



# PSEG Long Island

## *Operating Report*

LIPA Board of Trustees

March 29, 2023

# Agenda

- 2023 Metrics
- Select Performance Metric Review
- Customer Services - Call Center Update

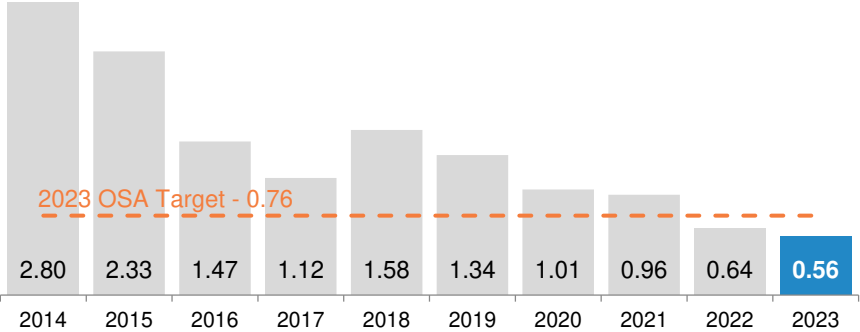
# 2023 OSA Metrics

## Scope Functions, Metric Areas and Incentive Compensation Allocations

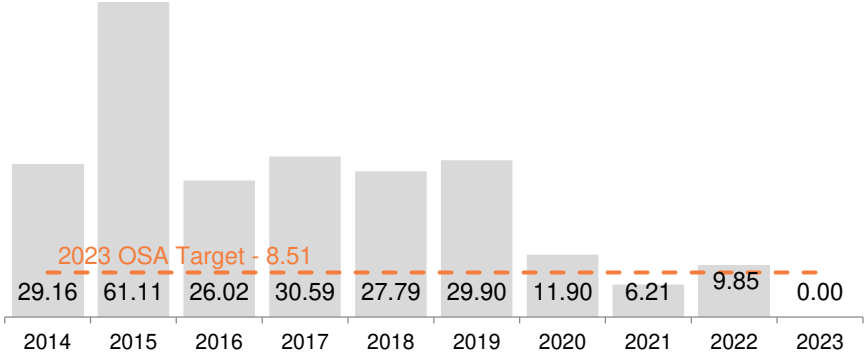
Electric T&D	Customer Services	Information Technology	Business Services	Power Supply & Clean Energy
40% = \$8M*	20% = \$4M*	15% = \$3M*	15% = \$3M*	10% = \$2M*
<u>42</u> Metrics	<u>22</u> Metrics	<u>7</u> Metrics	<u>14</u> Metrics	<u>8</u> Metrics
<ul style="list-style-type: none"> <li>Asset Management and EAMS</li> <li>Mis-Operations and Inadvertent Events</li> <li>PTCC/ATCC</li> <li>Reliability Metrics</li> <li>Safety Metrics</li> <li>Work Management and Overtime</li> <li>Vegetation Management</li> <li>Storm Hardening</li> <li>Real Estate Strategy</li> <li>Timely Project Justification Descriptions (PJDs)</li> <li>Projects and Construction - Project Milestones and Cost Estimating Accuracy</li> <li>Completion of Program Planned Units Per Workplan</li> <li>Program Unit Cost Variance</li> <li>Project Completion Consistent with Project Design</li> <li>Double Wood Poles</li> <li>Program Effectiveness - Vegetation Management</li> <li>Estimated Time of Restoration (ETR) Process Enhancements</li> <li>Regulatory Compliance</li> <li>Physical Security</li> <li>Root Cause Analysis (RCA) Execution and Compliance</li> <li>Program Effectiveness - Storm Hardening</li> </ul>	<ul style="list-style-type: none"> <li>Strategic Customer Experience &amp; Billing Projects</li> <li>J.D. Power – Resi and Business</li> <li>CIS Modernization</li> <li>Customer Transactional Performance</li> <li>Billing Exception Cycle Time</li> <li>Billing – Cancelled Rebill</li> <li>Contact Center Service Level</li> <li>First Call Resolution (FCR)</li> <li>Net Dollars Written Off</li> <li>Arrears % &gt;90 Days</li> <li>LMI Program Participation</li> <li>DPS Complaint Rate</li> <li>Outage Information Satisfaction</li> <li>AMI Roadmap and 2023 Improvements</li> <li>DPA Improvement</li> <li>Payment Transaction Ease</li> <li>IVR Containment Rate</li> <li>LSE Customer Compliance</li> <li>Estimated Bill %</li> <li>Move Process Improvement</li> <li>AMI Meter Validation, Estimations and Editing Enhancements</li> </ul>	<ul style="list-style-type: none"> <li>Organizational Maturity Level</li> <li>System Resiliency</li> <li>System and Software Lifecycle Management</li> <li>Project Performance - In-flight Projects</li> <li>Project Performance – New 2023 Projects</li> <li>System Segregation</li> <li>Cyber Security Organization - Structure, Staffing and Capabilities Review</li> </ul>	<ul style="list-style-type: none"> <li>Enterprise Risk Management (ERM)</li> <li>Full Time Vacancy Rate</li> <li>Affiliate Cost and Quality Justifications</li> <li>Capital Project Impact Analysis and Tracking Process</li> <li>Substation Property Tax Reports</li> <li>Utility Marketing Effectiveness</li> <li>Reputation Management</li> <li>Social Media Engagement and Following</li> <li>Storm Event Invoicing</li> <li>FEMA Tropical Storm Isaias Grant</li> <li>LMI Tariff and Billing</li> <li>Consolidate Real Estate Footprint</li> </ul>	<ul style="list-style-type: none"> <li>Complete Integrated Resource Plan (IRP) Follow-on Activities</li> <li>Complete Energy Storage Request for Proposal (RFP) Follow-on Activities</li> <li>Energy Efficiency Plan Savings</li> <li>Beneficial Electrification – Building Electrification</li> <li>Electric Vehicle (EV) Make-Ready</li> <li>Transition to New "Standard" Time of Day Residential and Small Business Rates on an Opt-Out Basis</li> <li>Implementation of Utility 2.0 Projects</li> <li>Heat Pump Strategy to Address Barriers to Customer Adoption</li> </ul>

# Safety Performance

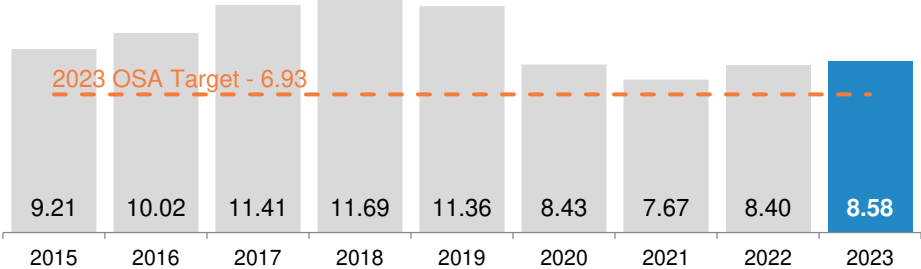
OSHA Recordable Incident Rate



OSHA Days Away Rate (Severity)



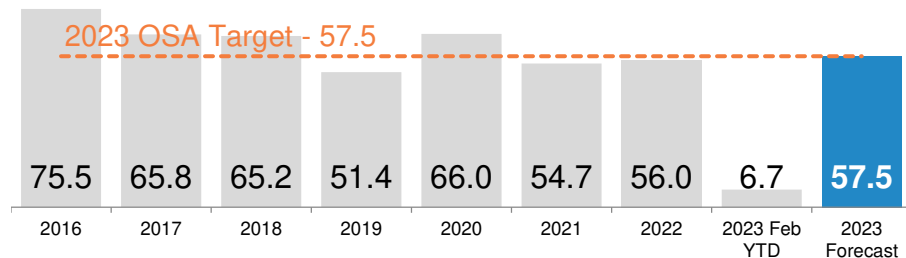
Motor Vehicle Accident Rate



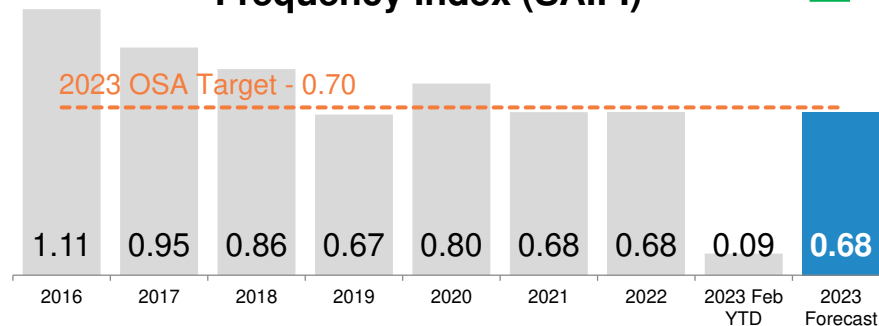
# Electric Reliability

Index Performance – SAIDI, SAIFI, MAIFI

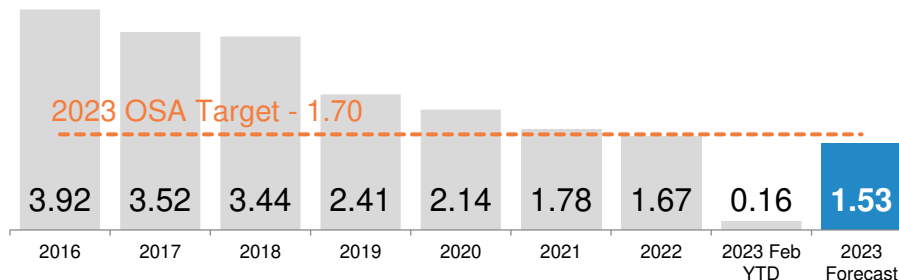
## System Average Interruption Duration Index (SAIDI)



## System Average Interruption Frequency Index (SAIFI)



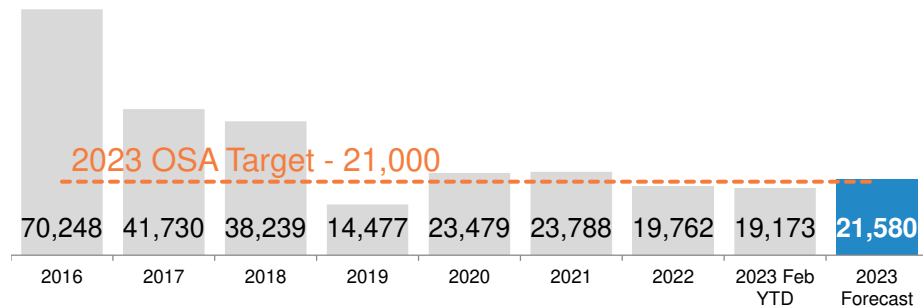
## Momentary Average Interruption Frequency Index (MAIFI)



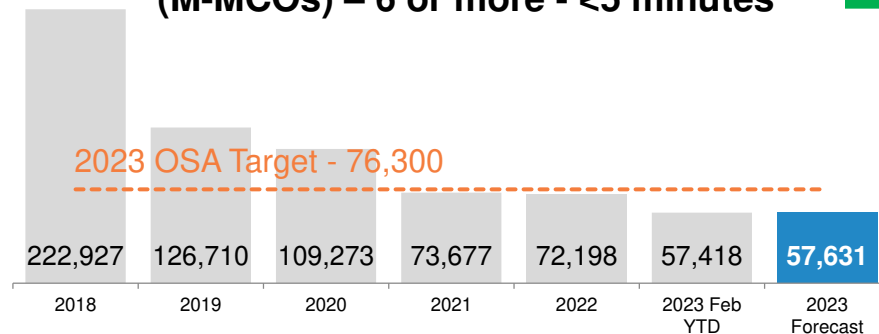
# Electric Reliability

*Multiple Customer Outages – Sustained, Momentary and Repeat MCO*

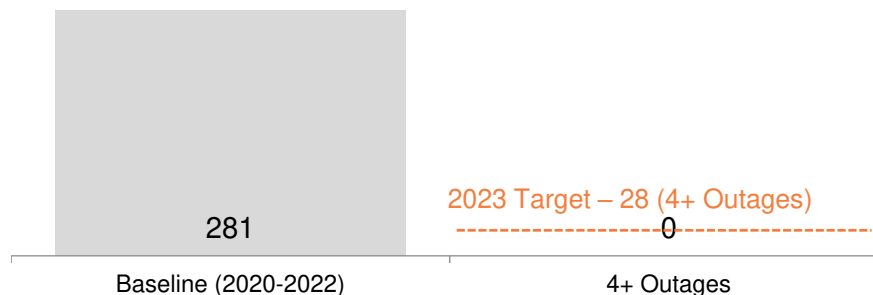
## Sustained Multiple Customer Outages (S-MCOs) 4 or more - >5 Minutes



## Momentary Multiple Customer Outages (M-MCOs) – 6 or more - <5 minutes

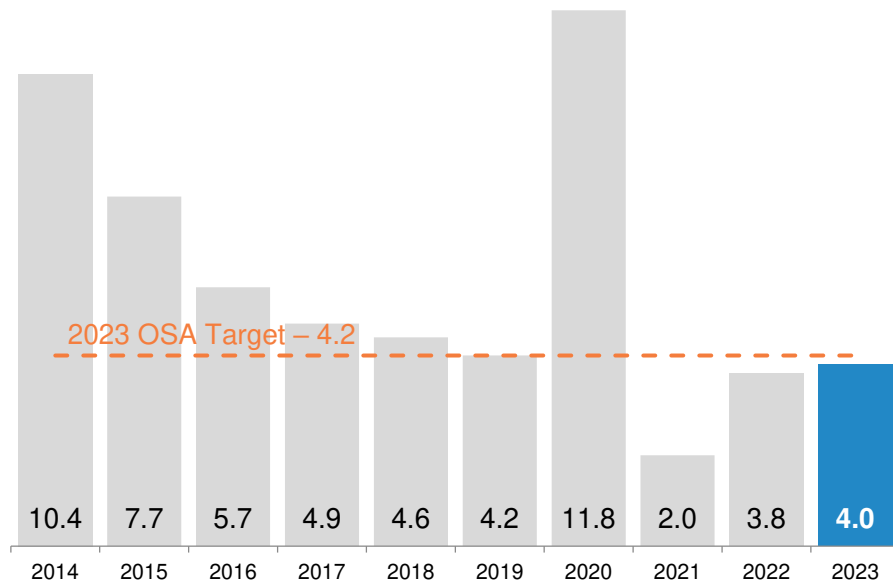


## Repeat Customer Sustained Multiple Customer Outages (S-MCOs)



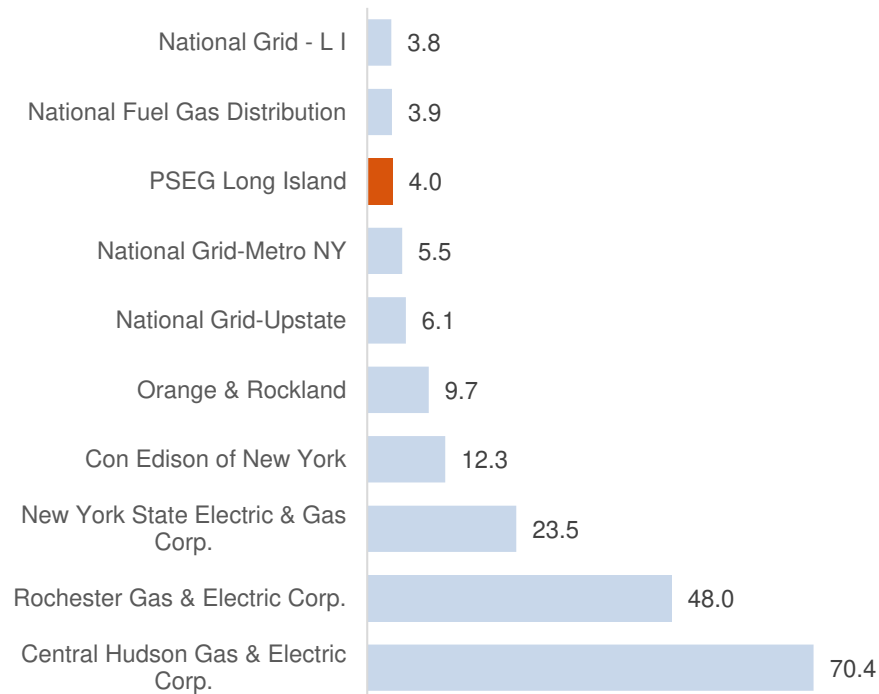
# NYS DPS Customer Complaint Rate

Customer Complaint Rate



## Rolling 12 Month DPS

Complaint Rate per 100,000 Customers



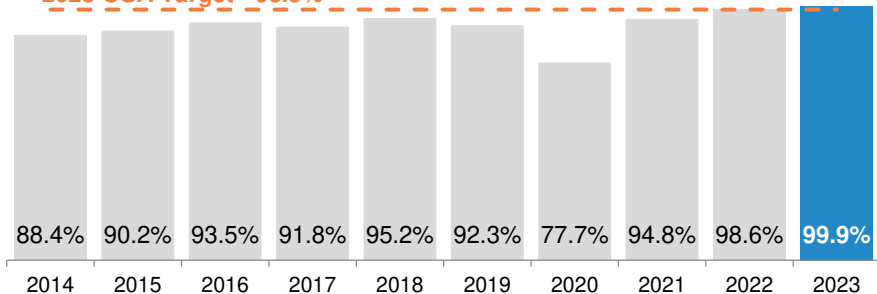
# Billing Metrics

*Exception Cycle Time, Cancel Rebills, Estimating Billing %*

## Billing - Exception Cycle Time

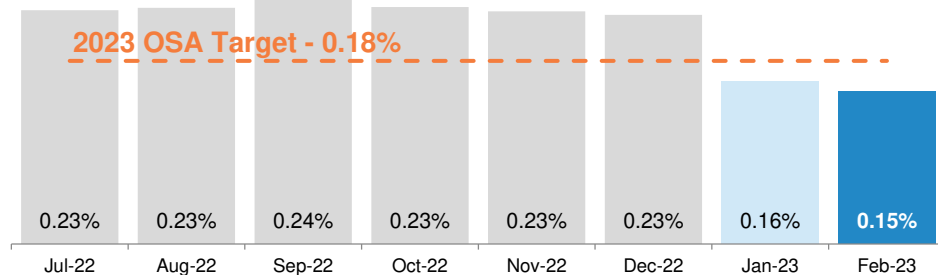
Exceptions completed in 3 Days or Less

2023 OSA Target - 98.5%



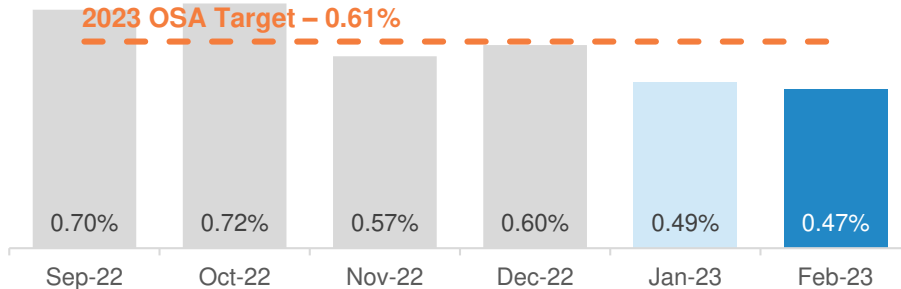
## Cancel Rebills

2023 OSA Target - 0.18%



## Estimated Billing %

2023 OSA Target - 0.61%





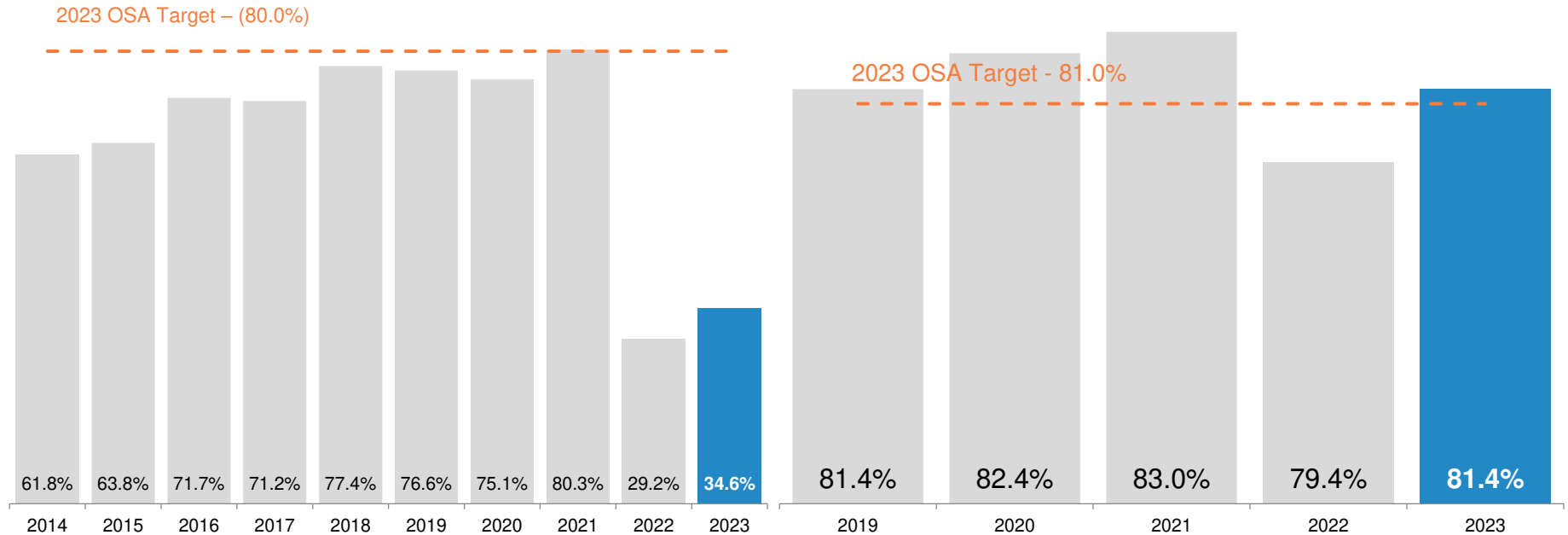
# Customer Contact

*Service Level with Live Agent Calls, First Call Resolution*

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



## First Call Resolution



# JD Power – Residential

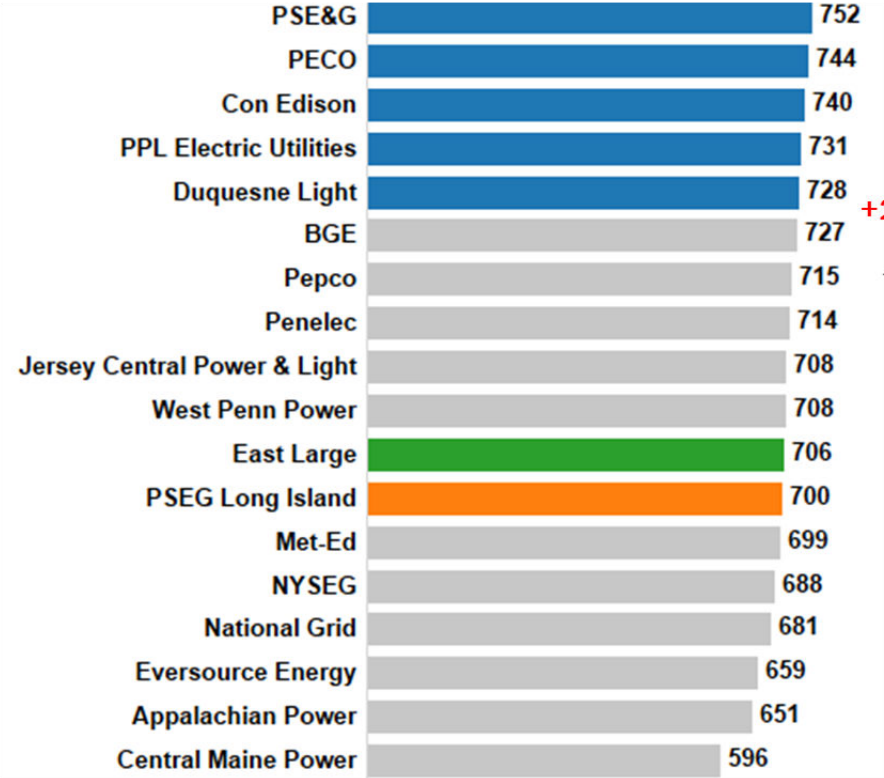
## Overall Customer Satisfaction Index

- **2023 Q1 (conducted in Jan/Feb 2023) score is 700, a +13 point change in CSI from the last quarter (687).**
  - Communications +17
  - Corporate Citizenship +16
  - PQR Index +15
  - Customer Care +14 (small sample)
  - Price +11
  - Billing & Payment +10
- **The Q1 score is +10 points higher than 2022 CSI (690) and moves us up to third quartile, ranking 11 of 17 utilities in East Large.**

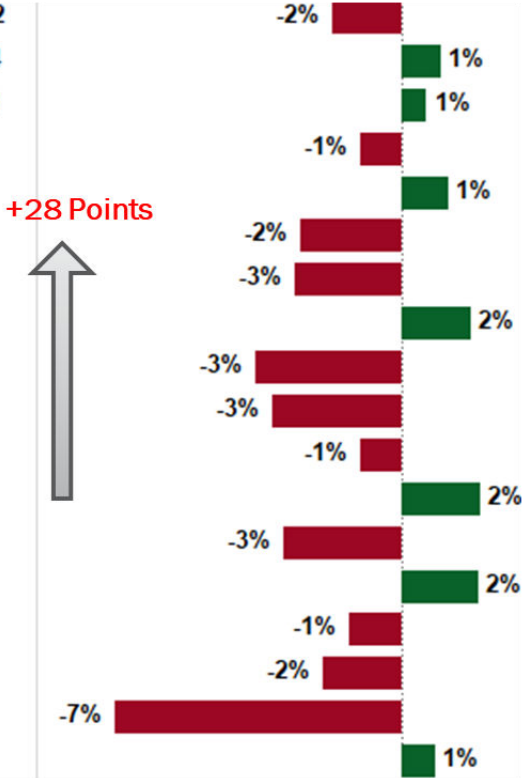
# JD Power – Residential

## Q1 - East Large - Overall CSI

2023 Q1 Ranking



Change in CSI from 2022 Q4



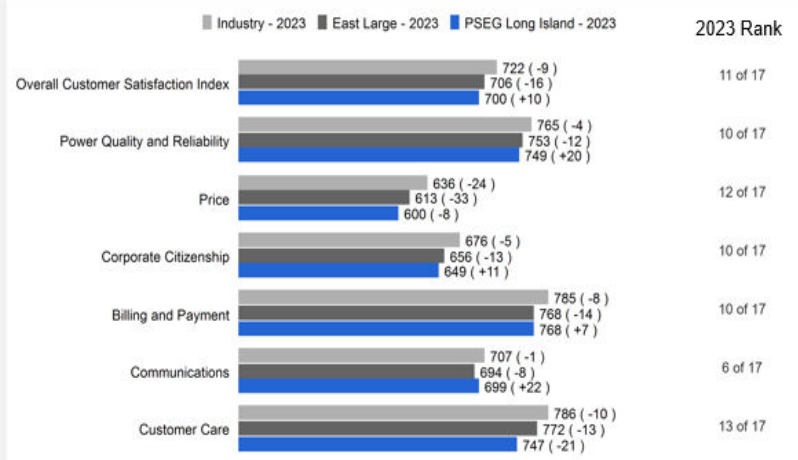
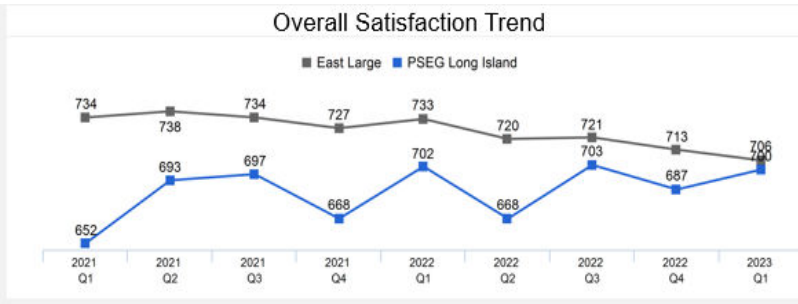
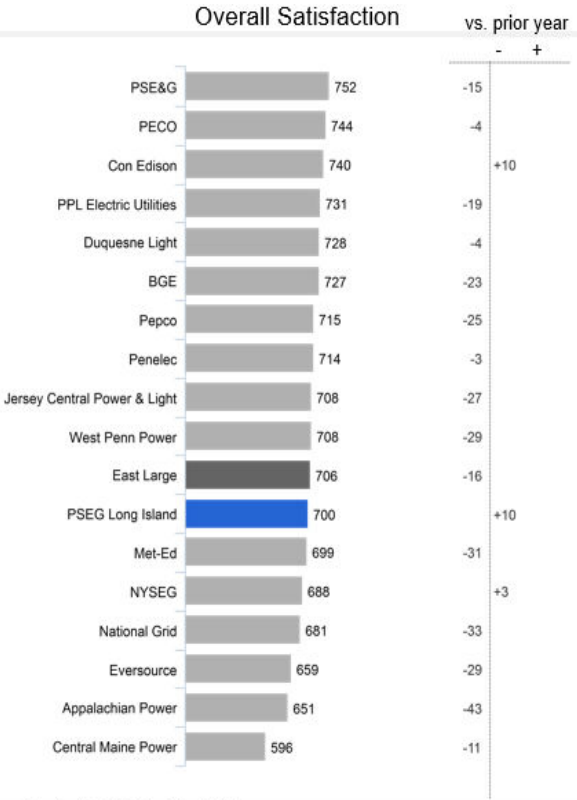
+28 Points

PSEG Long Island  
Sample size = 223

■ Top Quartile  
■ PSEG LI  
↑ To Reach Top Quartile

# JD Power – Residential

## Overall Customer Satisfaction Index



Filters Applied: PSEG Long Island 2023

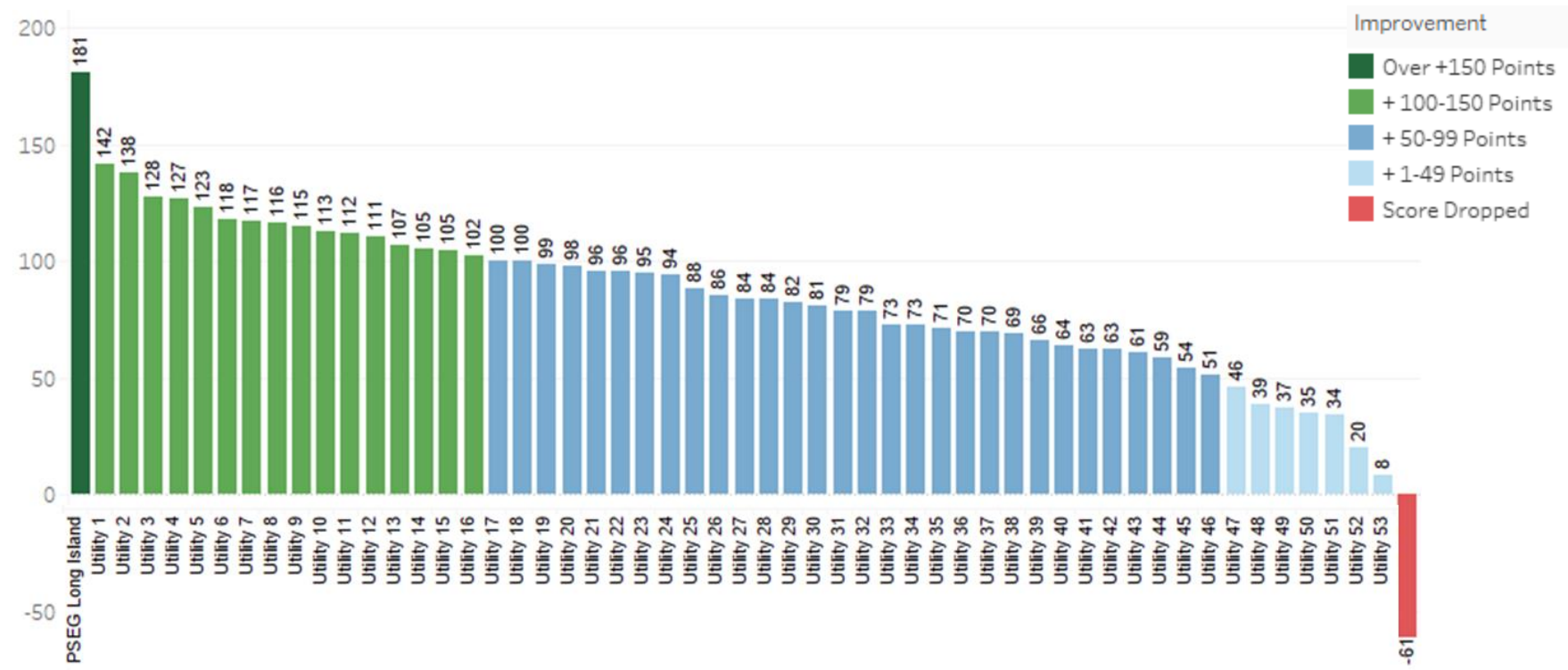
\*Small sample | Insufficient data suppressed | © J.D. Power. All Rights Reserved. CONFIDENTIAL & PROPRIETARY.

Electric Utility Residential Customer Satisfaction Study | Executive Overview | 2023-03-21

J.D. POWER

# JD Power – Residential

## Most Improved Large Utility – 2014 → 2023 W1



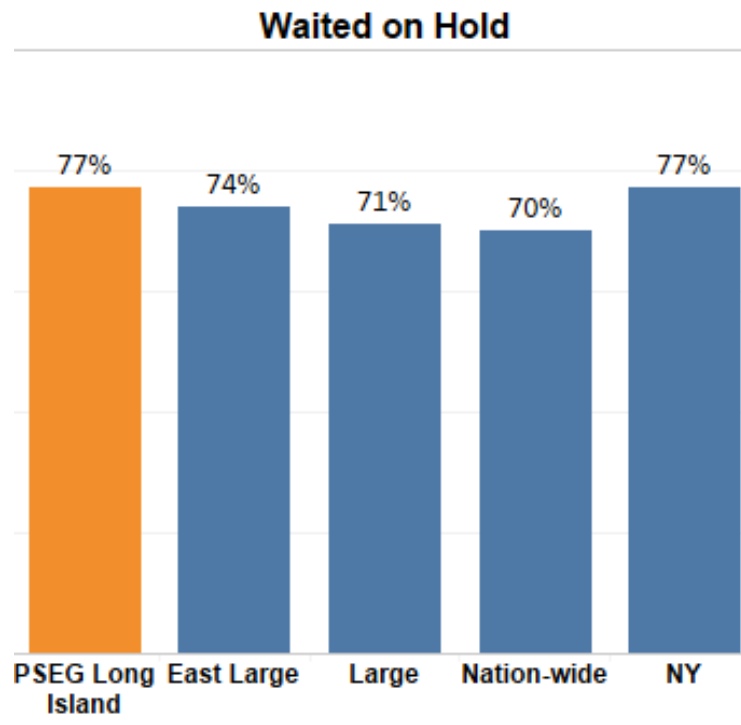
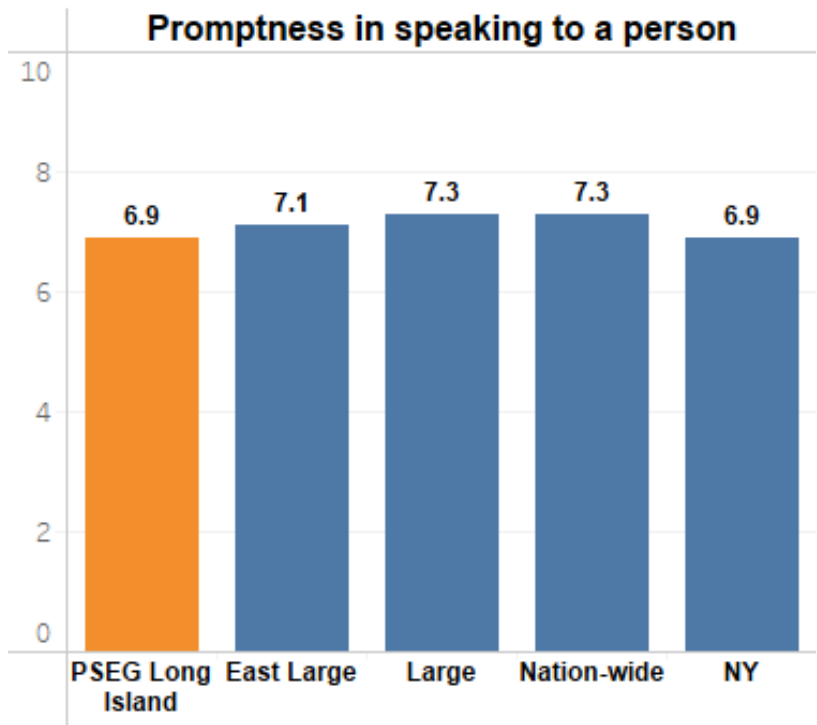
*J.D. Power Residential Overall Satisfaction scores for PSEG Long Island have increased 181 points (35%) since inception (700 vs. 519), a greater improvement than all other Large Utilities.*



# Customer Services Call Center Update

# JD Power – Residential W1 2023

## Customer Care – Phone Performance



*The satisfaction and wait time of PSEG Long Island who contacted by phone is slightly behind East large utilities, although closely aligned with NY utilities as a whole.*

# Call Center Performance

## *Industry Trends*

- Average handle time (AHT) continues to increase among surveyed utilities. AHT was 376 seconds, up from 332 seconds in 2018—a 13.3% increase.
- The average speed to answer (ASA) also increased. ASA was 100 seconds, up from 89 seconds in 2018—a 12.4% increase.
- Many utilities have relaxed their service-level goals. The median service-level goal in 80/60, while the 2018 goal was 80/30.

The COVID-19 pandemic affected utility contact center metrics in varying ways. Some utilities reported increased call volumes while others said a decrease in staffing affected overall service levels. Below is a thematic summary of impacts:

- When collections and disconnects for nonpayment resumed, call centers experienced increased Average Handle Time (AHT) due to credit/collections negotiations taking longer.
- Call volumes, AHT, and Service Level actual performance have been impacted by the pandemic and the suspension of disconnects.
- KPIs suffered because companies were short staffed and had a hard time rehiring; Began disconnecting for non-pay and subsequently went through high bill season, negatively impacting ability to maintain the service level for several months



# Call Center Key Performance Indicators

Industry Trends – AGA/EEI\* – Customer Contact Service Level Goals

		Seconds							
	Service Level	20	25	30	35	45	60	120	180
Rep Only	60-70%	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 2	<div><div></div><div></div></div> 1	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 0
	71-80%	<div><div></div><div></div></div> 1	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 7	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 1	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 0
	81-100%	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 1	<div><div></div><div></div></div> 0
Rep + Technology	60-70%	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 4	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 3	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 0
	71-80%	<div><div></div><div></div></div> 4	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 15	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 2	<div><div></div><div></div></div> 14	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 1
	81-90%	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 0	<div><div></div><div></div></div> 0

- 43 companies utilize a target including IVR satisfied calls versus 13 companies that measured it only at the rep level
- The highest concentrated targets are 80%/30s w/ technology, 80%/60s w/ technology and 80%/30s rep only
- PSEG Long Island's 2022 and 2023 target is rep only and aligns to 80%/30s
- Continue to monitor and analyze industry service level trends and measure impact of various service levels on customer satisfaction; Perform associated cost/benefit analyses to determine if funding would be better directed to other initiatives to drive increased satisfaction.

# Appendix

## Detailed Scorecard Results – February Scorecards



# Electric T&D Scope Function Scorecard

## PSEG Long Island OSA 2023 Scope Specific Function - Electric T&D

					February YTD				February
Metric #	Operations Services Agreement Metrics	\$ Allocation	Metric Type	Low/ High	OSA YE Target	OSA YTD Target	YTD Result	OSA Forecast	Month Result
T&D-01	Asset Management Program Implementation - Asset Inventory	\$167,140	Hybrid	H	1	1	1	⬆️	1
T&D-02	Asset Management Program Implementation - AM Governance	\$167,140	Project	H	See Smartsheet		1	⬆️	1
T&D-03	Enterprise Asset Management System Implementation	\$668,560	Project	H			1	⬆️	1
T&D-04	T&D System Relay Operations - Relay Mis-Operations	\$111,427	Quantitative	L	13	2	1	⬆️	1
T&D-05	T&D Inadvertent Operation Events	\$111,427	Quantitative	L	26	4	6	⬆️	4
T&D-06	Primary and Alternative Trans Control Center Replacement	\$278,567	Project	H	See Smartsheet		1	⬆️	1
T&D-07	SAIDI (System Average Interruption Duration Index)	\$334,280	Quantitative	L	57.5	7.6	6.7	➡️	3.3
T&D-08	SAIFI (System Average Interruption Frequency Index)	\$222,853	Quantitative	L	0.70	0.10	0.09	⬆️	0.05
T&D-09	MAIFI (Momentary Average Interruption Frequency Index)	\$167,140	Quantitative	L	1.70	0.23	0.16	⬆️	0.07
T&D-10	Sustained Multiple Customer Outages (MCO) - 4 or more	\$139,283	Quantitative	L	21,000	21,000	19,173	⬆️	N/A
T&D-11	Reduce Repeat Customer Sustained MCOs	\$83,570	Quantitative	L	28	5	0	⬆️	N/A
T&D-12	Momentary MCO (6 or more)	\$111,427	Quantitative	L	76,300	76,300	57,418	⬆️	N/A
T&D-13	Serious Injury Incident Rate (SIIR)	\$222,853	Quantitative	L	0.00	0.00	0.00	⬆️	0.00
T&D-14	OSHA Recordable Incidence Rate	\$222,853	Quantitative	L	0.76	0.76	0.51	⬆️	0.99
T&D-15	OSHA Days Away Rate (Severity)	\$222,853	Quantitative	L	8.51	8.51	0.00	⬆️	0.00
T&D-16	Motor Vehicle Accident Rate	\$167,140	Quantitative	L	6.93	6.93	8.58	⬆️	16.75
T&D-17	Work Mgmt Enhancements - Short-Term Scheduling	\$111,427	Project	H	See Smartsheet		1	⬆️	1
T&D-18	Work Mgmt Enhancements - Workforce Mgmt Plans	\$278,567	Project	H			1	⬆️	1
T&D-21	WME - Work Mgmt KPIs & Dashboards	\$111,427	Project	H			1	⬆️	1
T&D-23	Employee Overtime	\$167,140	Quantitative	H	100.0%	100.0%	50.0%	⬆️	N/A
T&D-24	Veg Mgmt Work Plan - Cycle Tree Trim With Veg Intelligence	\$222,853	Hybrid	H	1	1	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

## PSEG Long Island OSA 2023 Scope Specific Function - Electric T&D

					February YTD				February
Metric #	Operations Services Agreement Metrics	\$ Allocation	Metric Type	Low/High	OSA YE Target	OSA YTD Target	YTD Result	OSA Forecast	Month Result
T&D-25	Veg Mgmt Work Plan - Trim-To-Sky (TTS) Circuits	\$278,567	Hybrid	H	1	1	1	⬆️	1
T&D-26	Veg Mgmt Work Plan - Hazard Tree Removal	\$334,280	Hybrid	H	1	1	1	⬆️	1
T&D-27	Storm Hardening Work Plan - Overhead Hardening	\$278,567	Hybrid	H	1	1	1	⬆️	1
T&D-28	Storm Hardening Work Plan - Underground Hardening	\$167,140	Hybrid	H	1	1	1	⬆️	1
T&D-29	T&D System Enhancements	\$167,140	Project	H	See Smartsheet		1	⬆️	1
T&D-30	Storm Hardening Work Plan - ACRV Commissioning Program	\$278,567	Hybrid	H	1	1	1	⬆️	1
T&D-31	Storm Hardening Work Plan - LT5H (ASUV) Program	\$167,140	Hybrid	H	1	1	1	⬆️	1
T&D-33	Execute Real Estate Strategy	\$139,283	Project	H	See Smartsheet		1	⬆️	1
T&D-34	Construction – Quality and Timely Completion of PJDs	\$222,853	Project	H			July	⬆️	July
T&D-35	Construction - Project Milestones Achieved	\$222,853	Quantitative	H	90.0%	90.0%	94.1%	⬆️	85.7%
T&D-36	Construction - Cost Estimating Accuracy	\$222,853	Quantitative	H	90.0%	90.0%	87.0%	⬆️	N/A
T&D-37	Completion of Program Planned Units Per Workplan	\$445,707	Quantitative	H	100.0%	100.0%	100.0%	⬆️	N/A
T&D-38	Program Unit Cost Variance	\$222,853	Quantitative	L	100.0%	100.0%	100.0%	⬆️	N/A
T&D-39	Project Completion Consistent with Project Design	\$111,427	Quantitative	H	100.0%	100.0%	100.0%	⬆️	N/A
T&D-40	Double Woods	\$55,713	Quantitative	L	5,829	6,369	6,634	➡️	N/A
T&D-41	Program Effectiveness - Vegetation Management	\$194,997	Quantitative	L	-50.0%	-50.0%	2.9%	⬆️	6.9%
T&D-42	Estimated Time of Restoration (ETR) Process Enhancements	\$278,567	Project	H	See Smartsheet		1	⬆️	1
T&D-44	Regulatory Compliance	\$167,140	Hybrid	H	1	1	1	⬆️	1
T&D-45	Physical Security	\$278,567	Project	H	See Smartsheet		1	⬆️	1
T&D-46	Root Cause Analysis (RCA) Execution and Compliance	\$194,997	Project	H	See Smartsheet		1	⬆️	1
T&D-48	Program Effectiveness - Storm Hardening	\$194,997	Quantitative	L	8	1	0	⬆️	0

### 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



# Customer Services Scope Function Scorecard

## PSEG Long Island OSA 2023 Scope Specific Function - Customer Services

					February YTD					February
Metric #	Operations Services Agreement Metrics	\$ Allocation	Metric Type	Low/ High	OSA YE Target		OSA YTD Target	YTD Result	OSA Forecast	Month Result
CS-01	Delivery of Strategic Customer Experience & Billing Projects	\$334,280	Project	H	See Smartsheet			1	↑	1
CS-02	JD Power Customer Satisfaction Survey (Residential)	\$222,853	Hybrid	H	740 or 10th	740 or 10th		Mar	↑	Mar
CS-03	JD Power Customer Satisfaction Survey (Business)	\$222,853	Hybrid	H	9th Rank	9th Rank		Jul	↑	Jul
CS-04	CIS Modernization	\$445,707	Project	H	See Smartsheet			1	↑	1
CS-05	Customer Transactional Performance	\$334,280	Hybrid	H	1	1		1	→	1
CS-09	Billing Exception Cycle Time	\$55,713	Quantitative	H	98.5%	98.5%		99.9%	↑	100.0%
CS-10	Billing Cancelled Rebill	\$111,427	Quantitative	L	0.18%	0.18%		0.15%	↑	0.15%
CS-11	Contact Center Service Level with Live Agent Calls	\$389,993	Quantitative	H	80.0%	80.0%		34.6%	→	33.9%
CS-13	First Call Resolution (FCR)	\$111,427	Quantitative	H	81.0%	81.0%		81.4%	↑	81.9%
CS-14	Net Dollars Written Off	\$222,853	Quantitative	L	31,136,189	5,988,753		8,503,873	↑	4,975,358
CS-15	Arrears Aging Percent > 90 Days Past Due	\$334,280	Quantitative	L	52.80%	52.80%		63.97%	↑	55.39%
CS-17	Low to Moderate Income Program Participation	\$111,427	Quantitative	H	50,000	41,651		41,651	↑	N/A
CS-19	Customer Complaint Rate	\$111,427	Quantitative	L	4.2	4.2		4.0	↑	3.6
CS-21	Outage Information Satisfaction	\$222,853	Quantitative	H	70.0%	70.0%		64.5%	↑	59.0%
CS-22	AMI Roadmap and 2023 Improvements	\$111,427	Project	H	See Smartsheet			1	↑	1
CS-23	Deferred Payment Agreement (DPA) Improvement	\$167,140	Project	H	See Smartsheet			1	↑	1
CS-24	Payment Transaction Ease	\$167,140	Quantitative	H	90.0%	90.0%		88.8%	↑	89.0%
CS-25	Interactive Voice Response (IVR) Containment Rate	\$222,853	Quantitative	H	61.0%	58.0%		60.8%	↑	62.0%
CS-26	Life Sustaining Equipment (LSE) Customer Compliance	\$111,427	Project	H	See Smartsheet			1	↑	1
CS-27	Estimated Bill %	\$111,427	Quantitative	L	0.61%	0.61%		0.47%	↑	0.45%
CS-28	Move Process Improvement	\$167,140	Project	H	See Smartsheet			1	→	1
CS-29	AMI Meter Validation, Est., Editing Enhance & Reporting	\$167,140	Project	H	See Smartsheet			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

# Business Services Scope Function Scorecard

## PSEG Long Island OSA 2023 Scope Specific Function - Business Services

					February YTD			February	
Metric #	Operations Services Agreement Metrics	\$ Allocation	Metric Type	Low/ High	OSA YE Target	OSA YTD Target	YTD Result	OSA Forecast	Month Result
BS-01	ERM - Implementation of the Mitigation Effect. Process	\$167,140	Project	H	See Smartsheet		1	↑	1
BS-05	Full Time Vacancy Rate	\$501,420	Quantitative	H	100.0%	100.0%	60.0%	↑	N/A
BS-07	Complete Affiliate Cost and Quality Justifications	\$278,567	Project	H	See Smartsheet		1	↑	1
BS-08	Improve Capital Proj Impact Analysis & Tracking Process	\$167,140	Project	H			1	↑	1
BS-10	Improve Annual Substation Property Tax Reports	\$167,140	Project	H			1	↑	1
BS-18	Utility Marketing Effectiveness	\$278,567	Project	H			1	↑	1
BS-19	Reputation Management – Positive Media Sentiment	\$167,140	Quantitative	H	30.0%	30.0%	43.8%	↑	28.5%
BS-20	Reputation Management – Share of Voice	\$167,140	Quantitative	H	50.0%	50.0%	N/A	↑	N/A
BS-21	Social Media Engagement and Following	\$278,567	Quantitative	H	100.0%	100.0%	100.0%	↑	N/A
BS-22	Timely, Accurate, and Supported Storm Event Invoicing	\$334,280	Hybrid	H	1	1	1	↑	1
BS-23	FEMA Tropical Stm Isaias Grant - Engineering to Support	\$167,140	Project	H	See Smartsheet		1	↑	1
BS-24	Improve the Accuracy of Asset Records for Outside Plant	\$167,140	Project	H			1	↑	1
BS-32	Update Low and Moderate Income (LMI) Tariff and Billing	\$167,140	Project	H			1	↑	1
BS-33	Consolidate Real Estate Footprint	\$334,280	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
- \*\* For BS-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 OSA 2023 Scope Specific Function - Information Technology

					February YTD				February
Metric #	Operations Services Agreement Metrics	\$ Allocation	Metric Type	Low/ High	OSA YE Target	OSA YTD Target	YTD Result	OSA Forecast	Month Result
IT-01	Organizational Maturity Level	\$612,847	Project	H	See Smartsheet		1	↑	1
IT-03	System Resiliency	\$724,273	Project	H			1	↑	1
IT-04	System and Software Lifecycle Management	\$111,427	Project	H			1	↑	1
IT-05	Project Performance - In-flight Projects	\$445,707	Project	H			1	↑	1
IT-06	Project Performance – New 2023 Projects	\$557,133	Project	H			1	↑	1
IT-07	System Segregation	\$668,560	Project	H			1	↑	1
IT-08	Cyber Sec Org - Structure, Staff & Capabilities Review	\$222,853	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 OSA 2023 Scope Specific Function - Power Supply & Clean Energy

Metric #	Operations Services Agreement Metrics	\$ Allocation	Metric Type	Low/High	February YTD		YTD Result	OSA Forecast	February
					OSA YE Target	OSA YTD Target			Month Result
PS&CE-01	Complete Integrated Resource Plan Follow-on Activities	\$278,567	Project	H	See Smartsheet		1	↑	1
PS&CE-02	Complete Energy Storage RFP Follow-on Activities	\$222,853	Project	H			1	↑	1
PS&CE-03	Energy Efficiency Annualized Energy Savings	\$278,567	Quantitative	H	900,730	183,298	178,168	↑	97,370
PS&CE-05	Beneficial Electrification	\$111,427	Quantitative	H	100.0%	100.0%	50.0%	↑	N/A
PS&CE-06	Electric Vehicle (EV) Make Ready	\$111,427	Quantitative	H	100.0%	100.0%	50.0%	↑	N/A
PS&CE-08	Transition to New Std TOD Resi & Small Business Rates	\$668,560	Project	H	See Smartsheet		1	↑	1
PS&CE-11	Implementation of Utility 2.0 Projects	\$278,567	Project	H			1	↑	1
PS&CE-13	Heat Pump Strategy to Address Barriers to Customer Adopt	\$278,567	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

\*\* 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