

For ALL TERRITORY

PROMOTIONAL PRACTICES
SCHEDULE PRO
Program Descriptions for MEEIA Cycle 1 2024 Plan

A. Residential Efficient Products

PURPOSE:

The Residential Efficient Products program is designed to raise customer awareness of the benefits of high efficiency products and to educate residential customers about energy use in their homes by offering information, products, and services to residential customers to save energy cost-effectively. The Empire District Electric Company’s (Company) participation in such financial incentives is limited to the amount approved by the Missouri Public Service Commission in Case No. EO-2022-0078.

DEFINITIONS:

Administrator – The Company will align itself with a third-party implementation vendor, which will also contribute to marketing and outreach.

DSM Advisory Group (“DSMAG”) – An advisory collaborative consisting of Company stakeholders including Missouri Public Service Commission Staff, Division of Energy, the Missouri Office of Public Counsel, National Housing Trust, and Renew Missouri. The Company will meet with the DSMAG no less than quarterly to: report on participation in its energy efficiency programs; discuss successes and challenges; report on expenditures, remaining budgets balances, and the Demand-side Investment Mechanism (“DSIM”); and work together toward the continuous improvement of the Company’s energy efficiency offerings.

Eligible Participant – Residential electric retail customer in rate schedule NS-RG, TC-RG or TP-RG.

Funds – The 2023 budget for this program, as ordered in Case No. EO-2022-0078, is \$358,201. The 2024 budget for this program, as ordered in Case No. EO-2022-0078, is \$380,145.

Program Period – As approved in EO-2022-0078, the program will be administered through the year 2024, or until superseded by a new MEEIA portfolio.

Measures – Empire will offer—via a combination of point-of-purchase instant rebates and offerings of an online marketplace—the following type of measures at a reduced cost: LED light bulbs, dehumidifiers, air purifiers, power strips, Advanced Thermostats, ENERGY STAR bathroom exhaust fans, ENERGY STAR ceiling fans, kitchen sink aerators, and low-flow showerheads.

THE EMPIRE DISTRICT ELECTRIC COMPANY d.b.a. LIBERTY

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DESCRIPTIONS:

Customers are eligible to purchase qualifying energy efficient lighting, water, and appliance measures at a decreased cost either at participating retailers either online or in-store. Customers that participate receive instant incentives at the point-of-purchase. Incentives will vary depending upon the type of lighting/equipment, manufacturer, and the associated retail cost.

Residential customers are also eligible to receive energy advice through an online energy audit tool available at no cost to the customer. The evaluation identifies potential energy efficiency upgrades, educates the customer on managing energy consumption, and provides further information on Liberty’s other energy efficiency programs. Residential customers may order recommended energy efficient measures following the completion of an online audit through an online marketplace. The online marketplace will be available to all customers to purchase energy efficient products regardless of their participation in the online energy audit tool.

TERMS & CONDITIONS:

Liberty and/or a contractor acting on the Company’s behalf may conduct desktop or field-based QA/QC on a random selection of completed energy efficiency projects. The QA/QC process may include verification of purchase and/or installation of any equipment/measures that receive incentives through the program. The QA/QC process does not constitute an inspection for proper installation except where the installation impacts the effectiveness or efficiency of the measure in question. Customers and building owners who participate in this program may participate in other programs, if qualified.

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B. Low-Income Multi-Family program

PURPOSE:

The Low-Income Multi-Family Program (“Program”) is designed to deliver long-term energy savings and bill reductions to owners/operators and income-eligible customers in multi-family properties. The program will issue multifamily customers energy audits, accompanied by the direct installation of installation of low-cost and no-cost energy efficiency measures and offering additional rebates as appropriate. The Empire District Electric Company’s (Company) participation in such financial incentives is limited to the amount approved by the Missouri Public Service Commission in Case No. EO-2022-0078.

DEFINITIONS:

Administrator – The Company will align itself with a third-party implementation vendor, which will also contribute to marketing and outreach.

DSM Advisory Group (“DSMAG”) –An advisory collaborative consisting of interested stakeholders such as Missouri Public Service Commission Staff, Division of Energy, and the Missouri Office of Public Counsel, National Housing Trust, and Renew Missouri. The Company will meet with the DSMAG no less than quarterly to: report on participation in its energy efficiency programs; discuss successes and challenges; report on expenditures, remaining budgets balances, and the Demand-side Investment Mechanism (“DSIM”); and work together toward the continuous improvement of the Company’s energy efficiency offerings.

Eligible Participant – Owners and operators of any multi-family property of three or more dwelling units receiving service under the NS-RG, TC-RG, TP-RG, NS-GS, TC-GS or TP-GS. rate schedules, and meet any of the following criteria:

- Participation in an affordable housing program: Documented participation in a federal, state, or local affordable housing program, including LIHTC, HUD, USDA, State HFA, and local tax abatement for low-income properties.
- Location in a low-income census tract: Location in a census tract identified as low-income, using HUD’s annually published “Qualified Census Tracts” as a starting point.
- Rent roll documentation: Where at least 50% of the units have rents affordable to households at or below 80% of the area median income, as published annually by HUD.
- Tenant income information: Documented tenant income information demonstrating at least 50% of units are rented to households meeting one of these criteria: at or below 200% of the Federal poverty level or at or below 80% of the Area Median Income (AMI).

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Eligible Participant (cont.)

- Participation in the Weatherization Assistance Program: Documented information demonstrating the property is on the waiting list for, currently participating in, or has in the last 5 years participated in the Weatherization Assistance Program.

Funds – The 2023 budget for this program, as ordered in Case No. EO-2022-0078, is \$203,642. The 2024 budget for this program, as ordered in Case No. EO-2022-0078, is \$208,642.

Program Period – As approved in EO-2022-0078, the program will be administered through the year 2024, or until superseded by a new MEEIA portfolio.

Eligible Measures –

The Program Administrator will provide or approve installation of Program specified energy efficiency measures and may provide custom incentives for measures that have been pre-authorized by the Program Administrator for tenant units, common areas, building shell, and whole-building systems.

Direct-install energy efficiency measures may include but are not limited to LED Light bulbs, faucet aerators, low-flow showerheads, advanced thermostats, and smart power strips. Additional in unit measures may include refrigerator replacement, room A/Cs, other energy saving small appliances, and associated recycling.

Common area and whole building measures may include but are not limited to lighting, weatherization, water heating, HVAC systems, and other custom measures.

AVAILABILITY:

The Program is available to Eligible Participants as described above. Customers will receive Eligible Direct Install Measures, as described above at no cost. Incentives are also available for Custom measures. Custom measures are defined as non-prescriptive energy efficiency measures, or the integration of several measures, which may include prescriptive measures, to achieve significant energy savings. All custom measures must receive a pre-approval commitment from the Company whether for tenant units, common areas, building shell, or whole building systems. Empire encourages tenants to address energy efficiency needs in common areas either as Custom measures in this program, or through the HVAC, Small Business Direct Install program, or the Commercial and Industrial rebate program, depending on availability of funds and eligibility for programs.

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DELIVERY:

The Company will deliver the Program with the aid of a program administrator, with whom it will deliver the program according to a contract.

The Company will also work with natural gas utilities with which it shares customers, where applicable.

TERMS AND CONDITIONS:

Liberty and/or a contractor acting on the Company's behalf may conduct desktop or field-based QA/QC on a random selection of completed energy efficiency projects. The QA/QC process may include verification of purchase and/or installation of any equipment/measures that receive incentives through the program. The QA/QC process does not constitute an inspection for proper installation except where the installation impacts the effectiveness or efficiency of the measure in question. Customers and building owners who participate in this program may participate in other programs, if qualified.

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C. Residential Heating, Ventilation, and Air Conditioning (“HVAC”) Rebate

PURPOSE:

The HVAC Rebate Program (Program) is designed to encourage the efficient use of energy through the purchase and installation of energy efficient HVAC systems by providing rebates to lower the cost of such improvements for residential customers.

DEFINITIONS:

Administrator – The Company will align itself with a third-party implementation vendor, which will also contribute to marketing and outreach.

DSM Advisory Group (“DSMAG”) – An advisory collaborative consisting of Company stakeholders including Missouri Public Service Commission Staff, Division of Energy, the Missouri Office of Public Counsel, National Housing Trust, and Renew Missouri. The Company will meet with the DSMAG no less than quarterly to: report on participation in its energy efficiency programs; discuss successes and challenges; report on expenditures, remaining budgets balances, and the Demand-side Investment Mechanism (“DSIM”); and work together toward the continuous improvement of the Company’s energy efficiency offerings.

Eligible Participant – Electric residential customers, owners of residential rental property, and builders of residential structures being served by the Company in rate schedule NS-RG, TC-RG, and TP-RG, who elect to upgrade or install central cooling or heating systems with a SEER2 value of 15 or higher.

Funds – The 2023 budget for this program, as ordered in Case No. EO-2022-0078, is \$415,081. The 2024 budget for this program, as ordered in Case No. EO-2022-0078, is \$421,039.

Program Period – As approved in EO-2022-0078, the program will be administered through the year 2024, or until superseded by a new MEEIA portfolio.

Measures – High-efficiency Air-Source Heat Pumps, Electric central air conditioners, mini-split heat pumps, and geothermal heat pumps rated 15 SEER2 and above.

DESCRIPTIONS:

HVAC rebates will range from \$100 to \$750 per system and include equipment that ranges from SEER2 15 to SEER2 20+.

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TERMS & CONDITIONS:

Liberty and/or a contractor acting on the Company's behalf may conduct desktop or field-based QA/QC on a random selection of completed energy efficiency projects. The QA/QC process may include verification of purchase and/or installation of any equipment/measures that receive incentives through the program. The QA/QC process does not constitute an inspection for proper installation except where the installation impacts the effectiveness or efficiency of the measure in question. Customers and building owners who participate in this program may participate in other programs, if qualified.

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D. Whole Home Energy: Pay As You Save (“PAYS”)

PURPOSE:

The PAYS Program facilitates whole-house improvements to existing homes by conducting home energy audits and encouraging the installation of energy efficient measures by offering on-bill financing on qualifying measures. The Empire District Electric Company’s (Company) participation in such financial incentives is limited to the amount approved by the Missouri Public Service Commission in Case No. EO-2022-0078.

DEFINITIONS:

Administrator – The Company will align itself with a third-party implementation vendor, which will also contribute to marketing and outreach.

DSM Advisory Group (“DSMAG”) –An advisory collaborative consisting of Company stakeholders including Missouri Public Service Commission Staff, Division of Energy, and the Missouri Office of Public Counsel, National Housing Trust, and Renew Missouri. The Company will meet with the DSMAG no less than quarterly to: report on participation in its energy efficiency programs; discuss successes and challenges; report on expenditures, remaining budgets balances, and the Demand-side Investment Mechanism (“DSIM”); and work together toward the continuous improvement of the Company’s energy efficiency offerings.

Eligible Participant – Electric residential customers, owners of residential rental property, and builders of residential structures being served by the Company in rate schedule NS-RG, TC-RG, or TP-RG.

Funds – The 2023 budget for this program, as ordered in Case No. EO-2022-0078, is \$509,891. The 2024 budget for this program, as ordered in Case No. EO-2022-0078, is \$516,103.

Program Period – As approved in EO-2022-0078, the program will be administered through the year 2024, or until superseded by a new MEEIA portfolio.

Measures – Energy efficiency upgrades that could potentially be financed through the PAYS mechanism may include: LED Light bulbs, faucet aerators, low-flow showerheads, water heater insulation, air sealing, insulation, duct sealing, ENERGY STAR Windows, high-efficiency Air-Source Heat Pumps, Electric central air conditioners, mini-split heat pumps and geothermal heat pumps rated 15 SEER and above, advanced thermostats, heat pump water heaters, ENERGY STAR dehumidifiers, ENERGY STAR air purifiers, ENERGY STAR refrigerators, or smart power strips.

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DESCRIPTIONS:

Customers receive free in-home evaluations and customized recommendations for energy efficient measure upgrades. Customers may choose to install any recommended upgrade and Liberty will cover the full installation cost of qualifying upgrades minus the cost of any incentives. There are no upfront costs to our customers. Customers instead pay a fixed tariff on their monthly energy bills that is attached to the metered location and is less than the estimated savings generated by the upgrades. Customers pay this tariff charge until Liberty fully recoups its original investment, then customers receive all of the upgrade savings thereafter. All eligible rebates for the qualifying measures still apply for the customer.

For a project to be eligible for the PAYS program, the investment of the project must be able to be repaid via a monthly cost recovery charge that does not exceed 80 percent of expected average first-year energy savings, and that persists for a maximum of 80 percent of the expected useful life of the installed energy upgrades. For building efficiency upgrades, this period is typically around 12 years.

In cases where expected cost recovery payments are not sufficient to fully finance installed energy upgrades, the customer may contribute an upfront co-payment that reduces the cost of the investment to a level that may be financed according to the PAYS' cost effectiveness criteria.

TERMS & CONDITIONS:

Liberty and/or a contractor acting on the Company's behalf may conduct desktop or field-based QA/QC on a random selection of completed energy efficiency projects. The QA/QC process may include verification of purchase and/or installation of any equipment/measures that receive incentives through the program. The QA/QC process does not constitute an inspection for proper installation except where the installation impacts the effectiveness or efficiency of the measure in question. Customers and building owners who participate in this program may participate in other programs, if qualified.

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E. Small Business Direct Install Program

PURPOSE:

The Small Business Direct Install Program is designed to promote the installation of energy efficient technologies in small businesses. The Empire District Electric Company’s (Company) participation in such financial incentives is limited to the amount approved by the Missouri Public Service Commission in Case No. EO-2022-0078.

DEFINITIONS:

Administrator – The Company will align itself with a third-party implementation vendor, which will also contribute to marketing and outreach.

DSM Advisory Group (“DSMAG”) –An advisory collaborative consisting of Company stakeholders including Missouri Public Service Commission Staff, Division of Energy, the Missouri Office of Public Counsel, National Housing Trust, and Renew Missouri. The Company will meet with the DSMAG no less than quarterly to: report on participation in its energy efficiency programs; discuss successes and challenges; report on expenditures, remaining budgets balances, and the Demand-side Investment Mechanism (“DSIM”); and work together toward the continuous improvement of the Company’s energy efficiency offerings.

Eligible Participant – Nonresidential electric customers or owners of newly-constructed or existing nonresidential property who are being served under nonresidential rate schedule NS-GS, TC-GS, or TP-GS.

Funds – The 2023 budget for this program, as ordered in Case No. EO-2022-0078, is \$474,824. The 2024 budget for this program, as ordered in Case No. EO-2022-0078, is \$476,324.

Program Period – As approved in EO-2022-0078, the program will be administered through the year 2024, or until superseded by a new MEEIA portfolio.

DESCRIPTIONS:

Customers receive an energy evaluation identifying potential energy savings. Customers are eligible to receive an incentive, direct installation of measures at no cost, and a customized recommendation for energy efficient equipment upgrades following the energy evaluation. The customized recommendation will provide information on potential energy savings, installation costs, and anticipated payback. The total incentive for direct install projects will vary by project.

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TERMS & CONDITIONS:

Liberty and/or a contractor acting on the Company's behalf may conduct desktop or field-based QA/QC on a random selection of completed energy efficiency projects. The QA/QC process may include verification of purchase and/or installation of any equipment/measures that receive incentives through the program. The QA/QC process does not constitute an inspection for proper installation except where the installation impacts the effectiveness or efficiency of the measure in question. Customers and building owners who participate in this program may participate in other programs, if qualified.

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F. Commercial and Industrial (“C&I”) Rebate Program

PURPOSE:

The C&I Rebate Program is designed to encourage the efficient use of energy by providing rebates to cover a portion of the costs associated with the purchase and installation of energy efficient equipment in commercial and industrial facilities. Empire District Electric Company’s (Company) participation in such financial incentives is limited to the amount approved by the Missouri Public Service Commission in Case No. EO-2022-0078.

DEFINITIONS:

Administrator – The Company will align itself with a third-party implementation vendor, which will also contribute to marketing and outreach.

DSM Advisory Group (“DSMAG”) –An advisory collaborative consisting of Company stakeholders including Missouri Public Service Commission Staff, Division of Energy, the Missouri Office of Public Counsel, National Housing Trust, and Renew Missouri. The Company will meet with the DSMAG no less than quarterly to: report on participation in its energy efficiency programs; discuss successes and challenges; report on expenditures, remaining budgets balances, and the Demand-side Investment Mechanism (“DSIM”); and work together toward the continuous improvement of the Company’s energy efficiency offerings.

Eligible Participant – Nonresidential electric customers or owners of newly-constructed or existing nonresidential property who are being served under nonresidential rate plans NS-GS, TC-GS, TP-GS, NS-LG, TC-LG, NS-SP, TC-SP, LP, or TS and have not opted out of participation in the program under Missouri Public Service Commission Rule 4 CSR 240-20.094(7)(A).

Funds – The 2023 budget for this program, as ordered in Case No. EO-2022-0078, is \$1,465,977. The 2024 budget for this program, as ordered in Case No. EO-2022-0078, is \$1,478,133.

Program Period – As approved in Case No. EO-2022-0078, the program will be administered through the year 2024, or until superseded by a new MEEIA portfolio.

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DESCRIPTIONS:

The program provides incentives to encourage the purchasing of energy efficient equipment at commercial and industrial facilities. The program consists of prescriptive and custom rebates.

Prescriptive – Pre-qualified prescriptive rebates are available for new construction and retrofit projects. A complete list of prescriptive measures and their incentives can be found in Empire’s MEEIA Filing, made in Case No. EO-2022-0078.

Custom – Equipment that does not qualify for a prescriptive rebate will be eligible for a custom rebate. Applications must be pre-approved by Empire before equipment is purchased and installed and must produce a Total Resource Cost Test benefit-cost ratio of at least 1.0. A \$250,000 incentive cap is imposed per facility per program year. However, if funds are still available in the last three months of the program year, the cap may be exceeded.

TERMS & CONDITIONS:

Liberty and/or a contractor acting on the Company’s behalf may conduct desktop or field-based QA/QC on a random selection of completed energy efficiency projects. The QA/QC process may include verification of purchase and/or installation of any equipment/measures that receive incentives through the program. The QA/QC process does not constitute an inspection for proper installation except where the installation impacts the effectiveness or efficiency of the measure in question. Customers and building owners who participate in this program may participate in other programs, if qualified.