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MISSOURI PUBLIC SERVICE COMMISSION

CASE NO.: ER-2027-0077

DIRECT TESTIMONY

OF

KATIE R. MCDONALD

ON BEHALF OF

EVERGY MISSOURI WEST

Kansas City, Missouri
November 2026

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DIRECT TESTIMONY

OF

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Case No. ER-2027-0077

I. INTRODUCTION

Q: Please state your name and business address.

A: My name is Katie McDonald. My business address is 1200 Main, Kansas City, Missouri 64105.

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

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

Q: On whose behalf are you testifying?

A**:** I am testifying on behalf of EMW.

Q: What are your responsibilities?

A: I lead the Public Affairs division and have responsibility for the strategy and execution of Corporate Communications, Marketing, Digital Strategy, and all digital tools (including the website, customer portals, and app), and Social Impact functions which include Customer Affairs, Community Relations, Connect Centers, and Community-based Sustainability.

Q: Please describe your education, experience, and employment history.

A: I earned a Bachelor of Journalism degree from the University of Missouri-Columbia and an MBA from the Bloch School of Management at the University of Missouri-Kansas City. I am also a graduate of the University of Idaho's Utility Executive Program. I have worked in various positions in the Public Affairs division at Evergy since I joined the company in 2007. Prior to joining KCP&L (now Evergy), I worked in marketing and public affairs roles at two integrated marketing communications agencies in Kansas City.

Q: Have you previously testified in a proceeding before the Missouri Public Service Commission ("Commission" or "MPSC") or before any other utility regulatory agency?

A: Yes, I have testified before the MPSC.

Q: What is the purpose of your testimony?

A: My testimony will discuss Evergy's approach and specific programs supporting its low income and medically vulnerable customers and also proposed tariff revisions to the Economic Relief and Rehousing programs. I will also discuss Evergy's approach to customer service in Missouri. Finally, I support implementing the Green Button Connect My Data capability for EMW customers on the same terms as contained in the programs stipulation filed in the recent EMM rate case.

II. SERVING LOW INCOME AND MEDICALLY VULNERABLE CUSTOMERS

Q: How does Evergy support its low-moderate income and vulnerable customers?

A: Evergy offers a portfolio of assistance programs generally focused on customers with household incomes at or below 200% of the Federal Poverty Level (FPL), while eligibility requirements vary by individual program. The 200% FPL threshold aligns with the

eligibility standard used by the federal Weatherization Assistance Program and provides a meaningful benchmark for identifying households facing affordability challenges. For 2026, 200% FPL is $43,280 annually for a two-person household.

This approach helps Evergy target assistance to customers who may be particularly vulnerable to energy insecurity and difficulty paying their utility bills. Evergy also provides specialized support for medically vulnerable customers, including customers experiencing medical or cognitive crises and those who rely on electric life-support equipment. Evergy's current portfolio includes programs specifically addressing these circumstances.

Evergy's portfolio is designed to address multiple dimensions of affordability, including bill-payment assistance, arrearage relief, flexible payment arrangements, support and outreach for medically vulnerable customers, and energy-efficiency and weatherization programs delivered in partnership with community agencies. These programs complement existing public assistance and help leverage utility resources alongside federal and state funding. As discussed further by Company witnesses Darrin Ives (Senior Vice President – Government and Regulatory Affairs) and Kevin Gunn (Vice President- Government and Regulatory Affairs), Evergy aims to combine affordability with tools that promote financial stability, energy efficiency, and long-term resilience.

Evergy also recognizes that making assistance available is only part of the solution. Customers must be able to understand, access, and navigate the programs for which they may qualify. Through proactive enrollment efforts, personalized and face-to-face assistance, community partnerships, and targeted mobile outreach in lower-income ZIP codes within the EMW service area, Evergy works to connect customers with available resources. These efforts are intended to increase program awareness and participation, help

customers avoid disconnection and growing arrearages, and reduce the likelihood that customers experience recurring financial crises.

Q: What programs are offered to support EMW low income and medically vulnerable customers?

A: Evergy offers a suite of programs designed to support low income and medically vulnerable customers in Missouri including:

- **Economic Relief Pilot Program**, which provides monthly bill credits, up to $65, to eligible households for up to 12 months;
- **Dollar Aide** is supported by voluntary donations, which Evergy matches, to assist income-eligible households with bill payments;
- **Rehousing Pilot Program** assists customers with arrearages as they transition into stable housing;
- **Critical Medical Needs Program** helps to link customers facing a medical or cognitive crisis to payment resources, stop disconnections, and layer additional programs;
- **Medical Program** offers additional outreach and assistance to customers dependent on life-saving medical equipment;
- **Cold Weather Registered Program** allows eligible customers to receive extra notice before disconnecting.
- **Medical Extension** postpones a disconnection for 21 days if losing power may aggravate the medical condition of a customer.
- **Income-Eligible Weatherization** programs deliver energy-efficiency upgrades and other tools to reduce ongoing energy costs.

- **Weatherization Ready/KC-Low Income Leadership Collaborative (KC-LILAC)** provides necessary home repairs for customers to allow for Weatherization upgrades. This program will also provide home repairs for customers who have already participated in Weatherization and are in need of repairs to maintain the efficiency/benefits of the prior Weatherization work.
- **Income-eligible Multi-family Program** offers energy upgrades and other energy efficiency improvements for homes.

Q: Does Evergy recommend continuing the Economic Relief Pilot Program?

A: Yes. Evergy recommends continuing the Economic Relief Pilot Program with equal sharing of costs between ratepayers and the Company. Please refer to the testimony of Company witness Jeremy Fischer for details on the funding level proposed in this case.

Q: Is Evergy proposing changes to the Economic Relief Pilot Program?

A: Yes. Evergy is submitting tariff revisions in this case to update the existing Economic Relief Program. The proposed revisions would remove the prior Department of Social Services eligibility criterion; provide greater flexibility for customers with arrearages or prior removal from the program; and extend participation for qualifying seniors receiving Supplemental Security Income for up to 24 months. These revisions are intended to improve access and provide greater flexibility in administering the program. In addition, Evergy proposes removing the word “pilot” from the program title. These changes also

align the EMW program with the proposed EMM stipulation, which is subject to Commission approval at the time of this filing.

Q: Is the Company proposing to change the funding levels for these assistance programs?

A: No. The Company proposes to continue the existing EMW funding levels and the equal sharing of program costs between customers and shareholders. The tariff changes I described concern eligibility and program administration rather than increased funding. Company witness Fischer supports the funding amounts reflected in the revenue requirement.

Q: What other services and outreach does Evergy use to reach and serve these customers?

A: Evergy utilizes in-person and mobile community-based outreach to ensure accessibility and engagement as well as marketing and communications.

- **Customized, Face-to-Face Support -** Evergy Connect ("Connect"), the Company's walk-in facility in Kansas City, Missouri, provides customers with a dedicated space to receive personalized support, payment options and application assistance, energy efficiency tools and education and information about available programs. At Connect, Evergy also conducts wrap-around resource customer events in which other community partners are present to offer Low Income Home Energy Assistance Program ("LIHEAP") assistance, food and nutrition resources, housing options, employment services, other utility resources (gas, water), and other social services. In 2025, Evergy provided customized support to approximately 27,600 EMM and EMW customers at its Kansas City Connect facility and

in 2026, from January through June, Evergy Connect has provided service to 19,340 EMW and EMM customers.

- **Mobile Outreach -** Evergy deploys mobile outreach teams at agency and community events, bringing resources directly to communities and customers. This outreach, which also allows us to reach our non-urban and rural areas, provides trained specialists to provide customized support and resources to income eligible customers.
- **Agency Training** - Additionally, Evergy conducts agency trainings to equip social service organizations with the knowledge and tools needed to assist clients in navigating energy assistance options. These efforts reflect Evergy's commitment to proactive, community-centered engagement that strengthens partnerships and expands access for customers in need.
- **Marketing and Communications -** Evergy implements a multi-channel customer communication strategy to ensure that all customers—particularly those facing financial hardship—are aware of the energy assistance programs, payment options, and support services available to them. These efforts are grounded in our commitment to proactively reach customers where they are, using both digital and traditional communication tools to increase awareness, improve understanding, and remove barriers to accessing assistance. Through coordinated outreach across media, direct customer communications, community engagement, and online platforms, Evergy has worked to provide timely, clear, and accessible information to increase awareness and help customers manage their energy needs.

- **Earned Media and Media Relations -** Evergy leverages earned media opportunities and works closely with news outlets to build public awareness and understanding of available energy assistance programs and customer support offerings.
- **Email Outreach -** Evergy utilizes multiple forms of email communication, including personalized emails based on a customer's past participation in programs, seasonal "high-usage" journey emails, and broad awareness campaigns to highlight assistance options and available resources.
- **Bill Messages and Bill Inserts -** To reach customers who prefer print or do not regularly use digital channels, Evergy includes bill messages and bill inserts that provide information about assistance programs throughout the year.
- **Educational Videos -** Evergy has developed a series of educational videos that explain available programs and outline how customers can apply. These videos are highlighted and distributed through multiple channels, including the Evergy website, social media channels, and email campaigns.
- **Website and Online Resources -** Evergy provides extensive program details on evergy.com, including a recently launched Energy Assistance landing page. This page consolidates information on assistance programs, payment plans, medical programs, and energy-saving tips to streamline customer access.

- **Paid Search -** The Company uses paid search to help customers more easily locate Evergy's energy assistance resources and program information when searching online for support.
- **Printed Handouts and Flyers -** Evergy develops printed materials that are distributed at community events and mailed to customers upon request, helping expand outreach beyond digital channels.
- **Weekly Energy Reports -** In addition to sharing weekly usage information, Evergy includes promotional messages in these reports to highlight available programs, financial assistance options, and energy-savings opportunities.
- **Social Media Outreach -** Evergy uses social media platforms, such as Facebook, to share informational videos, provide step-by-step guidance on completing applications, highlight assistance programs and events, and direct customers to partner agencies that can offer additional support.

Q: Please describe the improvements Evergy made to its website and mobile app to help customers access financial assistance information.

A: In February of 2026, Evergy launched a dedicated webpage for Missouri customers seeking financial assistance that brings support programs together in one place. The goal is to help customers navigate available resources and identify programs for which they may be eligible. The page provides easy access to eligibility criteria and applications, along with

a tutorial video to help customers understand their options and take the next steps toward assistance. The webpage includes the following programs and support options:

- Bill Payment Assistance
- Medical Customer Program
- Medical Extension
- Special Friend
- Average Payment Plan
- Adjustable Due Date
- Payment Extension
- Payment Plan
- Income Eligible Weatherization

In the summer of 2026, Evergy also added a new Payment Center to the mobile app that includes a dedicated Financial Assistance section where customers can find payment and assistance resources in one location. The content is based on the customer's jurisdiction and provides relevant assistance information, links, and telephone numbers. The mobile application uses a WebView of Evergy's Financial Help webpage, providing customers with a consistent source of information across the website and mobile app.

Q: How does this benefit customers experiencing financial hardship?

A: The website and mobile app enhancements are designed to improve access to available assistance programs. The webpage brings support options together in one place, helping customers review eligibility information, access applications, and use the tutorial video to understand their next steps. Many customers do not have access to a computer and rely on their phones and the mobile app to access this information. Customers can also return to

the mobile app when needed to review information and use the provided links and telephone numbers to pursue assistance. Together, these digital resources complement the personal and face-to-face support provided by our Connect and Customer Affairs teams representatives and give customers additional ways to access help.

Q: What is Evergy currently doing for its income-eligible customers that aligns with the Commission's recently released Utility Assistance Program Improvements?

A: Evergy's existing customer-support activities are consistent with many of the objectives identified in the Commission's Utility Assistance Program Improvements workplan. These efforts generally fall within three areas identified by the Commission: customer experience and outreach, process improvement and optimization, and program oversight, evaluation, and refinement. Evergy believes these existing efforts provide a strong foundation while the Commission's broader workplan continues.

A. Enhanced Customer Experience

- **Personalized assistance and customer routing**. Evergy Connect and Customer Affairs provide face-to-face support to help customers identify and access appropriate resources, both at the Evergy Connect facility and through mobile outreach. These teams also provide additional programs for eligible customers. For example, these teams connect those enrolled in the Critical Medical Needs and Rehousing Programs with ongoing bill assistance and other programs.
- **Accessible digital information**. Evergy's Energy Assistance webpage consolidates program descriptions, eligibility information, applications, tutorials, and payment options. The mobile app provides another way to access relevant assistance information. These resources support customer education and accessible

communications and complement the Commission's own website-access objectives.

- **Targeted outreach**. Evergy's mobile Customer Affairs team has expanded face-to-face participation in events in smaller and rural communities and targets lower-income ZIP codes in Missouri West. Earned media, personalized emails based on prior program participation, seasonal high-usage emails and broader awareness campaigns extend this outreach.
- **Customer education and utility literacy**. During face-to-face assistance, Evergy combines crisis and bill assistance with information about payment plans, budget billing, weatherization, and income-eligible efficiency resources. Webpage tutorials and program explanations help customers understand their options and next steps, supporting utility literacy and education.
- **Agency trainings.** Evergy provides community-agency partners with information and training on utility and federal assistance programs, including in-person and virtual Agency Link training. Because these agencies often serve as trusted points of contact for vulnerable customers, providing agency staff with accurate program information and practical tools helps customers navigate resources and connect with appropriate assistance.
- **Payment flexibility and assistance.** Average Payment Plan, Adjustable Due Date, Payment Extension, and other payment plans help customers manage payments, while other bill assistance programs provide assistance.

B. Process Improvement & Optimization

- **Application guidance.** Evergy Connect and Customer Affairs representatives help customers understand available assistance and navigate application processes. Online eligibility information, application resources, and tutorials provide additional support.
- **Coordinated referrals**. The Critical Medical Needs Program provides a strong example of Evergy's coordinated approach. Through its community-based network, vulnerable customers can be connected with LIHEAP, other utility assistance, weatherization, and social services. Coordinating these resources helps address both immediate bill needs and underlying circumstances that may contribute to continued energy insecurity.
- **Reducing weatherization barriers.** Evergy offers income-eligible weatherization and complementary Weatherization Ready assistance for qualifying home repairs that would otherwise prevent weatherization. These offerings and program referrals support improved access to weatherization.
- **More flexible Economic Relief Program enrollment.** Evergy's Economic Relief Program tariff revisions are designed to allow otherwise eligible customers with outstanding arrearages to be considered for enrollment at the Company's discretion. This flexibility provides a path to ongoing bill assistance rather than making an unpaid balance an automatic barrier. Additionally, eligible seniors receiving

supplemental social security will be eligible for 24 months of assistance without re-enrollment.

- **Rehousing support for housing stability**. Evergy's Rehousing tariff revisions broaden the program's purpose from helping customers enter stable housing to helping them remain in their homes. In addition to broadening the program to survivors of domestic violence, Evergy is also pursuing a broader referral pathway through social service organizations assisting customers with housing. Together, these changes are intended to expand access and make assistance more responsive to customer circumstances.

C. Program Oversight, Evaluation, and Refinement

- **Independent evaluation**. Evergy participated in an independent process evaluation of the Critical Medical Needs Program that examined program implementation and data-collection practices. Evergy is using those findings to identify opportunities to refine program administration and customer support.
- **Refining program delivery**. Evergy uses the quarterly Critical Medical Needs Collaborative to discuss goals and process improvement for all income-eligible programs and addresses enrollment, weatherization fund utilization, data sharing, application improvements, and program effectiveness.
- **Complementary efficiency support.** Income-eligible weatherization and energy-efficiency offerings help customers manage energy use alongside payment needs. Weatherization Ready separately addresses qualifying home-repair barriers. These

activities are relevant to the Commission's examination of targeted efficiency benefits.

Taken together, these efforts demonstrate that Evergy is already advancing many of the customer-service, outreach, process-improvement, and program-evaluation objectives identified by the Commission. Evergy intends to continue refining these efforts while participating in the Commission's ongoing Utility Assistance Program Improvements process and evaluating additional opportunities to improve affordability and access for income-eligible customers.

III. EVERGY'S CRITICAL MEDICAL NEEDS AND REHOUSING PILOT PROGRAMS

Q: Please describe Evergy's Critical Medical Needs Program.

A: The Critical Medical Needs Program is in the third year of a three-year pilot program designed to support medically and cognitively vulnerable customers through a community-based information resource network that coordinates services and help customers through:

- Avoid or prevent disconnection;
- Connect customers with state and federal bill-assistance programs, such as LIHEAP;
- Connect customers with other state and utility programs that address energy burden, including weatherization, as well as other social-service resources;
- Leverage other available utility-assistance funds;
- Avoid adverse impacts on customers with serious medical conditions; and
- Reduce the accumulation of utility arrearages.

Customers must be referred to the program by a medical or health professional, and there are no income-eligibility requirements for participation.

Q: How is Evergy making customers aware of this program?

A: Evergy partners with the United Way of Greater Kansas City ("UWGKC") to administer the program's community-based referral network. UWGKC works with area medical providers to increase awareness of the program and establish referral pathways for medically and cognitively vulnerable customers. Through the program, eligible customers can be connected with bill assistance, weatherization and other social-service resources based on their individual needs. Evergy also promotes the program through Evergy Connect, mobile customer-outreach events, community partners, and online information available through Evergy and participating organizations.

Q: What is the status of the roll-out of the Critical Needs Program?

A: Evergy worked with UWGKC to establish the program's processes, referral network, and performance measures. The program officially launched in May 2024. Through the end of June 2026, the program had served 1,055 customers. By the end of 2025, 91% of program participants remained connected to electric service. The program also has undergone an independent evaluation by the Applied Public Policy Research Institute for Study and Evaluation ("APPRISE"), which examined program design, implementation, barriers, and opportunities for improvement. Evergy is evaluating the recommendations from that work as it considers future program refinements.

Q: Does Evergy recommend continuing the Critical Needs Program as a pilot program?

A: Yes. Evergy recommends continuing the Critical Medical Needs Program for an additional three-year pilot period, with costs shared equally between customers and the Company. Although the program has demonstrated encouraging results, it remains relatively new. An

additional three-year period will provide Evergy more experience and data to evaluate program effectiveness, incorporate lessons from the independent evaluation, and determine appropriate program design and funding levels for the future. Please refer to the testimony of Company witness Jeremy Fischer for details regarding the funding level proposed in this case.

Q: Does Evergy recommend any changes to the Critical Needs Program eligibility criteria?

A: No. Evergy is not proposing changes to the Critical Medical Needs Program's eligibility criteria at this time. The Company believes it is appropriate to continue operating the program under its existing eligibility framework during the additional pilot period while Evergy evaluates program performance and considers recommendations from the independent evaluation.

Q: Please describe the Rehousing Pilot Program.

A: The Rehousing Low-Income Pilot Program is designed to help income-eligible residents enter into stable housing by providing additional resources to those unable to secure or remain in affordable housing because of an arrearage. Eligible customers are provided with up to $1,000 to use toward their electric payment arrearage. If the arrearage is below $1,000, the remainder may be used toward future electric payments.

The program helps customers by:

- Taking away arrearage as a barrier to entering or remaining in stable housing
- Leveraging other utility assistance funds
- Maintaining utility services

- Avoiding negative impacts on residents who struggle with securing housing
- Helping to minimize the build-up of utility arrearages

Q: Does Evergy partner with other entities to deliver this program?

A: Yes. Evergy is partnering with the Housing Authority of Kansas City ("HAKC"). HAKC coordinates with other housing authorities to offer the program throughout Evergy Missouri Metro and Evergy Missouri West service territories. Additionally, in December 2025, Evergy expanded its partners to domestic violence shelters and offer the same arrearage payment support for victims of domestic violence. Hope House, located in Kansas City, Missouri, is the administrative partner and works with the other local shelters in Evergy's Missouri territory to create awareness of the program and apply the arrearage payment support.

Q: What is the status of the Rehousing Pilot Program?

A: Evergy has worked with the HAKC to build out the program, processes, and metrics. The program was launched in May of 2024 and then expanded to domestic violence shelters in 2025. By the end of June 2026, the Rehousing program has assisted a total of 127 customers with $127,000 in arrearage payments.

Q: Does Evergy recommend continuing the Rehousing Program as a pilot program?

A: Yes. The current three-year pilot program is scheduled to end in 2026. Evergy recommends continuing the Rehousing Program as a three-year pilot program with equal sharing of costs between ratepayers and the Company. This program is a relatively new pilot program, and the Company needs more time to evaluate the effectiveness of the program and determine future funding levels. Please refer to the testimony of Company witness Jeremy Fischer for details on the funding level proposed in this case.

Q: Does Evergy recommend any changes to the Rehousing Program eligibility criteria?

A: Yes. In January 2025, Evergy filed for a revision to the Rehousing Low-Income Pilot Program eligibility criteria in Tariff modification JE-2025-0114 to include seniors living in public housing in the eligibility criteria. In this case, Evergy is submitting additional tariff revisions to broaden eligibility beyond customers entering stable housing to also include income-eligible customers who need assistance to remain in their current homes. The proposed revisions would also provide greater flexibility for qualified community agencies to refer eligible customers and administer program assistance. These changes are intended to remove arrearages as a barrier to stable housing, expand participation, and allow the program to better meet customers' housing needs.

Q: What is the status of Evergy's customer outreach, bill assistance, and program support?

A: In 2026, from January through June, Evergy provided customized, face-to-face support to 24,306 EMM and EMW customers through Kansas City Connect and mobile outreach events. For this same time period, Evergy linked EMW customers to $2,596,974 in bill payment support. This work, along with other customer outreach channels, helped link EMM and EMW customers to a total of $5,200,115 in bill payment assistance for this time period.

Q: How else does Evergy support income eligible customers?

A: Annually Evergy provides approximately $3,500,000 in community donations in its EMM and EMW service areas. Evergy employees dedicate approximately 15,000 hours in volunteerism and donate more than $700,000 of their own money to important community groups providing vital services for our customers.

IV. DIGITAL CUSTOMER SERVICE

Q: Please summarize Evergy's digital customer service approach.

A: Customers in all aspects of their daily interactions with companies are utilizing tools that allow them to transact business and communicate based on their preference. Those preferences are no different when it comes to transacting business with Evergy. Therefore, Evergy has worked over the years to provide its customers with the ability to utilize digital self-service tools, which is the primary way customers interact with Evergy, while still having the option of the more traditional contact centers to assist them with complex and in-depth interactions.

Q: How has Evergy met the demand for digital self-service tools?

A: Evergy provides several ways in which customers can digitally interact. Evergy's website provides important information on general company information, electric rates, energy efficiency programs, account information, energy usage information, payments, outage reporting and notifications, start and stop service requests, etc. Evergy's mobile app allows customers to stay updated on their account information, provides outage reporting and notifications, payment and usage information, and changes in their rate. Evergy's Intelligent Voice Assistant ("IVA") provides customers several interactive choices as discussed in more detail later in this testimony.

Q: What happens when a customer does not want to use the digital self-service tools or the customer wants to transact their business with a human?

A: Evergy's Raytown Missouri contact center is staffed with highly qualified employees to assist customers with their needs. With the increase in customers primarily utilizing digital

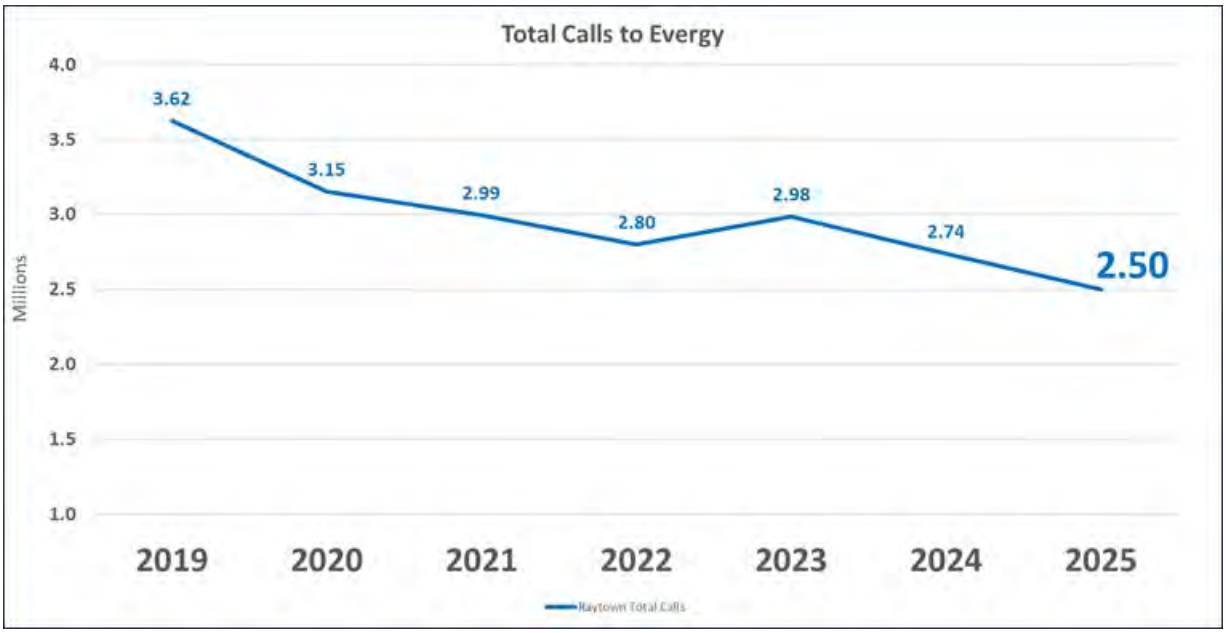
self-service tools for their interactions, the contact center has evolved to a high-touch customer service facility that focuses on a personalized customer interaction approach.

A. Digital Self-Service Tools

Q: Evergy has made a number of investments to improve self-service tools since the merger. Explain the rationale behind these investments.

A: Evergy has made consistent investments to improve our self-service tools, and we should continue to make additional investments to meet the changing expectations of customers and to manage service costs that could impact rates. We have focused our efforts to improve the self-service capabilities on our web site, mobile app, and interactive voice assistant ("IVA"). These projects help to remove technical debt (i.e., the natural accumulation of work or change that arises as technology, needs and priorities evolve), decrease friction in transactions, and provide new and innovative ways for customers to conveniently and easily meet their own needs through our tools.

We are adapting to keep pace with the evolving behaviors of our customers. Customers expect to be able to do most of their business through self-service; they tend to want to call us when they have an emergency or a more difficult issue to resolve. The data bears this out. As the chart below shows, since 2019, our Raytown call center has seen a 1.1M reduction in overall call volume. This is a 31% reduction in total calls over that period.



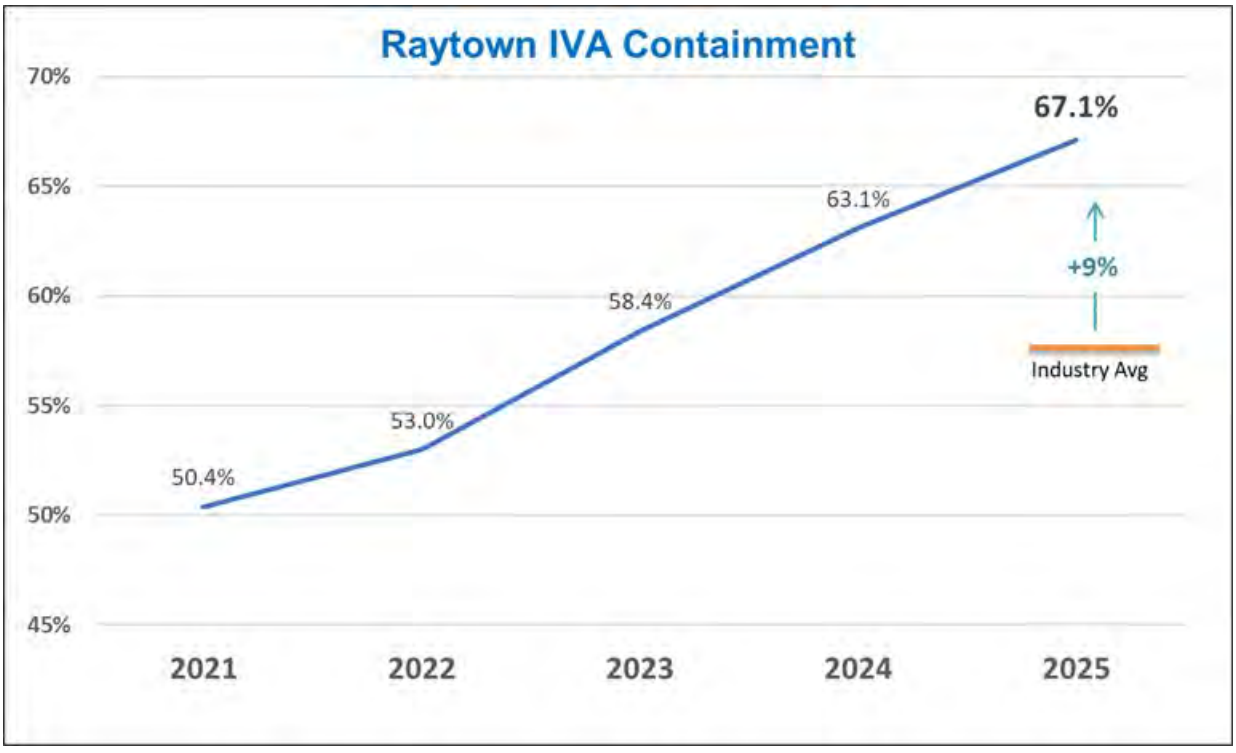
The overall reduction in call volume reflects a broader, long-term shift in how customers prefer to engage with us. More customers are choosing self-service options over calling, driven by several factors. While improvements to our self-service tools have been a major contributor, customer behavior during COVID—specifically the shift toward and continued preference for digital self-service—also played a significant role. Our investments in self-service have enabled and accelerated this transition.

Our initial investments in 2021 focused on bringing all of Evergy onto a unified meter-to-cash system and a single IVA platform. Establishing this common framework allowed us to streamline future investments and focus for the next two years on high-volume transactions that created the most friction in self-service. More recently, our efforts have shifted to lower-volume transactions and targeted reductions in technology debt. Throughout this period, we have consistently invested in enhancements that make it easier for customers to do business with us through self-service.

We work to balance smart, customer-focused technology investments with the need to provide affordable energy. To achieve this, we prioritize small to mid-sized projects that

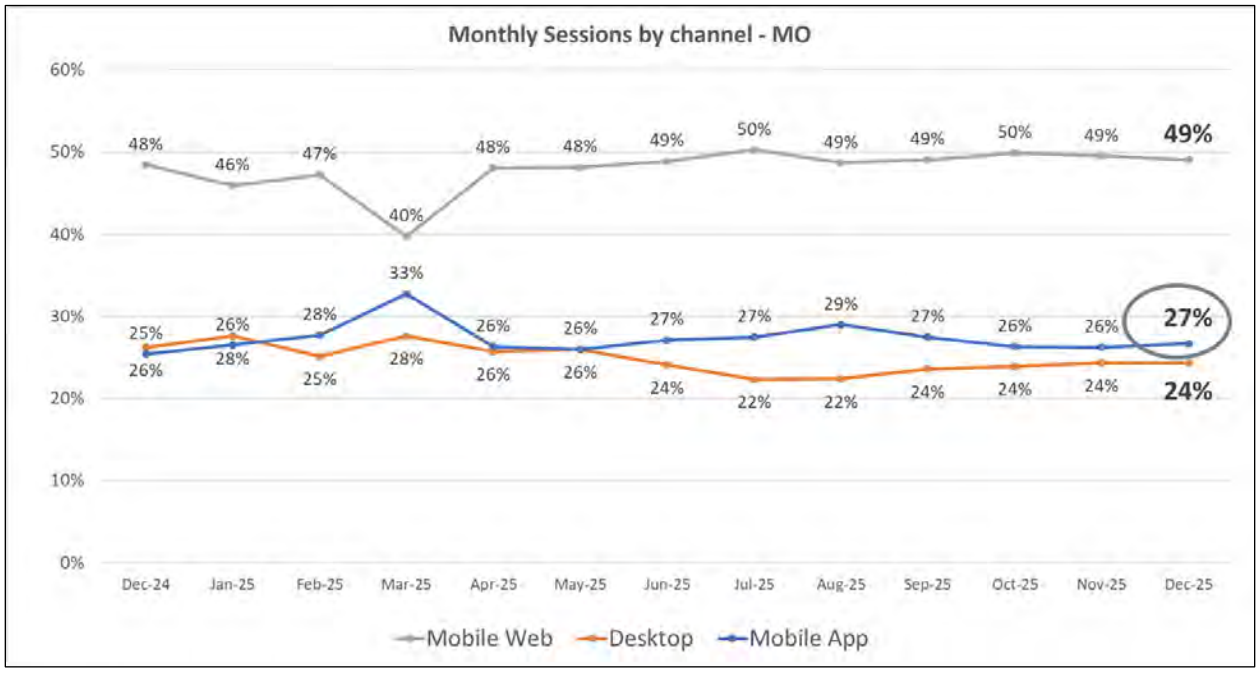
deliver strong customer impact and drive operational efficiencies. Our focus is on tools and platforms that simplify interactions, minimize friction, strengthen security, and improve the overall customer experience. We choose solutions that scale efficiently and offer quick, meaningful wins for both customers and our teams.

The results of our investments have been excellent. An example of this is our IVA. Our IVA contains 67% of all calls to Evergy. According to Chartwell's 2025 IVA study, this is 9% higher than the industry average. Prior to getting onto a single IVA system, containment for Raytown was 53%. Had these investments not been made, it would have led to higher volume of calls in the call center which would require more call center staffing and therefore increased costs to customers.



Another investment is the mobile app which was launched in 2022. The chart below shows our monthly digital sessions by channel for 2025. On average for the year, 27% of

all digital sessions in Missouri occurred through the mobile app. Also in 2025, mobile app usage surpassed desktop usage for the first time.



The app was intentionally designed to support the most common customer transactions while maintaining a cost-conscious approach. We focused on delivering a reliable, streamlined experience without overbuilding and adding unnecessary expenses.

Q: How have customers responded to the self-service tools?

A: The strong containment rates in our self-service tools—and the growing adoption of those tools—demonstrate that customers are responding positively. Today, more than 80% of our Missouri customers have an active web account and use the web, the mobile app, or both. In 2025, 85% of all payments, 85% of all pay arrangements, and 86% of all rate changes were completed through self-service. This high level of usage demonstrates that a majority of customers prefer these channels over speaking to a call center representative for these types of routine transactions.

Q: Why does Evergy plan to keep investing in your self-service tools if they are working well today?

A: While Evergy has made significant progress in enhancing our self-service offerings, we must continue making prudent, customer-focused investments in our tools and channels. We actively listen to customers through surveys, feedback, and user testing. Customers consistently tell us that keeping costs and rates low is essential, yet they also expect fast, intuitive, secure, and informative technologies—as well as new channels like chat and AI-driven experiences. To meet these expectations, we must continue reducing technical debt across our systems and strengthen the core architectures that ensure speed, security, and reliability. We must also add new capabilities in a deliberate, cost-efficient way that delivers meaningful value without introducing unnecessary expense.

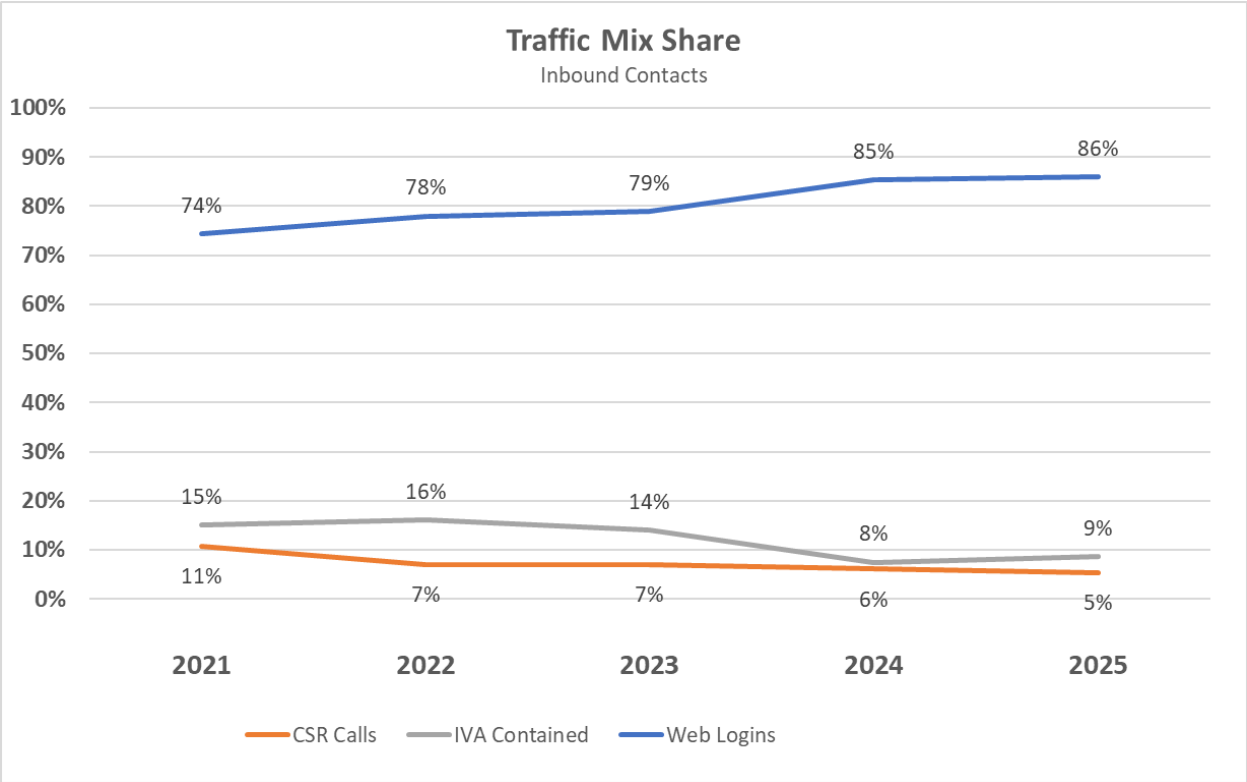
Our systems perform well today, but technologies age and customer expectations continue to rise. If our tools stop meeting those expectations, customers will shift away from self-service and return to calling us—driving down satisfaction and increasing our cost to serve. Our customers have already shown, through their behavior, that they prefer self-service when it is reliable, fast, and easy to use. These tools offer the convenience and immediacy they expect. To sustain that Evergy must continue investing in experiences that are efficient, dependable, and cost-effective, ensuring we deliver strong value while keeping service affordable.

Q: You stated that Evergy customers are transacting business primarily through digital self-service tools. Please provide more information on that topic.

A: In 2025, customers transacted business with Evergy through digital self-service tools 95% of the time. This is achieved through our IVA system and web logins (Evergy.com and the

Evergy mobile app). Figure 1 below shows the relative mix of how customers interact with Evergy. As shown, digital self-service interactions have increased over the last five years while calls to Evergy's Customer Service Representatives ("CSR") have decreased.

Figure 1: Customer Digital Interaction by Type

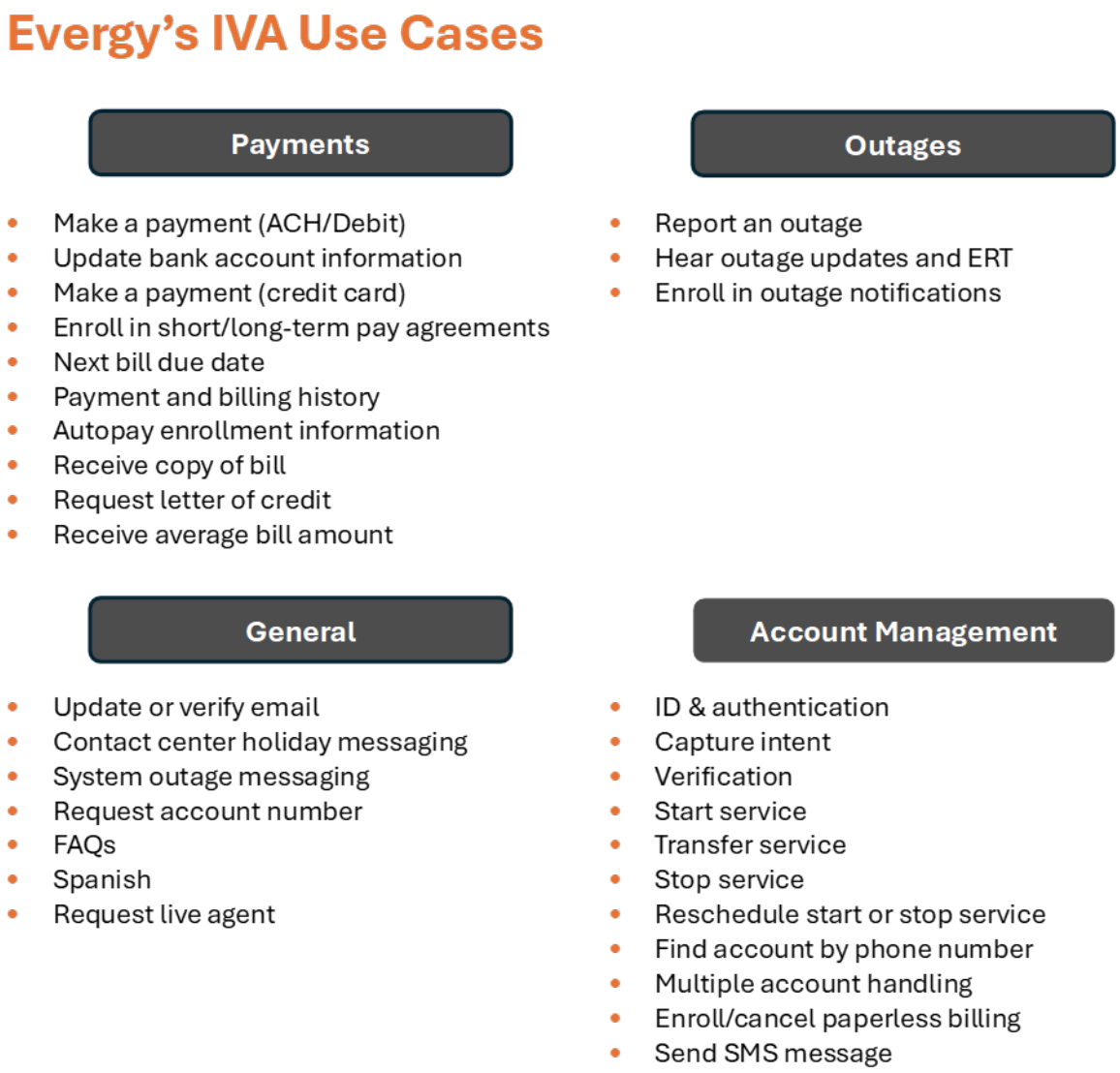


Q: Provide some examples of how customers utilize the IVA system.

A: Evergy's IVA system provides several options for customers. Customers can easily accomplish their most common transactional tasks in the IVA. Additionally, Evergy adds new features or capabilities each year to facilitate common tasks. In 2025, Evergy added the ability to pay by credit card within the IVA rather than being transferred to a payment vendor. The result is an improved experience for customers and greater transparency for Evergy. Figure 2 demonstrates other ways customers utilize the IVA system. As noted

above, the last five years reflect a trend of customers calling less and transacting more by self-service channels, especially the web and mobile app.

Figure 2: Evergy's Intelligent Voice Assistant Uses



Q: Has the utilization of the IVA system increased?

A: Yes. The IVA utilization by Evergy's Missouri customers was at an all-time high in 2025. In 2021 the IVA was able to successfully contain or handle 58% of the customer calls. In

2025, 67% of all calls to our Raytown call center were successfully contained by the IVA. The utilization of IVA has grown year-over-year ("YoY") during this timeframe.

Q: How are customers utilizing Evergy.com for customer service needs?

A: Evergy has seen growth in the number of customers that have online accounts. In 2025, 80% of Evergy Missouri customers have online accounts which is a significant increase from 62% in 2021. In September 2022, Evergy's mobile application was launched and currently has over 400,000 total downloads. In 2025, we saw for the first time that our mobile app was used more by Missouri customers than desktop usage on the web. Two thirds of these customers are mobile device users, as compared to a desktop. This is another clear indicator of customer preference regarding use of their mobile device.

Q: How do your digital self-service tools assist with customer payments?

A: In 2025, almost 87% of customer payments are transacted through digital self-service tools. Evergy has also seen YoY declines in the number of mailed payments (2021 – 20.6% to 2025 – 12.3%) along with payments that a CSR receives in the contact center (2021 – 0.9% to 2025 0.5%).

Q: Is the Company proposing to implement Green Button Connect My Data for EMW customers?

A: Yes, subject to the Commission's approval of the Green Button Connect provision in the programs stipulation filed in EMM's rate case, Case No. ER-2026-0143. If that provision is approved, EMW proposes to implement Green Button Connect My Data on the same terms, including implementation no later than December 31, 2028. The Company's preference is to implement this capability across its service territories rather than develop separate approaches for individual utilities.

Q: What requirements would apply to the proposed implementation?

A: The solution would comply with all Green Button standards and would be available to all customer classes. Customer authorization would be convenient and secure and would follow Green Button Connect best practices. The solution would also include annual certification by the Green Button Alliance.

Q: What accounting treatment is the Company requesting for those costs?

A: The Company requests authority to defer EMW's set-up, implementation, and licensing costs for consideration in its next general rate case. That request would allow the costs to be reviewed for recovery in that proceeding; it would not establish their recoverability in advance.

V. CONCLUSION

Q: Please summarize your testimony.

A: In summary, Evergy aims to address affordability, in part, with tools that promote financial stability, energy efficiency and long-term resilience. As I described above, EMW offers numerous programs to support its low income and vulnerable customers, and these programs have been integral to the provision of meaningful assistance to eligible low income and vulnerable customers to use our electric services efficiently and manage their electric bills. As part of its digital customer service offerings, EMW also proposes to implement Green Button Connect My Data on the same terms as the EMM programs stipulation, subject to the Commission's approval.

Q: Does this conclude your testimony?

A: Yes.

BEFORE THE PUBLIC SERVICE COMMISSION
OF THE STATE OF MISSOURI

In the Matter of Evergy Missouri West, Inc. d/b/a Evergy Missouri West's Request for Authority to Implement A General Rate Increase for Electric Service	))))	Case No. ER-2027-0077

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 Direct Testimony on behalf of Evergy Missouri West consisting of twenty-nine (29) 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 3rd day of November 2026.

Notary Public

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