

Exhibit No.:

Issue: Income-Eligible Programs;
Green Button Connect

Witness: Katie R. McDonald

Type of Exhibit: Surrebuttal Testimony

Sponsoring Party: Evergy Missouri Metro

Case No.: ER-2026-0143

Date Testimony Prepared: September 10, 2026

MISSOURI PUBLIC SERVICE COMMISSION

CASE NO. ER-2026-0143

SURREBUTTAL TESTIMONY

OF

KATIE R. MCDONALD

ON BEHALF OF

EVERGY MISSOURI METRO

Kansas City, Missouri

September 2026

SURREBUTTAL TESTIMONY

OF

KATIE R. MCDONALD

CASE NO. ER-2026-0143

1 **Q. Please state your name and business address.**

2 A. My name is Katie R. McDonald. My business address is 1200 Main Street, Kansas City,
3 Missouri 64105.

4 **Q: By whom and in what capacity are you employed?**

5 A: I am employed by Evergy Metro, Inc. I serve as Vice President, Public Affairs for Evergy,
6 Inc., Evergy Metro, Inc. d/b/a as Evergy Missouri Metro (“Evergy Missouri Metro,”
7 “EMM,” or the “Company”), Evergy Missouri West, Inc. d/b/a Evergy Missouri West
8 (“EMW”), Evergy Metro, Inc. d/b/a Evergy Kansas Metro (“EKM”), and Evergy Kansas
9 Central, Inc. and Evergy South, Inc., collectively d/b/a as Evergy Kansas Central (“EKC”)
10 the operating utilities of Evergy, Inc. (“Evergy”).

11 **Q. Are you the same Katie R. McDonald who filed direct and rebuttal testimony in this**
12 **case?**

13 A. Yes.

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

15 A: I am testifying on behalf of EMM.

16 **Q. What is the purpose of your surrebuttal testimony?**

17 A. The purpose of my surrebuttal testimony is to respond to the rebuttal testimony filed by
18 Staff witnesses Contessa King (pp. 1–8), Tammy Huber (pp. 2–7), Amy Eichholz (pp. 1–
19 3), Brooke Mastrogiannis (pp. 12-15), and Shawn Lange (pp. 5–9). My testimony addresses

1 the topics I discussed in my rebuttal testimony related to income-eligible programs
2 including the Economic Relief Program (ERPP), Rehousing Program, Critical Medical
3 Needs Program, and Income-Eligible Weatherization Program. Finally, I will also address
4 the rebuttal testimony of Staff witness Shawn Lange on the Green Button Connect issue.

5 **Q. What is Evergy’s overall position on making changes to the income-eligible programs**
6 **at this time?**

7 A. Evergy strongly believes that the Commission should not adopt program changes while the
8 Affordability Docket is ongoing. The docket is examining affordability holistically,
9 including rate design, bill assistance, arrearage management, and program coordination.
10 Premature changes in this case would undermine the collaborative process and could result
11 in inconsistent or duplicative program structures.

12 **Q. Why did the Commission establish the Utility Assistance Programs Working Case**
13 **(OW-2026-0085) and hold the Low-Income/Utility Assistance Workshop?**

14 A. The Commission opened the working case and convened the workshop to conduct a
15 comprehensive review of existing utility affordability programs and explore ways to
16 improve assistance for low-income and senior residential customers. As stated in the
17 Commission’s October 1, 2025, Order in No. OX-2026-0085, the purpose is to “evaluate
18 efficiencies, consider new affordability tools, examine special alternative residential rates
19 authorized under Section 393.1680, RSMo, and improve community outreach and
20 customer education.”

21 The workshop aims to gather input from utilities, agencies, nonprofits, and the
22 public to inform future program design. The PSC’s July 27, 2026, press release explains

1 that “public comments and workshop feedback will help the Commission evaluate and
2 improve investor-owned utility assistance programs statewide.”

3 **Q. On page 3 of her rebuttal testimony, Ms. King states that underspending Economic**
4 **Relief Pilot Program (“ERPP”) allocated funds has been a recurring issue. What**
5 **factors have affected Evergy’s ability to fully utilize the program funding?**

6 A. Evergy recognizes that ERPP funding has not been fully utilized in some years. Program
7 enrollment is affected by the existing tariff requirements. Specifically, some customers who
8 appear to meet the income requirements may not be enrolled because they do not satisfy
9 all applicable program requirements or because other account-related circumstances must
10 first be resolved. This has been discussed as part of the PSC’s Affordability Docket and
11 Workshop process, and Evergy is reviewing and evaluating potential tariff changes that
12 could improve enrollment while preserving appropriate program controls.

13 **Q: Please explain EMM’s efforts to increase ERPP participation.**

14 A. Evergy is taking several steps to improve ERPP participation. The Company is evaluating
15 a tariff adjustment intended to address enrollment barriers, working to identify customers
16 who may qualify for the program but have not been enrolled, and conducting more targeted
17 outreach to potentially eligible customers. Evergy is also reviewing situations in which
18 customers were not enrolled because of credit or collection requirements to determine
19 whether an appropriate path to participation is available. These efforts are intended to
20 improve program access and utilization while ensuring that customers satisfy the applicable
21 eligibility requirements.

1 **Q. On page 4 of her rebuttal testimony, Ms. King discusses EMM's plan to conduct a**
2 **future evaluation of ERPP. Would you explain EMM's plans to evaluate the program?**

3 A. Evergy agrees that additional evaluation could provide useful information about the
4 program. The Company is assessing an appropriate process for evaluating enrollment,
5 program utilization, customer outcomes, and opportunities for improvement. Evergy
6 believes the scope and timing should account for the enrollment and tariff improvements
7 currently under consideration so that any evaluation reflects the updated operation of the
8 program.

9 **Q. On page 2 of her rebuttal testimony, Ms. King states that Staff agrees, in part, with**
10 **Dr. Marke's recommendation to allow ERPP funds to be fungible with other**
11 **programs if spending stalls. What is Evergy's position on this recommendation?**

12 A. Evergy does not recommend making ERPP funding broadly fungible among other income-
13 eligible programs at this time. The programs have different purposes, eligibility
14 requirements, funding mechanisms, administrative structures, and reporting requirements.
15 Moving funds among programs without clearly defined parameters could reduce
16 transparency and make it more difficult to determine whether each program is achieving
17 its intended purpose. Evergy believes the immediate priority should be improving ERPP
18 enrollment and utilizing the approved funding for eligible ERPP customers.

19 **Q: On page 5 of her rebuttal testimony, Ms. King states that the Staff would support**
20 **EMM's previous request to remove the "Pilot" designation on the ERPP. Does EMM**
21 **continue to support this proposal?**

22 A. Yes. ERPP has operated for many years and is no longer a new or experimental offering.
23 In light of its operating history and the statutory changes resulting from Senate Bill 4,

1 Evergy believes it is appropriate to remove the “Pilot” designation. Removing that
2 designation would not, by itself, change the program’s funding, eligibility requirements, or
3 customer benefits.

4 **Q. Staff witness King discusses participation in the Rehousing Program and the absence**
5 **of a formal program evaluation. What context should the Commission consider when**
6 **reviewing the program’s performance?**

7 A. The Rehousing Program is still a relatively new program and remains within its initial pilot
8 period. Developing the program required Evergy and its partner agencies to establish
9 referral, eligibility, payment, reporting, and customer-support processes. Evergy has also
10 expanded the program beyond its initial partnership with the Housing Authority of Kansas
11 City to reach additional eligible customers, including seniors in affordable housing and
12 survivors of domestic violence through participating shelters. Those expansions require
13 coordination with community organizations and time to establish effective referral
14 pathways. For those reasons, participation during the early years should be considered in
15 the context of a new and evolving program.

16 **Q. Does Evergy plan to evaluate and report on the Rehousing Program?**

17 A. Yes. Evergy intends to provide the required year-end reporting and to assess the program
18 after completion of its initial three-year pilot period. That assessment will have the benefit
19 of more complete participation information and experience from the program’s expanded
20 partnerships. Evergy believes evaluation at the conclusion of the pilot will provide a more
21 meaningful basis for determining whether any longer-term changes to program design,
22 administration, or reporting are appropriate.

1 **Q. On page 8 of her rebuttal testimony, Ms. King recommends that the Commission**
2 **order EMM to file quarterly Rehousing Program reports as non-case-related filings**
3 **in the Commission's Electronic Filing and Information System, in addition to the**
4 **year-end report currently required. Does Evergy agree that an additional quarterly**
5 **filing requirement is necessary?**

6 A. No. Evergy does not believe an additional quarterly EFIS filing requirement is necessary
7 at this time. The existing tariff requires year-end reporting, and Evergy also provides
8 program updates during its quarterly customer-service meetings with Commission Staff.
9 The Rehousing Program remains in its pilot period, and Evergy believes that continuing
10 the existing reporting process through completion of the pilot will provide adequate
11 information without adding a duplicative filing requirement. Evergy will provide the
12 required year-end report and evaluate whether changes to reporting are warranted after the
13 pilot is complete.

14 **Q. Staff discusses increased emphasis on elderly and single-parent households while**
15 **continuing the tariff's existing priority for veterans and disabled individuals. Does**
16 **Evergy believe a change to the Rehousing Program is needed to address those**
17 **populations?**

18 A. Evergy does not believe an immediate program or tariff change is necessary. The Company
19 already conducts outreach to senior residents through its partnership with the Housing
20 Authority of Kansas City. The recent expansion to domestic violence shelters also provides
21 another pathway to assist eligible households seeking stable housing, some of which may
22 be headed by a single parent. Evergy will continue to work with its partner agencies to
23 identify eligible customers, including veterans and disabled individuals, under the existing

1 tariff. Further expansion should be approached deliberately because each new partnership
2 requires appropriate referral, eligibility, payment, and reporting processes.

3 **Q. On pages 2–7 of her rebuttal testimony, Staff witness Huber discusses OPC’s**
4 **proposed income-eligible rate design. Do you have any comments in response?**

5 A. Huber’s testimony illustrates that significant issues remain unresolved, including
6 eligibility, participation limits, duration, renewal requirements, third-party administration,
7 implementation costs, program evaluation, and recovery of the revenue that would no
8 longer be collected from participating customers. These questions should be considered as
9 part of the Affordability Docket before a new income-eligible rate is proposed. Evergy is
10 willing to continue working with Staff, OPC, community agencies, and other stakeholders
11 to develop approaches that are administratively workable, cost effective, and appropriately
12 targeted to customers in need.

13 **Q. On pages 1–3 of her rebuttal testimony, Staff witness Amy Eichholz rebutted Dr.**
14 **Marke’s proposal to increase Critical Medical Needs Program funding from \$300,000**
15 **to \$2 million. She emphasized maintaining current programs and funding levels,**
16 **pending further review. Do you agree with the Staff on this point?**

17 A. Yes. The Critical Medical Needs Program is still relatively new, and Evergy believes
18 additional experience and evaluation are needed before determining whether a significant
19 funding change is warranted. Evergy therefore supports maintaining the current funding
20 level while the program’s results are evaluated and the broader Affordability Docket
21 progresses.

1 **Q. Staff witness Brooke Mastrogiannis addresses Dr. Marke's recommendation to**
2 **increase Income-Eligible Weatherization funding and expand the allowable uses of**
3 **program funds. Does Evergy agree that those changes should be adopted?**

4 A. No. Evergy continues to believe the current funding level for the Income-Eligible
5 Weatherization Program is appropriate. In addition, Evergy already offers complementary
6 support through its Weatherization Ready initiative, which is designed to address certain
7 home-repair barriers that can prevent an otherwise eligible home from proceeding with
8 weatherization. The existence of that separate initiative allows the Income-Eligible
9 Weatherization Program to remain focused on its intended energy-efficiency purpose while
10 Weatherization Ready addresses qualifying pre-weatherization barriers.

11 **Q. On pages 5-9 of his rebuttal testimony, Staff witness Shawn Lange discusses Renew**
12 **Missouri's Green Button Connect proposals. Do you agree with the Staff's position**
13 **that the Green Button Connect program should not be adopted at this time?**

14 A: Yes. As I stated in my rebuttal testimony, Evergy believes that it is premature to pursue an
15 expansion of its existing Green Button Connect functionality as recommended by Renew
16 Missouri witness Wyszowski. Evergy agrees with Staff that adopting a tariff governing
17 the use of GBC as proposed by Ms. Wyszowski is not appropriate at this time.

18 **Q. Does this conclude your surrebuttal testimony?**

19 A. Yes.

**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-2026-0143
Implement A General Rate Increase for Electric)
Service)

AFFIDAVIT OF KATIE MCDONALD

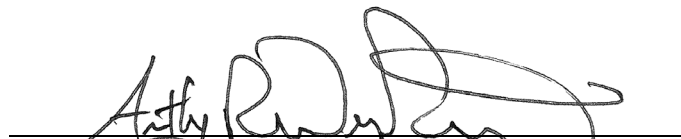
STATE OF MISSOURI)
) ss
COUNTY OF JACKSON)

Katie McDonald, being first duly sworn on his oath, states:

1. My name is Katie McDonald. I work in Kansas City, Missouri and I am employed by Evergy Metro, Inc. as Vice President, Public Affairs.
2. Attached hereto and made a part hereof for all purposes is my Surrebuttal Testimony on behalf of Evergy Missouri Metro consisting of e i g h t (8) 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.


Katie R. McDonald

Subscribed and sworn before me this 10th day of September 2026.


Notary Public

My commission expires: April 26, 2029

