

**FOR CONSIDERATION**

April 28, 2021

**TO:** The Board of Trustees

**FROM:** Thomas Falcone

**SUBJECT:** Consideration of the Adoption of PSEG Long Island Implementation Plans for Isaias Task Force Report Recommendations

---

**Requested Action**

The Board of Trustees (the “Board”) of the Long Island Power Authority (“LIPA”) is requested to approve a resolution adopting certain PSEG Long Island Implementation Plans for the Isaias Task Force (the “Task Force”), which resolution is attached hereto as **Exhibit “A.”**

**Background**

On Tuesday, August 4, 2020, Tropical Storm Isaias landed on Long Island with rain and wind gusts of up to 70 miles per hour. The resulting damage to the electrical system caused approximately 646,000 customer outages.

On August 5, LIPA’s Chief Executive Officer initiated an independent investigation of the circumstances and root causes that led to well-documented lapses in PSEG Long Island’s storm response. The Task Force was charged with providing actionable recommendations and overseeing PSEG Long Island’s remediation activities. LIPA committed to reporting the Task Force’s findings and recommendations to the Board and the public in a 30-Day Preliminary Report and 90-Day Interim Report. There will also be a Final Report in May 2021.

The Task Force presented the 30-Day Report to the Board at the September 23, 2020 Board Meeting and released it to the public. Because of the urgency of the immediate threat of another major storm, the 30-Day Report focused on the failures of PSEG Long Island’s information technology and communication systems and their proximate causes.

On November 13, the Department of Public Service (“DPS”) provided a recommendation (the “DPS Recommendation”) to the Board as a result of its ongoing investigation of PSEG Long Island’s storm response. DPS Staff identified more than 70 potential violations of PSEG Long Island’s ERP. The DPS recommended, among other things, that LIPA:

- evaluate options to terminate PSEG Long Island as LIPA’s Service Provider;

- declare PSEG Long Island’s poor performance during Isaias as a first failure of the Major Storm Performance Metric as defined in the Amended and Restated Operations Services Agreement (“OSA”); and
- seek to either terminate or renegotiate the OSA to enable greater oversight by LIPA and DPS.

The Task Force presented the 90-Day Report to the Board at the November 18, 2020 Board Meeting. The 90-Day Report expanded on the findings of the 30-Day Report and addressed broader questions on the effectiveness of PSEG Long Island’s management of utility operations.

As set forth in Appendix 2 and Appendix 3 of the 90-Day Report, the Task Force provided nearly 100 recommendations for the Board’s consideration (the “Task Force Recommendations”). The Task Force Recommendations were designed to, among other things, (i) change management incentives and accountabilities; (ii) reform information technology and emergency management; and (iii) strengthen LIPA’s oversight. The Task Force Recommendations are tiered based upon priority. The tiered system allows LIPA and PSEG Long Island to either implement or present implementation plans for the most critical recommendations on an accelerated basis.

By Resolution No. 1568, dated November 18, 2020, the Board directed the Task Force, together with PSEG Long Island, to implement the Task Force Recommendations, including the creation of Implementation Plans to be completed within the tiered structure as set forth in Appendix 2 and Appendix 3 of the 90-Day Report; and to report to the Board at least quarterly until such Task Force Recommendations are fully implemented.

Thereafter, by Resolution No. 1570, dated December 16, 2020, the Board adopted certain Implementation Plans for the Task Force Tier 1 Recommendations, and directed PSEG Long Island to amend the remaining Tier 1 Implementation Plans and resubmit such plans to the Task Force for review at the Board’s January 2021 meeting.

By Resolution No. 1590, dated January 27, 2021, the Board adopted certain other Tier 1 Recommendation Implementation Plans and directed PSEG Long Island to amend the remaining Tier 1 and 2 Implementation Plans and resubmit such plans to the Task Force for review on or before the Board’s February 2021 meeting.

Thereafter, by Resolution No. 1601, dated February 24, 2021, the Board adopted certain other Tier 1, Tier 2, and Tier 3 Recommendation Implementation Plans and directed PSEG Long Island to amend the remaining Implementation Plans and resubmit such plans to the Task Force for review on or before the Board’s March 2021 meeting.

By Resolution No. 1615, dated March 29, 2021, the Board adopted certain other Tier 1, Tier 2, and Tier 3 Recommendation Implementation Plans and directed PSEG Long Island to amend the remaining Implementation Plans and resubmit such plans to the Task Force for review on or before the Board’s April 2021 meeting.

## **Discussion of Implementation Plans**

On April 9, 2021, PSEG Long Island submitted two Tier 3 revised plans for the 18 plans due on April 10, 2021.

A summary of the Implementation Plans is provided as **Exhibit “B.”** The Task Force recommends the Board adopt two Implementation Plans as attached hereto as **Exhibit “C”.**

In addition, as of April 21, 2021, PSEG Long Island has not yet submitted one Tier 2 Implementation Plan and did not submit 15 revised Tier 1 and Tier 3 Implementation Plans that were previously considered by the Board in the December, February, and March meetings and not adopted. Revised plans were requested for the Board’s consideration for the January, March and April meetings. These remaining plans should also be submitted with the comments previously conveyed in December, February and March addressed.

The remaining 16 Plans shall be submitted by PSEG Long Island for Task Force review no later than May 10, 2021 for consideration at the Board’s May meeting. Thereafter, the Task Force shall submit a Status Report to the Board no less than quarterly that summarizes the Implementation Plans' status for each Task Force Recommendation.

## **Recommendation**

The issues identified by the Task Force’s investigation, as well as the DPS’ separate investigation, remain urgent. Based upon the foregoing, I recommend approval of the above requested action by adoption of a resolution in the form attached hereto.

## **Attachments**

- Exhibit “A”** Resolution
  - Exhibit “B”** Summary of Implementation Plans
  - Exhibit “C”** Tier 3 Implementation Plans
-

**RESOLUTION ADOPTING CERTAIN PSEG LONG ISLAND IMPLEMENTATION PLANS FOR THE ISAIAS TASK FORCE REPORT RECOMMENDATIONS**

---

**WHEREAS**, on Tuesday, August 4, 2020, Tropical Storm Isaias landed on Long Island with rain and wind gusts of up to 70 miles per hour, resulting in damage to the electrical system and causing approximately 646,000 customer outages; and

**WHEREAS**, pursuant to Section 1020-f(y) of the Public Authorities Law, General Powers of the Authority, LIPA, in part, may “make any inquiry, investigation, survey or study which the authority may deem necessary to enable it effectively to carry out the provisions of this title. . .”; and

**WHEREAS**, pursuant to Section 4.4(16), Rights and Responsibilities of LIPA, of the Amended and Restated Operations Services Agreement (“OSA”), LIPA, in part, has the right to “make recommendations to the Service Provider, in each case as may be reasonably necessary or appropriate to perform LIPA’s oversight responsibilities and obligations with respect to the provision of Operations Services under this Agreement and as may otherwise be necessary or appropriate to comply with LIPA’s legal, contractual and fiduciary obligations. . .”; and

**WHEREAS**, on August 5, 2020, LIPA’s Chief Executive Officer initiated an independent review of the circumstances and root causes that led to the lapses in PSEG Long Island’s Tropical Storm Isaias storm restoration; and

**WHEREAS**, LIPA’s Chief Executive Officer appointed an Isaias Task Force that was charged with both providing actionable recommendations and overseeing PSEG Long Island’s remediation activities; and

**WHEREAS**, LIPA committed to reporting the Isaias Task Force’s findings, observations, and recommendations to the LIPA Board of Trustees (the “Board”) and public in a 30-Day Report, 90-Day Report, and 180-Day Final Report; and

**WHEREAS**, the Task Force presented the 30-Day Report to the Board at the September 23, 2020 Board Meeting and released it to the public; and

**WHEREAS**, on November 18, 2020, the Task Force presented the 90-Day Report, which provided recommendations to, among other things, (i) Change Management Incentives and Accountabilities; (ii) Reform Information Technology and Emergency Management; and (iii) Strengthen LIPA’s Oversight (together with the 30-Day Report recommendations, the “Task Force Recommendations”); and

**WHEREAS**, by Resolution No. 1568, dated November 18, 2020, the Board directed the Isaias Task Force, in coordination with PSEG Long Island, to submit an Implementation Plan to the Board for each Task Force Recommendation; and

**WHEREAS**, by Resolution No. 1570, dated December 16, 2020, the Board adopted certain Implementation Plans for the Task Force Tier 1 Recommendations, and directed that PSEG Long Island to amend the remaining Tier 1 Implementation Plans and resubmit such plans to the Task Force for review at the Board’s January 2021 meeting; and

**WHEREAS**, pursuant to the Board’s direction, LIPA’s CEO and Staff developed the Phase I Options Analysis, which was the first in a series of reports detailing options to improve the management of LIPA’s assets; and

**WHEREAS**, at its meeting in December 2020, the Board adopted the Phase I Options Analysis; found that privatization was too costly for LIPA’s customers; and directed LIPA’s CEO to further develop the Single-Provider Municipal model and Municipal Management model, as more specifically described in the Phase I Analysis, and report back to the Board in a Phase II Analysis Report no later than March 31, 2021; and

**WHEREAS**, by Resolution No. 1590, dated January 27, 2021, the Board adopted certain other Tier 1 Recommendation Implementation Plans; directed PSEG Long Island to amend the remaining Tier 1 and 2 Implementation Plans and resubmit such plans to the Task Force for review on or before the Board’s February 2021 meeting; and extended the time to submit the Task Force 180-Day Final Report to a 270-Day Final Report due to the Board on or before its May 2021 meeting; and

**WHEREAS**, by Resolution No. 1601, dated February 24, 2021, the Board adopted certain other Tier 1, Tier 2, and Tier 3 Recommendation Implementation Plans; directed PSEG Long Island to amend the remaining Implementation Plans and resubmit such plans to the Task Force for review on or before the Board’s March 2021 meeting; and

**WHEREAS**, by Resolution No. 1615, dated March 29, 2021, the Board adopted certain other Tier 1, Tier 2, and Tier 3 Recommendation Implementation Plans and directed PSEG Long Island to amend the remaining Implementation Plans and resubmit such plans to the Task Force for review on or before the Board’s April 2021 meeting; and

**WHEREAS**, the Isaias Task Force has submitted to the Board two Implementation Plans recommended for the Board’s approval; and

**WHEREAS**, the Isaias Task Force Recommendations include that if LIPA and PSEG Long Island renegotiate and cannot reach an agreement on acceptable reforms, or should there be a lack of progress to implement the Isaias Task Force Recommendations, the Board consider the exercise of its rights to terminate the OSA with PSEG Long Island before 2025 due to the urgent issues identified by the Task Force’s investigation.

**NOW, THEREFORE, BE IT RESOLVED**, the Board hereby adopts Implementation Plans for the Task Force Tier 1, 2, and 3 Recommendations attached hereto as **Exhibit “C”**; and

**BE IT FURTHER RESOLVED**, the Board hereby directs PSEG Long Island to amend the

remaining Tier 1, 2, and 3 Implementation Plans to address the comments provided by the Isaias Task Force and resubmit such plans to the Isaias Task Force for review on or before the Board's May 2021 meeting.

Dated: April 28, 2021

## Summary of Implementation Plans: ITF Tier1, Tier2 and Tier3 April Review

Date Issued	No.	Recommendation	Tier	End State	Deliverable	Date Draft Plan Received	Individual PIP Received	Accept or Reject	Comments
<b>Appendix 2 List Of 90-Day Report Recommendations</b>									
<b>Section 4 Customer Communications and Outage Management Systems</b>									
11/18/20	4.10	Implement a solution that allows the OMS to decouple customer reporting from field management activities.	3				No Revised PIP Submitted - Rejected - March.	Resubmit in May	Please resubmit the revised PIP.
11/18/20	4.12	Systematically test the OMS system to ensure that concrete root causes are identified and remedied. If the errors are due to system defects, then demand accountability from the system vendor for timely fixes. Ensure that root causes, not just symptoms, are addressed.	1	Root causes for failures in the OMS (and feeder systems) have been identified and fixed. OMS functional and technical performance criteria (acceptance criteria) have been established and agreed upon by LIPA and the OMS system passes tests based upon such criteria. This includes and enhances 3.2.2.3, emphasizing systematic root cause identification and validation. Systems deployed to production	Deployed remediated and tested OMS, acceptance test package. Final OMS Configuration Document. All configuration items in CMDB. Business and technical sign-off.		No Revised PIP Submitted - Rejected - March.	Resubmit in May	Please resubmit the revised PIP.
11/18/20	4.16	Install standby hardware resources for use during peak	1	Standby resources acquired and deployment tested/exercised. Procedures developed.	System and process documentation for deployed standby hardware resources. All configuration items in CMDB.		No Revised PIP Submitted - Rejected - March.	Resubmit in May	Please resubmit the revised PIP.
11/18/20	4.18	Monitor application performance and error logs of all mission critical application systems, such as OMS, CAD, SCADA, ESB, etc.	1	All mission critical application performance data and logs and error logs are monitored 24x7 in NOC. Processes and procedures including thresholds and corrective or preventative actions are established, documented, tested and trained for. This expands on the specific monitoring recommendations in the 30 Day Report (3.2.2.4, 3.2.2.5, 3.2.2.6, 3.2.2.7, 3.2.2.8 and 3.2.4.2) to encompass structured and documented monitoring of all mission critical systems.	System and process documentation for monitored application systems, including telecom systems. Application monitoring part of NOC operations documentation.		No Revised PIP Submitted - Rejected - March.	Resubmit in May	Please resubmit the revised PIP.
11/18/20	4.21	Complete the integration of the MDMS and OMS to report the meters' power restoration events.	2	OMS reflects the up to date current information about status of all the AMI meters deployed in the field.	1. Report showing status of all the AMI meters being tracked in OMS and its comparison with status of all the meters tracked in MDMS. 2. Testing report for a sample event showing OMS updates as and when a meter's power is interrupted and restored. 3. A training manual which can be used to train support personnel on how to interpret and respond to various MDMS events as shown by the OMS.	4/9/21	No PIP Submitted	Submit in May	Please submit PIP.
<b>Section 5 Emergency Response Planning and Preparation</b>									
11/18/20	5.01	Improve Emergency Planning governance so that utility-wide Emergency Training is under a single Emergency Planning Team and not dispersed among various departments.	3	"1. Restructured Emergency Planning organization and governance (under a new VP Emergency Management) with appropriate staff and roles and responsibilities. 2. Relevant PSEG Long Island staff has adequate awareness and clarity on the structure and governance of Emergency Planning operation. 3. Updates to relevant sections of the ERP have been made."	1. Organizational and governance plan for the restructured Emergency Planning operation. 2. Implementation of this plan.		5.01_PIP Emerg. Training Governance 4.8.21	Accept	Improve Emergency Planning governance so that utility-wide Emergency Training is under a single Emergency Planning Team and not dispersed among various departments. PSEG-LI should try to accelerate the implementation plan. PSEG-LI should outline their detail plans at the next bi-weekly update.
11/18/20	5.08	Institute a program to train National Grid Gas and Generation resources to support damage assessment and materials handling work during major storms.	3	"1. NG Gas and NG Generation resources trained on PSEG Long Island damage assessment processes, procedures, and protocols (including periodic retraining). 2. Overall plan/processes are in place for management, training, retraining, retention/replacement of NG Gas and NG Generation employees for damage assessment and materials handling roles."	"1. Training plan 2. Management plan"		No Revised PIP Submitted - Rejected - March.	Resubmit in May	Please resubmit the revised PIP.
11/18/20	5.10	Undertake a thorough review of damage assessment crew management processes and especially performance shortcomings during Isaias. Ensure that the damage assessment protocols are optimized and that they leverage modern field management technology (e.g. mobility app).	3	Undertake a thorough review of damage assessment crew management processes and especially performance shortcomings during Isaias. Ensure that the damage assessment protocols are optimized and that they leverage modern field management technology (e.g. mobility app).	1. Report showing results of the review of damage assessment processes, findings and recommendations. 2. Implementation plan for recommendations arising from (1), including use of mobility app by all damage assessors.		No Revised PIP Submitted - Rejected - March.	Resubmit in May	Please resubmit the revised PIP.
11/18/20	5.14	Develop a backup plan for tiered restoration in large-scale events. Train and exercise for tiered restoration operations.	3	A tiered restoration plan has been developed and documented (in the ERP) for backup conditions. Personnel have been trained and have exercised the activation of the tiered restoration plan as dictated by the BCP.	1. Backup plan - Tiered Restoration 2. Training on tiered restoration.	4/9/21	5.14_PIP Tiered Restoration_3_10_Rev2 4.8.21 (002)	Accept	Develop a backup plan for tiered restoration in large-scale events. Train and exercise for tiered restoration operations. Please submit the updated Training Plan(s) as soon as possible. Training plans should include MISLS for tiered restoration during future exercises.
<b>Section 6 PSEG Lacks Transparency</b>									
11/18/20	6.01	PSEG should review the Isaias Task Force's 90-day Report and Issue a CATRR (Causal Analysis Team Review Report) that fully addresses the root causes of its failed storm response, including management shortcomings documented in this Report. PSEG should implement an improved after action analysis process for future storms that has greater rigor.	1	1. Revised CATRR formally released. 2.A policy/process document for the development of After Action Reports which includes requirement for LIPA review and approval to ensure quality and independence.			No Revised PIP Submitted - Rejected - Feb.	Resubmit in May	Please resubmit the revised PIP.
<b>Section 7 Leadership and Management</b>									
11/18/20	7.04	Initiate programs to develop stronger project management capability in PSEG Long Island's IT practice areas.	3	1. PSEG Long Island has strong project and program management capabilities internal to the organization.	1. Project Plan for strengthening the IT project management capability in Long Island. The project plan should identify specific goals, management, recruiting, and retention strategy and overall fit of the PM team with the rest of the IT organization.		No Revised PIP Submitted - Rejected - March.	Resubmit in May	Please resubmit the revised PIP.
<b>Appendix 3 List Of 30-Day Report Recommendations</b>									
<b>Section 3 Customer Communications and Outage Management Systems</b>									
09/23/20	3.2.1.1	PSEG Long Island should complete implementing the planned telecommunication design changes and conduct additional capacity testing as soon as possible.	1	Blue Sky and Storm Days Telephone System tested and deployed. Detail design, specifications, configuration of the system is documented (as deployed). Periodic testing plan is documented and activated.	Detailed design, specifications, configuration and test documentation for a tested and deployed Blue Sky and Storm Days Telephone System with a periodic testing plan. All configuration items in CMDB.		No Revised PIP Submitted - Rejected - March.	Resubmit in May	Please resubmit the revised PIP.
09/23/20	3.2.1.5	PSEG Long Island should develop appropriate capacity monitoring and management processes to support evidence-based demand forecasting and capacity planning.	1	PSEG Long Island has capacity analysis and planning processes in place.	Process and results documentation		No Revised PIP Submitted - Rejected - March.	Resubmit in May	Please resubmit the revised PIP.
09/23/20	3.2.2.4	Automate monitoring of OMS and CAD performance at the application level to detect application failures and give administrators an opportunity to adjust the configuration settings that affect performance.	1	Deployed automated application level monitoring of OMS and CAD performance allowing administrators to make adjustments in case of application failures	System and process documentation for tested and deployed automated monitoring		No Revised PIP Submitted - Rejected - March.	Resubmit in May	Please resubmit the revised PIP.
09/23/20	3.2.4.1	Review the storm-oriented customer journey maps implemented within the mobile and web-apps so that customer transactions are directed to the externally hosted infrastructure rapidly.	3	Review of the storm-oriented customer journey maps implemented within the mobile and web apps have been completed, opportunities for streamlining have been identified, appropriate programming/configuration changes have been made, and tested. Outcome: smoother and faster operation of the apps for storm-related use cases.	1. Review report (findings and recommendations) 2. Implementation plan for revisions identified in (1). 3. Implementation of (2).		No Revised PIP Submitted - Rejected - March.	Resubmit in May	Please resubmit the revised PIP.
09/23/20	3.2.4.4	Model storm scenarios and conduct thorough stress testing on the website for all customer journeys and ensure that the infrastructure has sufficient capacity for high activity periods.	3	1. Storm scenarios have been meticulously modeled, stress testing has been conducted on the website for all customer priority customer journeys, infrastructure capacity and resiliency has been quantified/characterized and determined to meet at least Isaias level high-activity scenarios.	1. Customer journey model 2. Test Plan 3. Test results 4. Remediation implementation plan (if applicable) 5. Implementation of (4) and retest.		No Revised PIP Submitted - Rejected - March.	Resubmit in May	Please resubmit the revised PIP.
09/23/20	3.2.5.1	Review ETR strategy and revise it to allow for suspending ETRs while damage is being assessed and relevant information to estimate an ETR is still being gathered.	1	Revised ETR Operational Strategy.	Revised ETR Operational Strategy documentation, deployment, incorporation of strategy in drills.		No Revised PIP Submitted - Rejected - December.	Resubmit in May	Please resubmit the revised PIP.
09/23/20	5.4.2	Accelerating the deployment of smart meters and the full integration of smart meters with OMS so that outage reports will be available to OMS more rapidly and embedded outages (i.e., small-scale outages downstream of larger-scale outages) will be more readily identified, thus enhancing the efficiency of job dispatch. (PIP was split)		AMI/OMS integration complete and tested.	Revised Project Plans.		No Revised PIP Submitted - Rejected - March.	Resubmit in May	Please resubmit the revised PIP.

---

**PSEG Long Island  
Project Implementation Plan  
For  
Isaias Task Force Recommendation  
Implementations**

**Project Title: Emergency Training Governance  
Plan**

The following Isaias Task Force recommendation is directly addressed as part of this plan:

LIPA ID	Report	Task Force recommendations directly addressed in this plan
5.01	90 Day Report	Improve Emergency Planning governance so that utility-wide Emergency Training is under a single Emergency Planning Team and not dispersed among various departments.



# **Table of Contents**

- 1. Project Definition** ..... **2**
  - 1.1. Project Purpose, Objectives, and Success Criteria .....2
- 2. Project Deliverables**.....**3**
  - 2.1. Assumptions, Dependencies, and Constraints .....3
- 3. Project Structure** .....**3**
  - 3.1. Internal Project Organization.....3
  - 3.2. Other Stakeholders .....4
- 4. Project Plan** .....**4**
  - 4.1. Project Work Plan.....4
  - 4.2. Risk Mitigation Plan.....5
  - 4.3. LIPA Reporting Plan.....4

# **1. Project Definition**

Establish improved governance of the Training and Exercise Program. A new position within the emergency preparedness organization will be created to govern emergency restoration related training and exercises. Governance will include program quality, effectiveness, training compliance, and continuous improvement (identification of new courses and drills required and the associated development).

## **1.1. Project Purpose, Objectives, and Success Criteria**

### ***1.1.1 Project Objectives:***

The goal of this plan is to improve the quality of our emergency restoration training and exercise program through better governance. The creation of a position within the Emergency Preparedness organization to manage governance will be established. The position will have accountability for managing, developing and assuring delivery of the program.

### ***1.1.2 Project Scope:***

This scope includes:

- Creation of a job description and the placement of an individual in that position
- Governance document outlining:
  - Program quality
  - Effectiveness
  - Training compliance
  - Continuous improvement (identification of new courses and drills required and the associated development)

### ***1.1.3 Project End State and Success Criteria:***

End state includes creation of a governance position, placement of an individual in that position, completion of a governance document and implementation of enhanced governance activities.

Success criteria includes an excellent governance structure that drives enhanced value for emergency related training and improved overall emergency response.

## 2. Project Deliverables

- Position description for governance lead
- Placement of individual as governance lead
- Documented key governance activities for implementation in 2021 Training and Exercise program and beyond
- Deployment of the Learning Management System (LMS) as part of training compliance governance
- The following documents will have references to accountability for governance and storm training: Emergency Restoration Plan (ERP), Business Continuity ERIP-GEN-004 – Restoration Contingency Plans for Critical System Failure and Corporate BCP plans.

### 2.1. Assumptions, Dependencies, and Constraints

Assumptions: Enhancements to governance will yield increased value from the emergency response training and improvements to overall storm response.

Constraints: The project is dependent on allocation of sufficient resources to adequately deliver any new training courses.

## 3. Project Structure

### 3.1. Internal Project Organization

John O’Connell will be the Executive Sponsor for this Project, providing executive level support and subject-matter expertise.

Role	Responsibilities
<b>Project Sponsor</b> John O’Connell	<ul style="list-style-type: none"> <li>• Manage issues and decision making</li> <li>• Remove obstacles that impede the success of the overall project</li> <li>• Provide strategic guidance</li> <li>• Approve procurement of external parties (as needed)</li> <li>• Establish guiding principles for the project</li> <li>• Provide guidance and input on key project decisions</li> <li>• Monitor completion of activities</li> <li>• Challenge the project team where appropriate</li> <li>• Approve major changes to the project’s scope, objectives, timelines, costs, etc.</li> <li>• Act as the decision maker for issues requiring escalation</li> </ul>

	<ul style="list-style-type: none"> <li>Remove institutional barriers if and when they arise by serving as a project advocate</li> </ul>
<b>Project Lead</b> Larry Torres	<ul style="list-style-type: none"> <li>Achieve milestones</li> <li>Subject matter expertise</li> </ul>

### 3.2. Other Stakeholders

The other key stakeholders involved in the execution of this plan are:

- LIPA
- LIPA Board of Trustees
- Training Support Organizations (T&D Academy and Call Center Training Center)
- All Storm Organizations throughout the ICS Structure

## 4. Project Plan

### 4.1. Project Work Plan

PSEG Long Island is committed to continuous improvement in the form of developing an implementation plan to sustain an effective emergency response-training program.

#### *Emergency Training Centralization Milestones*

Task	Owner	Current Status	Target End Date
Draft position description for “Training and Development Specialist”	L. Torres	Complete	3/12/2021
Share draft description with LIPA for review	L. Torres	Complete	3/12/2021
Post position opening for “EP Training Governance Specialist”	L. Torres	Pending	4/16/2021
Create documented summary of key governance activities which incorporates accountability for managing, developing and assuring delivery of ERP training and exercises	L. Torres	In Progress	4/30/2021
Place position in Emergency Preparedness organization	L. Torres	Pending	5/24/2021
Accountability for Governance and Training to be referenced in ERP, BCP ERIP and Corporate BCP plans documents and include all resources ( operations, IT, etc. ) to ensure that all players detailed in the ERP ( both primary and second role ) are covered.	L. Torres	Started	6/30/21

**4.2. Risk Mitigation Plan**

No significant project risks

**4.3 Issue Resolution Plan**

There are no foreseen issues; any issues will be raised to our Project Sponsor.

**4.3 LIPA Reporting Plan**

PSEGLI will report updates to LIPA bi-weekly until plan completion

**Revision History**

Name	Date	Reason for Changes	Version
D.Abayathna	12/14/2020	Updated to focus exclusively on Emergency Training Centralization	2.0 draft 1
M.Davis	12/16/2020	Minor updates throughout	2.0 draft 2
C. Bryson	2/2/2021	Incorporate process for enhanced emergency training governance	
C. Bryson	3/10/2021	Update details with feedback from LIPA	
C. Bryson	4/6/2021	Updated to reflect LIPAs secondary round of feedback	

---

# **PSEG Long Island Project Implementation Plan**

**for**

## **Isaias Task Force Recommendation Implementations**

**Project Title:**

**Recommendation No.:**

<b>LIPA ID</b>	<b>Report</b>	<b>Task Force recommendations directly addressed in this plan</b>
5.14	90 Day Report	Develop a backup plan for tiered restoration in large-scale events. Train and exercise for tiered restoration operations.

# Table of Contents

- 1. Project Definition.....1**
  - 1.1. Project Purpose, Objectives, and Success Criteria ..... 1
- 2. Project Deliverables: .....1**
  - 2.1. Assumptions, Dependencies, and Constraints ..... 1
- 3. Project Structure .....2**
  - 3.1. Internal Project Organization.....2
  - 3.2. Other Stakeholders .....2
- 4. Project Plan.....2**
  - 4.1. Project Work Plan.....2
  - 4.2. Risk Management Plan.....3
  - 4.3. Issue Resolution Plan.....3
  - 4.4. LIPA Reporting Plan .....3
- 5. Technical Execution Plan.....3**
  - 5.1. Technical Approach.....3
  - 5.2. Quality Assurance Plan .....3
- 6. Project Artifacts**

## **1. Project Definition**

This project will outline existing tiered restoration concepts and provide additional clarity around when and how various concepts are activated. The concepts will cover general restoration priorities (transmission, substation, circuit, area, single), decentralized restoration concepts including remote dispatch authority, remote configuration authority, dispatching approaches including circuit sweeps, and overall integration with ETR protocols.

### **1.1. Project Purpose, Objectives, and Success Criteria**

#### ***Project Objectives:***

This project seeks to improve restoration efficiency, and associated restoration communication through improvements with tiered restoration approaches. Improvements will be achieved by developing enhanced documentation of the various approaches, creating new guidelines for when the various approaches will be deployed and training employees who are expected to execute the approaches.

#### ***Project End State and Success Criteria:***

- Documented full and clear view of various restoration approaches
- Documented activation guidelines for various restoration approaches
- Trained employees involved with restoration approaches
- Effective and consistent deployment of restoration approaches

## **2. Project Deliverables:**

- Document showing tiered restoration approaches
- Documented activation guidelines
- Trained employees
- Documented basis for Activation Guidelines
- Inclusion in Drills and ERP

### **2.1. Assumptions, Dependencies, and Constraints**

#### ***Assumption:***

Clarifications to existing protocols and activation guidelines will improve storm response



**Dependencies:**

No major dependencies

**Constraints:**

No major constraints

### 3. Project Structure

#### 3.1. Internal Project Organization

Role	Name	Responsibilities
Project Implementation Sponsor	John O’Connell	<ul style="list-style-type: none"> <li>Establishing guiding principles for the project</li> <li>Ensuring project activities remained aligned with the guiding principles as defined</li> <li>Providing guidance and input on key project decisions</li> <li>Challenging the project team where appropriate</li> <li>Approving major changes to the project’s scope, objectives, timelines, costs, etc.</li> <li>Acting as the decision maker for issues requiring escalation</li> </ul>
Project Lead	M. Sullivan	<ul style="list-style-type: none"> <li>Develop protocols and activation guidelines</li> <li>Train on new protocols on tiered restoration approaches</li> <li>Update appropriate ERP section to reflect new guidance</li> </ul>

**Other Stakeholders:**

LIPA  
 Operations Branch Director East/West  
 Crew Dispatching Personnel  
 Emergency Preparedness Group

### 4. Project Plan

#### 4.1. Project Work Plan

Task	Owner	Current Status	Target End Date
1. Create summary document of tiered restoration approaches including how tiered approached dovetail with traditional approaches and ETR protocols.	P. Mattera	Pending	4/16/21
2. Create document outlining guidance for tiered restoration activation guidelines	P. Mattera	Pending	4/16/21
3. Create a training plan to cover tiered restoration approaches and tiered restoration approaches and activation guidelines	P. Mattera	Pending	4/16/21
4. Document how activation criteria (#2	P. Mattera	Complete	3/17/21

above) was developed and include in “Technical Approach” below			
5. Review Items 1, 2, 3, & 4 with LIPA; Obtain and incorporate feedback.	P. Mattera	Pending	5/07/21
6. Submit this material for inclusion during the revision of ERP	P. Mattera	Pending	5/14/21
7. Integrate these concepts into the 2021 Hurricane Table Top and drill them during the Hurricane Exercise	L. Torres	Pending	06/01/21

**4.2. Risk Management Plan**

No significant risks.

**4.3. Issue Resolution Plan**

Project Sponsors will monitor progress and issues and collaborate to resolve issues.

**4.4. LIPA Reporting Plan**

PSEGLI will provide updates to LIPA on a monthly basis until plan completion.

**5. Technical Execution Plan**

**5.1. Technical Approach**

Activation criteria was developed as follows

- Experienced Operation Managers identified key drivers for each of the restoration approaches (Main Line Incidents, Total Incidents, # of crews and Incidents per lock out)
- Operation Managers reviewed historical storm information and drafted activation level matrix (see artifact)
- Operation Managers reviewed material with Senior Directors, Manager of EP, and VP T&D
- Operations Managers finalized activation guidelines

**5.2. Quality Assurance Plan**

Project sponsor oversight and approval of deliverables will be required.

**6. Project Artifacts**

Project Artifacts	Artifact
See Deliverables above	

## **Revision History**

<b>Name</b>	<b>Date</b>	<b>Reason for Changes</b>	<b>Version</b>
Larry Torres	02/02/21	Draft 1	1.0
Jason Goldsmith	02/04/21	Draft 2	1.1
Abhinav Kumar	03/09/21	Draft 3	1.2
Paul Mattera	04/08/21	Incorporated LIPA feedback	