FILED
November 9, 2026
Missouri Public
Service Commission

Exhibit No. 62

Evergy Missouri Metro – Exhibit 62
Surrebuttal Testimony of Katie R. McDonald
Case No. ER-2026-0143

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

Q. Please state your name and business address.

A. My name is Katie R. McDonald. My business address is 1200 Main Street, 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, Inc., Evergy Metro, Inc. d/b/a as Evergy Missouri Metro ("Evergy Missouri Metro," "EMM," or the "Company"), Evergy Missouri West, Inc. d/b/a Evergy Missouri West ("EMW"), Evergy Metro, Inc. d/b/a Evergy Kansas Metro ("EKM"), and Evergy Kansas Central, Inc. and Evergy South, Inc., collectively d/b/a as Evergy Kansas Central ("EKC") the operating utilities of Evergy, Inc. ("Evergy").

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

A. Yes.

Q: On whose behalf are you testifying?

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

Q. What is the purpose of your surrebuttal testimony?

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

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

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

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

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

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

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

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

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

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

Q: Please explain EMM's efforts to increase ERPP participation.

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

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

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

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

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

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

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

Evergy believes it is appropriate to remove the "Pilot" designation. Removing that designation would not, by itself, change the program's funding, eligibility requirements, or customer benefits.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Q. Does this conclude your surrebuttal testimony?

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 Implement A General Rate Increase for Electric Service	))))	Case No. ER-2026-0143

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

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