

## Program Details and Instructions

The Evergy and Spire Income-Eligible Multi-Family (IEMF) Program is designed to help multi-family customers replace aging, inefficient equipment and systems with energy-efficient technologies by offsetting improvement costs and providing technical assistance to help facilitate the installation of new systems. Evergy rebates are provided at a rate of \$0.30 per kilowatt-hour (kWh) saved. Prescriptive rates are also available for eligible equipment based on the end use category rate chart. Spire rebates are determined on the lesser of \$6.63 per MCF saved during the first year or a buydown to a two-year payback, depending on the technology.

Details of the offer, including rebate levels and technical requirements, are subject to change without prior notice.

To review the most current offer information, call Nicholas Newport at 816-772-1001.

## Eligible Participants

Eligible customers are those in the Evergy Missouri Metro and Evergy Missouri West and Spire territories under any residential rate schedule or business customers served under the SGS, MGS, LGS, SGA, MGA or LGA rate at multi-family income-qualified properties consisting of three or more dwelling units.

## Eligible Equipment

This application form is for custom energy conservation measures not included on the direct install portion of IEMF, or required by state, local or federal energy and building codes.

Custom rebates are available for projects involving the retrofit of existing equipment, replacement of end-of-life equipment and new construction.

All equipment must be new. Used or refurbished equipment is not eligible.

## Preapproval Requirements

All custom projects require preapproval from Evergy and Spire (if gas is included) prior to purchasing and installing any equipment.

After the application has been preapproved by Evergy and Spire (if gas is included), the applicant will be notified in writing, assigned a project identification number and given any specific instructions.

The applicant may then purchase and install the preapproved equipment.

## Terms and Conditions

Please review the Terms and Conditions on page 5 of this application.

### Contact Us

Mail: Evergy and Spire Income-Eligible Multi-Family  
c/o ICF  
1100 Main Street, Suite 1605  
Kansas City, MO 64105

Email: [Nicholas.Newport@icf.com](mailto:Nicholas.Newport@icf.com)

Phone: 816-772-1001

Fax: 877-574-3340

## Step 1

All custom applications require thorough and complete documentation of the proposed costs and projected electric energy or gas usage and savings.

Before beginning the application process, the customer or the contractor should check with the IEMF program manager, Nicholas Newport, to determine the eligibility of the proposed project and to establish requirements for detailed savings projections and cost estimates.

This information must be submitted for review and evaluation of potential rebates. Contact us at 816-772-1001 with any questions about eligibility.

## Step 2

Complete the application.

Refer to the Application Checklist on page 4 to verify that all required information and documentation are included for submission to the program.

Incomplete applications will not be accepted and will be returned to the applicant for completion.

Please indicate if the rebate payment should be made payable to the customer of record or a third party, such as the installation contractor.

All rebate payments require authorization from the customer of record.

Submit complete application packages by U.S. mail, email or fax.

Mail: Evergy and Spire Income-Eligible Multi-Family  
c/o ICF  
1100 Main Street, Suite 1605  
Kansas City, MO 64105

Email: [Nicholas.Newport@icf.com](mailto:Nicholas.Newport@icf.com)

Fax: 877-574-3340

## Step 3

Applications will be processed for preapproval, and the program will notify the applicant in writing when the review is complete and rebate funds have been reserved.

The program will notify customers if an inspection of the facility is necessary prior to preapproval. Upon receipt of program preapproval, participants may purchase and install the energy-efficient equipment.

Any changes in the proposed equipment, quantities or operating conditions must be approved by Evergy and Spire (if gas is included) prior to implementation.

## Step 4

Upon project completion, review the preapproved application and note any changes to the project that occurred during installation.

Submit the preapproval letter, with the authorized customer signature, and proof of purchase for rebate payment.

The program will notify the applicant if an inspection of the facility is necessary prior to final payment processing.

**I. Customer Information**

Application Date:		Expected Completion Date:	
Company Name:			
Evergy Electric Account #:		Spire Account #:	
Street Address (of the facility):			
City:	State:	ZIP Code:	
Mailing Address (if different):			
City:	State:	ZIP Code:	
Contact Person:			Title:
Phone:	Fax:	Email:	
Project Type: <input type="checkbox"/> New Building <input type="checkbox"/> Equipment Replacement <input type="checkbox"/> Expansion <input type="checkbox"/> Renovation <input type="checkbox"/> Other _____			
Square Footage Covered by the Application:			

**II. Payment Information**

Check Payable to: <input type="checkbox"/> Evergy Customer <input type="checkbox"/> Service Provider <input type="checkbox"/> Dual Customer (Evergy & Spire)	
Customer Name (please print):	
Customer Signature (if payment to Service Provider):	
Title:	Date:

**III. Service Provider Information**

Whom should we contact regarding this application? <input type="checkbox"/> Evergy Customer <input type="checkbox"/> Service Provider <input type="checkbox"/> Dual Customer (Evergy & Spire)		
Company Name:		
Mailing Address:		
City:	State:	ZIP Code:
Contact Person:		Title:
Phone:	Fax:	Email:

#### IV. Custom Specifications

The custom application must be used for all energy conservation measures that are not covered by the IEMF direct install rebate form. A single application form may be submitted for multiple custom energy conservation measures that are considered part of the same project. In these situations, a project summary, cost estimate and energy impacts must be presented for each measure individually, not in total. Custom applications require supporting documentation on equipment performance and calculations documenting the energy and demand savings that are expected to result from each measure. There are several methods that can be used to determine the baseline used to develop the savings for a given project.

Supporting documentation for each energy efficiency measure submitted with a custom application includes:

**PROJECT OVERVIEW:** Provide a brief overview of the proposed project. Include a basic description of the facility and its function, location of affected equipment and typical facility hours of operation.

**EXISTING SYSTEM OR BASE CASE DESCRIPTION:** For retrofit projects, describe the existing system or equipment that will be modified under this application and state how the current system is operating. For new construction or end-of-life equipment replacement projects, applications should provide information for the base efficiency system or other equipment that would be installed. This should include the following:

- Detailed description of the affected equipment, including system capacity, age, load profiles, production rate and hours of operation
- Number of existing units
- Manufacturer data sheets with equipment performance ratings (BHP, CFM, PSI, kW, efficiency rating, U-value). Provide nameplate data if manufacturer data sheets are unavailable
- Part-load performance data (where applicable)
- Description of controls and sequence of operations

**PROPOSED SYSTEM DESCRIPTION:** Describe in detail the measures that are proposed. Include:

- Detailed description of high-efficiency system or equipment and operating conditions
- Manufacturer data sheets for the materials or performance ratings for equipment being installed (BHP, CFM, PSI, kW, efficiency rating, U-value)
- Description of controls and sequence of operations
- One-line diagrams (where applicable)

**COST ESTIMATES:** Include a measure-by-measure summary of the estimated costs associated with the project. For retrofit projects, provide a detailed cost breakdown associated with the project, including written proposals from vendors and contractors or itemized estimates of components from up-to-date estimating manuals. For new construction or end-of-life equipment replacement projects, include cost data for base high-efficiency systems or equipment.

**ENERGY IMPACTS:** Include a measure-by-measure summary of the calculated energy and demand savings associated with the project. Clearly indicate all assumptions and variables used in the analysis. This includes all engineering formulas and documentation of all the factors, values and assumptions used in the formulas (Microsoft Excel® spreadsheet preferred).

In cases in which energy modeling is used to determine savings, approved modeling software must be used. Input and output data from the model must be provided.

Show calculations used to determine baseline and proposed estimated electricity usage and/or gas usage:

- Annual energy consumption (kWh)
- Summer peak demand (kW)
- Natural gas saved during the first year (MCF)

**NOTE:** If a project consists of multiple custom measures, Sections V, VI and VII must be completed for each proposed energy conservation measure. These sections are intended to provide a summary of each individual measure, with supporting documentation attached as appropriate.

#### V. Project Summary

Attach project study, including energy savings information and costs for each energy conservation measure separately. Briefly describe the project below.

Project Overview

Existing System or Base Case Description

Proposed System Description

### VI. Cost Estimates

Provide backup documentation for all equipment, materials and labor costs, categorized by energy efficiency measures. Sales tax may not be included. Adjust for salvage/resale value of equipment being replaced. Enter summarized costs in the table below.

Measure	Baseline Costs	Proposed Costs
Estimated Material Cost		
Estimated Equipment Cost		
Estimated Labor Cost		
Estimated Total Cost		

### VII. Energy Impacts

Provide estimated annualized energy usage (kWh) and demand (kW) for each category listed below. Attach full documentation supporting energy and demand estimates. When a computer model is used for energy and demand calculations, provide a complete description of input conditions for baseline and efficient states in addition to model outputs for both states.

Estimated Annual Energy Consumption			Estimated Summer Peak Demand			
Baseline (kWh or MCF)	Proposed (kWh or MCF)	Reduction (kWh or MCF)	Time Period	Baseline (kW)	Proposed (kW)	Reduction (kW)
			June–September, 2 p.m.–9 p.m., M–F, Non-Holiday			

### VIII. Application Checklist

Please submit the following items:

- Completed application, including:
  - Customer and payment information page
  - Customer’s Evergy account number, along with Spire account number if applicable
- Supporting documentation for each energy conservation measure, as indicated on page 3 of the application
- Customer’s signature in Customer Acknowledgment section below

Please submit completed application via one of the following methods:

Email: [Nicholas.Newport@icf.com](mailto:Nicholas.Newport@icf.com) Fax: 877-574-3340

U.S. mail: Evergy and Spire Income-Eligible Multi-Family c/o ICF, Suite 1605, 1100 Main Street, Kansas City, MO 64105

Applications will be processed in the order in which they are received. Applicants will be notified as to their preapproval status and/or any pre-inspection requirements within 10 business days from submission. Rebate payment will be processed within four weeks of final approval. Applicants will be notified if post-installation inspections are required prior to final payment.

### IX. Customer Acknowledgment of Terms and Conditions

By signing below, I hereby certify that all statements made on this application are correct to the best of my knowledge and that I have read and agree to the Terms and Conditions on page 5.

Customer or Authorized Representative Name (please print): \_\_\_\_\_

Customer Signature: \_\_\_\_\_

Title: \_\_\_\_\_ Date: \_\_\_\_\_

Note: For projects requiring preapproval, Evergy will email a preapproval letter to the customer, who must sign and return it, along with invoices for all energy efficiency measures, upon completion of project.

For more information about the IEMF offer, contact Nicholas Newport at 816-772-1001.

## X. Terms and Conditions

**IEMF OVERVIEW:** Income-Eligible Multi-Family ("IEMF"), offered by Evergy ("Evergy") and Spire ("Spire"), provides a walk-through assessment of the multi-unit property of an eligible Evergy and Spire customer (the "Customer") by a program manager (the "Program Manager") from ICF (the "Implementer"), a selection of energy-saving measures (the "Direct Measures") that may be installed by an energy efficiency professional (the "Energy Efficiency Professional") in tenant units and in property common areas at the time of the property visit and/or qualified custom measures incentivized per first year kWh saved or \$6.63 per MCF saved during the first year (the "Custom Incentive"). Customer shall provide tenants with 24-hour advance written notice of the IEMF assessment, and tenants may elect not to participate in IEMF by providing written notice to the Customer.

**SUMMARY REPORT:** Customers who participate in IEMF and own or manage the assessed multi-family property will receive a summary report (the "Summary Report") via mail or email from the Program Manager after the property visit. The Summary Report will serve as the minimum deliverable of IEMF and will provide the Customer with a record of the Program Manager's findings, a historical energy analysis, a review of energy-saving measures installed and additional recommendations related to energy efficiency. Evergy and Spire will not be responsible for any lost documentation pertaining to the Summary Report.

**ELIGIBILITY:** Funds for IEMF are limited and are available to eligible customers in the Evergy Missouri Metro and Evergy Missouri West and Spire territories on a first-come, first-served basis. "Eligible Customers" are any customers receiving electric service from Evergy under any residential rate schedule or business customers served under the SGS, MGS, LGS, SGA, MGA or LGA rate at multi-family income-qualified properties consisting of three or more dwelling units. Eligible Customers must complete and submit an application ("Application") to participate in IEMF; tenants residing in multi-family units owned by Eligible Customers will receive in-unit efficiency measures at no cost and are not required to submit an application. For the purposes of this program, the term "income-qualified" refers to tenant occupants meeting one of the following building eligibility requirements: (1) 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; (2) Location in a census tract we identify as low-income, using HUD's annually published "Qualified Census Tracts" as a starting point; (3) Rent roll documentation where at least 50% of units have rents affordable to households at or below 80% of area median income, as published annually by HUD; (4) 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 area median income; or (5) Documented information demonstrating the property is on the waiting list for, currently participating in or has in the last five years participated in the Weatherization Assistance Program. For IEMF properties with less than 51% qualifying tenants, the building's owner will be required to verify installation of comparable qualified energy efficiency measures at their expense in all non-qualifying units. Upon verification and approval, the program may upgrade the entire building, common areas and all of the remaining eligible units with qualified energy efficiency measures. Qualified energy efficiency measures are identified in official program materials. Customers are eligible for participation in IEMF only once in the 36-month program period.

**PRE-INSTALLATION ANALYSIS, SURVEY AND APPROVAL:** Customers must provide separate Applications for Direct Measures and the Custom Incentive. Unless otherwise agreed to in writing by Evergy and Spire, Evergy and Spire are not obligated to award any installations unless they approve the Customer's Application and complete a pre-installation audit of the Customer's facilities. After an Application is approved, the Customer will receive notification of preapproved installations.

**POST-INSTALLATION APPROVAL AND VERIFICATION:** Evergy and Spire reserve the right to verify the delivery of IEMF services and to have reasonable access to Customer's property to inspect the energy efficiency measures installed under IEMF. The Customer will be provided 24-hour advance notice for access to tenant dwelling units.

**LIABILITY WAIVER:** By executing this application, the Customer voluntarily agrees not to hold Evergy, Spire, Implementer, trade allies or any of their affiliates, directors, officers, employees, agents or contractors liable for any illness or injury. Customer further agrees not to engage in any inappropriate actions or otherwise endanger the safety or health of same.

**TAX LIABILITY:** Evergy and Spire will not be responsible for any tax liability that may be imposed on the Customer as a result of IEMF delivery and installation. Please contact your tax adviser for more information.

**NO ENDORSEMENT:** Evergy and Spire do not endorse any particular manufacturer, product, system design or service in promoting IEMF.

**INFORMATION RELEASE:** Customer agrees that Evergy and Spire may include Customer's name, address, Evergy account number and Spire account number, the services performed under IEMF for Customer and resulting energy savings to Customer in a database hosted by the Implementer, and such information may be included in reports or other documentation submitted to the Implementer and/or the Missouri Public Service Commission. Evergy and Spire will treat such information as confidential and report such information only in the aggregate.

**LIMITATION OF LIABILITY:** NOTWITHSTANDING ANYTHING TO THE CONTRARY HEREIN AND TO THE EXTENT PERMITTED BY APPLICABLE LAW, CUSTOMER AGREES THAT REGARDLESS OF THE LEGAL THEORY ASSERTED (INCLUDING BUT NOT LIMITED TO BREACH OF CONTRACT, WARRANTY, NEGLIGENCE OR TORT), THE LIABILITY OF EVERGY, SPIRE OR IMPLEMENTER UNDER IEMF TO CUSTOMER, OR ANY PARTY ASSERTING CLAIMS ON BEHALF OF OR IN THE NAME OF CUSTOMER, WILL NOT EXCEED COLLECTIVELY AND IN THE AGGREGATE, FOR ALL CLAIMS, LIABILITIES, LOSSES, DAMAGES OR EXPENSES, THE VALUE OF THE ASSESSMENT PERFORMED BY EVERGY, SPIRE OR IMPLEMENTER FOR CUSTOMER DURING THE FIRST YEAR OF IEMF. FURTHER, IN NO EVENT WILL EVERGY, SPIRE OR IMPLEMENTER BE LIABLE, WHETHER IN CONTRACT, TORT (INCLUDING NEGLIGENCE), STRICT LIABILITY, WARRANTY OR OTHERWISE FOR SPECIAL, INCIDENTAL OR CONSEQUENTIAL DAMAGES CONNECTED WITH OR RESULTING FROM IEMF.

**WARRANTIES:** EVERGY AND SPIRE DO NOT WARRANT THE PROPER COMPLETION OF WORK OR PERFORMANCE OF INSTALLED PRODUCTS, EXPRESSLY OR IMPLICITLY. EVERGY AND SPIRE MAKE NO WARRANTIES OF ANY KIND, WHETHER STATUTORY, EXPRESSED OR IMPLIED, INCLUDING WITHOUT LIMITATIONS, WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE REGARDING ANY ENERGY-SAVING MEASURES INSTALLED PURSUANT TO IEMF, INCLUDING BUT NOT LIMITED TO LED LIGHT BULBS, EFFICIENT-FLOW SHOWERHEADS, FAUCET AERATORS, SMART POWER STRIPS OR PIPE INSULATION. EVERGY AND SPIRE MAKE NO GUARANTEE OF ENERGY-SAVING RESULTS BY RECEIVING IEMF AND DIRECT MEASURE INSTALLATION. THE ENERGY EFFICIENCY PROFESSIONAL SHALL BE RESPONSIBLE FOR DELIVERING DETAILS REGARDING WARRANTIES (IF ANY) FOR PRODUCTS INSTALLED PURSUANT TO IEMF. EVERGY, SPIRE AND IMPLEMENTER PROVIDE NO WARRANTIES REGARDING SAFETY, HEALTH OR WELL-BEING.

**PROPERTY RIGHTS:** Customer represents that he/she has the right to complete and/or install the energy-saving measures under IEMF on the property on which those measures are completed and/or installed, and that any required consents from landlords, tenants and others to permit IEMF to be performed on Customer's property, as the case may be, have been obtained by the Customer.

**RIGHT TO REFUSE:** The Energy Efficiency Professional and/or Program Manager has the right to refuse service or end IEMF delivery when confronted by a Customer acting inappropriately or when facing a situation deemed potentially unsafe or harmful to health or well-being in the sole discretion of the Energy Efficiency Professional and/or Program Manager. "Inappropriate" includes, but is not limited to, the following: unreasonable demands for service, personally threatening or offensive language, threatening or erratic behavior and inappropriate personal conduct in the Energy Efficiency Professional and/or Program Manager's discretion. The Energy Efficiency Professional and/or Program Manager reserves the right to exclude any premises, or vicinity therein, deemed by the Energy Efficiency Professional and/or Program Manager to be potentially unsafe or harmful.

**USE OF EMAIL ADDRESS:** Customer acknowledges and agrees that Evergy, Spire or their Implementer may contact Customer via mail or email in connection with IEMF.