

February 29, 2024

Kansas Corporation Commission 1500 SW Arrowhead Rd. Topeka, Kansas 66604-4027

#### **RE: KEEIA Recovery Compliance Tariffs 22-EKME-254-TAR**

To Whom it May Concern:

Evergy Kansas Central, Inc. and Evergy Kansas South, Inc both doing business as Evergy Kansas Central and Evergy Kansas Metro hereby submit the KEEIA recovery compliance tariffs as ordered in docket 22-EKME-254-TAR.

Sincerely, Robin allen

Robin Allacher Regulatory Analyst Lead

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THE STATE CORPORATION COMMISSION OF KANSAS				
EVERGY KANSAS CENTRAL, INC., & EVERGY KANSAS SOUTH, INC., d.b.a. EVERGY	Y KANSAS CENTRAL	SCHEDULE_	EER	_
(Name of Issuing Utility)	Replacing Sched	ule FFP	Sheet 1	
EVERGY KANSAS CENTRAL RATE AREA	Replacing Sched	uic <u>EER</u>		_
(Territory to which schedule is applicable)	which was filed	October 3	1, 2023	
No supplement or separate understanding shall modify the tariff as shown hereon.	ç	Sheet 1 of 13 Shee	ets	
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#### ENERGY EFFICIENCY RIDER (LEGACY ENERGY EFFICIENCY AND DEMAND RESPONSE PROGRAMS)

#### **APPLICABLE**

This Energy Efficiency Rider shall be applicable to all retail rate schedules of Evergy Kansas Central and Evergy Kansas South with the exception of Security Area Lighting Service, Street Lighting and Traffic Signal rate schedules.

#### **PURPOSE**

This Energy Efficiency Rider is filed in compliance with the Commission's Order in Docket No. 08-GIMX-441-GIV and is designed to recover costs associated with Commission approved Energy Efficiency and Demand Response Programs deferred but not recovered. This Rider will be effective for November 2023 through October 2024 usage. Evergy Kansas Central will file a new Energy Efficiency Rider for Commission approval in July 2024.

#### **BASIS FOR CHARGE**

Energy Efficiency incremental program costs will be recovered using an Energy Efficiency (EE) factor applied to each applicable customer's bill. The EE factor will be applied to each applicable customer's energy usage by multiplying the kilowatt-hours (kWh) of electricity billed by the EE factor. The charge associated with this Energy Efficiency Rider will be identified and shown as a separate line on the applicable customer's monthly billings.

Issued	December	17	2021
	Month	Day	Year
Effective	March	1	2024
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	Index
THE STATE CORPORATION COMMISSION OF KANSAS EVERGY KANSAS CENTRAL, INC., & EVERGY KANSAS SOUTH, INC., d.b.a. EVERGY	Y KANSAS CENTRAL SCHEDULE <u>EER</u>
(Name of Issuing Utility) EVERGY KANSAS CENTRAL RATE AREA (Territory to which schedule is applicable)	Replacing Schedule <u>EER</u> Sheet <u>2</u> which was filed October 31, 2023
No supplement or separate understanding shall modify the tariff as shown hereon.	Sheet 2 of 13 Sheets
	tual program costs deferred for Commission approved h period ending in June of each year plus any true up
costs are recorded in separate sub-accounts of Acc Energy Efficiency or Demand Response Program a under approved Demand Response Programs. True = The annual true-up amount for an Energy E next EE Rider and to be applied to the subsequent I	mission approved Energy Efficiency programs. These count 182.3 Other Regulatory Assets for each approved and for demand response credits provided to customers Efficiency Rider year, to be determined prior to filing the EE Factor calculation. The true-up will be the difference tual recovery amount during the time the EE Factor was

kWh = The estimated kilowatt-hours for the period this EE factor will be applied to customers' monthly bills.

# EE FACTOR

\$0.000188 / kWh effective for November 2023 through October 2024.

# **DEFINITIONS AND CONDITIONS**

1. All provisions of this Rider are subject to changes made by order of the regulatory authority having jurisdiction.

Issued	December	17	2021
	Month	Day	Year
Effective	March	1	2024
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Darrin Ives, Vice President

	Index
THE STATE CORPORATION COMMISSION OF KANSAS	
EVERGY KANSAS CENTRAL, INC., & EVERGY KANSAS SOUTH, INC., d.b.a. EVERGY	KANSAS CENTRAL SCHEDULE EER
(Name of Issuing Utility)	Replacing Schedule EER Sheet 3
EVERGY KANSAS CENTRAL RATE AREA	Replacing Schedule <u>EER</u> Sheet <u>3</u>
(Territory to which schedule is applicable)	which was filed October 31, 2023
No supplement or separate understanding shall modify the tariff as shown hereon.	Sheet 3 of 13 Sheets
ENERGY EFFICIEN (KEEIA 2024-2028 DSM Portfolio Approved Under	

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#### TRANSITION FROM LEGACY ENERGY EFFICIENCY PROGRAMS TO KEEIA 2024-2028 DSM PORTFOLIO:

As Evergy Kansas Central transitions from the Legacy Energy Efficiency and Demand Response Programs (Legacy Programs), it is anticipated that Energy Efficiency (EE) Costs in July 2023 through February 2024 and True-Up for the preceding Energy Efficiency Rider year will be filed on July 15, 2024 for recovery over the period from November 2024 through September 2025. Further, the transition over to the KEEIA programs will occur in the June 2025 filing for the program year one, March 2024 to December 2024 months, with recovery over the period of October 2025 through September 2026. These filings will also continue to include the EEDR recovery as ordered in the 10-WSEE-141-TAR and 18-KG&E-303-CON dockets.

#### APPLICABLE

This Energy Efficiency Rider shall be applicable to all non-lighting Retail Rate Schedules of Evergy Kansas Central and Evergy Kansas South. The Energy Efficiency Rider will be calculated and applied separately to Residential and Non-Residential customer classes.

#### PURPOSE

This Energy Efficiency Rider is filed in compliance with the Commission's Order in Docket No. 22-EKME-254-TAR and is designed to recover costs associated with Commission approved KEEIA 2024 – 2028 DSM Portfolio deferred but not recovered and any remaining unrecovered charges from the Company's Legacy Energy Efficiency and Demand Response Programs. Those charges include:

1) Program Costs (PC), Throughput Disincentive (TD), and Earnings Opportunity Award (EO) (if any) for the KEEIA 2024 – 2028 DSM Portfolio and any true-up associated with Legacy Programs. Program Costs (PC) and Throughput Disincentive (TD) will include interest carrying costs at the Company's average of 12 months of short-term debt and 6 months of long-term debt on the unrecovered balances. These filings will also continue to include the EEDR recovery as ordered in the 10-WSEE-141-TAR and 18-KG&E-303-CON dockets.

Issued	December	17	2021
	Month	Day	Year
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Effective	March	1	2024
	Month	Pay	Year
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		(Name of Issuing Utility)	Replacing Schedu	e FFR	Sheet 1
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<b>(KE</b> 2)	Reco	ENERGY EFFICIENCY 4-2028 DSM Portfolio Approved Under Kansa nciliations, with interest, to true-up for difference ency Rider and total actual monthly amounts for:	s Energy Efficier	-	
-	Reco	4-2028 DSM Portfolio Approved Under Kansa nciliations, with interest, to true-up for difference	s Energy Efficier s between the rev Award (EO) or EDR)	enues billed n dered by th	under this Energ

#### DEFINITIONS

As used in this Energy Efficiency Rider, the following definitions shall apply:

"Throughput Disincentive" (TD) is meant to represent the utility's lost margins associated with the successful implementation of the KEEIA programs.

"Effective Period" (EP) means the year beginning with January 2024, and each year thereafter for program years one, two and three. Program year four will be January 2027 through February 2028 until all allowed charges associated with the approved KEEIA 2024 – 2028 DSM Portfolio are recovered.

Issued	December	17	2021
	Month	Day	Year
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Effective	March	1	2024
	Month	pay	Year
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THE STATE CORPORATION COMMISSION OF KANSAS			
EVERGY KANSAS CENTRAL, INC., & EVERGY KANSAS SOUTH, INC., d.b.a. EVERGY	KANSAS CENTRAL	SCHEDULE	EER
(Name of Issuing Utility)	Replacing Schedule	EER	Sheet5
(Territory to which schedule is applicable)	which was filed	October 3	1, 2023
No supplement or separate understanding shall modify the tariff as shown hereon.	Shee	et 5 of 13 Shee	ets

#### ENERGY EFFICIENCY RIDER

# (KEEIA 2024-2028 DSM Portfolio Approved Under Kansas Energy Efficiency Investment Act)

"Evaluation Measurement & Verification" (EM&V) means the performance of studies and activities intended to evaluate the process of the utility's program delivery and oversight and to estimate and/or verify the estimated actual energy and demand savings, cost effectiveness, and other effects from demand-side programs.

"Incentive" means any consideration provided by the Company, including buy downs, markdowns, rebates, bill credits, payments to third parties, direct installation, giveaways, and education, which encourages the adoption of program measures.

"KEEIA 2024 – 2028 DSM Portfolio" consists of the demand-side programs and the Energy Efficiency Rider described in the KEEIA 2024 – 2028 DSM Portfolio Filing, which became effective following Commission order and approval of the KEEIA 2024 – 2028 DSM Portfolio under Docket No. 22-EKME-254-TAR.

"Program Costs" (PC) means any prudently incurred program expenditures, including such items as program planning, program design; administration; delivery; end-use measures and incentive payments; advertising expense; evaluation, measurement, and verification; market potential studies; and other costs necessary to deliver approved programs.

"Earnings Opportunity" (EO) means the annual incentive ordered by the Commission based on actual performance verified through EM&V against planned targets.

"Recovery Period" (RP) includes the twelve-month period beginning October 1, 2025 through September 30, 2026 for program year one recovery. Program year two recovery will be the October 1, 2026 through September 30, 2027. Program year three recovery will be October 1, 2027 through November 30, 2028. Program year four recovery will be December 1, 2028 through November 30, 2029.

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The Energy Efficiency Factor (EE Factor) during each applicable RP is a dollar per kWh rate for each nonlighting rate schedule calculated as follows:

EE Factor = [PC + TD + EO + EEDR + TRUE]/PE

Issued	December	17	2021
	Month	Day	Year
Effective	March	1	2024
-	Month	Pay	Year
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THE STATE CORPORATION COMMISSION OF KANSAS		
EVERGY KANSAS CENTRAL, INC., & EVERGY KANSAS SOUTH, INC., d.b.a. EVERG	Y KANSAS CENTRAL	SCHEDULE <u>EER</u>
(Name of Issuing Utility)	Replacing Schedule_	EER Sheet 6
EVERGY KANSAS CENTRAL RATE AREA		
(Territory to which schedule is applicable)	which was filed	October 31, 2023
No supplement or separate understanding shall modify the tariff as shown hereon.	Shee	et 6 of 13 Sheets

#### (KEEIA 2024-2028 DSM Portfolio Approved Under Kansas Energy Efficiency Investment Act)

#### Where:

PC = Actual Program Costs incurred for the applicable EP. Such amounts shall include monthly interest on cumulative over- or under-balances at an interest rate calculated using the Company's average of 12 months of short-term debt interest rate and 6 months of long-term debt interest rate. This interest rate is calculated as follows:

((Short-term debt interest rate multiplied by 12) + (Long-term debt interest rate multiplied by 6)) / 18

TD = Throughput Disincentive is the Company's TD calculated by the Company during the applicable EP. See below for the detailed methodology for calculating the TD. Such amounts shall include monthly carrying costs on cumulative over- or under- balances at an interest rate calculated using the Company's average of 12 months of short-term debt interest rate and 6 months of long-term debt interest rate. This interest rate is calculated as follows:

((Short-term debt interest rate multiplied by 12) + (Long-term debt interest rate multiplied by 6)) / 18.

EO = Earnings Opportunity is equal to the Earnings Opportunity Award means the annual incentive ordered by the Commission based on actual performance verified through EM&V against planned targets.

EEDR = Energy Efficiency Demand Response program rider per the EEDR tariff as Ordered in the 10-WSEE-141-TAR and 18-KG&E-303-CON dockets.

True = The annual true-up amount for an Energy Efficiency Rider year, to be determined prior to filing the next EE Rider and to be applied to the subsequent EE Factor calculation. The true-up will be the difference between the approved recovery amount and the actual recovery amount during the time the EE Factor was in effect for the prior recovery period.

PE = Projected Energy, in kWh, forecasted to be delivered to the customers to which the Energy Efficiency Rider applies during the applicable RP.

The EE factor components and total EE Factor applicable to the Residential and Non-Residential rate schedules shall be rounded to the nearest \$0.00001.

Issued	December	17	2021
	Month	Day	Year
Effective	March	1	2024
	Month	Nay	Year
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THE STATE CORPORATION COMMISSION OF KANSAS		Index
EVERGY KANSAS CENTRAL, INC., & EVERGY KANSAS SOUTH, INC., d.b.a. EVERGY K	ANSAS CENTRAL	SCHEDULE EER
(Name of Issuing Utility)		
EVERGY KANSAS CENTRAL RATE AREA	Replacing Schedule	e <u>EER</u> Sheet <u>7</u>
(Territory to which schedule is applicable)	which was filed	October 31, 2023
No supplement or separate understanding shall modify the tariff as shown hereon.	Sh	eet 7 of 13 Sheets
ENERGY EFFICIENC (KEEIA 2024-2028 DSM Portfolio Approved Under K		cy Investment Act)
CALCULATION OF TD:		
Monthly Throughput Disincentive = the sum of the Th applicable to (1) Residential and (2) Non-Residential cus		Calculation for all programs
Throughput Disincentive Calculation:		
The Throughput Disincentive Calculation for each progra	am shall be determined	by the formula:
TD\$ = MS x NMR		
Where:		
TD\$ = Throughput Disincentive Dollars to be collect	ed for a given calendar ı	month, for a given class.
NMR = Net Margin Revenue. Net Margin revenue Margin Revenue Rates By Rate Class By Month_tab		re provided below in the Net
MS = The sum of all Programs' Monthly Savings in k Savings in kWh for each Program shall be determine		or a given class. The Monthly
MS = (MASCY + CASPY – RB)	x LS	
RB = Rebasing Adjustment. The Rebasing Adjustm of the date used for the KEEIA normalization in any effective during the accrual and collection of TD\$ pi event more than one general rate case resulting in collection of TD\$ pursuant to KEEIA 2024 – 2028 D each and every prior Rebasing Adjustment calculate	y general rate case resu ursuant to KEEIA 2024 new rates becoming effe SM Portfolio, the Rebas	ulting in new rates becoming – 2028 DSM Portfolio. In the ective during the accrual and
LS = Load Shape. The Load Shape is the monthly lo	oad shape percent for ea	ach program as follows:

Issued	December	17	2021
	Month	Day	Year
Effective	March	1	2024
	Month	∧Day	Year
	V)	Vale	
By	Do	- nur	
-	Darrin Ives, V	Vice President	

		Index	
THE STATE CORPORATION COMMISSION OF KANSAS			
EVERGY KANSAS CENTRAL, INC., & EVERGY KANSAS SOUTH, INC., d.b.a. EVERGY KANSAS	S CENTRAL	SCHEDULE	EER
(Name of Issuing Utility)	Denlesing Cabada	ala EED	Sheet 9
EVERGY KANSAS CENTRAL RATE AREA	Replacing Schedu	ile <u>EEK</u>	Sheet8
(Territory to which schedule is applicable)	which was filed	October 3	1, 2023
No supplement or separate understanding shall modify the tariff as shown hereon.	S	heet 8 of 13 Shee	ets

#### **ENERGY EFFICIENCY RIDER**

#### (KEEIA 2024-2028 DSM Portfolio Approved Under Kansas Energy Efficiency Investment Act)

Program Name	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Whole Business Efficiency	8.117%	7.809%	8.087%	8.291%	9.156%	8.765%	9.264%	8.805%	7.652%	8.337%	8.021%	7.695%	100.000%
Business Energy Education	8.179%	8.120%	8.098%	8.325%	8.469%	7.799%	8.543%	8.495%	7.907%	9.084%	8.687%	8.294%	100.000%
Hard-to-Reach Businesses	7.805%	7.539%	7.881%	8.365%	9.589%	9.288%	9.810%	8.999%	7.486%	8.080%	7.742%	7.416%	100.000%
Hard-to-Reach Homes	5.945%	4.702%	3.666%	3.687%	7.312%	16.682%	17.456%	17.112%	11.193%	3.296%	3.617%	5.330%	100.000%
Home Demand Response	1.864%	1.561%	1.245%	2.153%	7.472%	20.996%	22.390%	22.384%	14.106%	2.290%	1.409%	2.129%	100.000%
Whole Home Efficiency	3.864%	3.076%	2.419%	3.069%	7.738%	19.364%	20.049%	19.668%	12.397%	2.529%	2.363%	3.464%	100.000%
Home Energy Education	7.702%	7.150%	8.021%	7.853%	8.530%	8.863%	9.385%	9.398%	8.511%	8.612%	7.952%	8.023%	100.000%

Where:

MC = Measure Count. Measure Count, for a given program year, for a given class, for each measure is the number of each measure installed in the current program year.

ME = Measure Energy. Measure Energy will be the savings for each measure reported in the final EM&V report for the current program year.

MAS = The sum of MC multiplied by ME for all measures in a program in the current program year.

CAS = Cumulative sum of MAS for each program for the KEEIA 2024 - 2028 DSM Portfolio

CY = Current program year

PY = Prior program year

Measure - Energy efficiency measures described for each program in the Technical Resource Manual.

Programs – KEEIA 2024 – 2028 DSM Portfolio programs.

TRM – Commission-Approved Technical Resource Manual updated based on EM&V ex-post gross adjustments and NTG factors determined for Year 1 no later than 24 months after the commencement of the KEEIA 2024 – 2028 DSM Portfolio.

Issued	December	17	2021
	Month	Day	Year
Effective	March	1	2024
	← Month	Pay	Year
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		Index	
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EVERGY KANSAS CENTRAL, INC., & EVERGY KANSAS SOUTH, INC., d.b.a. EVERGY	( KANSAS CENTRAL	SCHEDULE	EER
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EVERGY KANSAS CENTRAL RATE AREA	Replacing Schedul	le <u>EER</u>	Sheet9
(Territory to which schedule is applicable)	which was filed	October 3	1, 2023
No supplement or separate understanding shall modify the tariff as shown hereon.	Sł	neet 9 of 13 She	ets

#### **ENERGY EFFICIENCY RIDER**

#### (KEEIA 2024-2028 DSM Portfolio Approved Under Kansas Energy Efficiency Investment Act)

#### EARNINGS OPPORTUNITY

The annual KEEIA 2024 – 2028 DSM Portfolio EO Award shall be calculated using the Earnings Opportunity Matrix below. The EO target at 100% is \$11,196,553. The EO cannot go above \$13,571,914. The cap is based on current program levels. If Commission-approved new programs are added during the approved program period, the Company may seek Commission approval to have the targets and cap of the EO increase proportionately to the increase in savings targets.

#### **OTHER PROVISIONS**

The Company shall file an update to NMR rates by month by class contemporaneous with filing any compliance tariff sheets in any general rate case reflecting the rates set in that case, and the billing determinants used in setting rates in that case.

Annual kWh savings per measure will be updated prospectively in the TRM no later than 24 months after the commencement of the KEEIA 2024 – 2028 DSM Portfolio based on EM&V ex-post gross adjustments determined for Year 1 and annually thereafter upon finalization of each subsequent program year EM&V report.

KEEIA NTG factors will be updated prospectively in the TRM no later than 24 months after the commencement of the KEEIA 2024 – 2028 DSM Portfolio based on EM&V net-to-gross percentages for each program determined for Year 1 and annually thereafter upon finalization of each subsequent program year EM&V report.

#### <u>FILING</u>

Under the term of this Energy Efficiency Rider, the Company will make the initial EE KEEIA Rider rate adjustment filing for program year one in June 2025, to take effect October 1, 2025 through September 30, 2026. Program year two EE KEEIA filing will take place in June 2026 with effective dates of October 1, 2026 through September 30, 2027. Program year three EE KEEIA filing will take place in June 2027 with effective dates of October 1, 2027 through November 30, 2028. Program year four EE KEEIA filing will take place in August 2028 with effective dates of December 1, 2028 through November 30, 2029.

Issued	December	17	2021
	Month	Day	Year
Effective	March	1	2024
	Month	🜔 Day	Year
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			Index		_		
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ENERGY EFFICIENCY RIDER (KEEIA 2024-2028DSM Portfolio Approved Under Kansas Energy Efficiency Investment Act) EE Factors for the billing months of October 2025 through September 2026 are as follows: Residential - \$0.00000							
Non-Resic	dential - \$0.00000 REVENUE RATES BY RATE CLASS BY M						
Class	January February March April May		eptember Octobe				
Residential - RES	\$ 0.07901 \$ 0.07901 \$ 0.07901 \$ 0.07901 \$ 0.07901 \$				07901		
Residential - RSDG	\$ 0.07753 \$ 0.07753 \$ 0.07753 \$ 0.07753 \$ 0.07753 \$ 0.07753 \$				07753		
Non Residential - SGS Non Residential - MGS	\$         0.06737         \$         0.02187         \$         0.02187         \$         0.02187         \$         0.02187         \$         0.02187         \$         0.02187         \$         0.02187         \$         0.02187         \$         0.02187         \$         0.02187         \$         0.02187         \$         0.02187         \$         0.02187         \$         0.02187         \$         0.02187         \$         0.02187         \$         0.02187         \$         0.02187         \$         0.02187         \$         0.02187 <th< td=""><td></td><td></td><td></td><td>)6737 )2187</td></th<>				)6737 )2187		
Non Residential - LGS	\$ 0.0249 \$ 0.0249 \$ 0.0249 \$ 0.0249 \$ 0.0249 \$ 0.0249 \$				)2449		
Non Residential - LPS	\$ 0.02346 \$ 0.02346 \$ 0.02346 \$ 0.02346 \$ 0.02346 \$ 0.02346 \$				02346		
Non Residential - LTM	\$ 0.03528 \$ 0.03528 \$ 0.03528 \$ 0.03528 \$ 0.03528 \$ 0.03528 \$				)3528		
Non Residential - ICS	\$ 0.04568 \$ 0.04568 \$ 0.04568 \$ 0.04568 \$ 0.04568 \$ 0.04568 \$				4568		
Non Residential - SPECIAL	\$ 0.02341 \$ 0.02341 \$ 0.02341 \$ 0.02341 \$ 0.02341 \$				)2341		
Non Residential - CHURCH	\$ 0.07120 \$ 0.07120 \$ 0.07120 \$ 0.07120 \$ 0.07120 \$				07120		
Non Residential - SCHOOL	\$ 0.05484 \$ 0.05484 \$ 0.05484 \$ 0.05484 \$ 0.05484 \$ 0.05484 \$				)5484		
Non Residential - EV	\$ 0.09957 \$ 0.09957 \$ 0.09957 \$ 0.09957 \$ 0.09957 \$	\$ 0.13057 \$ 0.13057 \$ 0.13057 \$	0.13057 \$ 0.09	···· + ···· + ···	9957		

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(K	EEIA 2024-2028DSM Portfoli	o Approved	Under Kans	as Energy Eff	ficiency l	nvestme	nt Act)	
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Evergy	y Kansas Central Earnin	igs Opport	unity Matr	ix (w/ rese	rve bud	get)		
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		Target	Incentivo	Stretch li	ncentivo			
	Program Name	Metric	Incentive Amount	Metric	Amount			
	Hard-to-Reach Businesses	Note 1	\$ 815,915					
	Hard-to-Reach Homes	Note 2	\$ 368,713 \$ 206,567	Same as	Target			
	Business Energy Education Home Energy Education	Note 3 Note 3	\$ 306,567 \$ 203,915	-				
	Business Demand Response	Note 4	\$ 1,236,165	125% of Target	\$ 1,545,2	206		
	Home Demand Response	Note 5	\$ 1,699,613	125% of Target	\$ 2,124,5	516		
	Whole Business Efficiency	Note 6	\$ 4,476,539	125% of Target				
	Whole Home Efficiency Total	Note 7	\$ 2,089,126 \$11,196,553	125% of Target	\$ 2,611,4 \$13,571,9			
	Total		\$11,190,333		φ 13,371,8	/14		
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		Index		
	CORPORATION COMMISSION OF KANSAS S CENTRAL, INC., & EVERGY KANSAS SOUTH, INC., d.b.a. EVERGY KANS	SAS CENTRAL S	CHEDULE	EER
	(Name of Issuing Utility)	Replacing Schedule_		
EVER	GY KANSAS CENTRAL RATE AREA			
(Territory to which schedule is applicable)		which was filed	October 3	1, 2023
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•	EIA 2024-2028 DSM Portfolio Approved Under Kan EARNINGS OPPORTUNITY CALCULATION	sas Energy Efficiency	/ Investme	nt Act)
Note 1	The annual Hard-to Reach Business Program perform MWh energy savings reported in the EM&V report. Th MWh achieved multiplied by t	e calculation of the Anr	nual Incentiv	
Note 2	The annual Hard-to Reach Homes Program performanc energy savings reported in the EM&V report. The calc achieved multiplied by the	ulation of the Annual In	•	
Note 3	<ol> <li>Community Events held quarterly w/ eligible customers completing online energy analysis of programs greater than 50%. If metrics are achieved, target total of \$306,567 over four years for Busine</li> </ol>	yearly; 3) EM&V custor then the annual Incent	mer survey ive Amount	of awareness is 25% of the
Note 4	This performance metric will be based on the cumulative each program year. For Business DR, the cumulative MW from customers enrolled during each year's summ be reported each year in the EM&V report. The targ calculated as 15% of Net Benefits from Business DR Annual Incentive Amount is incremental MW achie	demand response capa er peak events. The cur get is 47.20 MW. Targo at target MW reduction	bility will be nulative DR et Incentive n. The calcu	the evaluated capability wil Amount is ulation of the

Issued	December	17	2021
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Effective	March	1	2024
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	S CENTRAL, INC., & EVERGY KANSAS SOUTH, INC., d.b.a. EVERGY KA	ANSAS CENTRAL S	SCHEDULE	EER	
	(Name of Issuing Utility)	Replacing Schedule_	EER	_ Sheet_	13
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ll modify the	or separate understanding e tariff as shown hereon.	Shee	et 13 of 13 Sho	eets	
Note 5	This performance metric will be based on a combi capability at the end of each program year and first- the EM&V report. For Home DR, the cumulative der normalized average peak savings per participant mult end of the program year. The cumulative DR capabil The total target is 61.64 MW. The total target for C 3.936 MWh. Target Incentive Amount is calculated MW reduction. The calculation of the Annual Incenti- by a rate of \$26,190.17/MW and MWh achie	year incremental MWh en mand response capability tiplied by the number of p ity will be reported each umulative Incremental Fin as 15% of Net Benefits ive Amount is incremental	nergy saving in each ye articipants o year in the E st Year MW from Home I MW achie	gs reporte ar will be enrolled a EM&V rep /h saving DR at tar ved multi	ed in the at the port. s is get
Note 6	The performance metric for Whole Business Efficien MW coincident peak demand savings reported in t energy savings reported in the EM&V report. The ha will be excluded from this performance metric. The t MWh savings is 81,451 MWh. The total target for Cu Peak is 29.75 MW. The calculation of the Annual rate of \$91,093.72/MW and MWh achieve	he EM&V report and first ard to reach and energy e total targets for Cumulativ umulative Incremental MV Incentive Amount is MW	-year increm education er æ Increment V Coinciden achieved m	nental MW nergy sav tal First Y t with Sy ultiplied b	Vh ings ′ear stem
	The performance metric for Whole Home Efficiency coincident peak demand savings reported in the EN savings reported in the EM&V report. The hard to re excluded from this performance metric. The total ta	I&V report and first-year i each and energy education	ncremental on energy sa	MWh en avings wil	ergy I be

	December	1/	2021
	Month	Day	Year
Effective	March	1	2024
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EVERGY METRO, INC., d.b.a. EVERGY KANSAS METRO

(Name of Issuing Utility)

EVERGY KANSAS METRO RATE AREA

(Territory to which schedule is applicable)

# No supplement or separate understanding shall modify the tariff as shown hereon.

#### ENERGY EFFICIENCY RIDER LEGACY ENERGY EFFICIENCY PROGRAMS

#### AVAILABILITY:

This Energy Efficiency (EE) Rider (Schedule EE) shall be applicable to all non-lighting Kansas Retail Rate Schedules for Evergy Kansas Metro.

#### PURPOSE:

This EE Rider is designed to recover all costs associated with the following Commission-approved Income-Eligible, Energy Efficiency and Demand Response schedules: (1) IEW; (2) PT; (3) BOC; (4) ER; (5) CHP; (6) NH; (7) RHER; (8) RSTP; and (9) DRI. Evergy Kansas Metro will file a new EE Rider no later than March 31 of each year to recover EE Program costs incurred during the prior calendar year for recovery over the following July through June period.

#### BASIS:

Program Costs will be recovered using an EE factor applied to each customer's bill. The EE factor will be applied to the customer's usage on a kilowatt-hour basis (\$/kWh). Retail customer charges for EE Program Costs are determined by multiplying the kilowatt-hours of electricity billed by the corresponding EE factor. The customer charges associated with this EE Rider will be identified and shown as a separate line on the customer's bill.

#### ENERGY EFFICIENCY RIDER AMOUNT CALCULATION:

A separate EE factor will be calculated for each customer class based upon the demand allocator and total kWh for each class. The EE factor (EEF) for each customer class will be calculated to recover the Program Costs for approved EE Programs from the specified period plus any applicable true up amount from the prior period by applying a class Demand Allocator and then dividing by the total kilowatt-hours (kWh) for that class as follows:

 $EEF_{(class)} = \frac{(EEC_n + TRUE_{n-1}) \times DA_{(class)}}{KWH_n (class)}$ 

Issued	December	17	2021
	Month	Day	Year
Effective	March	1	2024
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Darrin Ives, Vice President

SCHEDULE EE

Replacing Schedule <u>EE</u> Sheet 1

Sheet 1 of 13 Sheets

which was filed June 22, 2023

Index

(Name of Issuing Utility)

EVERGY KANSAS METRO RATE AREA

(Territory to which schedule is applicable)

# No supplement or separate understanding shall modify the tariff as shown hereon.

Index

SCHEDULE EE

Replacing Schedule <u>EE</u> Sheet 2

which was filed June 22, 2023

#### Sheet 2 of 13 Sheets

#### **ENERGY EFFICIENCY RIDER** LEGACY ENERGY EFFICIENCY PROGRAMS

#### Where:

 $EEC_n$  = All actual costs associated with Commission-approved EE Programs incurred during the applicable time-period (n). These costs are recorded in a deferred regulatory asset account established to accumulate the Kansas jurisdictional costs of all EE Programs.

 $TRUE_{p-1}$  = The annual true-up amount for an EE Rider year, to be determined prior to filing the next EE Rider and to be applied to the subsequent EE factor calculation. The true-up amount will reflect any difference between the total EE revenue collected and the actual costs (EEC<sub>n</sub>) for the previous applicable time-period (n-1). Such true-up amount may be positive or negative. The true-up amount used to calculate the EEF for the first EE Rider equals zero.

DA<sub>(class)</sub> = The demand allocator for the applicable non-lighting classes. This demand allocator shall be based on the 12-CP allocator utilized by the Company for its Class Cost of Service Study in the most recent Kansas retail rate case.

 $KWH_n$  (class) = The actual kWh electric sales for the Kansas jurisdiction for the applicable time-period (n) of the Class Cost of Service Study for the applicable class.

#### TERM:

This EE Rider shall remain in effect until such time the Commission-approved amount is recovered. In the event the Commission rules on, or a law is passed regarding treatment of such expenses, then Evergy Kansas Metro shall have the right to file for Commission approval of a compliant recovery methodology to replace or revise this EE Rider. Evergy Kansas Metro shall have the right to continue recovery under this EE Rider until such time a replacement methodology is approved and implemented or all Commissionapproved amounts are recovered.

#### NOTES TO THE TARIFF:

- 1. The references to Accounts within the EE tariff are as defined in the FERC uniform system of accounts.
- The EEC factor will be expressed in dollars per kilowatt-hour (kWh) rounded to five decimal places. 2.

Issued	December	17	2021	
	Month	Day	Year	
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Effective	March	1	2024	
	Month	\Lambda Day	Year	
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# Index\_\_\_\_\_

### THE STATE CORPORATION COMMISSION OF KANSAS

EVERGY METRO, INC., d.b.a. EVERGY KANSAS MET
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(Name of Issuing Utility)

EVERGY KANSAS METRO RATE AREA

(Territory to which schedule is applicable)

No supplement or separate understanding shall modify the tariff as shown hereon.

Sheet 3 of 13 Sheets

#### ENERGY EFFICIENCY RIDER LEGACY ENERGY EFFICIENCY PROGRAMS

# EE FACTORS FOR JULY 1, 2023 THROUGH JUNE 30, 2024 USAGE:

Residential Service \$0.00005/kWh
 Small General Service \$0.00004/kWh
 Medium General Service \$0.00004/kWh
 Large General Service \$0.00004/kWh

Issued	December	17	2021	
	Month	Day	Year	
Effective	March	1	2024	
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SCHEDULE EE

Replacing Schedule\_\_\_\_\_ EE\_\_\_\_ Sheet\_3\_\_\_\_

which was filed \_\_\_\_\_ June 22, 2023

EVERGY METRO, INC., d.b.a. EVERGY KANSAS METRO

(Name of Issuing Utility)

EVERGY KANSAS METRO RATE AREA

(Territory to which schedule is applicable)

No supplement or separate understanding shall modify the tariff as shown hereon.

#### ENERGY EFFICIENCY RIDER

### (KEEIA 2024-2028 DSM Portfolio Approved Under Kansas Energy Efficiency Investment Act)

#### TRANSITION FROM LEGACY ENERGY EFFICIENCY PROGRAMS TO KEEIA 2024-2028 DSM PORTFOLIO:

As Evergy Kansas Metro transitions from the Legacy Energy Efficiency Programs (Legacy Programs), it is anticipated that Energy Efficiency (EE) Costs for January 2023 to February 2024 and True-Up for the preceding Energy Efficiency Rider year(s) will be filed in conjunction with the first KEEIA EER filing in June 2025 for program year one, March 2024 through December 2024 months, with recovery over the period of October 2025 through September 2026. The EER tariff rate will be set to \$0 from July 2024 through September 2025.

#### APPLICABLE:

This Energy Efficiency Rider shall be applicable to all non-lighting Kansas Retail Rate Schedules for Evergy Kansas Metro. The Energy Efficiency Rider will be calculated and applied separately to Residential and Non-Residential customer classes.

#### PURPOSE:

This Energy Efficiency Rider is filed in compliance with the Commission's Order in Docket No. 22-EKME-254-TARand is designed to recover costs associated with Commission approved KEEIA 2024 – 2028 DSM Portfolio deferred but not recovered and any remaining unrecovered charges from the Company's Legacy Energy Efficiency Programs. Those charges include:

- Program Costs (PC), Throughput Disincentive (TD), and Earnings Opportunity Award (EO) (if any) for the KEEIA 2024 – 2028 DSM Portfolio and any true-up associated with Legacy Programs. Program Costs (PC) and Throughput Disincentive (TD) will include interest carrying costs at the Company's average of 12 months of short-term debt and 6 months of long-term debt on the unrecovered balances.
- 2) Reconciliations, with interest, to true-up for differences between the revenues billed under this Energy Efficiency Rider and total actual monthly amounts for:
  - i. Program Costs (PC) incurred.
  - ii. Throughput Disincentive (TD) incurred.
  - iii. Amortization of any Earnings Opportunity Award (EO) ordered by the Kansas Corporation Commission (Commission)
  - iv. Remaining unrecovered amounts associated with Legacy Programs.

Issued	December	17	2021	
	Month	Day	Year	
Effective	e March	1	2024	
	Month	🐧 Day	Year	
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By	10-			
Darrin Ives, Vice President				

Index

SCHEDULE EE

Replacing Schedule <u>EE</u> Sheet 4

which was filed June 22, 2023

Sheet 4 of 13 Sheets

THE STATE CORPORATION COMMISSION OF KANSAS	
EVERGY METRO, INC., d.b.a. EVERGY KANSAS METRO	SCHEDULE EE
(Name of Issuing Utility)	
	Replacing Schedule <u>EE</u> Sheet 5
EVERGY KANSAS METRO RATE AREA	
(Territory to which schedule is applicable)	which was filed June 22, 2023
No supplement or separate understanding shall modify the tariff as shown hereon	Sheet 5 of 13 Sheets

Index

#### **3) ENERGY EFFICIENCY RIDER**

#### 4) (KEEIA 2024-2028 DSM Portfolio Approved Under Kansas Energy Efficiency Investment Act)

#### **BASIS FOR CHARGE:**

Energy Efficiency incremental program costs will be recovered using an Energy Efficiency (EE) factor applied to each applicable customer's bill. The EE factor will be applied to each applicable customer's energy usage by multiplying the kilowatt-hours (kWh) of electricity billed by the EE factor for the respective Residential and Non-Residential customer class. The charge associated with this Energy Efficiency Rider will be identified and shown as a separate line on the applicable customer's monthly billings.

#### **DEFINITIONS:**

As used in this Energy Efficiency Rider, the following definitions shall apply:

"Throughput Disincentive" (TD) is meant to represent the utility's lost margins associated with the successful implementation of the KEEIA programs.

"Effective Period" (EP) means the year beginning with January 2024, and each year thereafter for programs years one, two and three. Program year four will be January 2027 through February 2028 until all allowed charges associated with the approved KEEIA 2024 – 2028 DSM Portfolio are recovered.

"Evaluation Measurement & Verification" (EM&V) means the performance of studies and activities intended to evaluate the process of the utility's program delivery and oversight and to estimate and/or verify the estimated actual energy and demand savings, cost effectiveness, and other effects from demand-side programs.

"Incentive" means any consideration provided by the Company, including buy downs, markdowns, rebates, bill credits, payments to third parties, direct installation, giveaways, and education, which encourages the adoption of program measures.

"KEEIA 2024 – 2028 DSM Portfolio" consists of the demand-side programs and the Energy Efficiency Rider described in the KEEIA 2024 – 2028 DSM Portfolio, which became effective following Commission order and approval of the KEEIA 2024 – 2028 DSM Portfolio under Docket No. 22-EKME-254-TAR.

Issued	December	17	2021
	Month	Day	Year
Effective	March	1	2024
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EVERGY METRO, INC., d.b.a. EVERGY KANSAS METRO	SCHEDULE EE
(Name of Issuing Utility)	Devlacing Schedula EE Sheet 6
	Replacing Schedule <u>EE</u> Sheet <u>6</u>
EVERGY KANSAS METRO RATE AREA	
(Territory to which schedule is applicable)	which was filed June 22, 2023
No supplement or separate understanding shall modify the tariff as shown hereon.	Sheet 6 of 13 Sheets

#### ENERGY EFFICIENCY RIDER

#### (KEEIA 2024-2028 DSM Portfolio Approved Under Kansas Energy Efficiency Investment Act)

"Program Costs" (PC) means any prudently incurred program expenditures, including such items as program planning, program design; administration; delivery; end-use measures and incentive payments; advertising expense; evaluation, measurement, and verification; market potential studies; and other costs necessary to deliver approved programs.

"Earnings Opportunity" (EO) means the annual incentive ordered by the Commission based on actual performance verified through EM&V against planned targets.

"Recovery Period" (RP) includes the twelve-month period beginning October 1, 2025 through September30, 2026 for program year one recovery. Program year two recovery will be the October 1, 2026 through September 30, 2027. Program year three recovery will be October 1, 2027 through November 30, 2028. Program year four recovery will be December 1, 2028 through November 30, 2029.

#### DETERMINATION OF ENERGY EFFICIENCY FACTOR RATES:

The Energy Efficiency Factor (EE Factor) during each applicable RP is a dollar per kWh rate for each nonlighting rate schedule calculated as follows:

EE Factor = [PC + TD + EO + TRUE]/PE

Where:

PC = Actual Program Costs incurred for the applicable EP. Such amounts shall include monthly interest on cumulative over- or under-balances at an interest rate calculated using the Company's average of 12 months of short-term debt interest rate and 6 months of long-term debt interest rate. This interest rate is calculated as follows:

((Short-term debt interest rate multiplied by 12) + (Long-term debt interest rate multiplied by 6)) / 18

TD = Throughput Disincentive is the Company's TD calculated by the Company during the applicable EP. See below for the detailed methodology for calculating the TD. Such amounts shall include monthly carrying costs on cumulative over- or under- balances at an interest rate calculated using the Company's average of 12 months of short-term debt interest rate and 6 months of long-term debt interest rate. This interest rate is calculated as follows:

Issued	December	17	2021			
	Month	Day	Year			
Effective	March	1	2024			
	Month	💧 Day	Year			
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By	10-	-////				
Darrin Ives, Vice President						

Index

EVERGY METRO, INC., d.b.a. EVERGY KANSAS METRO	SCHEDULE EE
(Name of Issuing Utility)	
	Replacing Schedule <u>EE</u> Sheet 7
EVERGY KANSAS METRO RATE AREA	
(Territory to which schedule is applicable)	which was filed June 22, 2023
No supplement or separate understanding shall modify the tariff as shown hereon.	Sheet 7 of 13 Sheets

Index

#### ENERGY EFFICIENCY RIDER

# (KEEIA 2024-2028 DSM Portfolio Approved Under Kansas Energy Efficiency Investment Act)

((Short-term debt interest rate multiplied by 12) + (Long-term debt interest rate multiplied by 6)) / 18

EO = Earnings Opportunity is equal to the Earnings Opportunity Award means the annual incentive ordered by the Commission based on actual performance verified through EM&V against planned targets.

True = The annual true-up amount for an Energy Efficiency Rider year, to be determined prior to filing the next EE Rider and to be applied to the subsequent EE Factor calculation. The true-up will be the difference between the approved recovery amount and the actual recovery amount during the time the EE Factor was in effect for the prior recovery period.

PE = Projected Energy, in kWh, forecasted to be delivered to the customers to which the Energy Efficiency Rider applies during the applicable RP.

The EE factor components and total EE Factor applicable to the Residential and Non-Residential rate schedules shall be rounded to the nearest \$0.00001.

#### **CALCULATION OF TD:**

Monthly Throughput Disincentive = the sum of the Throughput Disincentive Calculation for all programs applicable to (1) Residential and (2) Non-Residential customers.

Throughput Disincentive Calculation:

The Throughput Disincentive Calculation for each program shall be determined by the formula:

Where:

TD\$ = Throughput Disincentive Dollars to be collected for a given calendar month, for a given class.

NMR = Net Margin Revenue. Net Margin revenue values for each class are provided below in the Net Margin Revenue Rates By Class By Month table.

Issued	December	17	2021			
	Month	Day	Year			
Effective	March	1	2024			
	Month	∧Day	Year			
	Y)-	Va				
By	Do	- nur				

Index

### THE STATE CORPORATION COMMISSION OF KANSAS

EVERGY METRO, INC., d.b.a. EVERGY KANSAS METRO	SCHEDULE EE
(Name of Issuing Utility)	
	Replacing Schedule <u>EE</u> Sheet 8
EVERGY KANSAS METRO RATE AREA	
(Territory to which schedule is applicable)	which was filed June 22, 2023
No supplement or separate understanding hall modify the tariff as shown hereon.	Sheet 8 of 13 Sheets

#### ENERGY EFFICIENCY RIDER

#### (KEEIA 2024-2028 DSM Portfolio Approved Under Kansas Energy Efficiency Investment Act)

MS = The sum of all Programs' Monthly Savings in kWh, for a given month, for a given class. The Monthly Savings in kWh for each Program shall be determined by the formula:

 $MS = (MASCY + CASPY - RB) \times LS$ 

RB = Rebasing Adjustment. The Rebasing Adjustment shall equal the CAS defined below applicable as of the date used for the KEEIA normalization in any general rate case resulting in new rates becoming effective during the accrual and collection of TD\$ pursuant to KEEIA 2024 – 2028 DSM Portfolio. In the event more than one general rate case resulting in new rates becoming effective during the accrual and collection of TD\$ pursuant to KEEIA 2024 – 2028 DSM Portfolio. In the event more than one general rate case resulting in new rates becoming effective during the accrual and collection of TD\$ pursuant to KEEIA 2024 – 2028 DSM Portfolio, the Rebasing Adjustment shall include each and every prior Rebasing Adjustment calculation.

LS = Load Shape. The Load Shape is the monthly load shape percent for each program as follows:

Program Name	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Whole Business Efficiency	8.117%	7.809%	8.087%	8.291%	9.156%	8.765%	9.264%	8.805%	7.652%	8.337%	8.021%	7.695%	100.000%
Business Energy Education	8.179%	8.120%	8.098%	8.325%	8.469%	7.799%	8.543%	8.495%	7.907%	9.084%	8.687%	8.294%	100.000%
Hard-to-Reach Businesses	7.805%	7.539%	7.881%	8.365%	9.589%	9.288%	9.810%	8.999%	7.486%	8.080%	7.742%	7.416%	100.000%
Hard-to-Reach Homes	5.945%	4.702%	3.666%	3.687%	7.312%	16.682%	17.456%	17.112%	11.193%	3.296%	3.617%	5.330%	100.000%
Home Demand Response	1.864%	1.561%	1.245%	2.153%	7.472%	20.996%	22.390%	22.384%	14.106%	2.290%	1.409%	2.129%	100.000%
Whole Home Efficiency	3.864%	3.076%	2.419%	3.069%	7.738%	19.364%	20.049%	19.668%	12.397%	2.529%	2.363%	3.464%	100.000%
Home Energy Education	7.702%	7.150%	8.021%	7.853%	8.530%	8.863%	9.385%	9.398%	8.511%	8.612%	7.952%	8.023%	100.000%

Where:

MC = Measure Count. Measure Count, for a given program year, for a given class, for each measure is the number of each measure installed in the current program year.

ME = Measure Energy. Measure Energy will be the savings for each measure reported in the final EM&V report for the current program year.

MAS = The sum of MC multiplied by ME for all measures in a program in the current program year.

CAS = Cumulative sum of MAS for each program for the KEEIA 2024 – 2028 DSM Portfolio

CY = Current program year

Issued	December	17	2021
	Month	Day	Year
Effective	March	1	2024
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EVERGY METRO, INC., d.b.a. EVERGY KANSAS METRO	SCHEDULE EE
(Name of Issuing Utility)	Replacing Schedule <u>EE</u> Sheet 9
EVERGY KANSAS METRO RATE AREA (Territory to which schedule is applicable)	which was filed June 22, 2023
No supplement or separate understanding shall modify the tariff as shown hereon.	Sheet 9 of 13 Sheets

#### ENERGY EFFICIENCY RIDER

#### (KEEIA 2024-2028 DSM Portfolio Approved Under Kansas Energy Efficiency Investment Act)

PY = Prior program year

Measure - Energy efficiency measures described for each program in the Technical Resource Manual.

Programs – KEEIA 2024 – 2028 DSM Portfolio programs.

TRM – Commission-Approved Technical Resource Manual updated based on EM&V ex-post gross adjustments and NTG factors determined for Year 1 no later than 24 months after the commencement of KEEIA the 2024 – 2028 DSM Portfolio.

#### EARNINGS OPPORTUNITY:

The annual KEEIA 2024 – 2028 DSM Portfolio EO Award shall be calculated using the Earnings Opportunity Matrix below. The EO target at 100% is \$4,261,750. The EO cannot go above \$5,192,293. The cap is based on current program levels. If Commission- approved new programs are added during the approved program period, the Company may seek Commission approval to have the targets and cap of the EO increase proportionately to the increase in savings targets.

#### **OTHER PROVISIONS:**

The Company shall file an update to NMR rates by month by class contemporaneous with filing any compliance tariff sheets in any general rate case reflecting the rates set in that case, and the billing determinants used in setting rates in that case.

Annual kWh savings per measure will be updated prospectively in the TRM no later than 24 months after the commencement of the KEEIA 2024 – 2028 DSM Portfolio based on EM&V ex-post gross adjustments determined for Year 1 and annually thereafter upon finalization of each subsequent program year EM&V report.

KEEIA NTG factors will be updated prospectively in the TRM no later than 24 months after the commencement of the KEEIA 2024 – 2028 DSM Portfolio based on EM&V net-to-gross percentages for each program determined for Year 1 and annually thereafter upon finalization of each subsequent program year EM&V report.

Issued	December	17	2021
	Month	Day	Year
		-	
Effective	March	1	2024
	Month	<b>∧</b> Day	Year
		Va	
By	Do	- nur	
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Darrin Ives, Vice President

Index

	Index
THE STATE CORPORATION COMMISSION OF KANSAS	
EVERGY METRO, INC., d.b.a. EVERGY KANSAS METRO	SCHEDULE EE
(Name of Issuing Utility)	
	Replacing Schedule <u>EE</u> Sheet <u>10</u>
EVERGY KANSAS METRO RATE AREA	
(Territory to which schedule is applicable)	which was filed June 22, 2023
No supplement or separate understanding shall modify the tariff as shown hereon.	Sheet 10 of 13 Sheets

#### ENERGY EFFICIENCY RIDER

### (KEEIA 2024-2028 DSM Portfolio Approved Under Kansas Energy Efficiency Investment Act)

# FILING:

Under the term of this Energy Efficiency Rider, the Company will make the initial EE KEEIA Rider rate adjustment filing, for program year one in June 2025, to take effect October 1, 2025 through September 30, 2026. In conjunction with the June 2025 filing, the Company will include Energy Efficiency (EE) Costs for January 2023 to February 2024 and True-Up for the preceding Energy Efficiency Rider year(s). Program year two EE KEEIA filing will take place in June 2026 with effective dates of October 1, 2026 through September 30, 2027. Program year three EE KEEIA filing will take place in June 2027 with effective dates of October 1, 2027 through November 30, 2028. Program year four EE KEEIA filing will take place in August 2028 with effective dates of December 1, 2028 through November 30, 2029.

EE Factors for the billing months of October 2025 through September 2026 are as follows:

Residential - \$0.00000 Non-Residential - \$0.00000

EE Factors for the billing months of October 2025 through September 2026 are as follows:

Residential - \$0.00000 Non-Residential - \$0.00000

#### NET MARGIN REVENUE RATES BY CLASS BY MONTH:

Class	January	February	March	April	May	June	July	August	September	October	November	December
Residential - RES	\$0.07242	\$0.07205	\$0.07238	\$0.07343	\$0.07450	\$0.08894	\$0.10018	\$0.10018	\$ 0.10018	\$0.08848	\$ 0.07420	\$ 0.07345
Residential - RSDG	\$0.07350	\$0.07360	\$0.07350	\$0.07433	\$0.07485	\$0.09075	\$0.10021	\$0.10021	\$ 0.10021	\$0.08555	\$ 0.07442	\$ 0.07395
Non Residential - SGS	\$0.08146	\$0.08281	\$0.08423	\$0.08594	\$0.08775	\$0.09852	\$0.10578	\$0.10625	\$ 0.10671	\$0.09816	\$ 0.08576	\$ 0.08308
Non Residential - MGS	\$0.06835	\$0.06966	\$0.07100	\$0.07361	\$0.07501	\$0.08175	\$0.08736	\$0.08758	\$ 0.08845	\$0.08269	\$ 0.07343	\$ 0.07022
Non Residential - LGS	\$0.05466	\$0.05628	\$0.05683	\$0.05801	\$0.05872	\$0.06270	\$0.06583	\$0.06615	\$ 0.06657	\$0.06350	\$ 0.05768	\$ 0.05597
Non Residential - LPS	\$0.04954	\$0.05029	\$0.05084	\$0.05108	\$0.05058	\$0.05571	\$0.05856	\$0.05874	\$ 0.05928	\$0.05594	\$ 0.05042	\$0.04908
Non Residential - EV	\$0.19525	\$0.19290	\$0.19290	\$0.14046	\$0.12494	\$0.13441	\$0.15117	\$0.15156	\$ 0.14707	\$0.19885	\$ 0.19892	\$0.19736

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Darrin Ives, Vice President						

# Index\_\_\_\_\_

#### THE STATE CORPORATION COMMISSION OF KANSAS

# EVERGY METRO, INC., d.b.a. EVERGY KANSAS METRO

(Name of Issuing Utility)

EVERGY KANSAS METRO RATE AREA

(Territory to which schedule is applicable)

Sheet 11 of 13 Sheets

# No supplement or separate understanding shall modify the tariff as shown hereon.

### ENERGY EFFICIENCY RIDER

# (KEEIA 2024-2028 DSM Portfolio Approved Under Kansas Energy Efficiency Investment Act)

#### EARNINGS OPPORTUNITY MATRIX:

# Evergy Kansas Metro Earnings Opportunity Matrix (w/ reserve budget)

Program Name	Targe	Incentive	Stretch Incentive	
	Metric	Amount	Metric	Amount
Hard-to-Reach Businesses	Note 1	\$ 265,280	Same as Target	
Hard-to-Reach Homes	Note 2	\$ 113,747		
Business Energy Education	Note 3	\$ 76,432		
Home Energy Education	Note 3	\$ 84,119		
Business Demand Response	Note 4	\$ 551,424	125% of Target	\$ 689,280
Home Demand Response	Note 5	\$ 593,709	125% of Target	\$ 742,137
Whole Business Efficiency	Note 6	\$ 1,917,886	125% of Target	\$ 2,397,357
Whole Home Efficiency	Note 7	\$ 659,153	125% of Target	\$ 823,941
Total		\$ 4,261,750		\$ 5,192,293

Issued	December	17	2021
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Effective	March	1	2024
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SCHEDULE EE

which was filed June 22, 2023

Replacing Schedule <u>EE</u> Sheet 11

(Name of Issuing Utility)

EVERGY KANSAS METRO RATE AREA

(Territory to which schedule is applicable)

# No supplement or separate understanding shall modify the tariff as shown hereon.

### ENERGY EFFICIENCY RIDER

# (KEEIA 2024-2028 DSM Portfolio Approved Under Kansas Energy Efficiency Investment Act)

#### ANNUAL EARNINGS OPPORTUNITY CALCULATION:

Note 1	The annual Hard-to Reach Business Program performance metric is based on first-year incremental MWh energy savings reported in the final EM&V report. The calculation of the Annual Incentive Amount is MWh achieved multiplied by the rate of \$22.78/MWh.	
Note 2	The annual Hard-to Reach Homes Program performance metric is based on first-year incremental MWh energy savings reported in the final EM&V report. The calculation of the Annual Incentive Amount is MWh achieved multiplied by the rate of \$30.83/MWh.	
Note 3	<ol> <li>Community Events held quarterly w/ documentation (4 / year); 2) minimum of 10% eligible customers completing online energy analysis yearly; 3) EM&amp;V customer survey of awareness of programs greater than 50%. If metrics are achieved, then the annual Incentive Amount is 25% of the target total of \$76,432 over four years for Business and \$84,119 over four years for Home.</li> </ol>	
Note 4       This performance metric will be based on the cumulative MW demand response capability at the each program year. For Business DR, the cumulative demand response capability will be t evaluated MW from customers enrolled during each year's summer peak events. The cumulative capability will be reported each year in the EM&V report. The final year target is 23.05 MW. The incentive Amount is calculated as 15% of Net Benefits from Business DR at target MW reduction calculation of the Annual Incentive Amount is incremental MW achieved multiplied by a rate \$23,927.45/MW.		
Issued	December 17 2021 Month Day Year	

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Effective	March	1	2024
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Darrin Ives, Vice President

Index\_\_\_\_\_

SCHEDULE EE

Sheet 12 of 13 Sheets

Replacing Schedule <u>EE</u> Sheet 12

which was filed June 22, 2023

THE STATE CORPORATION COM	IMISSION OF KANSAS
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EVERGY METRO, INC., d.b.a. EVERGY KANSAS METRO	

(Name of Issuing Utility)

#### EVERGY KANSAS METRO RATE AREA

(Territory to which schedule is applicable)

Index\_\_\_\_\_

SCHEDULE EE

Replacing Schedule <u>EE</u> Sheet <u>13</u>

which was filed June 22, 2023

No supplement or separate understanding shall modify the tariff as shown hereon. Sheet 13 of 13 Sheets This performance metric will be based on a combination of the cumulative MW demand response capability at the end of each program year and first-year incremental MWh energy savings reported in the EM&V report. For Home DR, the cumulative demand response capability in each year will be the normalized average peak savings per participant multiplied by the number of participants enrolled at the end of the program year. The cumulative DR capability will be reported each year in the EM&V report. Note 5 --The final year demand target is 23.62 MW. The final year energy cumulative incremental first year MWh savings target is 1.505 MWh. Target Incentive Amount is calculated as 15% of Net Benefits from Home Demand Response at target MW reduction. The calculation of the Annual Incentive Amount is MW achieved multiplied by a rate of \$23,927.45/MW and MWh achieved multiplied by the rate of \$18.92/MWh. The performance metric for Whole Business Efficiency will be a combination of first-year incremental MW coincident peak demand savings reported in the EM&V report and first-year incremental MWh energy savings reported in the EM&V report. The hard to reach and energy education energy savings Note 6 -will be excluded from this performance metric. The final year target for Cumulative Incremental First Year MWh savings is 39,182 MWh. The final year target for Cumulative Incremental MW Coincident with System Peak is 13.19 MW. The calculation of the Annual Incentive Amount is MW achieved multiplied by a rate of \$89,203.17/MW and MWh achieved multiplied by the rate of \$18.92/MWh. The performance metric for Whole Home Efficiency will be a combination of first-year incremental MW coincident peak demand savings reported in the EM&V report and first-year incremental MWh energy savings reported in the EM&V report. The hard to reach and energy education energy savings will be Note 7 -excluded from this performance metric. The final year target for Cumulative Incremental First Year MWh savings is 8,499 MWh. The final year target for Cumulative Incremental MW Coincident with System Peak is 5.59 MW. The calculation of the Annual Incentive Amount is MW achieved multiplied by a rate of \$89,203.17/MW and MWh achieved multiplied by the rate of \$18.92/MWh.

Issued	December	17	2021
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Darrin Ives, Vice President