PSEG Long Island
Operating Report

LIPA Board of Trustees
February 15, 2023

Agenda

- OMS CAD Testing Progress Update

- 2022 OSA Performance Metric Overview – Year End

- Select Performance Metric Review

- Call Center Get Well Plan

- Highlights from 2022

OMS CAD Testing Progress Update (as of 2.10.23)

Test For	Test Type	Test Results
New York State Department of Public Service	ISAIAS Model [12 Hours]	✔ Completed and Passed (12/1)
New York State Department of Public Service	90% Customers OUT [24 Hours]	✔ Completed and Passed (12/9-12/10)
Long Island Power Authority	Dry Run Test – ran multiple tests Formal Test – yet to schedule	◆ 1/12/23 Dry Run Test - Experienced high call backlog in OMS >100K due to failure of Customer Manager Service (CMS Manager) ◆ 1/18/23 Dry Run Test - No system issues observed. No OMS Call backlog observed. ◆ 1/25/23 Dry Run Test - No system issues observed. No OMS Call backlog observed.

Long Island Power Authority	Functional Testing	• **463 Completed out of 646 Test Cases**
		• **66** Deemed as functionality no longer used
		• **117** Scripts requiring additional enhancements
		  ○ 99 – Ready for IV&V team to re-test
		    • 24 – SAS test system access provisioned. Test scenarios related to SAS reports being reviewed & updated by business SMEs
		    • Overhead/Underground test cases (~40) are excluded from IV&V Testing citing business not using the functionality and focus is on future EAMS
		  ○ 12 – Pending with PSEG LI for test case revision
		  ○ 6 – Created defect to CGI

2022 OSA Performance Metric Overview

50 Qualitative Metrics that are project-oriented and incorporate one or more required deliverables with defined target dates.

- **Of the 50 Qualitative Metrics**
  - 30 Achieved Performance Outcome/Deliverables
  - 14 Under Review/To Be Determined
  - 4 Did Not Achieve Performance Outcome/Deliverables
  - 2 Partial Achievement of Performance Outcome/Deliverables

46 Quantitative Metrics that specify predefined numerical measurements of performance.
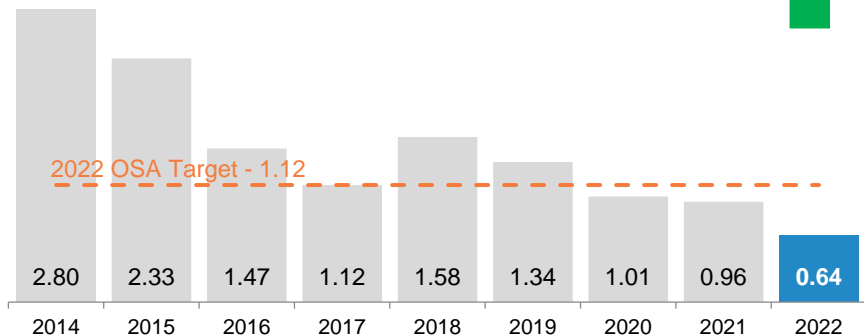
- **Of the 46 Quantitative Metrics – PSEG Long Island achieved 33 of 46 Quantitative Metrics**
  - 18 of 20 Electric T&D metrics achieved YE performance level targets
  - 7 of 15 Customer Services metrics achieved YE performance level targets
  - 6 of 7 Business Services metrics achieved YE performance level targets
  - 2 of 4 Power Supply & Clean Energy metrics achieved YE performance level targets
    - For 2 PS&CE metric – PSEG Long Island met the 50-75% achievement level of the sub components for beneficial electrification and EV make ready
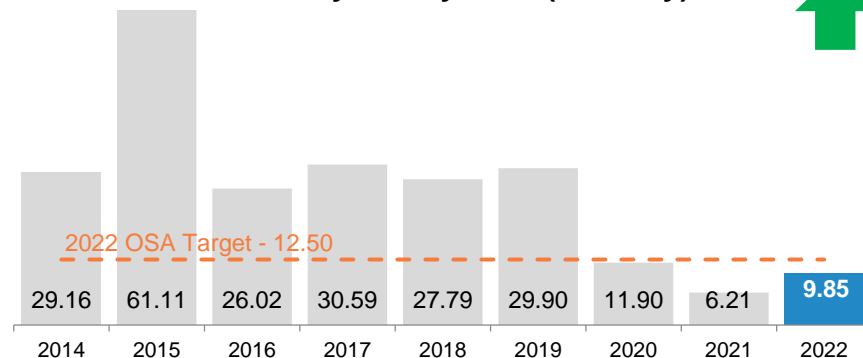
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Safety Performance

OSHA Recordable Incident Rate

2022 OSA Target - 1.12

2014	2015	2016	2017	2018	2019	2020	2021	2022
2.80	2.33	1.47	1.12	1.58	1.34	1.01	0.96	0.64

OSHA Days Away Rate (Severity)

2022 OSA Target - 12.50

2014	2015	2016	2017	2018	2019	2020	2021	2022
29.16	61.11	26.02	30.59	27.79	29.90	11.90	6.21	9.85

Motor Vehicle Accident Rate

2022 OSA Target - 9.20

2015	2016	2017	2018	2019	2020	2021	2022
9.21	10.02	11.41	11.69	11.36	8.43	7.67	8.40

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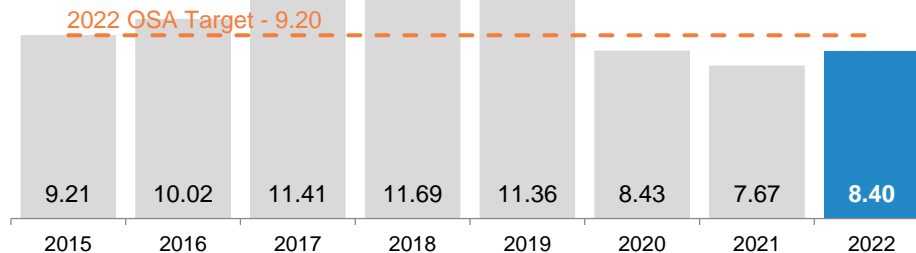
Electric Reliability
Index Performance – SAIDI, SAIFI, MAIFI

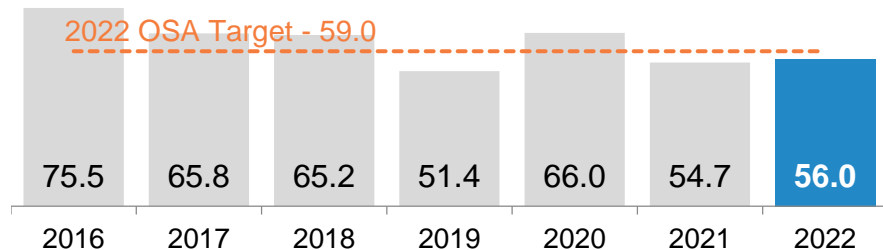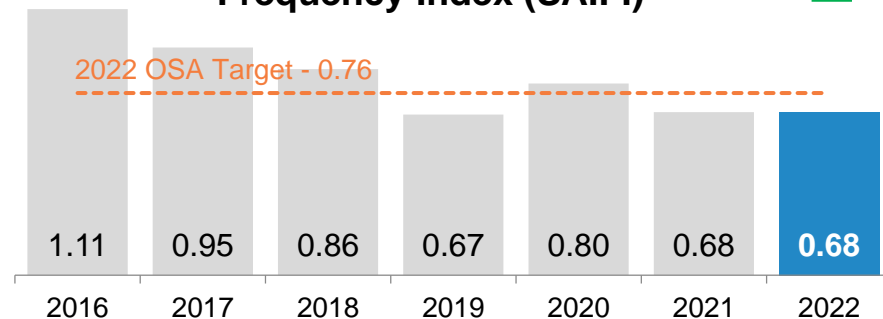Made Goal   Did Not Make Goal

System Average Interruption Duration Index (SAIDI)

2022 OSA Target - 59.0

75.5	65.8	65.2	51.4	66.0	54.7	**56.0**
2016	2017	2018	2019	2020	2021	2022

System Average Interruption Frequency Index (SAIFI)

2022 OSA Target - 0.76

1.11	0.95	0.86	0.67	0.80	0.68	**0.68**
2016	2017	2018	2019	2020	2021	2022

Momentary Average Interruption Frequency Index (MAIFI)

2022 OSA Target - 1.89

3.92	3.52	3.44	2.41	2.14	1.78	**1.67**
2016	2017	2018	2019	2020	2021	2022

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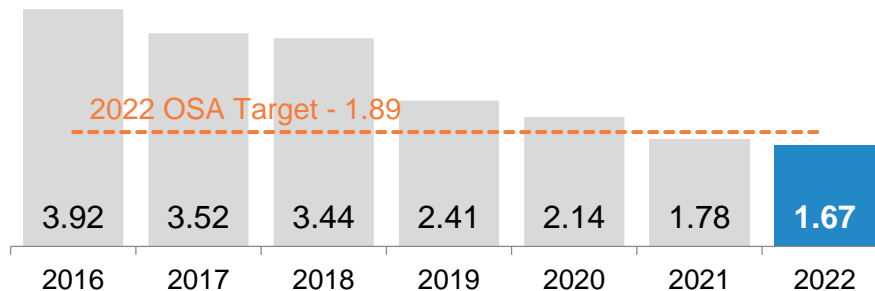
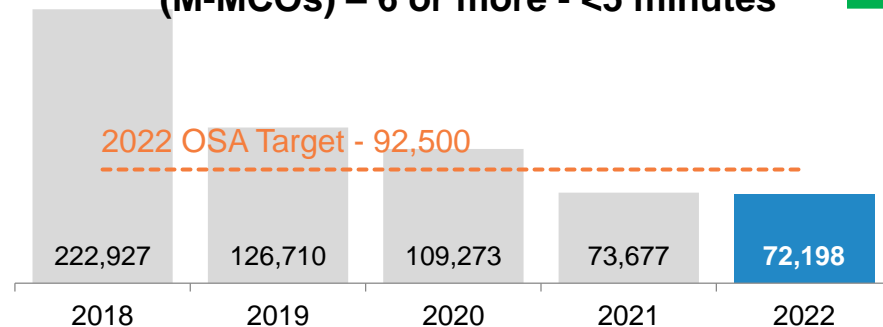# Electric Reliability

Multiple Customer Outages – Sustained, Momentary and Repeat MCO

Sustained Multiple Customer Outages (S-MCOs) 4 or more - >5 Minutes

2022 OSA Target - 23,475

2016	2017	2018	2019	2020	2021	2022
70,248	41,730	38,239	14,477	23,479	23,788	**19,762**
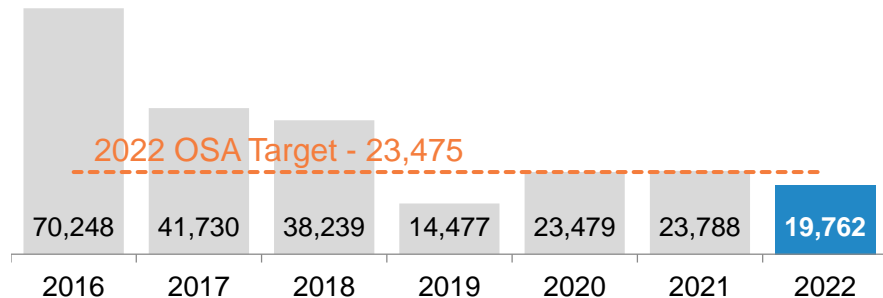
Momentary Multiple Customer Outages (M-MCOs) – 6 or more - <5 minutes

2022 OSA Target - 92,500

2018	2019	2020	2021	2022
222,927	126,710	109,273	73,677	**72,198**

Repeat Customer Sustained Multiple Customer Outages (S-MCOs)

2022 Target – 46 (4+ Outages)

Baseline (2019-2021)	4+ Outages
231	19

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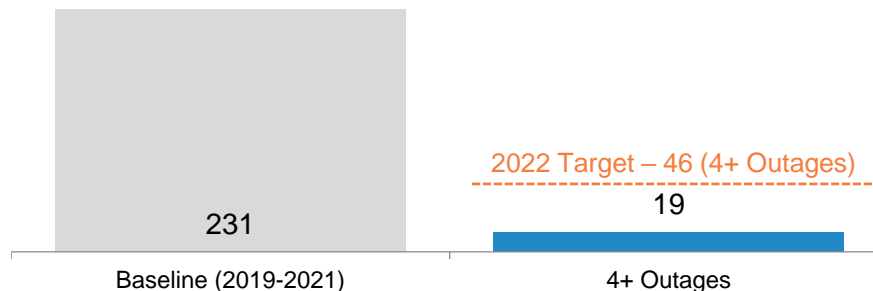
NYS DPS Customer Complaint Rate

Customer Complaint Rate ▲

Year	Rate
2014	10.4
2015	7.7
2016	5.7
2017	4.9
2018	4.6
2019	4.2
2020	11.8
2021	2.0
2022	3.8*

2022 OSA Target – 4.2
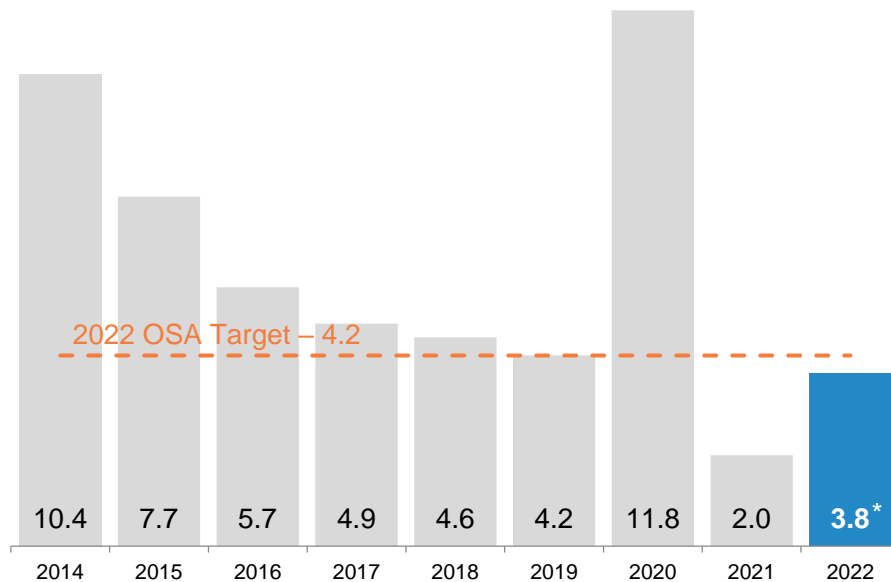
Rolling 12 Month DPS
Complaint Rate per 100,000 Customers

Company	Rate
National Fuel Gas Distribution	3.6
PSEG Long Island	3.8
National Grid - L I	4.0
National Grid-Metro NY	5.4
National Grid-Upstate	5.8
Orange & Rockland	8.8
Con Edison of New York	12.5
New York State Electric & Gas Corp.	18.4
Rochester Gas & Electric Corp.	39.2
Central Hudson Gas & Electric Corp.	67.4

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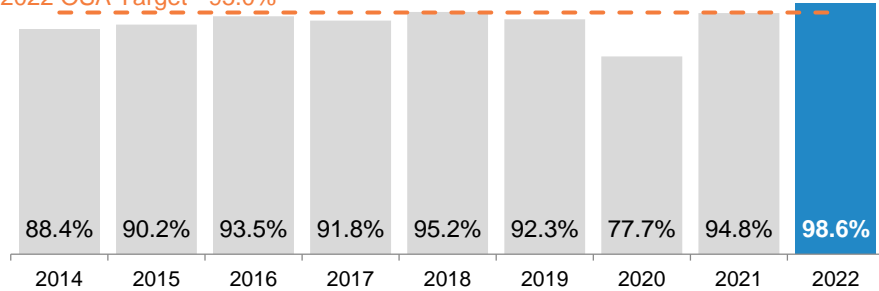*Collection complaints make up ~20% of overall customer complaints

8

Billing, Advanced Consumption and Long Term Estimates (LTEs)

Exception Cycle Time, Cancel Rebills, Advanced Consumption, Active and Inactive LTEs
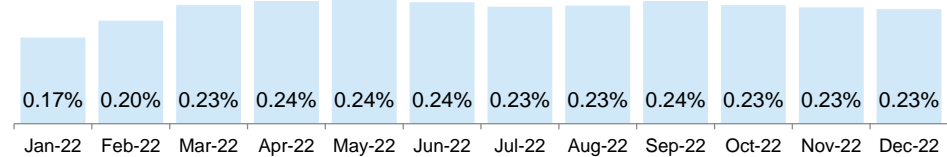
Billing - Exception Cycle Time
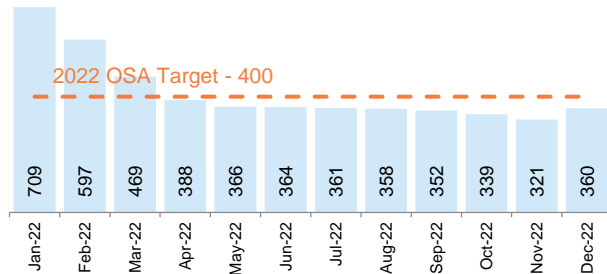### Exceptions completed in 3 Days or Less

2022 OSA Target - 95.0%

Year	Value
2014	88.4%
2015	90.2%
2016	93.5%
2017	91.8%
2018	95.2%
2019	92.3%
2020	77.7%
2021	94.8%
2022	98.6%

Cancel Rebills

2022 OSA Target - 0.50%

Month	Value
Jan-22	0.17%
Feb-22	0.20%
Mar-22	0.23%
Apr-22	0.24%
May-22	0.24%
Jun-22	0.24%
Jul-22	0.23%
Aug-22	0.23%
Sep-22	0.24%
Oct-22	0.23%
Nov-22	0.23%
Dec-22	0.23%

Unauthorized Use/Advanced Consumption

2022 OSA Target - 400

Month	Value
Jan-22	709
Feb-22	597
Mar-22	469
Apr-22	388
May-22	366
Jun-22	364
Jul-22	361
Aug-22	358
Sep-22	352
Oct-22	339
Nov-22	321
Dec-22	360

Active LTEs

2022 OSA Target - 700

Month	Value
Jan-22	3,088
Feb-22	2,885
Mar-22	2,499
Apr-22	2,169
May-22	1,981
Jun-22	1,772
Jul-22	1,572
Aug-22	1,392
Sep-22	1,302
Oct-22	1,183
Nov-22	863
Dec-22	623

Inactive LTEs

2022 OSA Target - 861

Month	Value
Jan-22	8,607
Feb-22	6,299
Mar-22	5,323
Apr-22	4,621
May-22	4,013
Jun-22	3,196
Jul-22	2,718
Aug-22	1,988
Sep-22	1,626
Oct-22	1,232
Nov-22	996
Dec-22	535

Made Goal ▲   Did Not Make Goal ▼

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Collection Metrics

Accounts Receivable > 90 Days, Days Sales Outstanding and Net Write-Offs/$100 Billed Revenue

Made Goal   Did Not Make Goal
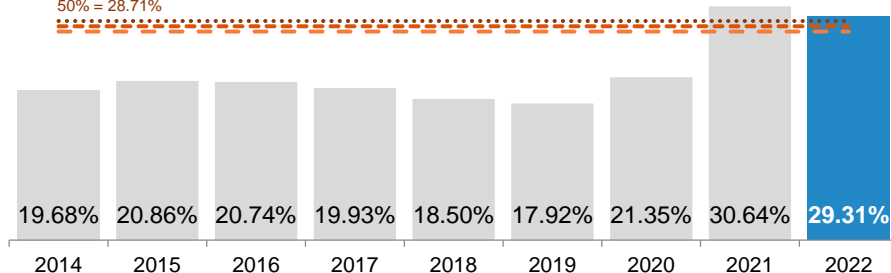
AR > 90

2022 OSA Targets
100% = 27.33%
75% = 28.02%
50% = 28.71%

2014	2015	2016	2017	2018	2019	2020	2021	2022
19.68%	20.86%	20.74%	19.93%	18.50%	17.92%	21.35%	30.64%	**29.31%**

Days Sales Outstanding

2022 OSA Target – 37.19

2014	2015	2016	2017	2018	2019	2020	2021	2022
39.97	39.22	36.99	36.87	34.90	34.28	35.25	41.45	**41.08**
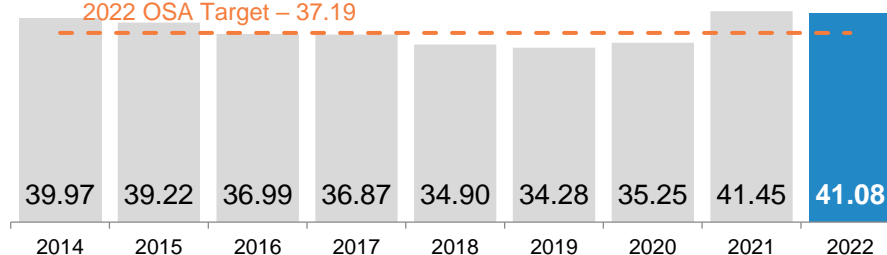
Net Write-Offs/$100 Billed Revenue

2022 OSA Target – 0.77

2014	2015	2016	2017	2018	2019	2020	2021	2022
0.66	0.67	0.57	0.73	0.53	0.50	0.37	0.28	**0.55**

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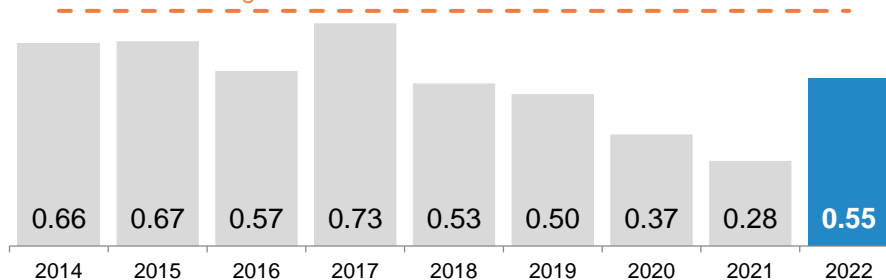
Customer Contact
Service Level with Live Agent Calls, E-mail Closure Rate and First Call Resolution

Made Goal   Did Not Make Goal

Service Level w/ Live Agent
% of calls answered in 30 secs

2022 OSA Target – (80.0%)

2014	2015	2016	2017	2018	2019	2020	2021	2022
61.8%	63.8%	71.7%	71.2%	77.4%	76.6%	75.1%	80.3%	**29.2%**
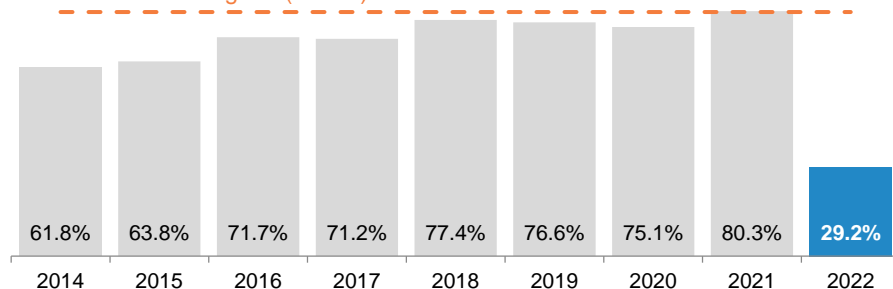
E-mail Closure Rate

2022 OSA Target - 70.0%

Jan YTD	Feb YTD	Mar YTD	Apr YTD	May YTD	Jun YTD	Jul YTD	Aug YTD	Sep YTD	Oct YTD	Nov YTD	Dec YTD
32.6%	47.1%	54.0%	58.1%	61.4%	62.5%	63.5%	61.7%	58.6%	59.5%	60.0%	**58.8%**
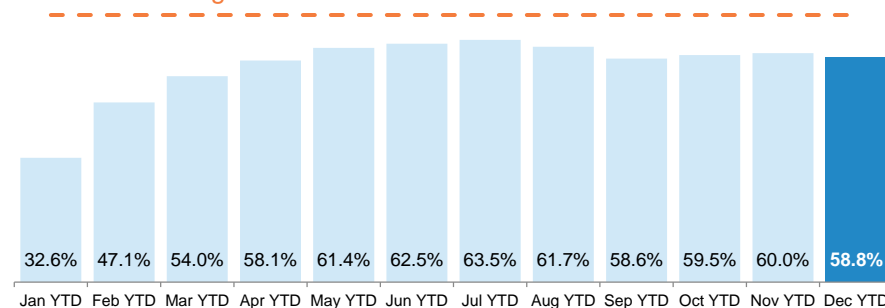
First Call Resolution

2022 OSA Target - 80.0%

2019	2020	2021	2022
81.4%	82.4%	83.0%	**79.4%**

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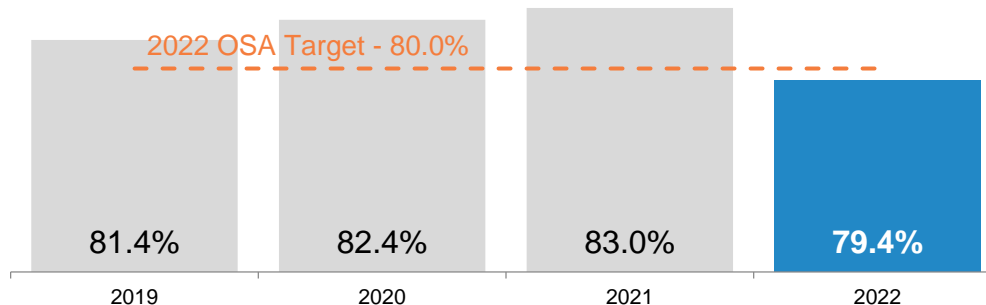
Customer Services
Call Center Get Well Plan Update

The Call Center "Get Well" plan has contributed to month-over-month improvement in customer hold times since September

Customer - Average Amount of Time on Hold (in Minutes)					
September	October	November	December	January	February
22	19	17	15	6	5.8 (Estimated)

The plan continues to address the 3 primary drivers of performance in 2022:

1. Increase Call Center staffing –
   - 25 agents completed training in December, and were added to the Call Center team in January
   - 30 "temporary agents" will complete their training by end of February and will work through June 30th
   - New class of 30 agents have started training in January and will be fully trained by end of April

2. Lower the "average handle time" (AHT) of each call
   - The average handle time per call:
   - November = 491 seconds, December = 466 seconds, January = 446 seconds

3. Lower the incoming call volume
   - Repeat calls are down as implied by abandon rate decreases.
   - Abandon rate in December = 36.7%, January = 15.1%

The of combination increased staffing, lower call volume (due primarily to the disconnect moratorium), and lower average handle time produced a marked improvement in customer hold times (from 22 minutes in September to 6 minutes in January).

We've continued to evaluate and refine the recommendations in our Get Well plan to ensure that they properly address all of the root causes that impacted us in 2022

Root Causes Identified	Get Well Response (Extract)	Impact Timing				
Average Handle Time (AHT):	**Improvements:**	**Q1/23**	**Q2/23**	**Q3/23**	**Q4/23**	**2024**
• Increased handle time for Collection related calls (more complex to handle)	• Require in office training and coaching days, with potential for hybrid reporting		◉			
• Long wait time and abandon call rate "apology"	• Provide more training for call center supervisor team on work from home "best practices"	◉				
• New leadership performance management skill development	• Ensure consistent and more aggressive performance management to address poor performing call agents	◉				
• Move to "Work from Home" increased AHT by 30 seconds in 2020	• Dedicate additional resources to provide "real time" monitoring of "longer than normal" calls & other anomalies	◉				
• Remote WFH performance management challenges	• Eliminate agent performance fatigue resulting from mandatory overtime		◉			
• Limited tracking of long duration calls						

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We've continued to evaluate and refine the recommendations in our Get Well plan to ensure that they properly address all of the root causes that impacted us in 2022

| Root Causes Identified	Get Well Response (Extract)	Impact Timing				
Call Volumes: • More customers in collections • Non-operating "call back" functionality created repeat unanswered calls • Long wait time caused repeat calls (increased abandon rate)	**Improvements:**	**Q1/23**	**Q2/23**	**Q3/23**	**Q4/23**	**2024**
	• Provide short-term debt forgiveness to decrease % of customers in collections	◉				
	• Build more self-service options via new IVR			◉		
	• Identify and suspend or reengineer processes that drive call volume, in particular repeat calls		◉			
	• Develop cross-company coordination team to proactively identify activities that drive call volume	◉				
	• Review and remediate platform stability issues (part of IVR replacement project)			◉		

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We've continued to evaluate and refine the recommendations in our Get Well plan to ensure that they properly address all of the root causes that impacted us in 2022

Root Causes Identified	Get Well Response (Extract)	Impact Timing				
Staffing: • Assumptions driving 2021 staffing decisions • Basic staffing forecast models • Long training time (16 weeks) • Long recruitment process • Challenging hiring market (WFH, "Sellers" market, COVID vaccination requirements, salary expectations, etc.)	**Improvements:**	**Q1/23**	**Q2/23**	**Q3/23**	**Q4/23**	**2024**
	• Reduce the time for recruiting and hiring		◉			
	• Shorten training process and duration		◉			
	• Adapt to changes in the employment market			◉		
	• Increase the retention rate			◉		
	• Review and update forecasting tools and data analytics		◉			
	• Investigate tiered call center agent job (i.e. associate level, full rep, level 2 rep).				◉	

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Updated ASA Forecast (as of Feb 7, 2023)

CAC Get Well Plan - Estimated ASA Improvement
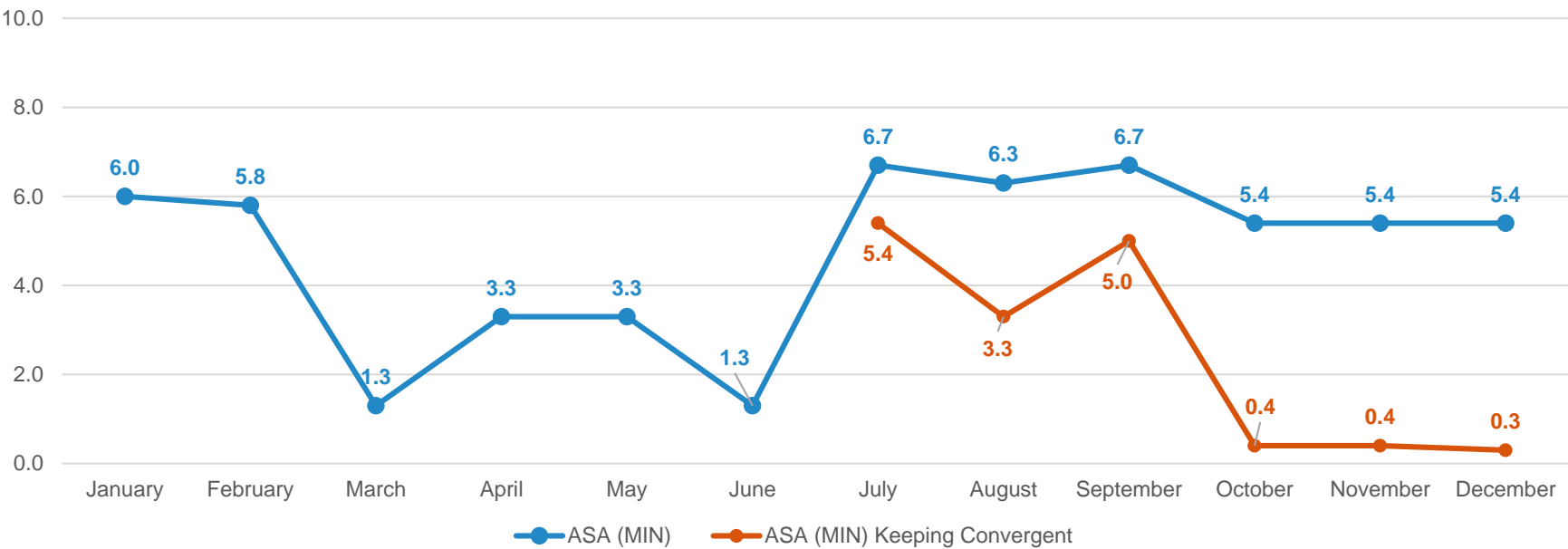
The forecast shown is based on our assumptions regarding the impacts of implementing the Get Well Plan initiatives targeting staffing, call volume, and performance management. Any changes in the assumptions, initiatives or current operating environment may change the forecasted performance.

What's Next?

1. Continue to implement identified initiatives that address staffing, handle time, and call volume issues

2. Finalize discussion on budgetary needs (i.e., Convergent)

3. Establish and track additional performance targets that align with "Get Well" plan

4. Monitor performance and adjust Plan as necessary

5. Monitor risks and develop mitigation strategies, some include:

    o   Risk 1: Call volume spikes in March/April/May when disconnects resume
    o   Risk 2: Possibility of short-term call volume increases from customers regarding the debt forgiveness plan
    o   Risk 3: Discrepancies between forecasted and actual call volumes
    o   Risk 4: Successful implementation of technology and processes (New IVR, New Payment Vendor, Move Out, etc.)

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Highlights from 2022

2022 Highlights

- **<u>Major Projects placed in service</u>**: Ruland to Plainview, Round Swamp substation, Brightwaters new bank and feeders, Captree and Ocean Beach, Bay Park Sewage Treatment, and Arverne to Far Rockaway. Failures Completed: Barrett bank, Newbridge bank and the Northport Cable

- Effectively managed supply chain disruptions associated with transformers, poles and cable

- Supported LIPA's receipt of FEMA reimbursement for Isaias $276M and new FEMA grants totaling $447.5M

- Completed all construction and submitted reimbursement documentation associated with Sandy 428 Grant

- Applied ~$25 million credits to of past-due bills for nearly 11,000 low-income customers as part of Phase I of New York's COVID-19 electric bill credit program

- Resumed field collections: Completed 106K residential and commercial field visits collecting $38.4M and $147.1M dollars collected through Back Office efforts

- PSEG Long Island's Power to Feed Program in partnership with Long Island Harvest collected more than 42,000 meals to help local families struggling with food insecurity

- Completed Integrated Resource Plan (IRP) study - identified reliable, environmentally compliant, cost effective, and timely options for meeting future demand

- Achieved 106% of the energy efficiency goals

- Provided rebates for 7,385 heat pumps, exceeding the goal of 6,000

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2022 Highlights

- Outage Management Systems (OMS) Operations and Performance Improvements
  - OMS upgrade to V6.7.8
  - OMS Failover Testing
  - AMI-OMS Integration
- Transmission EMS system Upgrade
- Transitioned to new Bill Print vendor (Kubra)
- Cybersecurity – Remediation and Response (Suffolk County)
- Enterprise Asset Management RFP for software platform completed, vendor selected and software acquired
- Processed 264 external new hires and movement of 114 internal candidates
- Completion of Enterprise Risk Management Annual Assessment and creation of Key Risk Indicators

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Appendix

Detailed Scorecard Results – December Scorecards

Electric T&D Scope Function Scorecard

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Metric #	Operations Services Agreement Metrics	$ Allocation	Metric Type	Low/ High	OSA YE Target	OSA YTD Target	YTD Result	OSA Forecast	Month Result
					December YTD				**December**
T&D-01	Asset Management Program Implementation - Asset Inventory	$157,691	Hybrid	H	1	1	0	↓	0
T&D-02	Asset Management Program Implementation - AM Governance	$210,254	Project	H	See Smartsheet		1	↑	1
T&D-03	Enterprise Asset Management System Implementation Plan	$630,762	Project	H			1	↑	1
T&D-04	T&D System Relay Operations - Relay Mis-Operations	$105,127	Quantitative	L	18	18	18	↑	3
T&D-05	T&D Inadvertent Operation Events	$105,127	Quantitative	L	34	34	23	↑	1
T&D-06	PTCC/ATCC Replacement	$262,818	Project	H	See Smartsheet		1	↑	1
T&D-07	SAIDI (System Average Interruption Duration Index)	$420,508	Quantitative	L	59.0	59.0	56.0	↑	4.5
T&D-08	SAIFI (System Average Interruption Frequency Index)	$210,254	Quantitative	L	0.76	0.76	0.68	↑	0.05
T&D-09	MAIFI (Momentary Average Interruption Frequency Index)	$210,254	Quantitative	L	1.89	1.89	1.67	↑	0.09
T&D-10	Sustained Multiple Customer Outages (MCO) - 4 or more	$157,691	Quantitative	L	23,475	23,475	19,762	↑	N/A
T&D-11	Reduce Repeat Customer Sustained MCOs	$210,254	Quantitative	L	46	46	19	↑	N/A
T&D-12	Momentary MCO (6 or more)	$157,691	Quantitative	L	92,500	92,500	72,198	↑	N/A
T&D-13	Serious Injury Incident Rate (SIIR)	$210,254	Quantitative	L	0.11	0.11	0.03	↓	0.00
T&D-14	OSHA Recordable Incidence Rate	$262,818	Quantitative	L	1.12	1.12	0.64	↑	0.53
T&D-15	OSHA Days Away Rate (Severity)	$262,818	Quantitative	L	12.50	12.50	9.85	↑	2.10
T&D-16	Motor Vehicle Accident Rate	$105,127	Quantitative	L	9.20	9.20	8.40	↑	34.84
T&D-17	Work Mgmt Enhancements - Short-Term Scheduling	$157,691	Project	H	See Smartsheet		1	↑	1
T&D-18	Work Mgmt Enhancements - Workforce Mgmt Plans	$262,818	Project	H			1	↑	1
T&D-19	WME - Improve Planning & Tracking of Work	$105,127	Project	H			1	↑	1
T&D-20	WME - Improve and Standardize Compatible Unit Estimating	$105,127	Project	H			1	↑	1

Notes:
- Color Coding in YTD Result column represents current status versus YTD Plan.
- YE Forecast is a subjective estimate of whether each metric is expected to meet the YE Target.
* For Project and Hybrid metrics, 1= Pass and 0 = Fail

YTD Result Color
- 🟩 At or Better than YTD Plan
- 🟨 Worse than YTD Plan

YE Forecast
- ↑ On track to meet Target
- → Meeting Target at risk
- ↓ Not expected to meet Target

Electric T&D Scope Function Scorecard

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PSEG Long Island OSA
2022 Scope Specific Function - Electric T&D

Metric #	Operations Services Agreement Metrics	$ Allocation	Metric Type	Low/ High	December YTD			OSA Forecast	December
					OSA YE Target	OSA YTD Target	YTD Result		Month Result
T&D-21	WME - Work Mgmt KPIs & Dashboards	$105,127	Project	H	See Smartsheet		1	⬆	1
T&D-22	WME - Clarify and Rationalize Work Mgmt Roles	$52,564	Project	H			1	⬆	1
T&D-23	Employee Overtime	$315,381	Quantitative	H	100.0%	100.0%	100.0%	⬆	N/A
T&D-24	Veg Mgmt Work Plan - Cycle Tree Trim With Veg Intelligence	$210,254	Hybrid	H	1	1	0	⬇	0
T&D-25	Veg Mgmt Work Plan - Trim-To-Sky (TTS) Circuits	$262,818	Hybrid	H	1	1	0	⬇	0
T&D-26	Veg Mgmt Work Plan - Hazard Tree Removal	$420,508	Hybrid	H	1	1	1	⬆	1
T&D-27	Storm Hardening Work Plan - Overhead Hardening	$262,818	Hybrid	H	1	1	1	⬆	1
T&D-28	Storm Hardening Work Plan - Underground Hardening	$157,691	Hybrid	H	1	1	1	⬆	1
T&D-29	Storm Hardening Work Plan - Transmission Load Pockets	$157,691	Project	H	See Smartsheet		1	⬆	1
T&D-30	Storm Hardening Work Plan - ACRV Commissioning Program	$262,818	Hybrid	H	1	1	1	⬆	1
T&D-31	Storm Hardening Work Plan - LT5H (ASUV) Program	$157,691	Hybrid	H	1	1	1	⬆	1
T&D-32	Estimated Time of Restoration (ETR)	$210,254	Quantitative	H	65.0%	65.0%	71.6%	⬆	69.5%
T&D-33	Real Estate Strategy	$105,127	Project	H	See Smartsheet		1	⬆	1
T&D-34	Construction – Quality and Timely Completion of PJDs	$210,254	Project	H			1	⬆	1
T&D-35	Construction - Project Milestones Achieved	$210,254	Quantitative	H	85.0%	85.0%	91.9%	⬆	97.3%
T&D-36	Construction - Cost Estimating Accuracy	$210,254	Quantitative	H	85.0%	85.0%	90.7%	⬆	87.6%
T&D-37	Completion of Program Planned Units Per Workplan	$420,508	Quantitative	H	87.5%	87.5%	87.5%	⬆	N/A
T&D-38	Program Unit Cost Variance	$210,254	Quantitative	H	87.5%	87.5%	87.5%	⬆	N/A
T&D-39	Project Completion Consistent with Project Design	$105,127	Quantitative	H	100.0%	100.0%	100.0%	⬆	N/A
T&D-40	Double Woods	$52,564	Quantitative	L	6,295	6,295	6,477	⬇	N/A

Notes:
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* For Project and Hybrid metrics, 1= Pass and 0 = Fail

YTD Result Color
- 🟩 At or Better than YTD Plan
- 🟨 Worse than YTD Plan

YE Forecast
- ⬆ On track to meet Target
- ➡ Meeting Target at risk
- ⬇ Not expected to meet Target

Customer Services Scope Function Scorecard

PSEG Long Island OSA
2022 Scope Specific Function - Customer Services

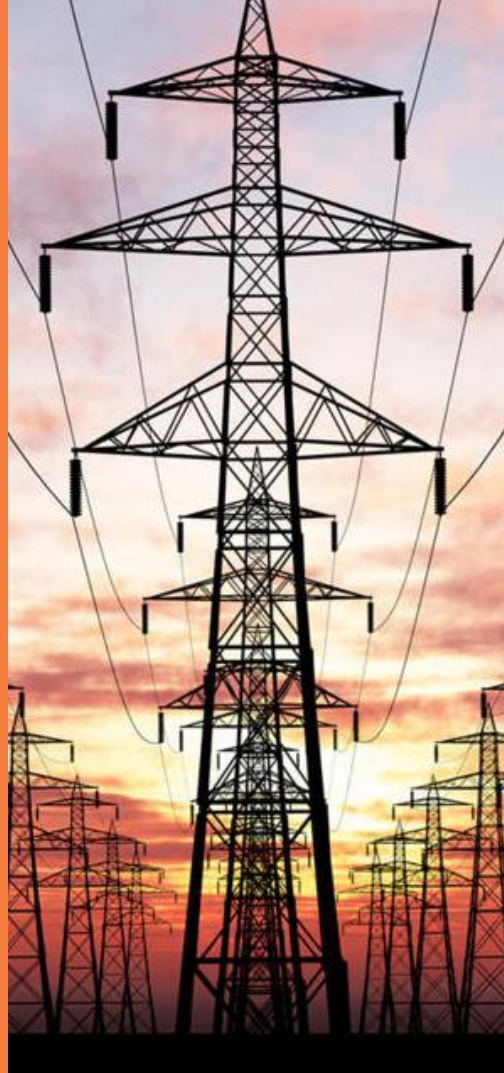| Metric #	Operations Services Agreement Metrics	$ Allocation	Metric Type	Low/ High	December YTD		YTD Result	OSA Forecast	December
					OSA YE Target	OSA YTD Target			Month Result
CS-01	Delivery of Strategic Customer Experience & Billing Projects	$525,635	Project	H	See Smartsheet		50% of comp	⬆	1
CS-02	JD Power Customer Satisfaction Survey (Residential)	$210,254	Quantitative	H	3rd Quartile	3rd Quartile	690	⬇	687
CS-03	JD Power Customer Satisfaction Survey (Business)	$210,254	Quantitative	H	3rd Quartile	3rd Quartile	710	⬇	728
CS-04	CIS Modernization – Phase 1	$630,762	Project	H	See Smartsheet		100% of revised scope	⬆	1
CS-05	Customer Transactional Performance	$420,508	Hybrid	H	1	1	1	⬆	1
CS-06	Inactive Accounts Long Term Estimates (LTEs)	$105,127	Quantitative	L	861	861	535	⬆	N/A
CS-07	Active Accounts Long Term Estimates (LTEs)	$105,127	Quantitative	L	700	700	623	⬆	N/A
CS-08	Unauthorized Use/Advanced Consumption Resolution	$105,127	Quantitative	L	400	400	360	⬆	N/A
CS-09	Billing Exception Cycle Time	$210,254	Quantitative	H	95.0%	95.0%	98.6%	⬆	99.9%
CS-10	Billing Cancelled Rebill	$210,254	Quantitative	L	0.50%	0.50%	0.23%	⬆	0.19%
CS-11	Contact Center Service Level with Live Agent Calls	$183,972	Quantitative	H	80.0%	80.0%	29.2%	⬇	11.3%
CS-12	Customer Email Closure Rate	$78,845	Quantitative	H	70.0%	70.0%	58.8%	⬇	43.2%
CS-13	First Call Resolution (FCR)	$105,127	Quantitative	H	80.0%	80.0%	79.4%	⬇	76.3%
CS-14	Net Write-Offs per $100 Billed Revenue	$262,818	Quantitative	L	0.77	0.77	0.55	⬆	0.86
CS-15	AR > 90 (No Exclusions)	$315,381	Quantitative	L	27.33%	27.33%	29.31%	⬇	28.35%
CS-16	Days Sales Outstanding	$210,254	Quantitative	L	37.19	37.19	41.08	⬇	44.56
CS-17	Low to Moderate Income Program Participation	$105,127	Quantitative	H	55,000	55,000	42,365	⬇	N/A
CS-18	Low to Moderate Income Program Automation	$105,127	Project	H	See Smartsheet		1	⬆	1
CS-19	Customer Complaint Rate	$105,127	Quantitative	L	4.2	4.2	3.8	⬆	4.3

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* For Project and Hybrid metrics, 1= Pass and 0 = Fail

YTD Result Color
🟩 At or Better than YTD Plan
🟨 Worse than YTD Plan

YE Forecast
⬆ On track to meet Target
➡ Meeting Target at risk
⬇ Not expected to meet Target

Business Services Scope Function Scorecard

PSEG LONG ISLAND

PSEG Long Island OSA
2022 Scope Specific Function - Business Services

					December YTD				December
Metric #	Operations Services Agreement Metrics	$ Allocation	Metric Type	Low/ High	OSA YE Target	OSA YTD Target	YTD Result	OSA Forecast	Month Result
BS-01	Enterprise Risk Management (ERM) Report	$157,691	Hybrid	H	1	1	1	⬆	1
BS-02	ERM Key Risk Indicators (KRIs)	$157,691	Project	H	See Smartsheet		1	⬆	1
BS-03	Employee Engagement - Participation Rate	$105,127	Quantitative	H	100.0%	100.0%	100.0%	⬆	N/A
BS-04	Employee Engagement Score	$210,254	Quantitative	H	66.7%	66.7%	33.3%	⬇	N/A
BS-05	Full Time Vacancy Rate	$210,254	Quantitative	H	100.0%	100.0%	4 of 5 Targets	⬆	N/A
BS-06	Contract Administration Manual (CAM) Completion	$52,564	Project	H			1	⬆	1
BS-07	Affiliate Cost Benefit Justification	$262,818	Project	H			1	⬆	1
BS-08	Capital Project Impact Analysis	$105,127	Project	H			1	⬆	1
BS-09	Substation Property Tax Report	$157,691	Project	H	See Smartsheet		1	⬆	1
BS-10	Substation Property Tax Module Plan	$52,564	Project	H			1	⬆	1
BS-11	Long Island Choice Reform	$157,691	Project	H			1	⬆	1
BS-12	Advanced Metering Infrastructure (AMI) Opt Out Fees	$105,127	Project	H			1	⬆	1
BS-13	Information Request (IR) Responses	$157,691	Quantitative	H	90.0%	90.0%	95.1%	⬆	N/A
BS-14	Legal Staffing	$157,691	Project	H			1	⬆	1
BS-15	Contractor Performance Evaluation System	$262,818	Project	H	See Smartsheet		1	⬆	1
BS-16	Government & Legislative Affairs	$105,127	Hybrid	H	1	1	1	⬆	1
BS-17	Project Outreach	$210,254	Hybrid	H	1	1	1	⬆	1
BS-18	Customer Segmentation	$105,127	Project	H	See Smartsheet		1	⬆	1
BS-19	Reputation Management – Positive Media Sentiment	$105,127	Quantitative	H	28.0%	28.0%	63.1%	⬆	59.6%
BS-20	Reputation Management – Share of Voice	$105,127	Quantitative	H	50.0%	50.0%	100.0%	⬆	100.0%
BS-21	Social Media Engagement and Following	$210,254	Quantitative	H	100.0%	100.0%	100.0%	⬆	N/A

Notes:
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* For Project and Hybrid metrics, 1= Pass and 0 = Fail
** For BS-3/5 & BS-21, the YTD result is calculated on pass/fail for each of the components of the metric..

YTD Result Color
🟩 At or Better than YTD Plan
🟨 Worse than YTD Plan

YE Forecast
⬆ On track to meet Target
➡ Meeting Target at risk
⬇ Not expected to meet Target

Information Technology Scope Function Scorecard

PSEG LONG ISLAND

PSEG Long Island OSA
2022 Scope Specific Function - Information Technology

Metric #	Operations Services Agreement Metrics	$ Allocation	Metric Type	Low/ High	OSA YE Target	OSA YTD Target	December YTD		December
							YTD Result	OSA Forecast	Month Result
IT-1	Organizational Maturity Level – Doing	$262,818	Project	H			1	⬆	1
IT-2	Organizational Maturity Level – Managing	$525,635	Project	H			1	⬆	1
IT-3	System Resiliency	$420,508	Project	H			0	⬇	0
IT-4	System and Software Lifecycle Management	$315,381	Project	H	See Smartsheet		Evaluating	➡	
IT-5	System Implementation – 2022 Budget Projects	$841,016	Project	H			Evaluating	➡	
IT-6	System Implementation – Board PIPs	$525,635	Project	H			60% Tier 1 100% Tier 2	⬆	1
IT-7	System Segregation	$262,818	Project	H			1	⬆	1

Notes:
- Color Coding in YTD Result column represents current status versus YTD Plan.
- YE Forecast is a subjective estimate of whether each metric is expected to meet the YE Target.
- * For Project metrics, 1= Pass and 0 = Fail

YTD Result Color
- 🟩 At or Better than YTD Plan
- 🟨 Worse than YTD Plan

YE Forecast
- ⬆ On track to meet Target
- ➡ Meeting Target at risk
- ⬇ Not expected to meet Target

Power Supply and Clean Energy Scope Function Scorecard

PSEG LONG ISLAND

PSEG Long Island OSA
2022 Scope Specific Function - Power Supply & Clean Energy

Metric #	Operations Services Agreement Metrics	$ Allocation	Metric Type	Low/ High	December YTD			YTD Result	OSA Forecast	December
					OSA YE Target	OSA YTD Target				Month Result
PS&CE-1	Integrated Resource Plan (IRP)	$394,226	Project	H	See Smartsheet			1	↑	1
PS&CE-2	Energy Storage Request for Proposal (RFP)	$394,226	Project	H				1	↑	1
PS&CE-3	Energy Efficiency Annualized Energy Savings	$210,254	Quantitative	H	1,147,670	1,147,670		1,224,185	↑	84,099
PS&CE-4	Utility 2.0 - DER Hosting	$157,691	Project	H	See Smartsheet			1	↑	1
PS&CE-5	Beneficial Electrification	$210,254	Quantitative	H	100.0%	100.0%		75.0% 3 of 4 Targets	↑	N/A
PS&CE-6	Electric Vehicle (EV) Make Ready	$105,127	Quantitative	H	100.0%	100.0%		50.0% 2 of 4 Targets	↑	N/A
PS&CE-7	DER Interconnection Process	$210,254	Project	H	See Smartsheet			1	↑	1
PS&CE-8	TOU Pricing Options - Space Heating & Large Commercial	$210,254	Project	H				1	↑	1
PS&CE-9	Time of Use Pricing Pilot - Year 1 Marketing	$210,254	Quantitative	H	12,000	12,000		13,434	↑	N/A

Notes:
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* For Project metrics, 1= Pass and 0 = Fail
** For PS&CE-5 & PS&CE-6, the YTD result is calculated on pass/fail status of each of the 4 targets..

YTD Result Color
- 🟩 At or Better than YTD Plan
- 🟨 Worse than YTD Plan

YE Forecast
- ↑ On track to meet Target
- → Meeting Target at risk
- ↓ Not expected to meet Target