of qualifying equipment or requests a free opt-in water efficiency kit.  <u>Participant Cost Test (PCT)</u> – The test of cost-effectiveness of demand-side programs that measures the economics of a demand-side program from the perspective of the participants in the program.  <u>Program Year</u> – January 1 through December 31  <u>Total Resource Cost Test (TRC)</u> – The 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 utility and participant contributions), plus utility costs to administer, deliver, and evaluate each demand-side program.  <u>Trade Ally</u> - Installers assisting eligible customers with the rebate submission process for eligible high efficiency gas equipment (furnaces, water heaters, and boilers)..  <u>Utility Cost Test (UCT)</u> – The test that compares the avoided utility costs to the sum of all utility incentive payments, plus utility costs to administer, deliver, and evaluate each demand-side program for supply-side resources.			
<b>PROGRAM DESCRIPTION</b> The measures proposed for the ERP Pilot include common market-ready technologies included in other successful utility energy efficiency programs. SNGMO will provide a financial incentive in the form of a rebate check to eligible Participants who purchase and install qualifying natural gas equipment identified in the table below. Rebate forms will be available for download on the Company website ( <a href="https://summitnaturalgas.com">https://summitnaturalgas.com</a> ). Participants will mail in the completed rebate application form along with copies of all required supporting documentation. Participants will also have the option to submit a completed rebate form online through the Company website. SNGMO will process the rebate request and either mail the customer a check or a denial letter stating why the rebate application and/or installed equipment does not qualify within four to six (4-6) weeks. * Indicates new rate or text + Indicates change			

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Issued By: Goldie Bockstruck  
Director of Regulatory Affairs  
Name and Title of Issuing Officer

10825 Geddes Ave Suite 410  
Centennial Colorado 80127  
Company Mailing Address

Summit Natural Gas of Missouri, Inc.  
Name of Issuing Company

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### **EQUIPMENT REBATE PROGRAM PILOT (CONT'D)**

Measure	Efficiency Level	Customer Rebate
Boiler	90% AFUE or higher	\$300
Furnace	90-94.9% AFUE	\$400
	95% AFUE or higher	\$500
Tankless Water Heater	0.90 EF or higher	\$400
Smart Thermostat	ENERGY STAR-certified	\$100

Water efficiency measures will be offered as opt-in water efficiency kits or stand-alone measures. Opt-in water efficiency kits will be mailed to Participants who request them at no charge. These kits will include low flow shower heads, faucet aerators, and a water temperature card to help Participants reduce both water and associated natural gas consumption. Three kits, designed for one (1), one and a half (1.5) and two (2) bathroom homes, will be offered. Requests for opt-in water efficiency kits will be accepted through an online submission form on the Company's website, and orders will be processed periodically in batches, based on demand. Stand-alone water efficiency measures, such as low-flow showerheads and faucet aerators will also be available at a reduced cost to Participants.

SNGMO staff will provide the overall strategic direction and administration of the program. SNGMO may process equipment rebate applications and fulfill opt-in water efficiency measures requests in-house or procure an outside vendor.

SNGMO will market the program primarily through the Company website, bill stuffers and brochures. Radio or print advertising may also be utilized to drive participation.

In the event of program oversubscription, the Company may:

1. Establish a waiting list for payment of pending rebates in the following program year.
2. File for a program budget modification.
3. Notify customers via the Company website that program funds have been exhausted and remove links to the rebate forms.

#### **AVAILABILITY**

Equipment rebates under this program are available to active SNGMO customers who install qualifying equipment and receive service under the following rates:

1. General Service (GS) in Gallatin, Warsaw and Lake of the Ozarks
2. GS-Residential in Rogersville and Branson
3. Commercial Service (CS) within all SNGMO's service territories

Any active SNGMO customer, owner or tenant, within an eligible rate class may participate in the ERP Pilot; however, the installed measure must save energy (natural gas) delivered by SNGMO.

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Sheet No. 94

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### **EQUIPMENT REBATE PROGRAM PILOT (CONT'D)**

**TRADE ALLY REBATES** – As approved in Commission Case No. GE-2023-0104, a \$50 rebate will be offered to installers assisting eligible customers with the rebate submission process for each eligible unit of high efficiency gas equipment (furnaces, water heaters, and boilers) installed. Fuel switching installations are not eligible for a Trade Ally Rebate.

Additional terms and conditions may be included on the Company's website, marketing materials, and rebate application forms.

#### **REPORTING**

The Company will submit the ERP Pilot annual report on February 28, 2026, which will cover Program Year 2025. Subsequent annual reports will be submitted on February 28, 2027 and February 28, 2028. The annual reports shall include (1) a narrative description of the status of each program, (2) information (by program) on actual program expenditures and estimated impacts, and (3) a comparison (by program) of budgeted expenditures and impacts (CCF's, to the extent reasonably available) to actual expenditures and impacts.

#### **EVALUATION PLAN**

The evaluation, measurement and verification of the rebate program will be performed by an independent, third-party evaluator. The overall evaluation objectives will be to provide an impact evaluation including determining gross and net savings attributable to the ERP Pilot. Gross savings will be determined through a calibrated engineering approach (i.e., reviewing the program tracking data for actual equipment characteristics, such as efficiency levels, and updating the engineering algorithms accordingly). Net savings will be determined through a review of secondary data from similar programs. The evaluation contractor will also interview program and implementation staff to determine their perspective on the strengths and limitations of the ERP Pilot. Cost effectiveness tests (TRC, UCT and PCT) will be completed by the evaluator. The evaluation plan will begin October 1, 2027 and the Evaluation Report will be submitted with the Program Year 2027 Annual Report on February 28, 2028.

#### **PROGRAM BUDGET**

The annual budget for the ERP Pilot will be \$150,000 for each Program Year. Program funds will be used to cover (1) rebates paid directly to program participants and Trade Allies and (2) utility costs to administer, deliver, and evaluate the program. Funding for this program is set forth in the Stipulation and Agreement in Case No. GR-2014-0086.

#### **COST RECOVERY**

The Company shall be authorized to accumulate any energy efficiency costs for which there is a general consensus among the Advisory Group members in a regulatory asset account as the costs are incurred, for potential recovery in a future rate case. The regulatory asset account shall accrue interest at the Company's short-term debt rate through the Company's next rate case. Program costs in the regulatory asset account that have been prudently incurred will be included in rate base in the Company's next general rate case and amortized over six (6) years.

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<b><u>EQUIPMENT REBATE PROGRAM PILOT (CONT'D)</u></b>		
<div style="display: flex; align-items: flex-start;"> <div style="width: 20px; text-align: center; margin-right: 10px;">+</div> <div> <p><b>PROGRAM TERM</b></p> <p>The ERP Pilot will run from January 1, 2025 through December 31, 2027, unless funding for this program does not continue due to the elimination of funding resulting from a Commission order. The implementation of any changes to the tariff are contingent upon approval of this tariff.</p> <p><b>ENERGY EFFICIENCY ADVISORY GROUP</b></p> <p>An Energy Efficiency Advisory Group (Advisory Group) was established as a result of Commission order in Case No. GR-2014-0086. The Advisory Group will continue to provide feedback to the Company regarding the design, implementation, and evaluation of its energy efficiency programs. The Advisory Group shall convene meetings or conference calls at least one time per year, at which the Company shall provide updates on:</p> <ol style="list-style-type: none"> <li>1. The status of program design and implementation, including the amount of expenditures for the program and the level of customer participation.</li> <li>2. The status of program evaluations, including consultants chosen, evaluation budgets, evaluation expenditures, and copies of any interim and final evaluations.</li> <li>3. The status of new program selection and design efforts.</li> </ol>            <div style="display: flex; flex-direction: column; gap: 5px;"> <div>* Indicates new rate or text</div> <div>+ Indicates change</div> </div> </div> </div>		

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