BEFORE THE PUBLIC SERVICE COMMISSION OF
THE STATE OF MISSOURI

In the Matter of Evergy Metro, Inc. d/b/a Evergy Missouri Metro's and Evergy Missouri West, Inc. d/b/a Evergy Missouri West's Notice of Intent to File an Application for Authority to Establish a Demand-Side Programs Investment Mechanism	)))))	File No. EO-2026-0345

APPLICATION TO APPROVE DSIM FILING AND REQUEST FOR VARIANCES

COMES NOW, Evergy Metro, Inc. d/b/a Evergy Missouri Metro ("Evergy Missouri Metro") and Evergy Missouri West, Inc. d/b/a Evergy Missouri West ("Evergy Missouri West") (collectively, the "Company" or "Evergy") and, pursuant to, 20 CSR 4240-20.093 and 20 CSR 4240-20.094, files this *Application to Approve DSIM Filing and Request for Variances* ("Application"), and seeks thereby approval of certain demand-side programs, a Technical Resource Manual ("TRM"), an Evaluation Measurement and Valuation ("EM&V") plan, and a Demand-Side Investment Mechanism ("DSIM") as contemplated by the Missouri Energy Efficiency Investment Act ("MEEIA")[1] and the Missouri Public Service Commission ("MPSC" or "Commission") regulations implementing MEEIA.[2] The documents which are being filed concurrently with this Application, together with the Application, are sometimes referred to collectively herein as the Company's MEEIA Cycle 5 programs or filings.

A. The Applicants

1. Evergy Missouri Metro is a Missouri corporation with its principal office and place of business at 1200 Main Street, Kansas City, Missouri 64105. The Company is primarily engaged in the business of generating, transmitting, distributing, and selling electric energy in portions of

[1] Section 393.1075, RSMo.
[2] 20 CSR 4240-093 and 20 CSR 4240-094. Under MEEIA, a demand-side program is defined to include energy efficiency measures.

eastern Kansas and western Missouri. The Company is an electric corporation and public utility as defined in Section 386.020 Mo. Rev. Stat. (2000), as amended. A Certificate of Good Standing was filed with the Commission in Case No. EN-2020-0063 and is incorporated herein by reference in accordance with 20 CSR 4240-2.060(1)(G).

2. Evergy Missouri West is a Delaware corporation with its principal office and place of business at 1200 Main Street, Kansas City, Missouri 64105. Evergy Missouri West is primarily engaged in the business of providing electric and steam utility service in Missouri to the public in its certificated areas. Evergy Missouri West is an electrical corporation and public utility as defined in Section 386.020 (2000), as amended. *Id*. A Certificate of Authority for a foreign corporation to do business in the State of Missouri, evidencing the Evergy Missouri West's authority under the law to conduct business in the State of Missouri, was filed with the Commission in Case No. EN-2020-0064 and is incorporated herein by reference in accordance with 20 CSR 4240-2.060(1)(G). Evergy Missouri West's fictitious name registration was filed in Case No. EN-2020-0064 and is incorporated herein by reference.

3. In addition to undersigned counsel all correspondences, pleadings, orders, and communications regarding this proceeding should be sent to:

Kevin D. Gunn
Vice President State & Federal Regulatory Policy
Evergy, Inc.
1200 Main Street
Kansas City, Missouri 64105
E-mail: Kevin.Gunn@evergy.com

Brian File
Director of Demand-Side Management and Energy Efficiency
Evergy, Inc.
1200 Main Street
Kansas City, Missouri 64105
E-mail: Brian.File@evergy.com

Anthony R. Westenkirchner
Senior Paralegal – Regulatory Affairs
Evergy, Inc.
1200 Main Street, 17th Floor
Kansas City, Missouri 64105
E-mail: Anthony.Westenkirchner@evergy.com

4. Data requests concerning this Application should be addressed to Regulatory.Affairs@evergy.com.

5. Evergy Missouri Metro has no pending actions or final unsatisfied judgments or decisions against it from any state or federal agency or court that involves customer service or rates, which action, judgment or decision has occurred within three years of the date of this Application other than the following:

(i) File No. EC-2026-0065, Show Me Ethanol, LLC v. Evergy Missouri Metro

6. Evergy Missouri West has no pending actions or final unsatisfied judgments or decisions against it from any state or federal agency or court that involves customer service or rates, which action, judgment or decision has occurred within three years of the date of this Application other than the following:

(i) File No. EC-2026-0350, Mark A. Hill and Bethann C. Hill v. Evergy Missouri West

7. Neither Evergy Missouri Metro nor Evergy Missouri West has any annual reports nor regulatory assessment fees that are overdue in Missouri.

8. 20 CSR 4240-22.080(18) requires the Company to certify this Application as substantially consistent with its preferred resource plan in its most recent Integrated Resource Plan ("IRP") or to explain why it is not consistent. As discussed in the direct testimony of Cody Vandevelde, this Application is substantially consistent with its preferred resource plan in its current IRP although due to timing the 2026 IRP does not include energy efficiency and lower levels of demand response requested in the Application. If approved, Evergy will continue to

update in future IRPs the expected benefits of the MEEIA Cycle 5 portfolio, just as it has done in previous IRPs with previously approved MEEIA Cycles.

9. On June 2, 2026, both Evergy Missouri Metro and Evergy Missouri West filed their respective *Notices of Intended Case Filing* establishing File Nos. EO-2026-0345 (Evergy Missouri Metro) and EO-2026-0346 (Evergy Missouri West), pursuant to 20-CSR 4240-4.017(1), indicating their intent to submit MEEIA filings no earlier than 60 days from that date.

B. Application

12. Being filed concurrently with this Application and incorporated herein by reference is the direct testimony of Kevin Gunn, Brian File and Cody VandeVelde ("Supporting Direct Testimony"), supported by verifications, explaining the elements of the Company's proposed demand-side programs, TRM and DSIM. The Application and Supporting Testimony request Commission approval of the Company's proposed demand-side programs, TRM and DSIM is necessary to fulfill MEEIA's mandate that the Commission align utility financial incentives with helping customers to use energy more efficiently and in a manner that sustains or enhances utility customers' incentives to use energy more efficiently. The Company asks the Commission to approve the programs, TRM and the DSIM and tariffs as filed. Specifically, the requested programs, TRM and the DSIM, consist of the following principal elements:

- Evergy seeks to implement its DSM portfolio January 1, 2027, to be effective through December 31, 2028[3];
    - Evergy needs approval for the energy efficiency programs proposed in 2027 and for all programs proposed in 2028;
- Recovery of program costs and offset of the throughput disincentive at the same time energy efficiency investments are made; and

[3] The terms "demand-side" and "energy efficiency" are used synonymously herein. Under MEEIA, energy efficiency programs or investments are a subset of demand-side programs or investments.

- An opportunity to earn an incentive amount based upon demand and energy savings achieved.

13. In addition to the above elements, the Company has filed tariffs which give it the discretion to discontinue programs and the DSIM following appropriate notice to the Commission. The Commission approved similar tariffs containing regulatory flexibility provisions in the Company's MEEIA 2, MEEIA 3, and MEEIA 4 applications. The tariffs provide that, should matters adversely impact the Company's plan or ability to recover its costs as approved, the Company reserves to the right to discontinue MEEIA programs and/or its plan. In such event, the Company will file a notice with the Commission in these cases indicating the extent to which it will discontinue programs and/or its plan on date certain that is not less than 30 days after the filing of the notice.

14. Evergy Missouri Metro and Evergy Missouri West's MEEIA Cycle 4 filings were approved by the Commission's *Order Approving Agreement and Tariffs* in File Nos. EO-2023-0369 and EO-2023-0370 (issued December 11, 2024) (MEEIA Cycle 4[4]). The MEEIA programs proposed in this Application for MEEIA Cycle 5 are very similar to the approved MEEIA Cycle 4 programs with the exception that there is a new proposed Whole Home Efficiency with Home Energy Financing program which will replace the current Modified PAYS program. The Whole

---

[4] The *Order Approving Agreement and Tariffs* in File Nos. EO-2023-0369 and EO-2023-0370 stated on pages 2-3: "The [MEEIA Cycle 4] portfolio includes:

• An Income-Eligible Multi-Family and KC LILAC (Kansas City Low-Income Leadership Assistance Collaborative) program with a budget of $5,500,000 over two-years, including weatherization ready investments for Federal Department of Energy weatherization deferrals.

• A modified Pay As You Save® (PAYS®) residential energy efficiency program with a budget of $7,100,00 over a two-year period. The portfolio includes a Business Demand Response program with a budget of 3 $29,075,000 over three years and a Residential Demand Response program with a budget of $17,869,000 over three years.

• A business energy efficiency program, focused on non-lighting measures, with a budget of $7,300,000 over two years.

• An Urban Heat Island program with a budget of $2,564,990 over three years.

• As part of the portfolio Evergy will provide up to $250,000 for a 3rd party statewide feasibility study to review statewide Demand Side Mechanism programs."

Home Efficiency with Home Energy Financing Program is designed to help residential customers reduce energy use, manage energy costs, and install eligible high-efficiency equipment. The Home Energy Financing component is intended to address one of the largest barriers to residential energy efficiency: upfront capital requirements associated with HVAC replacement. The details of the program are contained in the proposed tariffs.

15. In order to ensure there is no gap between the MEEIA Cycle 4 and MEEIA Cycle 5 programs, the Company requests that the Order approving the MEEIA Cycle 5 programs be issued no later than December 9, 2026, with an effective date of January 1, 2027 effective date. The proposed tariffs[5], which are filed concurrently with this application, have been designed to provide the Company with the necessary flexibility to effectively implement and operate its demand-side programs and to make improvements as necessary to adapt to evolving market conditions. The simplest example of this flexibility is the Company's ability to change the incentive level if customer participation is lower than anticipated.

16. The Company is requesting variances for certain Commission regulations (including rules contained in Chapters 14 and 20 of Part 4240), that contain requirements that are inconsistent with the Company's requested MEEIA filing and DSIM. Accordingly, the Company seeks variances from those regulations listed in the direct testimony of Brian File at pages 25-27.

17. Because the programs and issues are very similar and the Company is filing a single Application, Evergy Missouri Metro and Evergy Missouri West propose that both cases follow the same procedural schedule. Given these needs, the Company proposes the following procedural schedule:

---

[5] Due to the pending revisions to Every Missouri Metro's Rules & Regulations in PSC MO. No. 3 in ER-2026-0143, the proposed tariffs are being submitted as exemplar tariffs, attached hereto as Exhibit A.

Date	Description
08/21/2026	Filing Date
09/30/2026	Rebuttal Testimony
10/21/2026	Surrebuttal Testimony
10/28-30/2026	Hearing
11/09/2026	Briefs
11/16/2026	Reply Briefs
12/09/2026	Expected Order

WHEREFORE, Evergy Missouri Metro and Evergy Missouri West respectfully request that the Commission approve the demand-side programs, TRM and the DSIM and tariffs proposed in its MEEIA filing, the variances listed in the testimony of Brian File, and for other relief as is appropriate in this case.

Respectfully submitted,

/s/ Roger W. Steiner

Roger W. Steiner MBN#39586
Evergy, Inc.
1200 Main Street, 17th Floor
Kansas City, Missouri 64105
Telephone: (816) 556-2314
E-mail: Roger.Steiner@evergy.com

James M. Fischer, MBN 27543
Fischer & Dority, P.C.
2081 Honeysuckle Lane
Jefferson City, Missouri 65109
Phone: (573) 353-8647
jfischerpc@aol.com

Attorneys for Evergy Missouri Metro and Evergy Missouri West

CERTIFICATE OF SERVICE

I hereby certify that a true and correct copy of the above and foregoing document was served upon counsel for Staff and the Office of the Public Counsel on this 21st day of August 2026, by either e-mail or U.S. Mail, postage prepaid.

/s/ Roger W. Steiner

Roger W. Steiner

VERIFICATION

STATE OF MISSOURI)
) SS.
COUNTY OF JACKSON)

I, Kevin D. Gunn, having been duly sworn upon my oath, state that I am the Vice President State and Federal Regulatory Policy for Evergy Metro, Inc., that I am authorized to make this verification on behalf of Evergy Missouri Metro and Evergy Missouri West, and that the matters stated in the foregoing Application are true and correct to the best of my information, knowledge, and belief.

Kevin D. Gunn
Vice President-State and Federal Regulatory Policy
Evergy Metro, Inc.

SUBSCRIBED AND SWORN TO before me this 21st day of August 2026.

My Commission Expires: April 26, 2029

ANTHONY R WESTENKIRCHNER
NOTARY PUBLIC - NOTARY SEAL
STATE OF MISSOURI
MY COMMISSION EXPIRES APRIL 26, 2029
PLATTE COUNTY
COMMISSION #17279952

15. MEEIA CYCLE 5

15.01 BUSINESS DEMAND-SIDE MANAGEMENT

A. PURPOSE

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

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

B. AVAILABILITY

Except as otherwise provided in the terms governing a particular program, these Programs are available to any of Evergy Missouri Metro Company's customers served under SGS, MGS, LGS, LPS, SGA, MGA, LGA, or TPP rate schedules. The Programs are not available to customers electing to opt-out of DSM program funding under 20 CSR 4240-20.094(7).

A customer may elect not to participate (opt-out) in an electric utility's DSM programs under 20 CSR 4240-20.094(7) if they:

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

A customer electing to opt-out must provide identification of locations and utility account number(s) of accounts for which the customer is requesting to opt-out, demonstrate an achievement of savings at least equal to those expected from utility-provided demand-side programs and written notice to the electric utility no earlier than September 1 and not later than October 30 to be effective for the following calendar year but shall still be allowed to participate in interruptible or curtailable rate schedules or tariffs offered by the electric utility.
A customer who participates in demand-side programs shall be required to participate in demand-side programs funding for a period of three (3) years following the last date when the customer received a demand-side incentive of a service.

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

The Company reserves the right to discontinue the entire MEEIA cycle 5 portfolio, if the Company determines that implementation of such programs is no longer reasonable due to changed factors or circumstances that have materially negatively impacted the economic viability of such programs as determined by the Company, upon no less than thirty days' notice to the Commission.

15.01 BUSINESS DEMAND-SIDE MANAGEMENT (continued)

C. DEFINITIONS

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

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

DEMAND SIDE INVESTMENT MECHANISM (DSIM) – A mechanism approved by the Commission in Evergy Missouri Metro Company's filing for demand-side programs approval in Case No. EO-2026-0345.

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

INCENTIVE – Program costs for direct or indirect incentive payments to encourage customer and/or retail partner participation in programs and the cost of measures, which are provided at no cost as part of the program.

LONG-LEAD PROJECT - A project committed to by a Customer, accepted by the Company, and a signed commitment offer received by the program administrator by the end of the Program Period according to the terms and implementation of the MEEIA 2025-2028 programs, specifically to include the Income Eligible Multi-Family and the Whole Business Efficiency programs. The Income Eligible Multi-Family program will be allowed 12 months from end of the Program Period to be finalized, which includes the projects being closed out and incentives paid to the customer. The Whole Business Efficiency program will be allowed 6 months from the end of the Program Period to be finalized, which includes the projects being closed out and incentives paid to the customer.

MEASURE – An end-use measure, energy efficiency measure, and energy management measure as defined in 20 CSR 4240-22.020(18), (20), and (21).

PARTICIPANT – End-use customer and/or manufacturer, installer, or retailer providing qualifying products or services to end-use customers.

PROGRAM ADMINISTRATOR – The entity selected by Company to provide program design, promotion, administration, implementation, and delivery of services.

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

PROGRAM PERIOD – The period of which the programs are available. For the Business Demand Response Program and the Urban Heat Island Mitigation Program, the period will be from January 1, 2025 through December 31, 2028; for the Whole Business Efficiency Program the period will be from January 1, 2025 through December 31, 2028 Unless earlier terminated under the TERM provision of this tariff. Programs may have slightly earlier termination dates for certain activities, as noted on the Company website – www.evergy.com.

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

15.01 BUSINESS DEMAND-SIDE MANAGEMENT (continued)

TOTAL RESOURCE COST (TRC) TEST – A test of the cost-effectiveness of demand-side programs that compares the avoided utility costs to the sum of all incremental costs of end-use measures that are implemented due to the program (including both KCP&L and Participant contributions), plus utility costs to administer, deliver and evaluate each demand-side program.

E. TERM

These tariff sheets and the tariff sheets reflecting each specific Business DSM program shall be effective from the effective date of the tariff sheets to the applicable dates as noted below under 'Description', unless an earlier termination date is ordered or approved by the Commission.

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

F. DESCRIPTION

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

- Whole Business Efficiency – December 31, 2028
- Business Demand Response – December 31, 2028

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

G. CHANGE PROCESS

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

1. Identify need for program detail change regarding the interaction between Evergy Missouri Metro or Program Administrators and Participants;
2. Discuss proposed change with Program Administrator;
3. Discuss proposed change with Evaluator;
4. Analyze impact on program and portfolio (cost-effectiveness, goal achievement, etc.);
5. Inform the Staff and Office of the Public Counsel of the proposed change, the time within which it needs to be implemented, provide them the analysis that was done and consider recommendations from them that are received within the implementation timeline (the implementation timeline shall be no less than five business days from the time that the Staff and Office of the Public Counsel are informed and provided the above-referenced analysis);

15.01 BUSINESS DEMAND-SIDE MANAGEMENT (continued)

6. Take timely received recommendations into account and incorporate them where Evergy Missouri Metro believes it is appropriate to do so;
7. Notify and train customer contact personnel (Customer Service Representatives, Energy Consultants, Business Center) of the changes;
8. Make changes to forms and promotional materials;
9. Update program website;
10. File updated web pages and, if appropriate, updated list of Measures and Incentives amounts in Case No. EO-2026-0345; and
11. Inform Customer, trade allies, etc.

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

H. PROGRAM COSTS AND INCENTIVES

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

I. PROGRAM DESCRIPTIONS

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

15.01 BUSINESS DEMAND-SIDE MANAGEMENT (continued)

J. ****CHANGES IN MEASURES OR INCENTIVES**
Measures contained in Company's most recently approved Technical Resource Manual (TRM) in Case No. EO-2026-0345. The offering of Measures not contained within the aforesaid filing must be approved by the Commission. Measures being offered and Incentives available to customers will be listed on Company's website, www.evergy.com. The Measures and Incentives being offered are subject to change. Customers must consult www.evergy.com for the list of currently available Measures. Should a Measure or Incentive offering shown on Evergy Missouri Metro's website differ from the corresponding Measure or Incentive offering shown in the currently effective TRM, the stated Measure or Incentive offering as shown in the currently effective TRM shall govern.

15.02 WHOLE BUSINESS EFFICIENCY PROGRAM

A. PURPOSE

The Whole Business Efficiency Program aims to drive substantial energy savings and operational efficiency across existing facilities. By incentivizing the adoption of energy-efficient measures during new equipment purchases, facility modernization, and industrial process improvements, the program not only helps customers reduce their energy consumption and operational costs but also enhances their overall productivity and sustainability. This initiative supports customers in achieving their energy efficiency goals while reducing the Company's reliance on building or procuring additional energy resources. Ultimately, the program helps foster a more sustainable energy ecosystem, with a goal of benefiting both the customers and the broader community.

B. AVAILABILITY

The program is available throughout the Program Period to all Missouri commercial and industrial customers who receive electric service and meet the program descriptions below.

C. BUDGET

Combined Jurisdictions Component Budgets: Budgets are listed separately, however, will be managed at the combined, cumulative total level of $7,300,000 over the two years.

Program	Components	2027	2028	Total
Whole Business Efficiency	Business Standard & Business Custom	$3,650,000	$3,650,000	$7,300,000

D. PROGRAM DESCRIPTION

The Whole Business Efficiency program assists commercial and industrial customers to save energy through a wide range of energy efficiency options that address many major end uses and processes, excluding lighting. Evergy will hire a Program Administrator to implement the program, provide the necessary services to effectively manage it, and strive to achieve the energy and demand savings targets.

The program consists of three (3) components:

1. Standard Rebates are fixed incentives for technologies with known performance characteristics, which will include HVAC, refrigeration, water heating, operational efficiency, and food preparation technologies.
   - To participate in this rebate type, customers select energy-efficient equipment from a pre-qualified list, purchase and install the equipment, and submit a rebate application. Rebates will be issued to participants upon receipt and review of the rebate application. Pre-approval, including pre and post inspections, is required for incentives exceeding $15,000.
2. Business Custom offers incentives for qualifying efficient equipment that is not eligible for a rebate through the Standard Rebates. Custom rebates are determined on a $/kW or $/kWh bases for incremental savings above the baseline. Pre and post inspections are required for all custom projects.
   - New Construction includes incentives for early design assistance and qualifying complex or unique new construction projects. Custom rebates are calculated on a $/kW or $/kWh. To qualify, buildings must have a building code baseline that is less stringent than the unamended 2021 International Energy Conservation Code (IECC).
   - Projects must be pre-approved before equipment is purchased and installed. To be pre-approved, the project must have a Total Resource Cost (TRC) Test benefit-cost ratio of greater than 1.0. Once pre-approved, the customer purchases and installs the approved equipment and submits a rebate application. Rebates will be issued to participants upon post-inspection, receipt, and review of the rebate application.

15.02 WHOLE BUSINESS EFFICIENCY PROGRAM (continued)

D. PROGRAM DESCRIPTION (continued)

Total rebates per program year are limited to $500,000 per customer. Multiple rebate applications for different measures from the same customer may be submitted. The assessment budget is $80,000 annually, with a focus on Non-Profit Organizations.

3. **Free Energy Assessments** are offered to Small Businesses and Non-Profit Organizations.

- **Small Businesses** will be measured by annual usage and is defined as:
  - Businesses that have consumed less than 1.5 million kWh in the preceding 12 months and/or
  - Businesses that have had a monthly peak demand of 100 kW or less in the preceding 12 months

- **Non-Profit Organizations** that do not meet the eligibility requirements above must be:
  - Organizations in 501(c)3 status and in good standing
  - Serve low-income individuals and families
  - Own the facility and be responsible for paying the energy bills

E. ELIGIBILE MEASURES AND INCENTIVES

Measures in the most recently approved Technical Resource Manual (TRM) filed in Case No. EO-2026-0345 are eligible for program benefits and incentives and may be offered during the Program Period.

Eligible **Incentives** directly paid to customers and Measures, along with program Terms and Conditions, can be found at www.evergy.com.

F. EVALUATION

MPSC will hire a third-party evaluator to perform the Evaluation, Measurement and Verification (EM&V) on the program. Associated costs will be funded utilizing Evergy's Demand Side Investment Mechanism (DSIM) rate rider

15.03 BUSINESS DEMAND RESPONSE PROGRAM

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

B. AVAILABILITY
This Program is available during the Program Period and is available to all customers in the classes identified in the Business Demand-Side Management section that also meet Program provisions. Participants must show economic and technical feasibility for measurable and verifiable load curtailment during the Summer Curtailment Season of June 1 to September 30 and Winter Curtailment Season of October 1 to May 31 within designated Curtailment Hours of 8:00 a.m. to 8:00 p.m., on any weekday (Monday through Friday). In addition, the company may call a curtailment event on Saturday or Sunday during an Energy Emergency Alert (EEA) event officially designated as such. The Company will determine the most beneficial timing and length of curtailment events during the curtailment season, is not required to curtail all Participants simultaneously, and may elect to only call individual participants and/or stagger Participants as deemed appropriate. The Company also reserves the right to apply minimum and/or maximum event performance requirements for incentive payment, to apply financial bonuses or penalties and to terminate Participation Agreements for non-compliance.

The Company reserves the right to curtail some or all Participants year-round if needed. This off-season curtailment would be utilized during emergency situations locally or regionally. Off-season participation is voluntary with participant payment at the discretion of the Company outlined in the Participation Agreement. The Company will engage a third-party Administrator to implement all recruitment, enrollment and daily operations for the Program and manage Company approved Aggregators. A Customer may participate directly through the Program Administrator ("Administrator") or a Company-approved Aggregator ("Aggregator"). An aggregator is a curtailment service provider, appointed by a customer to act on behalf of said Customer with respect to all aspects of the Program, including but not limited to: a) the receipt of notices from the Company under this Program; and b) the receipt of incentive payments from the Company. The Aggregator will be responsible for establishing independent business to business (B:B) contracts and administering the participation of said customer. The Aggregator is fully responsible for fulfillment of these B:B customer contracts. Contracts between Aggregator and their enrolled customers are not limited to Program provisions.

For this program only, a Participant with multiple accounts may request that some or all of its accounts be aggregated for event performance evaluation. If the Company deems an aggregation would not benefit the customers' ability to improve event performance, the Company will present the option to the customer to determine whether they would prefer a single account or aggregated view of participation. The aggregated Participant account will be treated as a single account for purposes of calculating potential Program incentive payments. The Aggregator is responsible for all of their independent B:B customer contracts; no minimum customer account requirements apply. Aggregator must maintain a minimum aggregated load as stated in their Aggregator Participation Agreement to maintain Program eligibility.

15.03 BUSINESS DEMAND RESPONSE PROGRAM (continued)

This schedule is not applicable where the Customer's load reduction capability is registered for demand response participation in the wholesale market directly by the Customer or via a Demand Response (DR) Aggregator Agreements.

C. PROGRAM PROVISIONS

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

Regardless of the method by which the participating Customer chooses to participate, the Participant enrolls directly with the Administrator or Aggregator. The Administrator or Aggregator evaluates a Customer's metered usage data from the most recent Curtailment Season and gathers site-specific information from the Participant to establish their curtailment plan and estimated associated curtailable load (kW). The Participant or Aggregator enrolls this curtailable load in the Program by executing their Participation Agreement. The Company then issues notices to the Participant or Aggregator in advance of scheduled curtailment events, prompting Participants to respond in accordance with their chosen method of participation:

1. Manual Demand Response (DR)

The Participant manually executes their facility curtailment plan to curtail at least their enrolled curtailable load for the duration of the curtailment event.

2. Automated Demand Response (ADR)

The Participant's building/energy management system (BMS/EMS) or facility automation system is used to execute their curtailment plan. The Participant or Aggregator receives the integrated signal with the utility's event calling system and is used to execute their curtailment plan by enacting pre-programmed usage adjustments to respond to demand response events.

D. PARTICIPATION AGREEMENTS

There will be two versions of Program Participation Agreements ("Agreement"). Customers enrolling with the Administrator will have a customer Agreement between the customer and the Program. Aggregators will have an aggregator Agreement between the Program and the Aggregator. The participation agreements will include the terms and conditions of the agreement, including but not limited to committed event participation frequency, event frequency hours, and event days as well as performance measurement and payment structure. Multi-year participation Agreements will be re-evaluated annually or at any time the Company has data indicating the terms of the participation Agreement cannot be fulfilled by the Participant.

15.03 BUSINESS DEMAND RESPONSE PROGRAM (continued)

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

CURTAILMENT SEASON:

The Summer Curtailment Season will extend from June 1 to September 30 and winter curtailment season from October 1 to May 30 with the ability to call emergency demand response events as needed.

CURTAILMENT LIMITS:

The Company may call a curtailment event any weekday, Monday through Friday, or any weekend day (Saturday and Sunday) during an Energy Emergency Alert (EEA) event officially designated as such. A curtailment event occurs whenever the customer load is being called/dispatched by the Company or its assignees. The Company may call a maximum of one curtailment event per day per Participant. The Company is not required to call / dispatch all Participants simultaneously and may stagger curtailment events across Participants.

PROGRAM TRACKS:

Standard Demand Response: Participants agree to be on call year-round for a preset number of peak reduction and emergency events. Participants receive a standardized incentive based on their achieved performance.

Custom Demand Response: Participants with a peak reduction capability of 500 kW or greater, specific to their operation(s) and agree to be on call year-round for a preset number of peak reduction and emergency events. Participants receive a customized incentive amount based on their achieved performance.

Emergency Call: Participants with a peak reduction capability of 500 KW or greater, specific to their operation(s) under the program period agree to a be on call year-round. Participants receive an incentive based on their hourly achieved performance.

EVALUATION:

MPSC will hire a third-party evaluator to perform the Evaluation, Measurement and Verification (EM&V) on the program. Associated costs will be funded utilizing Evergy's Demand Side Investment Mechanism (DSIM) rate rider.

PROGRAM BUDGETS: Combined Jurisdictions budget

Program	2027	2028	Total
Business Demand Program	$10,177,035	$16,271,569	$26,448,604

15.04 RESIDENTIAL DEMAND-SIDE MANAGEMENT

A. PURPOSE

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

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

B. AVAILABILITY

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

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

The Company reserves the right to discontinue the entire MEEIA Cycle 5 portfolio, if Company determines that implementation of such programs is no longer reasonable due to changed factors or circumstances that have materially negatively impacted the economic viability of such program as determined by the Company, upon no less than thirty days' notice to the Commission

C. DEFINITIONS

Unless otherwise defined, terms used in tariff sheets or schedules in Section 23 have the following meanings:

<u>APPLICANT</u> – A customer who has submitted a program application or has had a program application submitted on their behalf.

<u>DEMAND SIDE INVESTMENT MECHANISM (DSIM)</u> – A mechanism approved by the Commission in Evergy Missouri Metro's filing for demand-side program approval in Case No. EO-2026-0345.

<u>ENERGY EFFICIENCY</u> - Measures that reduce the amount of electricity required to achieve a given end use.

<u>INCENTIVE</u> – Program costs for direct or indirect incentive payments to encourage customer and/or retail partner participation in programs and the cost of measures, which are provided at no cost as part of the program.

15.05 RESIDENTIAL DEMAND-SIDE MANAGEMENT (continued)

Long-Lead Project - A project committed to by a Customer, accepted by the Company, and a signed commitment offer received by the program administrator by the end of the Program Period according to the terms and implementation of the MEEIA 2027-2028 programs, specifically to include the Income Eligible Multi-Family and the Whole Business Efficiency programs. The Income Eligible Multi-Family program will be allowed 12 months from end of the Program Period to be finalized, which includes the projects being closed out and incentives paid to the customer. The Whole Business Efficiency program will be allowed 6 months from the end of the Program Period to be finalized, which includes the projects being closed out and incentives paid to the customer.

Measure – An end-use measure, energy efficiency measure, and energy management measure as defined in 20 CSR 4240-22.020(18), (20), and (21).

Participant – End-use customer and/or manufacturer, installer, or retailer providing qualifying products or services to end-use customers.

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

Program Period – The period of which the programs are available. For the Income-Eligible, Whole Home Efficiency with Home Energy Financing, and Residential Demand Response will be from January 1, 2027 through December 31,2028; Unless earlier terminated under the TERM provision of this tariff. Programs may have slightly earlier deadlines for certain activities, as noted on the Company website – www.evergy.com.

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

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

D. TERM

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

E. DESCRIPTION

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

- Income Eligible – December 31, 2028
- Whole Home Efficiency with Home Energy Financing – December 31, 2028
- Residential Demand Response – December 31, 2028

The tariff sheets and the tariff sheets reflecting each specific DSM program shall be effective from the date of the tariff sheets to the applicable dates as noted above next to each individual program, unless an earlier termination date is ordered or approved by Commission.

15.04 RESIDENTIAL DEMAND-SIDE MANAGEMENT (continued)

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

F. CHANGE PROCESS

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

1. Identify need for program detail change regarding the interaction between Company or Program Administrators and Participants in the Programs;
2. Discuss proposed change with Program Administrator;
3. Discuss proposed change with Evaluator;
4. Analyze impact on program and portfolio (cost-effectiveness, goal achievement, etc.);
5. Inform the Staff and Office of the Public Counsel of the proposed change, the time within which it needs to be implemented, provide them the analysis that was done and consider recommendations from them that are received within the implementation timeline (the implementation timeline shall be no less than five business days from the time that the Staff and Office of the Public Counsel are informed and provided the above-referenced analysis);
6. Take timely received recommendations into account and incorporate them where Company believes it is appropriate to do so;
7. Notify and train customer contact personnel (Customer Service Representatives, Energy Consultants, Business Center) of the changes;
8. Make changes to forms and promotional materials;
9. Update program website;
10. File updated web pages and, if appropriate updated list of Measures and Incentive amounts in Case No. EO-2026-0345; and
11. Inform Customers, trade allies, Program Partners, etc.

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

15.04 RESIDENTIAL DEMAND-SIDE MANAGEMENT (continued)

G. PROGRAMS ANNUAL ENERGY DEMAND SAVINGS

These values are estimates based on savings at customer meters (excluding transmission and distribution line losses).

H. PROGRAM COSTS AND INCENTIVES

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

I. PROGRAM DESCRIPTIONS

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

J. **CHANGES IN MEASURES OR INCENTIVES

Measures contained in the Company’s most recently approved Technical Resource Manual (TRM) in Case No. EO-2026-0345. The offering of Measures not contained within the aforesaid filing must be approved by the Commission. Measures being offered and Incentives available to customers will be listed on Company’s website, www.evergy.com. The Measures and Incentives being offered are subject to change. Customers must consult www.evergy.com for the list of currently available Measures. Should a Measure or Incentive offering shown on Company’s website differ from the corresponding Measure or Incentive offering shown in the currently effective TRM, the stated Measure or Incentive offering as shown in the currently effective TRM shall govern.

15.05 INCOME ELIGIBLE PROGRAM

A. PURPOSE

The Income-Eligible Program is designed to reduce energy burden, improve housing conditions, and address barriers that often prevent income-qualified customers from participating in energy efficiency programs. The program targets practical, deployable measures and services that can produce benefits within the two-year MEEIA Cycle 5 implementation period.

B. AVAILABILITY

Income Eligible Single Family / Weatherization Ready:

Income-eligible residential homeowners and renters that reside in single-family housing with two (2) or fewer units. Low-income customers are 200% or below the Federal poverty level.

Eligibility may be based on the following:

- Reside in federal, state, or local subsidized housing and meet those program income guidelines.
- Reside in non-subsidized housing and provide proof of income level.
- Reside within a census tract at or below the required income level or within Justice 40 Census Tracts.
- Have participated in other programs that require the same or lesser income levels, such as LIHEAP.

Income Eligible Multi-Family:

The Income Eligible Multi-Family program is available for the Program Period to any customer receiving service under any residential or business rate, meeting one of the following building eligibility requirements:

- Participation in an affordable housing program. Documented participation in a federal, state or local affordable housing program, including LIHTC, HUD, USDA, State HFA and local tax abatement for low-income properties.
- Location in a low-income census tract. Location in a census tract we identify as low-income, using HUD's annually published "Qualified Census Tracts" or Justice40 Census Tracts.
- Rent roll documentation. Where at least 50 percent of units have rents affordable to households at or below 80 percent of area median income, as published annually by HUD.
- Tenant income information. Documented tenant income information demonstrating at least 50 percent of units are rented to households, meeting one of these criteria: at or below 200 percent of the Federal poverty level or at or below 80% of area median income.
- Participation in the Weatherization Assistance Program. Documented information demonstrating the property is on the waiting list for, currently participating in, or has in the last five years participated in the Weatherization Assistance Program.

15.05 INCOME ELIGIBLE PROGRAM (continued)

C. BUDGETS
Combined Jurisdictions

Program	Components	2025	2026	Total
Income Eligible Program	Income Eligible Multi-Family & Income Eligible Single Family/Weatherization Ready	$5,767,080	$5,767,080	$11,534,160

D. PROGRAM PROVISIONS
The Income-Eligible Program will consist of two components:

- Income Eligible Single Family / Weatherization Ready promotes efficiency improvements to housing for low-income single-family customers. Evergy will work with local resources from the Kansas City Low Income Leadership Assistance Collaborative (KC-LILAC) to provide home repairs and/or Missouri community action agencies' deferred customers to remove barriers to proceed through the standard Weatherization Assistance Program for home efficiency improvements. The barriers vary by home but may include foundation issues, roof repairs, mold mitigation, etc.
- Income Eligible Multi-Family provides whole building analysis, recommendations for improvements with technical and process assistance, and incentives for upgrades. Projects include both in-unit and common area improvements.
- *In-Unit Upgrades.* Residents in qualifying multi-family housing will receive direct installation of low-cost measures at no cost. The measures may include: low-flow faucet aerators, low-flow showerheads, LEDs, advanced power strips, and hot water pipe insulation. Rebates for in-unit upgrades will also be available.
- *Multi-Family Common Areas.* Prescriptive and custom rebates will be available for qualifying upgrades.
- *Income Eligible Multi-*Family New Construction. Encourages income eligible multi-family builders to build buildings more energy efficiently by offering rebates to offset the cost difference between an inefficient and an efficient building.

Some of these components will be co-delivered with Spire to eligible customers for both utilities. Evergy offerings are not contingent upon co-delivery.

E. ELIGIBLE MEASURES AND INCENTIVES
Measures contained in Company's most recently approved Technical Resource Manual (TRM) filed in Case No. EO-2026-0345 are eligible for program benefits and incentives and may be offered during the Program Period. Eligible Incentives directly paid to customers and Measures can be found at www.evergy.com.

F. EVALUATION
MPSC will hire a third-party evaluator to perform the Evaluation, Measurement, and Verification (EM&V) of the program. Associated costs will be funded utilizing Evergy's Demand Side Management Investment Mechanism (DSIM) rate rider.

15.06 RESIDENTIAL DEMAND RESPONSE

A. PURPOSE

The voluntary Residential Demand Response Program is designed to reduce Participant load during peak periods to improve system reliability, offset forecasted system peaks that could result in future generation capacity additions and/or provide a more economical option to generation or purchasing energy in the wholesale market.

Participant curtailment may be requested for any of these operational or economic reasons as determined by the Company. The Program accomplishes this by deploying various demand response technologies to Participants WiFi enabled connected device(s) to modify the run-time and utilization of the device for a specified period of time in a Company coordinated effort to limit overall system peak load.

B. AVAILABILITY

The program is available during the Program Period and available to all Evergy Missouri Metro residential customers receiving electric service that also meet the program provisions below.

C. PROGRAM PROVISIONS

This program will consist of qualifying direct load control (DLC) devices. Customers must maintain a secure home WiFi enabled internet service and have a working central air conditioning system or heat pump. If a WiFi enabled device is provided to customers at a discounted price, customers must agree to install the device at their premise receiving electric service within fourteen (14) days of receiving the device, and keep it installed, operational and connected to a secure home WiFi network for the duration of the program Cycle.
Customers must agree to not sell the device for the duration of the program. If it is found that they do, a debit will be issued on their utility bill for the Manufacturer Suggested Retail Price (MSRP) of the WiFi-enabled device, or the value of incentive provided to the customer. Payment of that debit will be the customer’s responsibility. Incented devices through the Program are only eligible for utility retail or wholesale programs.

The Company reserves the right to apply minimum and/or maximum event performance requirements for incentive payment, to apply financial penalties and to terminate participation for non-compliance.

This schedule is not applicable where the Customer’s electric generating and/or electric storage system(s) are registered in the wholesale market as a part of a Demand Response (DR) or Distributed Energy Resource (DER) aggregation.

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

15.06 RESIDENTIAL DEMAND RESPONSE (continued)

D. CONTROLS & INCENTIVES

Participants will receive enrollment and participation incentives at a level determined by the Company. If customers have an existing WiFi enabled eligible device the customer may elect to enroll and participate in the demand response program. During a curtailment event, the Company or its assignee will deploy various demand response technologies to Participants' WiFi enable device to modify the run-time of central air-conditioning unit(s), heat pump(s) or other behind the meter technologies for a specified period of time in a Company coordinated effort to limit overall system peak load.

The customer has the option to opt out of any individual curtailment event by modifying the settings on their device or contacting the Company or its assignee. Participants have the option of opting out of the entire program by having the Company remove the device or by returning the device to the Company. The Company reserves the right to set and modify incentive levels at any point during the program.

E. CURTAILMENT METHODS

The Company may elect to deploy various types of demand response reductions including, but not limited to: (1) cycling the compressor unit(s); (2) deploying stand-alone pre-cooling and pre-heating strategies; (3) deploying a combination of pre-cooling and pre-heating cycling strategies; (4) deploying pre-cooling and pre-heating temperature modification strategies.

The Company reserves the right to test new DR enabled devices during the program period.

F. NOTIFICATION

The Company will notify Program Participants of a curtailment event via various communication channels, which could include, but is not limited to:

1. SMS.
2. Email.
3. Push notifications.
4. In-App notifications.
5. Device notifications.

The notification can occur prior to or at the start of a curtailment event.

15.06 RESIDENTIAL DEMAND RESPONSE (continued)

G. CURTAILMENT SEASON

The Summer Curtailment Season will extend from June 1 to September 30 and Winter Curtailment Season from October 1 to May 31 with the ability to call emergency demand response events as needed.

H. CURTAILMENT LIMITS

The Company may call a curtailment event any weekday, Monday through Friday. In addition, the company may call a curtailment event on Saturday or Sunday during an Energy Emergency Alert (EEA) event officially designated as such. A curtailment event occurs whenever the direct load control device is being controlled by the Company or its assignees. The Company may call a maximum of one curtailment event per eligible device per day per Participant. The maximum number of hours the Company may call per device per year will be governed by limitations established within the terms and conditions of the device original equipment manufacturers. The Company is not required to curtail all Participants simultaneously and may stagger curtailment events across Participants.

I. EVALUATION

MPSC will hire a third-party evaluator to perform the Evaluation, Measurement and Verification (EM&V) on the program. Associated costs will be funded utilizing Evergy's Demand Side Investment Mechanism (DSIM) rate rider.

J. PROGRAM BUDGETS

Combined Jurisdiction Budgets

Program	2027	2028	Total
Residential Demand Response	$6,530,427	$8,463,514	$14,993,940

15.07 WHOLE HOME EFFICIENCY WITH HOME ENERGY FINANCING

A. PURPOSE

The Whole Home Efficiency with Home Energy Financing Program is designed to help residential customers reduce energy use, manage energy costs, and install eligible high-efficiency equipment. The Home Energy Financing component is intended to address one of the largest barriers to residential energy efficiency: upfront capital requirements associated with HVAC replacement.

B. AVAILABILITY

- **Whole Home Efficiency:** This program is available during the Program Period and is available to any customer receiving service under any generally available residential rate schedule offered by the Company
- **Home Energy Financing:** This offering is available exclusively to Missouri residential customers receiving service under any generally available residential rate offered by The Company and is classified as Moderate Income according to the current year's US Federal Poverty Level guidelines, defined as 201-300% of the Federal Poverty Level.
  - Customers residing in Census Blocks where the average income falls within 201-300% of the Federal Poverty Level (based on 3-person households) will automatically qualify for this program offering. Additionally, customers living outside these eligible Census Blocks who self-attest to meeting the income requirements will also be eligible for this offer.
  - Low Income Customers (200% or below FPL) who have been informed of the no cost Weatherization Assistance Programs but do not wish to move forward with those, may sign an acknowledgement that they elect to instead utilize Evergy's Home Energy Financing.

C. BUDGET

Combined Jurisdiction Budgets

Program	2027	2028	Total Cycle
Whole Home Efficiency with Home Energy Financing	$6,000,000	$6,000,000	$12,000,000

D. PROGRAM OFFER DESCRIPTION

- **Whole Home Efficiency**

The Whole Home Efficiency Program may include residential energy efficiency offerings such as home comfort improvements, HVAC equipment, building shell improvements, appliance-related offerings, and other eligible residential measures identified in the Technical Resource Manual or supporting workpapers.

- **Home Energy Financing**

Eligible Equipment: Equipment that is eligible to receive a Home Energy Financing offer are systems that are designated HVAC and are listed within The Company's Technical Resource Manual.

Component Offer Description: The Company will hire a Program Administrator to implement the Home Energy Financing component within the existing Whole Home Efficiency Program. The Program Administrator will provide the necessary services to effectively implement:

- The Program Administrator will work with The Company's active authorized HVAC Trade Ally contractors to verify customer eligibility when applying for Financing.

D. PROGRAM OFFER DESCRIPTION (Continued)

- The Program Administrator will receive the eligible customer's usage history, pre/post equipment information, and the authorized HVAC Trade Ally contractors pricing to determine each qualifying participant's scope of work. The qualifying scope of work calculates that the customers' electric bill is 5% less (including the new project/tariff charge) than it would have been otherwise without the efficient HVAC upgrade.
- Once the installation of qualifying HVAC upgrades have been installed, the following actions will occur:
    - Post Install Quality Control Inspections – 100% of installations will be remotely inspected for quality assurance and photo documented.
    - The Program Administrator to file Property Notice with the location's property records with the applicable counties in the State of Missouri.
    - The Company will initiate on-bill charges a minimum of 30-days following verification of installation

Authorization to Release Electric Consumption: The Participant authorizes The Company to release their energy usage history to the Program Administrator to determine qualifying scopes of work.

Financing Offer: The Company will have its Program Administrator conduct a cost analysis and develop a Financing Offer provided to the authorized HVAC Trade Ally contractor for the Participant's decision if they would like to move forward with Home Energy Financing. The Financing Offer will incorporate the following:

- **Upgrade Rebate:** The Company will offer rebates currently available for an eligible residential HVAC measure as defined in the Company's MEEIA Demand Side Plan.
- **Positive Impact:** Qualifying upgrades for The Company's Financing Offer shall be limited to those where the annual tariff charge is no greater than 95% of the estimated annual benefit from the reduction to the Participant's annual utility charges based on electricity consumption. Essentially providing the customer with the opportunity for a 5% electricity bill reduction that's inclusive of the tariff charge.
- **Upfront Payments:** If the estimated annual bill savings is not sufficient to cover 95% of the upgrade costs, participants can cover the difference through an upfront payment paid directly to the authorized HVAC Trade Ally contractor. Upfront payments will be determined after qualifying rebates are applied.
- **Processing Fees:** Participants are responsible for any processing fees, if applicable.
- **Financing Term:** The Company will offer qualifying projects with repayment terms up to 15-years at 0% interest to the participant.

Repayment Terms and Agreement:
- **Monthly Payment:** The Company will recoup its investment costs, including any applicable fees, as permitted by this tariff through a Monthly Payment. This charge will be assigned to the premise/meter where the HVAC upgrade is installed and will be paid by the Participant or their successor occupying the location until all Company costs are recovered. The Monthly Payment duration will not exceed 15-years. Details of the Monthly Payment and payment duration will be included in the Financing Offer.
- **Tariff Repayment:** The Participant shall be billed for the monthly payment as indicated on the signed Financing Offer approximately 30 days after verification of upgrades have been completed. The Company will bill and collect Monthly Payments until tariff repayment is complete.

D. PROGRAM OFFER DESCRIPTION (Continued)

- **Completion of Tariff:** Once the Company's costs for the upgrades at a location have been fully recovered, including, contractor fees, and any repair expenses, the monthly payment will cease to be billed. Customers will have the option to pay off any remaining costs associated with the installed upgrades at any time.
- **Monthly Payment Extension:** In the event The Company has to reduce or suspend the monthly payment due to repairs or other reason, the repayment term shall be extended until the total amount received by the Company is equal to the Company's cost for installation, repairs, and deferred or missed payments as long as the occupant is still benefiting from the upgraded HVAC equipment.
- **Unoccupied Properties:** If a location with installed upgrades becomes unoccupied and electric service is disconnected, the Monthly Payment will be suspended until a new customer occupies the location. If the owner keeps the electric service active, they will be billed the Monthly Payment.
- **Maintenance and Reporting:** Participants and owners of the location (if the participant is not the owner) must keep the installed upgrades in place, in working order, and maintained according to the manufacturer's instructions throughout the cost recovery period. Participants must report any failure of the installed upgrades to The Company or its Program Administrator as soon as possible. If an upgrade fails, the authorized HVAC Trade Ally Contractor will determine the cause. If the damage was caused by the owner, participant, or occupants, they will reimburse The Company for the incurred expenses. If the failure was not due to the owner, participant, or occupant, The Company will determine if it is repairable through the Contractor/Manufacturer warranty. The Company may waive the remaining cost recovery balance for the participant if the repair is not covered under warranty and is more economical to do so.
- **Tariff Bound to Upgraded Property:** The Monthly Payment will remain at the location where upgrades were installed until The Company is repaid in full.
- **Policy for Disconnection:** The Company's disconnection for non-payment of the tariff is treated identical to the Company's standard policy.
- **Uncollectible Payments:** Costs associated with Participants who have fallen into non-pay status before complete recovery of equipment costs will follow the Company's standard Credit and Collections process.
- **Ownership of Upgrades:** The Company will retain ownership of the installed upgrades during the tariff repayment period. Once tariff repayments have been completed, ownership will transfer to the property.
- **Verification of Savings:** The Company and/or the EM&V partner will perform an analysis 12-months post installation date to evaluate weather normalized bill savings. In the event, the analysis determines that the Monthly Payment exceeds the estimated project cost savings, an investigation will take place. The Company cannot guarantee cost savings as a result of participant behavior or weather changes, but if it was determined there was an error in modeling – The Company will work with the Program Administrator and re-evaluate the Financing Offer. The Company reserves the right to reduce or eliminate the Monthly Payment based on the re-evaluated Financing Offer.

REQUIREMENTS OF PARTICIPANTS:

- **Rental Properties:**
    - **New Tenant Notice:** The landlord is responsible for notifying the new tenant of the Home Energy Financing tariff prior to signing lease agreement. If notice is not provided, The Company is not held responsible.
    - **Landlord Permission:** If the participant is not the owner of the location where upgrades are being installed, the property owner must sign an Owner's Agreement.
- **Notice on County Records:**
    - The Company will file a Notice of Tariff Surcharge for the county in which the property is located. In the event of selling a property with Home Energy Financing, it is the seller's duty to inform the purchaser. If notification is not provided to the purchaser, The Company is not held responsible.

Eligible Incentives directly paid to the Customers and Measures, along with Program Terms and Conditions can be found at www.evergy.com

EVALUATIONS

The Company's EM&V evaluator will perform the Evaluation, Measurement, and Verification of the Program.