



**PSEG**

**LONG ISLAND**

# PSEG Long Island

## 2022 Incentive Compensation Claim

March 31, 2023



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# Executive Summary

The Second Amended & Restated Operations Services Agreement (“2<sup>nd</sup> A&R OSA”) between the Long Island Power Authority (“Authority”), through its subsidiary Long Island Lighting Company d/b/a LIPA, and PSEG Long Island (“PSEG LI”) has established Scope Specific Performance metrics to measure PSEG LI’s performance against quantitative and qualitative performance measures. The OSA also established an Annual Variable Compensation Component for each contract year to be paid to PSEG LI based on favorable performance relative to the performance metrics. For 2022, the Annual Variable Compensation Component is \$21,025,409.33.

For 2022, PSEG Long Island and LIPA agreed to 96 performance metrics, distributed across five scope functions outlined in the 2<sup>nd</sup> A&R OSA including: Electric T&D (40%), Customer Services (20%), Information Technology (15%), Business Services (15%) and Power Supply and Clean Energy (10%).

Metrics are supposed to meet specific criteria in outlined in Appendix 4.3(C) the 2<sup>nd</sup> A&R OSA which include: (i) relate to the general nature of one or more Scope Functions or Scope Sub-Functions comprising the Operations Services, (ii) be objectively verifiable, such that their achievement is not based on LIPA’s subjective judgment or discretion, (iii) be reasonably achievable, and (iv) be such that the applicable budget available or to be made available by LIPA to the Service Provider is sufficient to provide the Service Provider a reasonable opportunity to achieve the applicable Scope Function-Specific Performance Metrics.

In accordance with Section 5.1 the OSA, PSEG LI is submitting to the Authority on March 31, 2023 its calculation of the incentive compensation due for 2022. PSEG Long Island is also providing a metric-by-metric breakdown on stated performance levels. All data and documentation supporting PSEG LI’s incentive compensation claim is on LIPA’s SharePoint site for quantitative performance measures and on LIPA’s Smartsheet for qualitative project based measures.

The following review process was established by the OSA and the LIPA Reform Act<sup>1</sup>

- No later than ninety (90) days following the end of a Contract Year, PSEG Long Island shall submit to LIPA and, to the extent required by the LIPA Reform Act, the DPS, supporting performance data, information and reports for that Contract Year and a calculation based thereon of its proposed Variable Compensation Award for that Contract Year.
- LIPA is required to submit its evaluation of PSEG LI’s performance to the New York State Department of Public Service (“DPS”) by May 15, 2023 (45 days after receipt).
- The DPS is required to make recommendations to LIPA by June 14, 2023 (30 days later).
- LIPA must notify PSEG LI of its acceptance or disagreement with the calculation and to pay any undisputed portion by June 29, 2023 (90 days after receipt).
- If there is any amount subject to a disagreement, notify the Service Provider that a Dispute exists, in which event the Service Provider may submit the Dispute for resolution pursuant to Section 8.6 hereof.

This report provides a summary and detail of PSEG LI’s incentive compensation claim on the 96 Scope-Specific performance metrics. PSEG LI’s incentive compensation claim for 2022 is \$16,951,736.29 out of the potential \$21,025,409.33. Below is the support for the calculation and metric by metric overview of PSEG Long Island’s incentive compensation claim position.

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<sup>1</sup> Refer to Section 5.1 of the OSA, Section 3-b(3)(h) of the Public Service Law, and Section 1020-f(hh) of the Public Authorities Law.



## 2022 Incentive Compensation Claim Calculation

Metric Number	Metric Name	Potential Incentive	Achieved Incentive Allocation	Claimed Performance Level	Claimed Achieved Incentive
BS-01	Enterprise Risk Management (ERM) Report	\$157,690.57	100%	↑	\$157,690.57
BS-02	ERM Key Risk Indicators (KRIs)	\$157,690.57	100%	↑	\$157,690.57
BS-03	Employee Engagement - Participation Rate	\$105,127.05	100%	↑	\$105,127.05
BS-04	Employee Engagement Score	\$210,254.09	0%	↓	\$0.00
BS-05	Full Time Vacancy Rate	\$210,254.09	75%	↑ (partial)	\$157,690.57
BS-06	Contract Administration Manual (CAM) Completion	\$52,563.52	100%	↑	\$52,563.52
BS-07	Affiliate Cost Benefit Justification	\$262,817.62	100%	↑	\$262,817.62
BS-08	Capital Project Impact Analysis	\$105,127.05	100%	↑	\$105,127.05
BS-09	Substation Property Tax Report	\$157,690.57	100%	↑	\$157,690.57
BS-10	Substation Property Tax Module Plan	\$52,563.52	100%	↑	\$52,563.52
BS-11	Long Island Choice Reform	\$157,690.57	100%	↑	\$157,690.57
BS-12	Advanced Metering Infrastructure (AMI) Opt Out Fees	\$105,127.05	100%	↑	\$105,127.05
BS-13	Information Request (IR) Responses	\$157,690.57	100%	↑	\$157,690.57
BS-14	Legal Staffing	\$157,690.57	100%	↑	\$157,690.57
BS-15	Contractor Performance Evaluation System	\$262,817.62	100%	↑	\$262,817.62
BS-16	Government & Legislative Affairs	\$105,127.05	100%	↑	\$105,127.05
BS-17	Project Outreach	\$210,254.09	100%	↑	\$210,254.09
BS-18	Customer Segmentation	\$105,127.05	100%	↑	\$105,127.05
BS-19	Reputation Management – Positive Media Sentiment	\$105,127.05	100%	↑	\$105,127.05
BS-20	Reputation Management – Share of Voice	\$105,127.05	100%	↑	\$105,127.05
BS-21	Social Media Engagement and Following	\$210,254.09	100%	↑	\$210,254.09
CS-01	Delivery of Strategic Customer Experience & Billing Projects	\$525,635.23	50%	↑ (partial)	\$262,817.62
CS-02	JD Power Customer Satisfaction Survey (Residential)	\$210,254.09	0%	↓	\$0.00
CS-03	JD Power Customer Satisfaction Survey (Business)	\$210,254.09	0%	↓	\$0.00
CS-04	CIS Modernization – Phase 1	\$630,762.28	50%	↑ (partial)	\$315,381.14



Metric Number	Metric Name	Potential Incentive	Achieved Incentive Allocation	Claimed Performance Level	Claimed Achieved Incentive
CS-05	Customer Transactional Performance	\$420,508.19	100%	↑	\$420,508.19
CS-06	Inactive Accounts Long Term Estimates (LTEs)	\$105,127.05	100%	↑	\$105,127.05
CS-07	Active Accounts Long Term Estimates (LTEs)	\$105,127.05	100%	↑	\$105,127.05
CS-08	Unauthorized Use/Advanced Consumption Resolution	\$105,127.05	100%	↑	\$105,127.05
CS-09	Billing Exception Cycle Time	\$210,254.09	100%	↑	\$210,254.09
CS-10	Billing Cancelled Rebill	\$210,254.09	100%	↑	\$210,254.09
CS-11	Contact Center Service Level with Live Agent Calls	\$183,972.33	0%	↓	\$0.00
CS-12	Customer Email Closure Rate	\$78,845.29	0%	↓	\$0.00
CS-13	First Call Resolution (FCR)	\$105,127.05	0%	↓	\$0.00
CS-14	Net Write-Offs per \$100 Billed Revenue	\$262,817.62	100%	↑	\$262,817.62
CS-15	AR > 90 (No Exclusions)	\$315,381.14	0%	↓	\$0.00
CS-16	Days Sales Outstanding	\$210,254.09	0%	↓	\$0.00
CS-17	LMI Program Participation	\$105,127.05	0%	↓	\$0.00
CS-18	Low to Moderate Income Program Automation	\$105,127.05	100%	↑	\$105,127.05
CS-19	Customer Complaint Rate	\$105,127.05	100%	↑	\$105,127.05
IT-1	Organizational Maturity Level – Doing	\$262,817.62	100%	↑	\$262,817.62
IT-2	Organizational Maturity Level – Managing	\$525,635.23	100%	↑	\$525,635.23
IT-3	System Resiliency	\$420,508.19	0%	↓	\$0.00
IT-4	System and Software Lifecycle Management	\$315,381.14	0%	↓	\$0.00
IT-5	System Implementation – 2022 Budget Projects	\$841,016.37	75.0% (60% of Tier 1 100% of Tier 2)	↑ (partial)	\$630,762.28
IT-6	System Implementation – Board PIPs	\$525,635.23	100%	↑	\$525,635.23
IT-7	System Segregation	\$262,817.62	100%	↑	\$262,817.62
PS&CE-1	Integrated Resource Plan (IRP)	\$394,226.43	100%	↑	\$394,226.43
PS&CE-2	Energy Storage Request for Proposal (RFP)	\$394,226.43	100%	↑	\$394,226.43
PS&CE-3	Energy Efficiency Annualized Energy Savings	\$210,254.09	100%	↑	\$210,254.09
PS&CE-4	Utility 2.0 - DER Hosting	\$157,690.57	100%	↑	\$157,690.57
PS&CE-5	Beneficial Electrification	\$210,254.09	75%	↑ (partial)	\$157,690.57
PS&CE-6	Electric Vehicle (EV) Make Ready	\$105,127.05	50%	↑ (partial)	\$52,563.52

Metric Number	Metric Name	Potential Incentive	Achieved Incentive Allocation	Claimed Performance Level	Claimed Achieved Incentive
PS&CE-7	DER Interconnection Process	\$210,254.09	100%	↑	\$210,254.09
PS&CE-8	TOU Pricing Options - Space Heating & Large Commercial	\$210,254.09	100%	↑	\$210,254.09
PS&CE-9	Time of Use Pricing Pilot - Year 1 Marketing	\$210,254.09	100%	↑	\$210,254.09
T&D-01	Asset Management Program Implementation - Asset Inventory	\$157,690.57	0%	↓	\$0.00
T&D-02	Asset Management Program Implementation - AM Governance	\$210,254.09	100%	↑	\$210,254.09
T&D-03	Enterprise Asset Management System Implementation Plan	\$630,762.28	100%	↑	\$630,762.28
T&D-04	T&D System Relay Operations - Relay Mis-Operations	\$105,127.05	100%	↑	\$105,127.05
T&D-05	T&D Inadvertent Operating Events	\$105,127.05	100%	↑	\$105,127.05
T&D-06	PTCC/ATCC Replacement	\$262,817.62	100%	↑	\$262,817.62
T&D-07	SAIDI	\$420,508.19	100%	↑	\$420,508.19
T&D-08	SAIFI	\$210,254.09	100%	↑	\$210,254.09
T&D-09	MAIFI	\$210,254.09	100%	↑	\$210,254.09
T&D-10	Sustained MCO (4 or more)	\$157,690.57	100%	↑	\$157,690.57
T&D-11	Reduce Repeat Customer Sustained MCOs	\$210,254.09	100%	↑	\$210,254.09
T&D-12	Momentary MCO (6 or more)	\$157,690.57	100%	↑	\$157,690.57
T&D-13	Serious Injury Incident Rate (SIIR)	\$210,254.09	0%	↓	\$0.00
T&D-14	OSHA Recordable Incidence Rate	\$262,817.62	100%	↑	\$262,817.62
T&D-15	OSHA Days Away Rate (Severity)	\$262,817.62	100%	↑	\$262,817.62
T&D-16	Motor Vehicle Accident Rate	\$105,127.05	100%	↑	\$105,127.05
T&D-17	Work Mgmt Enhancements - Short-Term Scheduling	\$157,690.57	100%	↑	\$157,690.57
T&D-18	Work Mgmt Enhancements - Workforce Mgmt Plans	\$262,817.62	100%	↑	\$262,817.62
T&D-19	WME - Improve Planning & Tracking of Work	\$105,127.05	100%	↑	\$105,127.05
T&D-20	WME - Improve and Standardize Compatible Unit Estimating	\$105,127.05	100%	↑	\$105,127.05
T&D-21	WME - Work Mgmt KPIs & Dashboards	\$105,127.05	100%	↑	\$105,127.05
T&D-22	WME - Clarify and Rationalize Work Mgmt Roles	\$52,563.52	100%	↑	\$52,563.52
T&D-23	Employee Overtime	\$315,381.14	100%	↑	\$315,381.14
T&D-24	Veg Mgmt Work Plan - Cycle Tree Trim With Veg Intelligence	\$210,254.09	0%	↓	\$0.00
T&D-25	Veg Mgmt Work Plan - Trim-To-Sky (TTS) Circuits	\$262,817.62	0%	↓	\$0.00

Metric Number	Metric Name	Potential Incentive	Achieved Incentive Allocation	Claimed Performance Level	Claimed Achieved Incentive
T&D-26	Veg Mgmt Work Plan - Hazard Tree Removal	\$420,508.19	100%	↑	\$420,508.19
T&D-27	Storm Hardening Work Plan - Overhead Hardening	\$262,817.62	100%	↑	\$262,817.62
T&D-28	Storm Hardening Work Plan - Underground Hardening	\$157,690.57	100%	↑	\$157,690.57
T&D-29	Storm Hardening Work Plan - Transmission Load Pockets	\$157,690.57	100%	↑	\$157,690.57
T&D-30	Storm Hardening Work Plan - ACRV Commissioning Program	\$262,817.62	100%	↑	\$262,817.62
T&D-31	Storm Hardening Work Plan - LT5H (ASUV) Program	\$157,690.57	100%	↑	\$157,690.57
T&D-32	Estimated Time of Restoration (ETR)	\$210,254.09	100%	↑	\$210,254.09
T&D-33	Real Estate Strategy	\$105,127.05	100%	↑	\$105,127.05
T&D-34	Construction – Quality and Timely Completion of PJDs	\$210,254.09	100%	↑	\$210,254.09
T&D-35	Construction - Project Milestones Achieved	\$210,254.09	100%	↑	\$210,254.09
T&D-36	Construction - Cost Estimating Accuracy	\$210,254.09	100%	↑	\$210,254.09
T&D-37	Completion of Program Planned Units Per Workplan	\$420,508.19	100%	↑	\$420,508.19
T&D-38	Program Unit Cost Variance	\$210,254.09	100%	↑	\$210,254.09
T&D-39	Project Completion Consistent with Project Design	\$105,127.05	100%	↑	\$105,127.05
T&D-40	Double Woods	\$52,563.52	0%	↓	\$0.00

**LEGEND:**

**Claimed Performance Level:** ↑ = Met or exceeded Target; ↓ = Did not meet Target

**Summary**

Scope Function	Potential Incentive	Claimed Incentive Compensation	% of Incentive Compensation Claimed
Business Services	\$3,153,811.40	\$2,890,993.78	91.70%
Customer Services	\$4,205,081.87	\$2,207,668.00	52.50%
Electric T&D	\$8,410,163.73	\$7,516,583.84	89.38%
Information Technology	\$3,153,811.40	\$2,207,667.98	70.00%
Power Supply & Clean Energy	\$2,102,540.93	\$1,997,413.89	95.00%
<b>Grand Total</b>	<b>\$21,025,409.33</b>	<b>\$16,820,327.49</b>	<b>80.00%</b>

# Business Services

## BS-01 - Enterprise Risk Management (ERM) Report

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$157,690.57		

BS-01	Enterprise Risk Management (ERM) Report			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-1.2	Deliver a comprehensive Annual Enterprise Risk Management Report by June 30, 2022.	6/30/2022	Achieved	Approved
BS-1.3	Deliverable 2: Description of a process that will be used to assess the effectiveness of mitigation activities on a qualitative basis	6/30/2022	Achieved	Approved
BS-1.4	Delivery of a comprehensive Annual Enterprise Risk Management presentation to LIPA senior management to be held within 30 days of delivery of the June 30 report.	7/29/2022	Achieved	Approved
BS-1.5	Deliverable 1: Deliver an update to the June 30 Risk Management Report no later than December 15, 2022.	12/15/2022	Achieved	Approved
BS-1.6	If both teams mutually agree, within 10 business days of delivery of December 15 update to the report, a presentation to LIPA senior management is necessary given the nature of the updates provided in the report, then such presentation will be held within 30 days of that mutual agreement.	1/25/2023	Achieved	Approved

### Summary

- On June 30, 2022 – PSEG Long Island delivered the PSEG Long Island Enterprise Risk Management 2022 Annual Assessment (“the Annual Report”) and the 2022 Addendum. The Addendum is the compilation of all risks identified at PSEG Long Island in the risk identification and assessment process.
- The submission of the Annual Report satisfied the first two deliverables of BS-1 (ERM-1) Enterprise Risk Management (ERM) Report Operating Services Agreement (OSA) metric, which required the delivery of a comprehensive Annual Enterprise Risk Management Report. The Annual Report includes the Tier 1 and Tier 2 top risks identified at PSEG Long Island; detailed discussion of newly identified risks, year-over year changes, key insights and mitigation actions for the top risks; updated benchmarking of the top risks to Edison Electric Institute/American Gas Association top risk survey results; a continuing plan to develop deep dive risk reviews; and our commentary on the process and ERM program progress.
- In addition, in order to continue to promote the maturity of the ERM program at PSEG Long Island, the Annual Report this year included improvements from the 2021 Annual Report, including:
  - Comparison of the risk assessment scores for 2022 and 2021 within each risk dashboard
  - Reference to applicable OSA metrics associated with the top risks
  - Commentary on the controllability of the top risks, along with commentary on any challenges to mitigations and the actions needed to address these challenges
  - Actions from the Mitigation Tracker (Tracker) for certain Tier 1 & Tier 2 risks in the risk dashboards
    - Note: This information is compiled in the Tracker, as a standalone tool. For efficiency purposes, this information is included in the Annual Report dashboards. The Tracker included mitigation actions that are long term in nature and/or associated with significant projects with specified completion dates.
  - Identification and description of emerging risks for PSEG Long Island

- Description of a new process, mutually agreed upon with the LIPA ERM Team, to begin to qualitatively assess the effectiveness of mitigation activities. ***This is the second deliverable of BS-1 (ERM-1) Enterprise Risk Management (ERM) Report.***
- Description of the proof-of-value pilot program to develop key risk indicators for select Tier 1 & 2 risks. As agreed to with the LIPA ERM Team, the risks selected for the pilot program in 2022 are:
  - Safety
  - Major Storm – Customer Expectations
  - Cyber Attack
  - Failure of Critical Business System Applications, and
  - Loss of Multiple Interconnections
- On July 15, 2022 – PSEG Long Island delivered of a comprehensive Annual Enterprise Risk Management presentation to LIPA senior management within 30 days of delivery of the June 30 report.
- On December 15, 2022 – PSEG Long Island delivered a final update to the June 30<sup>th</sup> Risk Management Report.
- There was no request for an updated presentation to be made to LIPA senior management, as the LIPA management team did not believe an updated presentation was necessary.

## BS-02 - ERM Key Risk Indicators (KRIs)

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$157,690.57		

BS-02	ERM Key Risk Indicators (KRIs)			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-1.2	By December 15, 2022, PSEG Long Island will develop a proof-of-value pilot to define and develop KRIs, including thresholds, and a process for tracking KRIs for five select Tier 1 and Tier 2 risks.	12/15/2022	<b>Achieved</b>	<b>Approved</b>

### Summary

- On December 15, 2022 – PSEG Long Island delivered along with final update to the June 30<sup>th</sup> Risk Management Report, developed and delivered a proof-of-value pilot to define and develop KRIs, including thresholds, and a process for tracking KRIs for five select Tier 1 and Tier 2 risks.

## BS-03 - Employee Engagement - Participation Rate

<b>Metric Type</b>	Quantitative	<b>Metric Performance</b>	↑ Achieved
<b>Incentive Compensation Claim</b>	\$105,127.05		

### J F M A M J J A S O N D BS-3 Employee Engagement - Participation Rate OSA Incentive: \$105,127



#### Metric Definition

Deliver the PSEG Long Island employee engagement survey results for 2022 that evidence a participation rate in the employee engagement survey that (i) has an increase above the 2021 rate by at least 15% for Union employees and (ii) maintains a participation rate of 78% or better for MAST employees, provided that if PSEG Long Island's 2021 survey results achieve a participation rate for Union employees of 75% or higher, the target for Union employees in 2022 will be maintaining or improving upon the 2021 participation rate.

#### Calculation

The participation rate is defined as the number of survey responses by PSEG Long Island employees divided by the actual headcount for PSEG Long Island employees as of the date the data collection ends. PSEG Long Island actual headcount includes all full time and part time employees. The same definition will apply to both the 2022 survey and the 2021 survey that defines the baseline. The "participation rate component" of this metric is calculated as the 2022 score (in percent) minus the 2021 score (in percent) divided by the 2021 score (in percent).

#### Target:

- Achieve a participant rate increase above the 2021 rate by  $\geq 15\%$  for Union employees
- Maintains a participation rate of 78% or better for MAST employees

#### Exclusion:

Affiliate services employees, contractors, temporary employees, and consultants are excluded from this metric.

#### YTD



#### Participation - # of Employees

2021	Mast	Invitees	696
		Respondents	582
	Union	Invitees	1,394
		Respondents	608
2022	Mast	Invitees	845
		Respondents	765
	Union	Invitees	1,372
		Respondents	918

<b>YTD Result</b>	<b>OSA YE Target</b>	<b>OSA YE Forecast</b>
100.0%	100.0%	↑



		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
		Percent of Respondents											
		OSA Target											
		Goals Met											
2021	Mast	83.6%											
		N/A											
	Union	43.6%											
		N/A											
2022	Mast	90.5%											
		78.0%											
	Union	66.9%											
		50.2%											

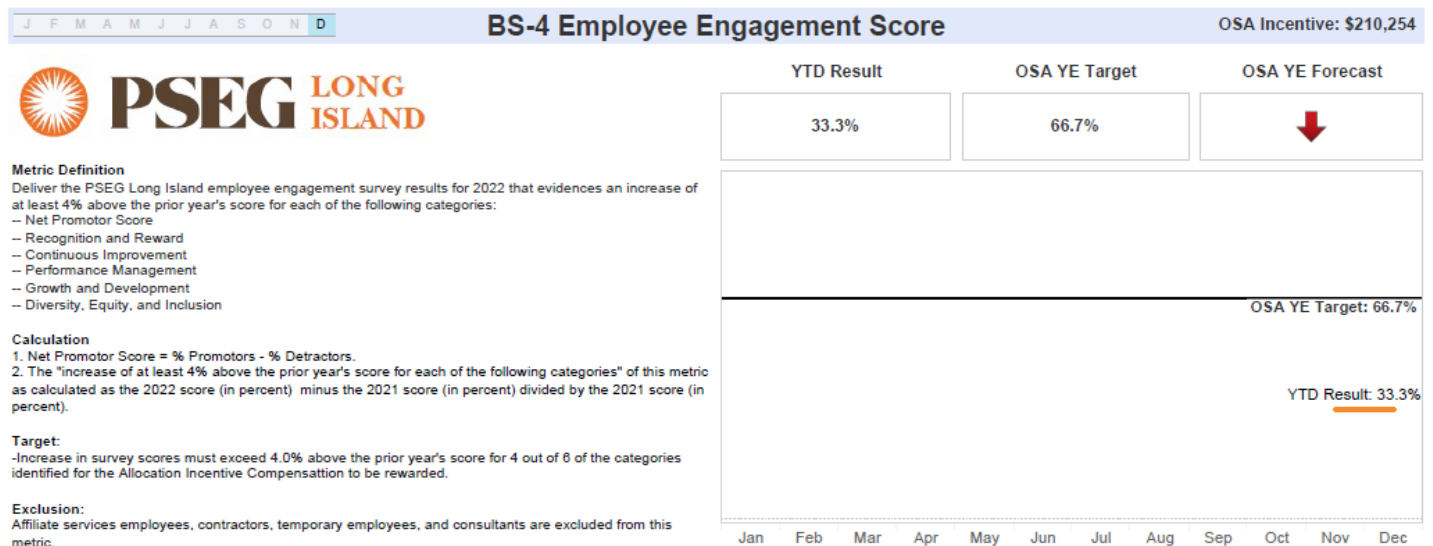
### Summary

- PSEG Long achieved objective of improving the rate of employee participation in the annual Employee Engagement survey so results are representative of a larger and broader spectrum of employees.
- PSEG Long Island achieved a participant rate increases above the 2021 rates by  $\geq 15\%$  for Union employees and maintained a participation rate of 78% or better for MAST employees.
- MAST Participation
  - In 2022, 90.5% (765 out of 845) of the MAST population participated in the survey vs. target of 78.0%
- Union Participation
  - In 2022, 66.9% (918 out of 1,372) of the Union population participated in the survey vs. a target of 50.2% which was a 15% improvement over 2021 result of 43.6%



## BS-04 - Employee Engagement Score

<b>Metric Type</b>	Quantitative	<b>Metric Performance</b>	↓ <b>Did Not Achieve</b>
<b>Incentive Compensation Claim</b>	\$0.00		



### Summary

- PSEG Long Island increased greater than 4.0% in two out of the six defined categories
- PSEG Long Island results did improve in all six of the categories
- The largest improvements that met the metric criteria of greater than 4.0% were in Net Promotor Score and Diversity & Inclusion

## BS-05 - Full Time Vacancy Rate

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$157,690.57 (75%)	Comments	4 out of 5 areas achieved <i>Dispute between parties</i>
Additional Comments	<p>Along with yearend reporting on January 27, 2023, PSEG Long Island submitted a topside adjustment for 2 Director areas in the Customer Services function. The topside adjustments were for business areas that were in a transformation phase in 2022. The request for Meter Services was to align meter reading attrition from planned to actual. PSEG LI planned to attrite staff post AMI implementation and exceeded targets, which had a negative impact on the metric performance but was a positive business outcome. The second request was for the Customer Offices function in Revenue Operations. In 2022, it was decided that PSEG LI would be decreasing our Customer Office footprint coming out of the pandemic. On May 19, 2022, LIPA recommended that PSEG LI no longer fill any vacancies within the Customer Offices organization. PSEG complied other than 2 internal hires that were already offered roles on 4/26 and then later started in June. For both of these adjustments, PSEG LI requested that the plan be altered to the actuals so there is no negative metrics impacts for appropriate business decisions in line with LIPA recommendations that were in conflict with the metric objective.</p>		

### J F M A M J J A S O N D BS-5 Full Time Vacancy Rate OSA Incentive: \$210,254



#### Metric Definition

Achieve an annual vacancy rate no greater than 5.0% for each of the four operating areas (Overall PSEG LI, Electric T&D, Customer Services (Including Energy Efficiency), and Business Services (Including Power Systems Management)). Achieve a vacancy rate no greater than 7.0% for Information Technology

#### Calculation

Full Time Vacancy Rate equals the actual headcount divided by the approved headcount in each month. The monthly Vacancy Rate equals 1 minus the Staffing rate. YTD performance results will be a simple average of the monthly operating results.

#### Target:

- 100% of allocated incentive compensation payable for achievement of vacancy rate targets for 5 out of 5 categories.
- 75% of allocated incentive compensation payable for achievement of vacancy rate targets for 4 out of 5 categories.

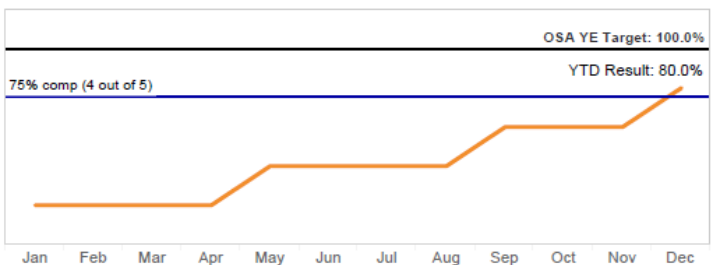
\*Affiliate services employees, contractors, and consultants are excluded from this calculation.

#### YTD

2022	80.0%
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#### YTD Result OSA YE Target OSA YE Forecast

80.0%	100.0%	↑
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YTD Vacancy Rate	Vacancy Rate	Target	Goal Met Thus Far
T&D Electric	0.2%	5.0%	✓
Customer Services	4.7%	5.0%	✓
Business Support Services	3.4%	5.0%	✓
IT	20.8%	7.0%	✗
PSEG LI	2.8%	5.0%	✓

Monthly	Actual Headcount	Final Approved Headcount	Staffing Rate	Vacancy Rate	Target Staffing Level Variance	Monthly	Actual Headcount	Final Approved Headcount	Staffing Rate	Vacancy Rate	Target Staffing Level Variance		
T&D Electric	Asset Management NJ	20	19	105.3%	-5.3%	-2	Customer Services	Customer Experience & Utility ..	78	82	95.1%	4.9%	0
	Engineering Resources	75	71	105.6%	-5.6%	-8		Customer Contact & Billing	204	213	95.8%	4.2%	-2
	Operations East Division	476	441	107.9%	-7.9%	-57		Meter Services	220	217	101.4%	-1.4%	-14
	Operations West Division	377	372	101.3%	-1.3%	-24		Revenue Operations	117	123	95.1%	4.9%	0
						Energy Efficiency and Renewa..		22	23	95.7%	4.3%	0	
	Emergency Planning	18	18	100.0%	0.0%	-1	Customer Services	641	658	97.4%	2.6%	-16	
	Transmission Operations	86	84	102.4%	-2.4%	-6	Business Support Services	Communications	9	8	112.5%	-12.5%	-1
	Security	15	15	100.0%	0.0%	-1		Finance & Accounting	55	55	100.0%	0.0%	-3
	Projects & Construction	80	81	98.8%	1.2%	-3		Human Resources	24	24	100.0%	0.0%	-1
	Services	117	123	95.1%	4.9%	0		Internal Audit	5	5	100.0%	0.0%	0
	Training, Support, & Technology	148	145	102.1%	-2.1%	-10		Legal	26	27	96.3%	3.7%	0
	Facilities	9	9	100.0%	0.0%	0		Power Markets	83	76	109.2%	-9.2%	-11
	Project Management	37	42	88.1%	11.9%	3		President & Other	10	7	142.9%	-42.9%	-3
						Procurement		25	26	96.2%	3.8%	0	
						Public Affairs		15	12	125.0%	-25.0%	-4	
						Strategic Planning & Analytics	30	38	78.9%	21.1%	6		
						Business Support Services	282	278	101.4%	-1.4%	-18		
IT						Information Technology	102	132	77.3%	22.7%	23		
PSEG LI						PSEG Long Island	2,483	2,488	99.8%	0.2%	-119		

PSEG Long Island put an exception request for two topside adjustments to the planned headcount areas of Revenue Operations and Meter Services in the Customer Services organization to align with business decisions that were appropriate and consistent with LIPA recommendations but had a negative impact to reported results due to constraints of the metric when dealing with transformational areas seeking headcount reduction. The exception was filed on

January 27, 2023. PSEG Long Island and LIPA met on February 27, 2023 to discuss the exception. PSEG Long Island provided follow up information regarding the Customer Offices on March 7, 2023 and additional follow up information requested for Meter Services on March 21, 2023. PSEG LI and LIPA met on March 23, 2023. Following that meeting, LIPA recognized and agreed that there should be an adjustment to the vacancy metric calculation to account for the meter reading attrition and customer office vacancies. However, we do not agree with LIPA's proposed calculation methodology as it discounts effective management of approximately 13.5% of personnel within the Customer Operations organization. PSEG Long Island's proposed topside adjustment is to zero base planning for areas in flux where headcount management was executed appropriately. LIPA's recommended proposal was to remove the 2 areas completely from the numerator and denominator hence not identifying/measuring appropriate management of resources. While both parties agree in principle that an exception is warranted the application and calculation recommended by both parties differ.

Note below adjustments are monthly adjustments to the plan and are not cumulative.

#### **Revenue Operations:**

- On, Thursday May 19th LIPA recommended via e-mail that PSEG LI agreed hold off on hiring additional Customer Office staff as there was a decision that Customer Offices will not be reopening – PSEG LI agreed and is seeking a topside adjustment to align actual headcount to planned headcount in this area which has the following adjustments by month (below numbers are reductions to approved plan values)
  - -8 – June 2022
  - -6 – July 2022
  - -6 – August 2022
  - -6 – September 2022
  - -8 – October 2022
  - -8 – November 2022
  - -9 – December 2022

#### **Meter Services:**

- PSEG LI is requested a topside adjustment to align the actual attrition vs. planned attrition for Meter Reading staff in meter services. PSEG LI exceeded attrition targets, which had a negative impact to the metric but was a positive business impact. PSEG LI is seeking to have the net impact of attrition adjust the planned headcount as attrition occurred quicker than plan and was a positive outcome with negative impacts to the vacancy rate metric. The following adjustments by month would be made to the Meter Services Plan Headcount Plan (below numbers are reductions to approved plan values)
  - -2 – January 2022
  - -10 – February 2022
  - -5 – March 2022
  - -2 – April 2022
  - 2 worse than plan (increase) – May 2022
  - -11 – June 2022
  - -13 – July 2022
  - -25 – August 2022
  - -24 – September 2022
  - -13 – October 2022
  - -26 – November 2022
  - -27 – December 2022

## BS-06 - Contract Administration Manual (CAM) Completion

Metric Type	Hybrid	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$52,563.52		

BS-06	Contract Administration Manual (CAM) Completion			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-6.1	Appointment of dedicated staff member no later than January 31, 2022. Appointment is communicated to LIPA's CAM lead within that same time period.	1/31/2022	Achieved	Approved
BS-6.2	Initial drafts for each of the stated seven CAM documents by March 31, 2022.	3/31/2022	Achieved	Approved
BS-6.3	PSEG LI is to achieve an annual on-time performance of $\geq 90.0\%$ for timely completion of individual iterative updates of all applicable individual CAMs where updating is being performed during the Contract Year, as mutually measured by LIPA and PSEG LI CAM leads.	12/30/2022	Achieved	Approved

### Summary

- PSEG Long Island notified LIPA of a dedicated staff member on January 14, 2022.
- Initial drafts for each CAM were submitted on March 31, 2022 to LIPA.
- PSEG Long Island achieved 97.2% annual on-time performance of timely completion of individual iterative updates of all applicable individual CAMs. The performance metric required PSEG Long Island to complete  $\geq 90\%$ .

## BS-07 - Affiliate Cost Benefit Justification

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$262,817.62	<b>Comments</b>	Dispute of performance between parties

BS-07	Affiliate Cost Benefit Justification			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-7.1	By March 31, 2022, PSEG and LIPA will reach agreement on specific scope of affiliate services within HR and IT that will be analyzed with timeline to split scope / analysis over of 2022 Q2 and 2022 Q3	3/31/2022	Achieved	Approved
BS-7.2	By June 30, 2022, PSEG will complete analysis of Q2 scope as agreed upon in Item #1	6/30/2022	Achieved	Approved
BS-7.3	By September 30, 2022, PSEG will complete analysis of Q3 scope as agreed upon in Item #BS-7.1	9/30/2022	Achieved	Reviewing
BS-7.4	By November 30th, 2022, PSEG will complete development remediation plans for any services deemed deficient in cost or quality. Execution of remediation plans may go beyond this date	11/30/2022	Achieved	Reviewing

**Note:** Due dates in Smartsheet for BS-7.3 and BS-7.4 were changed by LIPA without filing any exception. The dates above reflect the dates in the original metric.

- BS-7.1 - PSEG and LIPA reached agreement on specific scope of affiliate services within HR and IT that will be analyzed with timeline to split scope / analysis over of 2022 Q2 and 2022 Q3
- BS-7.2 - On June 30, 2022, PSEG Long Island provided with LIPA the analysis and results of the Human Resources scope
  - On October 13, 2022, LIPA sent PSEG Long Island summarizing review of Human Resources cost justification study and highlighted that it met the spirit of what was requested in the metric and that they disagreed with several of PSEG LI's assumption and that a study would be completed in 2023 to further analysis identified incremental costs for dissynergy of Human Resources function from being provided as an affiliate service.
- BS-7.3 PSEG delivered the Q3 Scope (Information Technology) on September 28, 2022
- The deliverable included the agreed upon content form BS-7.1 and was consistent with the deliverable produced for the Q2 Scope on June 30th, 2022.
- PSEG/PSEG LI received no feedback from LIPA until December 6, 2022 for materials provided on September 28, 2022. Dialog then continued for several weeks and PSEG/PSEG LI answered all questions asked by LIPA for which data existed and/or where we legally could. LIPA has requested
- BS-7.4 – LIPA never notified PSEG/PSEG LI of any services that they deemed to be deficient in cost or quality in 2022. While LIPA is now challenging allocated expenses for corporate level expenses (per letter from Mujib Lodhi on March 7, 2023), that request is not in scope BS-07.
- PSEG Long Island has subsequently received a letter in March of 2023 and e-mails from LIPA staff regarding Affiliate Cost Benefit Justification and LIPA directed remediation plans for services that have yet to even be analyzed for cost and/or quality. PSEG Long Island believes each of the services identified and analyzed will cause cost dissynergies and incremental operating costs to the ServCo organization.
- PSEG Long Island believes affiliate services currently provided will be different after completion of System Separation plan as noted in the plan when it states: "The System Separation Program envisions an end-state where none of the systems remain intermingled by the end of two years (Q4 2024), recognizing that the total separation of some of the administrative and support functions may extend into 2025."

## BS-08 - Capital Project Impact Analysis

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$105,127.05		

BS-08 Capital Project Impact Analysis				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-8.1	Provide LIPA with draft framework for approval, which shall not be unreasonably withheld, by June 30, 2022.	6/30/2022	Achieved	Approved
BS-8.2	Draft new internal procedures by August 30, 2022	8/30/2022	Achieved	Approved
BS-8.3	Provide LIPA analysis for new projects seeking approval in the 2023 planning cycle by September 15. The analysis shall be subject to LIPA review and approval, which shall not be unreasonably withheld. If this results in a listing of less than 5 projects, additional projects will be selected by the Joint PSEGLI and LIPA Capital working group to ensure the analysis is performed for a minimum of 5 projects.	9/15/2022	Achieved	Approved

### Summary

- PSEG Long Island provided LIPA with draft framework for Capital Project Impact Analysis which was approved
- PSEG Long Island drafted new internal procedures for Capital Project Impact Analysis
- PSEG Long Island provided LIPA with an analysis for new projects seeking approval in the 2023 planning cycle by September 15.

## BS-09 - Substation Property Tax Report

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$157,690.57		

BS-09	Substation Property Tax Report			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-9.1	PSEG Long Island shall develop a report using the property tax module and plant accounting data to monitor the reasonableness of property tax PILOTs, and provision of information to LIPA in connection with LIPA's contesting of tax and PILOT-related assessments.	12/30/2022	<b>Achieved</b>	<b>Approved</b>

### Summary

- PSEG Long Island develop a report using the property tax module and plant accounting data to monitor the reasonableness of property tax PILOTs, and provision of information to LIPA in connection with LIPA's contesting of tax and PILOT-related assessments and delivered the initial report on November 3, 2022 and closed out the final deliverable on December 23, 2022.



## BS-10 - Substation Property Tax Module Plan

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$52,563.52		

BS-10 Substation Property Tax Module Plan				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-10.1	Provide a Project Implementation Plan ("PIP") to map remaining approximate 45 substations not included in 2022 Tax and PILOT report on substation property by December 31, 2022, which PIP shall be approved by LIPA, and which shall not be unreasonably withheld. Report details as listed in the table agreed to in Metric.	12/30/2022	<b>Achieved</b>	<b>Approved</b>

### Summary

- PSEG Long Island provided a Project Implementation Plan ("PIP") to map remaining approximate 45 substations not included in 2022 Tax and PILOT report on substation property on November 3, 2022 and closed out the final deliverable on December 23, 2022.

## BS-11 - Long Island Choice Reform

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$157,690.57	<b>Comments</b>	Dispute of performance between parties

BS-11	Long Island Choice Reform			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-11.1	Termination of the Bill Credit Adjustment and associated transactions with the ESCOs	12/30/2022	Achieved	Approved
BS-11.2	Introduction of a non-bypassable Local Supply Charge to all customers	12/30/2022	Achieved	Approved
BS-11.3	Introduction of a bypassable Market Supply Charge to bundled service customers only	12/30/2022	Achieved	Approved
BS-11.4	Establishment a utility Single Bill Option with Purchase of Receivables	12/30/2022	Achieved	Approved
BS-11.5	Establishment of a CCA opt-out business process consistent with the PSC CCA framework, including (a) review and recommendation by DPS of PSEG LI's form CCA data security agreement, (b) publication on PSEG LI's website of a CCA onboarding process document specifying a process that meets the Commission's timelines for provision of aggregated data (20 days), customer contact data (5 days), customer-specific data (2 days), and a utility-generated switch letter.	1/31/2023	On Going Collaboration with DPS/LIPA	No Status LIPA has said they will reject
BS-11.6	Implementation of up-to-date Uniform Business Practices specific to LIPA that are consistent with the UBPs approved by the NY PSC for the investor-owned utilities.	12/30/2022	Achieved	Approved

### Summary

- PSEG Long Island terminated the Bill Credit Adjustment and associated transactions with the ESCOs
- PSEG Long Island introduced a non-bypassable Local Supply Charge to all customers
- PSEG Long Island introduced a bypassable Market Supply Charge to bundled service customers only
- PSEG Long Island established a utility Single Bill Option with Purchase of Receivables
- PSEG Long Island implemented up-to-date Uniform Business Practices specific to LIPA that are consistent with the UBPs approved by the NY PSC for the investor-owned utilities.
- In December 2022, PSEG LI sent to DPS the draft CCA DSA for DPS review and recommendation pursuant to the metric along with the CCA Onboarding document. The DSA included two exhibits but the Aggregator Risk Assessment was not included at that time. Following PSEG LI's submission of the CCA DSA and the CCA Onboarding document, the PSC issued on January 19, 2023, its Order Modifying Community Choice Aggregation Programs and Establishing Further Process ("CCA Modification Order"), which adopted numerous CCA program changes, including provisions regarding customer data.
- On January 27, 2023, DPS sent a letter formally notifying PSEG LI that additional work would be needed for DPS to complete its review before recommendations can be provided due, in part, to changes implemented by the Modification Order. The letter also stated that Staff is in the process of setting up meetings with PSEG LI to provide detailed feedback on PSEG LI's draft documents and seeks on-going collaboration to achieve further consistency with the Modification Order and the PSC's Data Access Framework Order.
- Accordingly, PSEG LI requested an extension of the metric deadline to facilitate such collaborative discussions with DPS Staff. Alternatively, PSEG LI requested that the DSA metric provision be severed from the 2022 metric and added to the 2023 metrics in order to provide sufficient time for collaborative discussions with DPS Staff, as well as the LIPA and PSEG LI cyber security teams, to develop a DSA consistent with the Modification Order and the Data Access Framework Order pursuant to Staff's guidance which was released formally ongoing throughout the metric process with no participation from PSEG Long Island.

- On March 9, 2023, PSEG LI and DPS staff met to discuss the DSA and on-boarding process in light of the CCA Modification Order. DPS provided sample data security agreements, including the Aggregator risk assessments. Following the call, DPS also provided a sample Exhibit B – Third-Party Representative Agreement.
- On March 23, 2023, PSEG LI sent to LIPA a revised DSA based on the DPS model CCA DSA, including Exhibit A - Self-Attestation of Information Security Controls and Exhibit B - Third-Party Representative Agreement.
- The PSEG LI IT team confirmed concerns regarding Exhibit A's requirement regarding processing confidential data only in the United States and Canada. Such a requirement would not be consistent with current practice and require process changes. PSEG LI counsel notified LIPA counsel that IT confirmed this was an issue, as well as contacting DPS regarding how other utilities were addressing this issue.

## BS-12 - Advanced Metering Infrastructure (AMI) Opt Out Fees

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$105,127.05	<b>Comments</b>	Dispute of performance between parties

BS-12	Advanced Metering Infrastructure (AMI) Opt Out Fees			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-12.1	All AMI fees are accurately implemented by June 30, 2022. Starting with July 2022, all fees are built into the billing system and appear on customers' bills based on meeting the defined criteria.	7/29/2022	Achieved	Declined

### Summary

- LIPA's position is that the AMI Opt-Out Fee was not implemented accurately by the target date of 7/31/2022. As a result, customers were billed daily charges for days prior to effective date authorized by the Board, 8/1/2022. This became a public relations issue when inquiry was received from Newsday reporter.
- LIPA's position is further that the AMI Opt-Out Fee is a daily charge that became effective on August 1st. Tariff leaf 100 says:
 

*3. Applying Rate Changes to Customer's Bills*

*If a rate change becomes effective during a billing period (and unless the Authority determines otherwise), the Authority will average the old and new rates, weighted by the number of days in the billing period before and after the effective date of the rate change.*
- LIPA believes the charge was not implemented accurately because the daily charge was imposed on days prior to August 1st which is not consistent with the Tariff provisions approved by the Board.
- PSEG Long Island does not agree with LIPA's rejection of this metric. The AMI Opt Out Fee was accurately implemented by the required due date (August 1 as established by LIPA and approved by their BOT) in accordance with our interpretation of the tariff and associated fee. While LIPA later took issue with the tariff interpretation and application of the fee, PSEG LI contends that its interpretation was appropriate. The fee is intended to reimburse the utility for the cost of the manual meter read and reflect such costs for meters that required a manual read on or after the August 1 date within the subject tariff.
- That notwithstanding, at the request of LIPA, PSEG LI subsequently applied a credit to all customers receiving the AMI Opt-Out fee in alignment with LIPA interpretation of the tariff. LIPA directed the decision for application of this credit and PSEG Long Island applied the credits even though PSEG Long Island at the time and currently contends that our interpretation of the tariff was correct
- PSEG Long Island believes the above tariff statement regarding "Applying Rate Changes to Customer's Bills" is associated with billing KWH usage based on a rate change. In the case of the "Opt Out" fee, the fee was implemented on August 1<sup>st</sup> reflecting different times within a customer bill period. The Opt Out fee is calculated based on a meter reader cost for reading meters and any meter requiring a manual read post-August 1 would therefore incur the cost to send a meter reader to the field to collect the read data (i.e., \$11.40). The meter reader cost is accounted for an entire bill cycle and requires that we maintain a resource on staff that is available to read a meter or to retry the read in case of an access issue or delays due to storm. It is therefore not appropriate to bill customers for the read on a prorated basis as the cost of the read would not be fully collected nor would the cost of the meter reader resource be fully covered and therefore require that the remaining uncollected cost be spread to the entire customer base, including those customers that had NOT chosen to Opt Out.
- DPS Chief Executive Officer on July 18, 2022 sent a letter to LIPA BOT Vice Chairman, Mark Fischl stating: "Opt-out fees should generally be limited to cost recovery. Staff also recommends LIPA set a monthly opt-out fee of \$11.40 (or a daily opt-out charge of \$0.38) while implementing monthly meter reads. Staff believes this fee is

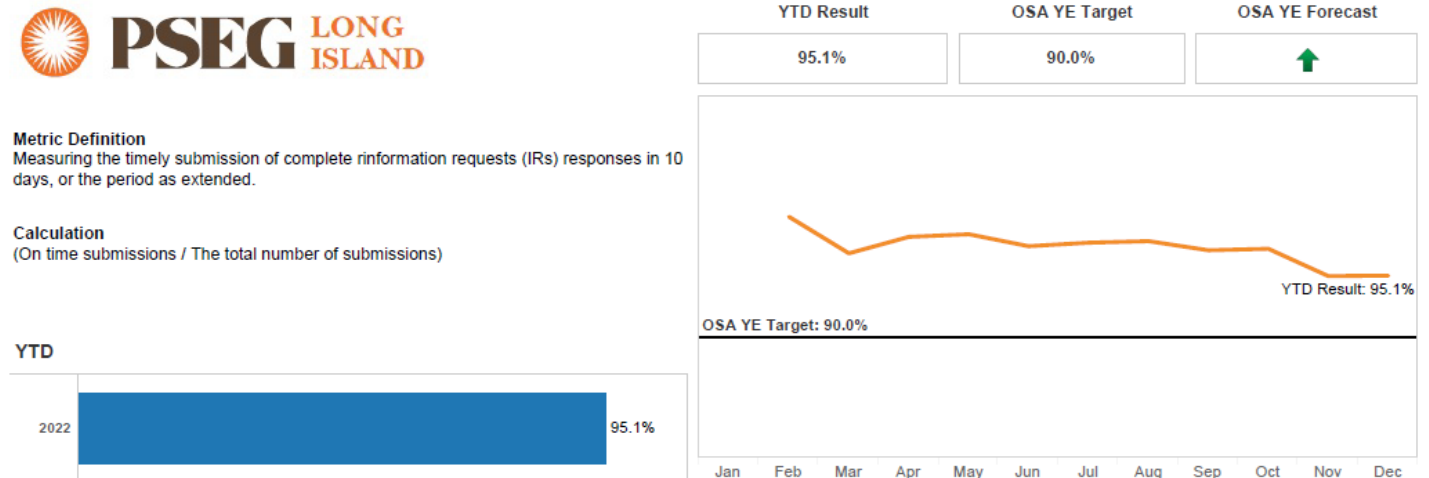
appropriate because it is closely aligned with the average opt-out fee charged by other IOUs of \$11.23. Further, the Commission has consistently authorized reasonable cost-based fees to cover the costs to manually read meters. Also, the Commission has stated that opt-out fees should properly balance opt-out customers' concerns related to AMI with "other customers' interests in achieving optimally efficient utility operations. Adoption of Staff's proposal, as described above, will provide an optimal balance of AMI Opt-Out customers' concerns and the need to recover the costs of manual meter reads for these customers. Accordingly, the Department recommends that a monthly opt-out fee of \$11.40, or a daily opt-out charge of \$0.38 should be adopted."

- Based on above, PSEG Long Island further contends that our applications was consistent with the recommendation of the NYS Department of Public Service and that the Opt Out fee implemented would be for cost recovery of services provided. If implemented aligned to LIPA's position above and in alignment with the inaccurate interpretation and further inquiry from a Newsday article we would not have appropriately recovered costs of the meter reading after the go-live date hence, sharing costs that should be covered by those who have chosen to Opt Out with the remaining customer base. There is only once month where this identified issue could have occurred. We applied credits aligned with LIPA's recommendation but still disagree that the fee was implemented inaccurately as true full cost recovery would not be achieved for services rendered based on LIPA's interpretation.

## BS-13 - Information Request (IR) Responses

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$157,690.57		

### BS-13 Information Request (IR) Responses OSA Incentive: \$157,691



#### YTD Timeliness By IR Responses

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
On time	12	17	32	59	72	84	91	97	106	112	116	117
Late	0	0	1	1	2	2	2	3	5	5	6	6
Total Completed	12	17	33	60	74	86	93	100	111	117	122	123
In Progress	0	0	0	0	0	0	0	0	0	0	0	2
% On Time	100.0%	100.0%	97.0%	98.3%	97.3%	97.7%	97.8%	97.0%	95.5%	95.7%	95.1%	95.1%

#### Information Request Responses

Date Received	Request Number	Responsible Organization	Initial LIPA Due Date	Extension	Due Date for Calculation	Date Submitted	
12/12/2022	LIPA IR-2022-12-12-0002A	FINANCE	12/22/2022	N	12/22/2022	12/19/2022	✓
12/19/2022	LIPA IR-2022-12-19-0001A	T&D	12/29/2022	Y	1/6/2023	1/5/2023	▲
12/20/2022	LIPA IR-2022-12-20-0001A	EXTERNAL AFFAIRS	12/30/2022	Y	1/6/2023	1/5/2023	▲

#### Summary

- PSEG Long Island received 125 Information Requests from LIPA in 2022
- PSEG Long Island requested extensions for 19 of the 125 Information Requests which were granted
- Out of the 125 information requests, PSEG LI completed responses within the 10 days for 100 of the requests and completed responses within the extended period for 19 of the responses.
- PSEG Long Island was delinquent in provided responses to 6 information requests.
- PSEG Long Island achieved the YE performance target of 90% of Information Requests within the 10 days or the extended period
- For YE reporting there were 2 open items so reported results are out of 123 requests of which 117 were made timely which is a 95.1% on time performance
- With the addition of the 2 pending items that were open at year end but answered timely PSEG LI made 119 timely responses out of 125 requests which equates to 95.2%.

## BS-14 - Legal Staffing

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$157,690.57		

BS-14	Legal Staffing			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-14.1	PSEG LI to fully participate in a legal staffing study to be completed in Q1 2022 to be performed at LIPA's direction, to determine any gaps and what is needed to achieve adequate staffing for a fully functional Legal department at PSEG Long Island. The staffing study shall include findings and recommendations, including reasonable timelines for implementation.	5/12/2022	Achieved	Approved
BS-14.2	Consultant to provide LIPA with its draft staffing study by 5/12/2022. The study will include its findings and recommendations with a reasonable timeline for implementation.	5/12/2022	Achieved	Approved
BS-14.3	LIPA to review draft study and provide its edits/comments to consultant by 5/19/22.	5/19/2022	Achieved	Approved
BS-14.4	Consultant will provide final report to LIPA and PSEG LI by May 26, 2022.	5/26/2022	Achieved	Approved
BS-14.5	PSEG LI to create a plan to implement the recommendations of the study by June 30, 2022, taking into account the consultants' suggested reasonable timelines for implementation, and submit it to LIPA for its approval.	8/12/2022	Achieved	Approved
BS-14.6	LIPA to approve PSEG LI's plan of implementation.	8/31/2022	Achieved	Approved
BS-14.7	PSEG LI to implement the milestones and deliverables of the approved plan by December 31, 2022, subject to any budgetary limitations in 2022, and to budget implementation in PSEG LI's 2023 budget submission, as needed.	12/30/2022	Achieved	Approved

### Summary

- PSEG LI participated in a legal staffing study that was performed at LIPA's direction, to determine any gaps and what is needed to achieve adequate staffing for a fully functional Legal department at PSEG Long Island. The staffing study shall include findings and recommendations, including reasonable timelines for implementation.
- PSEG LI created a plan to implement the recommendations of the study, taking into account the consultants' suggested reasonable timelines for implementation, and submit it to LIPA for its approval.
- PSEG LI implemented the milestones and deliverables of the approved plan by December 31, 2022, subject to any budgetary limitations in 2022, and to budget implementation in PSEG LI's 2023 budget submission, as needed.



## BS-15 - Contractor Performance Evaluation System

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$262,817.62		

BS-15	Contractor Performance Evaluation System			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-15.1	Develop a contractor performance evaluation system by March 31, 2022, for LIPA approval, which shall not be unreasonably withheld. The evaluation system shall include plans to award and / or re-allocate work that results in the best-performing contractors being retained and to improve or replace non-performing contractors.	3/31/2022	Achieved	Approved
BS-15.2	Using LIPA-approved evaluation criteria, PSEG Long Island will evaluate all applicable firms and present first bi-annual report, including remediation plan, by September 30, 2022.	9/30/2022	Achieved	Approved
BS-15.3	LIPA will provide comments on the bi-annual report within 30 days (October 30, 2022).	10/28/2022	Achieved	Approved
BS-15.4	PSEG Long Island will issue a revised report to LIPA by December 31, 2022.	12/30/2022	Achieved	Approved

### Summary

- PSEG LI developed a contractor performance evaluation system by March 31, 2022. The evaluation system included plans to award and / or re-allocate work that results in the best-performing contractors being retained and to improve or replace non-performing contractors.
- PSEG Long Island evaluated all applicable firms and presented first bi-annual report, including remediation plans, to LIPA on September 28, 2022.
- Based on LIPA's review of the report and follow-up meeting with PSEG Long Island to discuss report, we collectively agreed that a December update was not a good use of time because little was likely to change in 3 months.

## BS-16 - Government & Legislative Affairs

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$105,127.05		

BS-16	Government & Legislative Affairs			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-16.1	Develop mutually agreed upon legislative watch list with LIPA prior to start of 2022 legislative session.	1/14/2022	Achieved	Approved
BS-16.10	Provide LIPA with written notice within three weeks of introduction of Bills in the NYS Legislature that could have a direct impact on LIPA/PSEG Long Island. Quarterly review to include sign off on percentage of bill notifications that were made timely.	1/19/2022	Achieved	Approved
BS-16.11	Provide analysis on "mutual legislative priorities" in an agreed upon format, within 30 days of notification to LIPA of bill introduction. Analysis shall include but is not limited to: a. a summary of proposed legislation b. a summary of potential impacts on LIPA and/or PSEG Long Island operations c. a summary of potential ratepayer impacts Quarterly review to include sign off on percentage of bill notifications that were made timely.	6/30/2022	Achieved	Approved
BS-16.12	Track status of "mutual state legislative priorities" and provide an accurate bi-weekly update, if updates occur, beginning on January 14, 2022 and continuing until the end of scheduled legislative session. Provide monthly reports after scheduled legislative session until December 31, 2022 unless needed more frequent.	4/8/2022	Achieved	Approved
BS-16.13	Track status of "mutual state legislative priorities" and provide an accurate bi-weekly update, if updates occur, beginning on January 14, 2022 and continuing until the end of scheduled legislative session. Provide monthly reports after scheduled legislative session until December 31, 2022 unless needed more frequent.	4/22/2022	Achieved	Approved
BS-16.14	Track status of "mutual state legislative priorities" and provide an accurate bi-weekly update, if updates occur, beginning on January 14, 2022 and continuing until the end of scheduled legislative session. Provide monthly reports after scheduled legislative session until December 31, 2022 unless needed more frequent.	5/6/2022	Achieved	Approved
BS-16.15	Track status of "mutual state legislative priorities" and provide an accurate bi-weekly update, if updates occur, beginning on January 14, 2022 and continuing until the end of scheduled legislative session. Provide monthly reports after scheduled legislative session until December 31, 2022 unless needed more frequent.	5/20/2022	Achieved	Approved
BS-16.16	Track status of "mutual state legislative priorities" and provide an accurate bi-weekly update, if updates occur, beginning on January 14, 2022 and continuing until the end of scheduled legislative session. Provide monthly reports after scheduled legislative session until December 31, 2022 unless needed more frequent.	6/3/2022	Achieved	Approved
BS-16.17	Track status of "mutual state legislative priorities" and provide an accurate bi-weekly update, if updates occur, beginning on January 14, 2022 and continuing until the end of scheduled legislative session. Provide monthly reports after scheduled legislative session until December 31, 2022 unless needed more frequent.	6/17/2022	Achieved	Approved

BS-16 Government & Legislative Affairs				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-16.18	Provide LIPA with written notice within three weeks of introduction of Bills in the NYS Legislature that could have a direct impact on LIPA/PSEG Long Island. Quarterly review to include sign off on percentage of bill notifications that were made timely.	9/30/2022	Achieved	Approved
BS-16.19	Provide analysis on "mutual legislative priorities" in an agreed upon format, within 30 days of notification to LIPA of bill introduction. Analysis shall include but is not limited to: a. a summary of proposed legislation b. a summary of potential impacts on LIPA and/or PSEG Long Island operations c. a summary of potential ratepayer impacts Quarterly review to include sign off on percentage of bill notifications that were made timely.	9/30/2022	Achieved	Approved
BS-16.2	Provide LIPA with written notice within three weeks of introduction of Bills in the NYS Legislature that could have a direct impact on LIPA/PSEG Long Island. Quarterly review to include sign off on percentage of bill notifications that were made timely.	3/31/2022	Achieved	Approved
BS-16.20	Track status of "mutual state legislative priorities" and provide an accurate bi-weekly update, if updates occur, beginning on January 14, 2022 and continuing until the end of scheduled legislative session. Provide monthly reports after scheduled legislative session until December 31, 2022 unless needed more frequent.	7/1/2022	Achieved	Approved
BS-16.21	Track status of "mutual state legislative priorities" and provide an accurate bi-weekly update, if updates occur, beginning on January 14, 2022 and continuing until the end of scheduled legislative session. Provide monthly reports after scheduled legislative session until December 31, 2022 unless needed more frequent.	8/1/2022	Achieved	Approved
BS-16.22	Track status of "mutual state legislative priorities" and provide an accurate bi-weekly update, if updates occur, beginning on January 14, 2022 and continuing until the end of scheduled legislative session. Provide monthly reports after scheduled legislative session until December 31, 2022 unless needed more frequent.	9/1/2022	Achieved	Approved
BS-16.23	Provide LIPA with written notice within three weeks of introduction of Bills in the NYS Legislature that could have a direct impact on LIPA/PSEG Long Island. Quarterly review to include sign off on percentage of bill notifications that were made timely.	12/30/2022	Achieved	Approved
BS-16.24	Provide analysis on "mutual legislative priorities" in an agreed upon format, within 30 days of notification to LIPA of bill introduction. Analysis shall include but is not limited to: a. a summary of proposed legislation b. a summary of potential impacts on LIPA and/or PSEG Long Island operations c. a summary of potential ratepayer impacts Quarterly review to include sign off on percentage of bill notifications that were made timely.	12/30/2022	Achieved	Approved
BS-16.25	Track status of "mutual state legislative priorities" and provide an accurate bi-weekly update, if updates occur, beginning on January 14, 2022 and continuing until the end of scheduled legislative session. Provide monthly reports after scheduled legislative session until December 31, 2022 unless needed more frequent.	10/3/2022	Achieved	Approved

BS-16 Government & Legislative Affairs				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-16.26	Track status of “mutual state legislative priorities” and provide an accurate bi-weekly update, if updates occur, beginning on January 14, 2022 and continuing until the end of scheduled legislative session. Provide monthly reports after scheduled legislative session until December 31, 2022 unless needed more frequent.	11/1/2022	Achieved	Approved
BS-16.27	Track status of “mutual state legislative priorities” and provide an accurate bi-weekly update, if updates occur, beginning on January 14, 2022 and continuing until the end of scheduled legislative session. Provide monthly reports after scheduled legislative session until December 31, 2022 unless needed more frequent.	12/1/2022	Achieved	Approved
BS-16.28	Track status of “mutual state legislative priorities” and provide an accurate bi-weekly update, if updates occur, beginning on January 14, 2022 and continuing until the end of scheduled legislative session. Provide monthly reports after scheduled legislative session until December 31, 2022 unless needed more frequent.	12/30/2022	Achieved	Approved
BS-16.3	Provide analysis on “mutual legislative priorities” in an agreed upon format, within 30 days of notification to LIPA of bill introduction. Analysis shall include but is not limited to: a. a summary of proposed legislation b. a summary of potential impacts on LIPA and/or PSEG Long Island operations c. a summary of potential ratepayer impacts Quarterly review to include sign off on percentage of bill notifications that were made timely.	3/31/2022	Achieved	Approved
BS-16.4	Track status of “mutual state legislative priorities” and provide an accurate bi-weekly update, if updates occur, beginning on January 14, 2022 and continuing until the end of scheduled legislative session. Provide monthly reports after scheduled legislative session until December 31, 2022 unless needed more frequent.	1/14/2022	Achieved	Approved
BS-16.5	Track status of “mutual state legislative priorities” and provide an accurate bi-weekly update, if updates occur, beginning on January 14, 2022 and continuing until the end of scheduled legislative session. Provide monthly reports after scheduled legislative session until December 31, 2022 unless needed more frequent.	1/28/2022	Achieved	Approved
BS-16.6	Track status of “mutual state legislative priorities” and provide an accurate bi-weekly update, if updates occur, beginning on January 14, 2022 and continuing until the end of scheduled legislative session. Provide monthly reports after scheduled legislative session until December 31, 2022 unless needed more frequent.	2/11/2022	Achieved	Approved
BS-16.7	Track status of “mutual state legislative priorities” and provide an accurate bi-weekly update, if updates occur, beginning on January 14, 2022 and continuing until the end of scheduled legislative session. Provide monthly reports after scheduled legislative session until December 31, 2022 unless needed more frequent.	2/25/2022	Achieved	Approved
BS-16.8	Track status of “mutual state legislative priorities” and provide an accurate bi-weekly update, if updates occur, beginning on January 14, 2022 and continuing until the end of scheduled legislative session. Provide monthly reports after scheduled legislative session until December 31, 2022 unless needed more frequent.	3/11/2022	Achieved	Approved

BS-16 Government & Legislative Affairs				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-16.9	Track status of “mutual state legislative priorities” and provide an accurate bi-weekly update, if updates occur, beginning on January 14, 2022 and continuing until the end of scheduled legislative session. Provide monthly reports after scheduled legislative session until December 31, 2022 unless needed more frequent.	3/25/2022	Achieved	Approved

### Summary

- Initial list of bills for consideration for “watch list” delivered to LIPA on 12/29/2021. Meeting held on 1/13/22 with LIPA to discuss priorities. Mutually-agreed upon “watch list” delivered to LIPA on 1/13/2023.
- Notification of introduction of bills delivered to LIPA with bi-weekly report as agreed upon.
- Meeting held on 1/13/22 with LIPA to discuss priorities. Mutually-agreed upon “watch list” delivered to LIPA on 1/13/2023.
- Bill memos for each priority bill delivered to LIPA on time.
- All bi-weekly status reports delivered to LIPA on time.

## BS-17 - Project Outreach

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$210,254.09	Comments	Dispute of performance between parties
Additional Comments	PSEG Long Island met all of the requirements objectively outlined in the metric. The metric results did not yield increased project outreach feedback from the survey methodology, which was a concern of PSEG Long Island during the metrics negotiation process. The amount of surveys responses substantially increased but the results of those surveys received commented on completed work, tree trimming, vegetation, damage to property and negative rants about PSEG Long Island, not referencing outreach specific to capital projects.		

BS-17	Project Outreach			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-17.1	By February 1, 2022, modify and finalize survey tool developed in accordance with DPS Management Audit Rec #36 to include the questions to gauge the following: - Was the project information easily accessible? - Was the information provided timely? - Was the information provided clear and easy to understand? - Was the utility contact information made available to submit inquiries about this project?	2/1/2022	Achieved	Approved
BS-17.2	By February 1, 2022, develop and submit to LIPA a plan to increase awareness and participation in the survey referenced in #1	2/1/2022	Achieved	Declined
BS-17.3	Starting on March 15, 2022, and by the 15th of each month thereafter, provide to LIPA and DPS details of all survey responses received up until the 1st of the month.	3/15/2022	Achieved	Approved
BS-17.4	Starting on March 15, 2022, and by the 15th of each month thereafter, provide to LIPA and DPS details of all survey responses received up until the 1st of the month.	4/15/2022	Achieved	Approved
BS-17.5	Starting on March 15, 2022, and by the 15th of each month thereafter, provide to LIPA and DPS details of all survey responses received up until the 1st of the month.	5/13/2022	Achieved	Approved
BS-17.6	Starting on March 15, 2022, and by the 15th of each month thereafter, provide to LIPA and DPS details of all survey responses received up until the 1st of the month.	6/15/2022	Achieved	Approved
BS-17.7	Starting on March 15, 2022, and by the 15th of each month thereafter, provide to LIPA and DPS details of all survey responses received up until the 1st of the month.	7/15/2022	Achieved	Approved
BS-17.8	Starting on March 15, 2022, and by the 15th of each month thereafter, provide to LIPA and DPS details of all survey responses received up until the 1st of the month.	8/15/2022	Achieved	Approved
BS-17.9	Starting on March 15, 2022, and by the 15th of each month thereafter, provide to LIPA and DPS details of all survey responses received up until the 1st of the month.	9/15/2022	Achieved	Approved
BS-17.10	By September 30, 2022, develop and share with LIPA and DPS recommendations for outreach improvements deemed appropriate based on feedback from the survey tool.	9/30/2022	Achieved	Declined
BS-17.11	Starting on March 15, 2022, and by the 15th of each month thereafter, provide to LIPA and DPS details of all survey responses received up until the 1st of the month.	10/14/2022	Achieved	Approved
BS-17.12	Starting on March 15, 2022, and by the 15th of each month thereafter, provide to LIPA and DPS details of all survey responses received up until the 1st of the month.	11/15/2022	Achieved	Approved

BS-17 Project Outreach				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-17.13	Starting on March 15, 2022, and by the 15th of each month thereafter, provide to LIPA and DPS details of all survey responses received up until the 1st of the month.	12/15/2022	Achieved	Approved
BS-17.14	By December 31, 2022, implement recommendations for outreach improvements for the following year as outlined in #4.	12/30/2022	Achieved	Declined

### Summary

- LIPA notified of modification and finalization of survey tool in accordance with BS-17.1 on 1/27/2022.
- Per BS-17.2 OSA Metric Public Awareness Plan delivered to LIPA on 1/27/2022
- All monthly reports were delivered on time to LIPA.
- Recommendation document delivered to LIPA on 9/29/2022 per BS-17.10.
- Reports delivered to LIPA on 12/22/2022 per BS-17.14.

### Additional Comments

**Participation Rate:** LIPA initially proposed including in their original metric a participation target, which was removed during negotiations involving LIPA, PSEG Long Island and DPS. Specific customer participation rates in the survey was not a part of this finalized agreed-upon metric. The potential for limited survey responses was raised by PSEG Long Island during negotiations and was discussed in detail between the parties (LIPA/DPS/PSEG Long Island). It was specifically agreed upon by all parties that a specific level of customer participation was not a part of this metric and that the intent is to drive continuous improvement of PSEG Long Island's project outreach. PSEG Long Island increased awareness of and participation in the survey.

As of December 12, 2022:

- 276,978 mailers were sent to customers with the link to survey
  - Postcards included a new QR code to link to survey
- 50 survey responses total were received

Overall, survey responses received commented on completed work, tree trimming, vegetation, damage to property and other information about PSEG Long Island, not referencing outreach specific to capital projects. Details of responses can be found in the 2022 Project Outreach metric monthly reports.

**Adding More Methods:** PSEG LI completed accurately and on time the monthly reports and two additional reports required. However, on July 5, 2022, when all metric deliverables were previously marked as "accepted" by the LIPA Project Manager, we received notification that LIPA CEO, Tom Falcone, changed the "approved" by LIPA status to "declined" on the deliverable of the plan (submitted on 1/27/2022). Falcone added a note in Smartsheet that LIPA was requesting PSEG LI to enhance the survey to increase the number of results. The metric as agreed upon only refers to the planning and the availability of the online survey as created following the DPS Management Audit in 2017 (Audit Recommendation #36). This metric directs PSEG Long Island to use that specific survey tool, no additional tools as the ones mentioned in Tom Falcone's additional note on July 5, 2022 on Smartsheet and subsequent phone calls with Tom Locascio (some mentioned focus groups, survey monkey, etc.).

LIPA initially proposed including in their original metric a participation target, which was removed during negotiations involving LIPA, PSEG Long Island and DPS. While increased participation was not a requirement, PSEG Long Island did have more responses, albeit not ones regarding project outreach that would have been considered project outreach improvement insight. PSEG Long Island did not agree with the objectivity of this metric as outreach surveys have not been widely utilized and in the rare instances where they are it's typically used by customers to voice concerns



unrelated to outreach, which is what occurred here. Despite more people taking the survey, the results did not provide customer insight on project outreach.

While PSEG Long Island was able to increase the response rates, the responses did not yield actionable outreach improvements. Obtaining outreach improvements from the survey responses was not a requirement, and cannot be a requirement of any survey as we cannot control survey response rates or substance.



## BS-18 - Customer Segmentation

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$105,127.05	<b>Comments</b>	Dispute of performance between parties
<b>Additional Comments</b>	PSEG LI does not understand what the roadmap deliverable in the metric was. It only is in the calculation section of the metric as: "Present preliminary roadmap to LIPA by September 30, 2022 and final roadmap by year end 2022." There is nothing in the metric objective or definition that outlines the scope of the roadmap deliverable. It was never communicated to PSEG LI staff what the road map deliverable was during 2022 and/or that any deliverable was outstanding. Deliverables were previously approved by the LIPA PM on 1/31 and then subsequently rejected on 2/9. PSEG Long sent multiple clarifying e-mails to the LIPA Project Manager on 2/10 after the status change to inquire what the Roadmap deliverable was and why the change of status. PSEG LI's e-mails have gone unanswered.		

BS-18	Customer Segmentation			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-18.1	Deliver customer segmentation research analysis by January 31, 2022.	1/31/2022	Achieved	Approved
BS-18.2	<p>Develop three (3) marketing campaigns that will target residential customer segments identified from the customer segmentation analysis. A multi-channel campaign will be launched in 2022 to increase participation in the following programs:</p> <ul style="list-style-type: none"> <li>Household Assistance Rate</li> <li>Digital Payments</li> <li>Pay Station Payments</li> </ul> <p>PSEG Long Island will track customer conversion rates among customers to measure marketing effectiveness.</p> <p>Develop three (3) campaign strategies, as indicated above, by March 31, 2022 and track customer conversion rates.</p>	3/31/2022	Achieved	Approved
BS-18.5	<p>Measure Key Performance Indicators (KPIs) to understand if segments are performing well including:</p> <ul style="list-style-type: none"> <li>Effectiveness of marketing strategy</li> <li>Effectiveness of communication channels</li> <li>Increases in participation</li> </ul> <p>Based on program duration, PSEG Long Island will send monthly reporting of effectiveness.</p>	5/31/2022	Exempted via Approved Exception Request	Exempted via Approved Exception Request
BS-18.3	Launch education, communication, and marketing strategies by June 30, 2022.	6/30/2022	Achieved	Approved
BS-18.6	<p>Measure Key Performance Indicators (KPIs) to understand if segments are performing well including:</p> <ul style="list-style-type: none"> <li>Effectiveness of marketing strategy</li> <li>Effectiveness of communication channels</li> <li>Increases in participation</li> </ul> <p>Based on program duration, PSEG Long Island will send monthly reporting of effectiveness.</p>	6/30/2022	Exempted via Approved Exception Request	Exempted via Approved Exception Request

BS-18 Customer Segmentation				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-18.4	<p>Measure Key Performance Indicators (KPIs) to understand if segments are performing well including:</p> <ul style="list-style-type: none"> <li>Effectiveness of marketing strategy</li> <li>Effectiveness of communication channels</li> <li>Increases in participation</li> </ul> <p>Based on program duration, PSEG Long Island will send monthly reporting of effectiveness.</p>	8/1/2022	Achieved	Approved
BS-18.10	<p>Measure Key Performance Indicators (KPIs) to understand if segments are performing well including:</p> <ul style="list-style-type: none"> <li>Effectiveness of marketing strategy</li> <li>Effectiveness of communication channels</li> <li>Increases in participation</li> </ul> <p>Based on program duration, PSEG Long Island will send monthly reporting of effectiveness.</p>	8/31/2022	Exempted via Approved Exception Request	Exempted via Approved Exception Request
BS-18.9	<p>Measure Key Performance Indicators (KPIs) to understand if segments are performing well including:</p> <ul style="list-style-type: none"> <li>Effectiveness of marketing strategy</li> <li>Effectiveness of communication channels</li> <li>Increases in participation</li> </ul> <p>Based on program duration, PSEG Long Island will send monthly reporting of effectiveness.</p>	8/31/2022	Achieved	Approved
BS-18.11	<p>Measure Key Performance Indicators (KPIs) to understand if segments are performing well including:</p> <ul style="list-style-type: none"> <li>Effectiveness of marketing strategy</li> <li>Effectiveness of communication channels</li> <li>Increases in participation</li> </ul> <p>Based on program duration, PSEG Long Island will send monthly reporting of effectiveness.</p>	9/30/2022	Achieved	Approved
BS-18.7	Present preliminary roadmap to LIPA by September 30, 2022	9/30/2022	Achieved	Declined
BS-18.8	Evaluate available software or programs to host segmentation data. Complete evaluation of host platform by September 30, 2022.	9/30/2022	Achieved	Approved
BS-18.14	<p>Measure Key Performance Indicators (KPIs) to understand if segments are performing well including:</p> <ul style="list-style-type: none"> <li>Effectiveness of marketing strategy</li> <li>Effectiveness of communication channels</li> <li>Increases in participation</li> </ul> <p>Based on program duration, PSEG Long Island will send monthly reporting of effectiveness.</p>	10/31/2022	Achieved	Approved
BS-18.15	<p>Measure Key Performance Indicators (KPIs) to understand if segments are performing well including:</p> <ul style="list-style-type: none"> <li>Effectiveness of marketing strategy</li> <li>Effectiveness of communication channels</li> <li>Increases in participation</li> </ul> <p>Based on program duration, PSEG Long Island will send monthly reporting of effectiveness.</p>	11/30/2022	Achieved	Approved

BS-18 Customer Segmentation				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-18.12	Present final roadmap to LIPA by year end 2022	12/30/2022	Achieved	Declined
BS-18.13	Evaluate program participation and KPIs by year-end 2022.	12/30/2022	Achieved	Approved
BS-18.16	<p>Measure Key Performance Indicators (KPIs) to understand if segments are performing well including:</p> <ul style="list-style-type: none"> <li>Effectiveness of marketing strategy</li> <li>Effectiveness of communication channels</li> <li>Increases in participation</li> </ul> <p>Based on program duration, PSEG Long Island will send monthly reporting of effectiveness.</p>	12/30/2022	Achieved	Approved

### Summary

- PSEG LI delivered customer segmentation research analysis by January 31, 2022.
- PSEG Long Island developed three (3) marketing campaigns that targeted residential customer segments identified from the customer segmentation analysis. We launched a multi-channel education, communication, and marketing campaign that was launched prior to June 30, 2022 to increase participation in the following programs:
  - Household Assistance Rate
  - Digital Payments
  - Pay Station Payments
- PSEG Long Island provided LIPA with monthly reports on Key Performance Indicators (KPIs) to understand:
  - Effectiveness of marketing strategy, Effectiveness of communication channels and Increases in participation
- PSEG Long Island submitted an exception to deliverable BS-18.8, that was accepted, that both parties determined that the best place to host the host segmentation data was in PSEG LI's data lake, rather than the exploration or evaluation of software as the whole point of this exercise was to validate the data. The data has been imported to the data lake.
- PSEG LI does not understand what the roadmap deliverable in the metric was. It only is in the calculation section of the metric as: "Present preliminary roadmap to LIPA by September 30, 2022 and final roadmap by year end 2022." There is nothing in the metric objective or definition that outlines the scope of the roadmap deliverable. It was never communicated to PSEG LI staff what the road map deliverable was during 2022 and/or that any deliverable was outstanding. Our interpretation was that these deliverables were associated with the data hosting deliverable of the metric, which was mutually decided to utilize the data lake rather than evaluate an external software. Deliverables were previously approved by the LIPA PM on 1/31 and then subsequently rejected on 2/9. PSEG Long sent multiple clarifying e-mails to the LIPA Project Manager on 2/10 after the status change to inquire what the Roadmap deliverable was and why the change of status. PSEG LI's e-mails have gone unanswered. PSEG Long Island has in all of our monthly reports since September 30<sup>th</sup> have shown this activity as complete and LIPA has never said that we haven't provided what was expected in the metric other than stating that we didn't achieve the deliverable on 2/9/2023 via Smartsheet with no explanation.

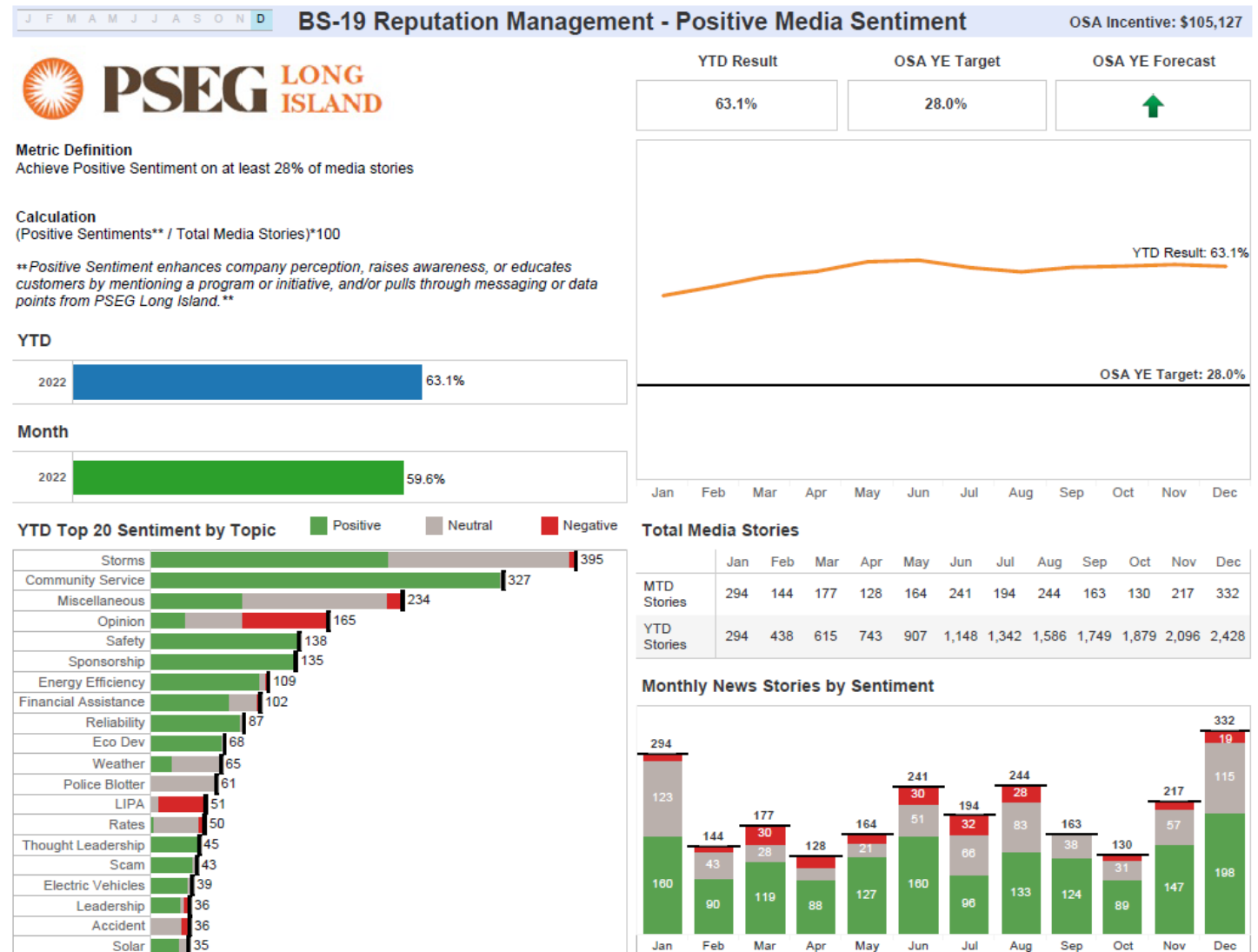
PSEG Long Island September Status report – please see attachment under BS-18.8 and all subsequent status reports:

## Next Steps

- **Deliver customer segmentation research analysis by January 31, 2022. COMPLETE**
- **Marketing**
  - Develop three (3) campaign strategies, as indicated above, by March 31, 2022. **COMPLETE**
  - Launch by June 30, 2022. **COMPLETE**
  - Deliver Monthly Reporting
    - July 31 **COMPLETE**
    - August 31 **COMPLETE**
    - September 30 **COMPLETE**
  - Evaluate program participation and KPIs by year end 2022. **COMPLETE**
- **Data Hosting COMPLETE**
  - Present preliminary roadmap to LIPA by September 30, 2022. **COMPLETE**
  - Complete evaluation of host platform by September 30, 2022. **COMPLETE**
  - Present final roadmap by year end 2022. **COMPLETE**

## BS-19 - Reputation Management – Positive Media Sentiment

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$105,127.05		



### Summary

- PSEG Long Island achieved a positive sentiment on 63.1% of media stories.
- There was 2,428 media stories in 2022. The breakdown of sentiment is:
  - Positive: 1,531
  - Neutral: 675
  - Negative: 222

## BS-20 - Reputation Management – Share of Voice

<b>Metric Type</b>	Quantitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$105,127.05		

### J F M A M J J A S O N D BS-20 Reputation Management - Share of Voice OSA Incentive: \$105,127



**Metric Definition**  
Achieve a 50% "Share of Voice" during storm and other crisis events

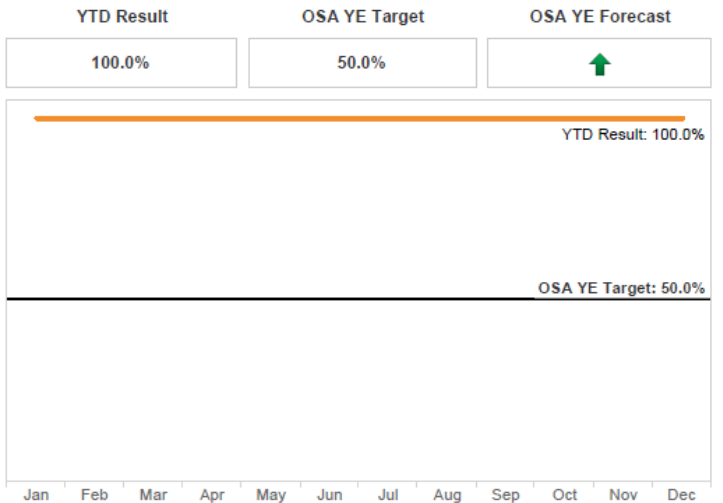
**Calculation**  
(Share of Voice / Crisis Event)\*100

**\*\*Share of Voice is defined as the amount of media stories mentioning PSEG Long Island that quote someone from the organization or cite data it has provided.\*\***

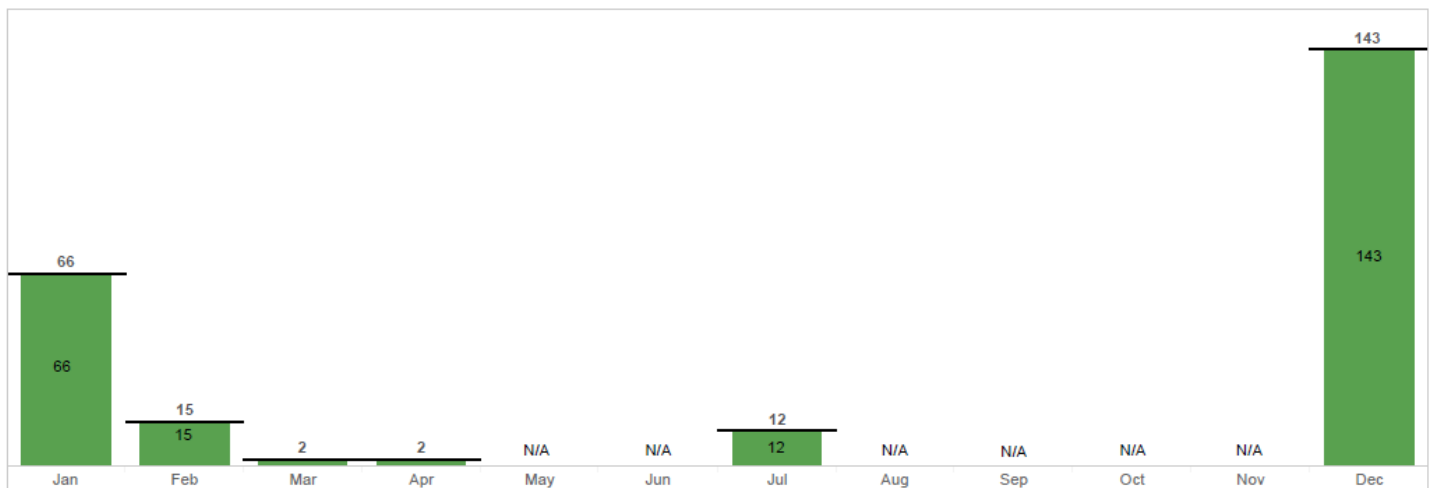
#### YTD



#### MTD



#### Share of Voice during Crisis Events - Monthly



#### Summary

- PSEG Long Island achieved a Share of Voice of 100% during storm and other crisis events.
- There was 143 media stories during these periods and PSEG Long Island's Share of Voice was present in every story.

## BS-21 - Social Media Engagement and Following

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$210,254.09	Comments	Achieved all 4 sub metric targets

### BS-21 Social Media Engagement and Following OSA Incentive: \$210,254



#### Metric Definition

Enhance PSEG Long Island's social media engagement (Facebook, Twitter) via monthly reporting of social media cases and timely first brand response by a live agent.

#### Calculation

##### On Blue Sky Days:

- 90% of cases related to personal health and safety responded within 2 hours.
- 90% of cases related to any other topic responded within 4 hours.

##### During Major Storms:

- 80% of cases related to personal health and safety responded within 3 hours
- 80% of cases related to any other topic responded within 5 hours

\*All responses captured are completed by live agents. Timely response calculation for cases received outside of Business Hours will begin at the start of the following Business Day shift.

#### YTD

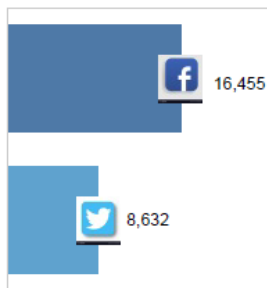


YTD Result	OSA YE Target	OSA YE Forecast
100.0%	100.0%	↑

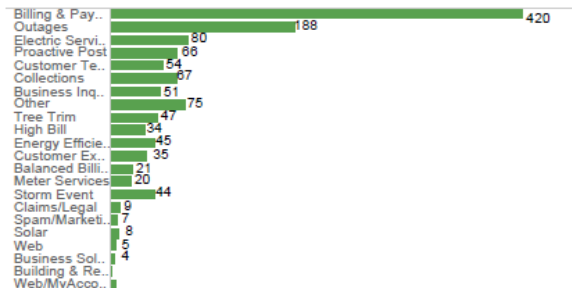
#### Social Media Engagement and Following - YTD vs Target

	# of Cases	% Achieved	Target	Pass/Fail	Pass Fail %
Blue Sky - Personal Health and Safety	57	98.2%	90.0%	Pass	100.0%
Blue Sky - Other	2,075	99.6%	90.0%	Pass	100.0%
Major Storm - Personal Health and Safety	13	100.0%	80.0%	Pass	100.0%
Major Storm - Other	71	98.6%	80.0%	Pass	100.0%

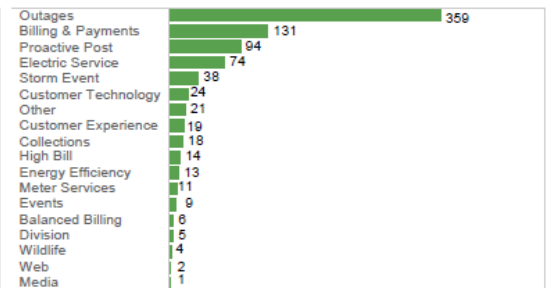
#### YTD Message Breakdown



#### YTD Facebook Service Case Category



#### YTD Twitter Service Case Category



#### Monthly Breakdown of Cases

	J	F	M	A	M	J	J	A	S	O	N	D	YTD
Blue Sky Personal Healthy and Safety	2	7	1	7	2	6	6	8	5	9	3	1	57
Other	92	134	131	136	90	162	282	182	220	263	173	210	2,075
Major Storm Personal Healthy and Safety	0	0	0	0	0	0	0	0	0	0	0	13	13
Other	18	0	0	0	0	0	1	0	0	0	4	48	71

#### YTD Performance

	YTD Performance	Failed	Achieved
Blue Sky Personal Safety	98.2%		
Other	99.6%		
Storm Personal Safety	100.0%		
Other	100.0%		

### Blue Sky – Personal Health and Safety

- PSEG Long Island had 57 Blue Sky – Personal Health and Safety cases and responded to 56 (98.2%) of them within the targeted 2 hour time period identified in the metric

### Blue Sky – Other

- PSEG Long Island had 2,075 Blue Sky – Other cases and responded to 2,066 (99.6%) of them within the targeted 4 hour time period identified in the metric

### Major Storm – Personal Health and Safety

- PSEG Long Island had 13 Major Storm – Personal Health and Safety cases and responded to 13 (100.0%) of them within the targeted 3 hour time period identified in the metric

### Major Storm – Other

- PSEG Long Island had 71 Major Storm – Other cases and responded to 71 (100.0%) of them within the targeted 5 hour time period identified in the metric



# Customer Services

## CS-01 - Delivery of Strategic Customer Experience & Billing Projects

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved (Partially)</b>
<b>Incentive Compensation Claim</b>	\$262,817.62	<b>Comments</b>	Achieved >4 projects (50% incentive)

### Project #1: AMI Field Disconnect and Cut Off Process

Project Status: **Achieved**

CS-1.1	Delivery of Strategic Customer Experience & Billing Projects – AMI Field Disconnect and Cut Off Process			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
CS-1.1	Project Implementation Plan (including expected outcomes) is submitted for LIPA approval-Advanced Metering Infrastructure (AMI) field remote disconnect (Phase 1)	01/31/22	<b>Achieved</b>	<b>Approved</b>
CS-1.1.1	AMI field technician to initiate the service disconnect remotely with associated updates to the billing system consistent with the current field business rules for cut-off, work order and contacts to achieve the expected outcomes-Phase 1	03/31/22	<b>Achieved</b>	<b>Approved</b>
CS-1.1.2	Project Implementation Plan (including expected outcomes) is submitted for LIPA approval - AMI field remote disconnect end state directly from field work order (AMI Phase 2)	03/31/22	<b>Achieved</b>	<b>Approved</b>
CS-1.1.3	AMI field technician to initiate the service disconnect remotely with associated updates to the billing system consistent with the current field business rules for cut-off, work order and contacts to achieve the expected outcomes.	12/01/22	<b>Exempted Via Exception Request</b>	<b>Exempted Via Exception Request</b>

### Summary

- PSEG Long Island provided a Project Implementation Plan for Advanced Metering Infrastructure (AMI) field remote disconnect (Phase 1)
- PSEG Long Island implemented a process that allowed AMI field technician to initiate the service disconnect remotely with associated updates to the billing system consistent with the current field business rules for cut-off, work order and contacts to achieve the expected outcomes-Phase 1
- PSEG Long Island provided a Project Implementation Plan for AMI field remote disconnect end state directly from field work order (AMI Phase 2)
- CS-1.1.3 was exempt due to an approved exception that pushed the Phase 2 deployment into 2023 which is captured in a 2023 metric. The reason for the exception was there was a low error rate for the existing solution Phase 1 solution of 0.07%. The Phase 2 of automating the disconnect process using the CAD work management solution is in progress to go live by 3/31/2023 as security is looking for pen test to be completed prior to going live.



## Project #2: AMI Theft Detection

Project Status: **Dispute**

CS-1.2 Delivery of Strategic Customer Experience & Billing Projects – AMI Theft Detection				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
CS-1.2	Project Implementation Plan (including expected outcomes) is submitted for LIPA approval-AMI technology implementation to improve the efficiency of theft detection and increase remote theft detection	03/31/22	Achieved	Approved
CS-1.2.1	AMI theft detection use case demonstration of expected outcomes	09/30/22	Achieved	Declined

### Summary

The metric target was to deliver a demonstrated use case by September 30<sup>th</sup>, 2022. An exception was approved by LIPA via email to demonstrate the use case by November 14, 2022 to allow additional time for analysis. This was successfully completed and the met expected outcomes from the approved project implementation plan were reviewed during the demonstration.

- Project Implementation Plan submitted on 03/31/2022
- LIPA approved target extension via email on 09/28/2022. Use case must be demonstrated by 11/14/2022.
- Use case demonstrated on 11/14/2022
- Analytical solution provided an increased ability to remotely detect anomalous incidents.
- Analytics allows for the identification of cases that may not have been otherwise detected through other means.
- Solution provided an increase in percentage of field verified revenue loss. This included loss due to tampering, substandard conditions, construction/electrical work and meter conditions.

## Project #3: Chat Assessment

Project Status: **Achieved**

CS-1.3 Delivery of Strategic Customer Experience & Billing Projects – Chat Assessment				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
CS-1.3	Project Implementation Plan is submitted for LIPA approval-Chat optimization assessment and expected outcomes related to use, call/email deflection, satisfaction and customer operations	03/31/22	<b>Achieved</b>	<b>Approved</b>
CS-1.3.1	Chat optimization assessment future use defined with forecasted changes in call/email volume, satisfaction and chat availability by transaction defined.	08/01/22	<b>Achieved</b>	<b>Approved</b>

### Summary

- Chat PIP document was submitted to LIPA by desired 3/31/22 date
- Chat optimization assessment was conducted in July 2022. Initial recommendations and findings report provided to LIPA by 8/1/22. Multiple iterations of the findings and recommendations report provided to LIPA throughout Q4 2022 and approved by LIPA on agreed upon dates.

## Project #4: Migrate to New Bill Print Vendor

Project Status: **Achieved**

CS-1.4 Delivery of Strategic Customer Experience & Billing Projects – Migrate to New Bill Print Vendor				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
CS-1.4	Project Implementation Plan (including expected outcomes) is submitted for LIPA approval-KUBRA Bill Print	01/31/22	<b>Achieved</b>	<b>Approved</b>
CS-1.4.1	Migrate bill print functions from Exela to Kubra to achieve the expected outcomes.	03/31/22	<b>Achieved</b>	<b>Approved</b>

### Summary

- Project Implementation Plan submitted to LIPA and approved by 1/31/22 date
- Bill print functions migrated from Exela platform to Kubra platform on 3/24/22 with no issues.

## Project #5: Credit Card Vendor Phase 0 – Execution of Contract and Project Implementation Plan

Project Status: **Achieved**

CS-1.5 Delivery of Strategic Customer Experience & Billing Projects – Credit Card Vendor Phase 0				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
CS-1.5.1	Credit Card Vendor contract executed	06/01/22	<b>Achieved</b>	<b>Approved</b>
CS-1.5.2	Project Implementation Plan (including expected outcomes) is submitted for LIPA approval-Credit card vendor selection	08/01/22	<b>Achieved</b>	<b>Approved</b>

### Summary

- Credit card vendor contract executed on 05/27/2022
- Project Implementation Plan submitted to LIPA on 07/29/2022

## Project #6: Mobile App Enhancements

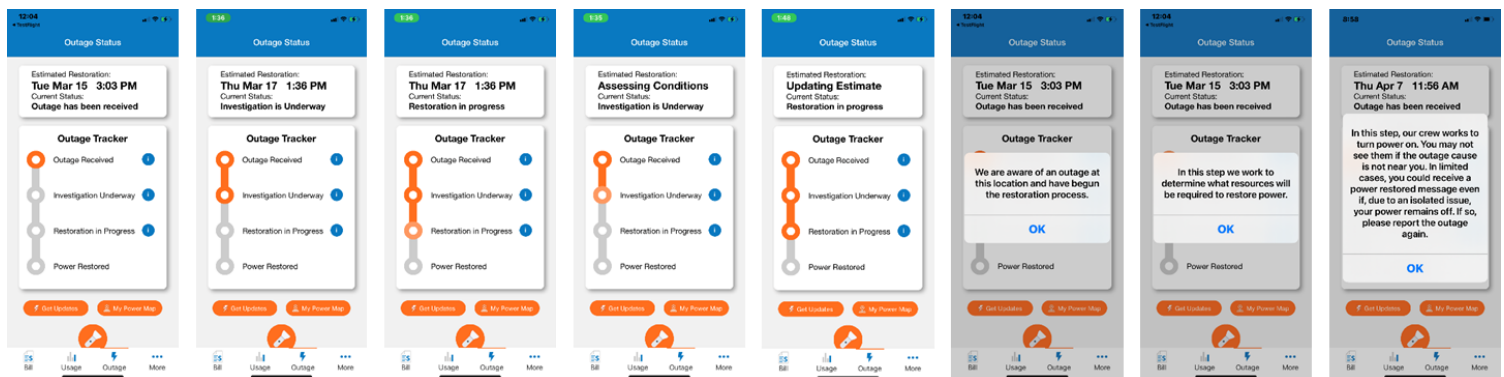
Project Status: **Did Not Achieve**

CS-1.6 Delivery of Strategic Customer Experience & Billing Projects – Mobile App Enhancements				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
CS-1.6	Project Implementation Plan (including expected outcomes) is submitted for LIPA approval-Mobile App Enhancements	03/31/22	Achieved	Approved
CS-1.6.1	Mobile app enhancements implemented to achieve expected outcomes	12/01/22	Did Not Achieve VOC deliverable	Declined

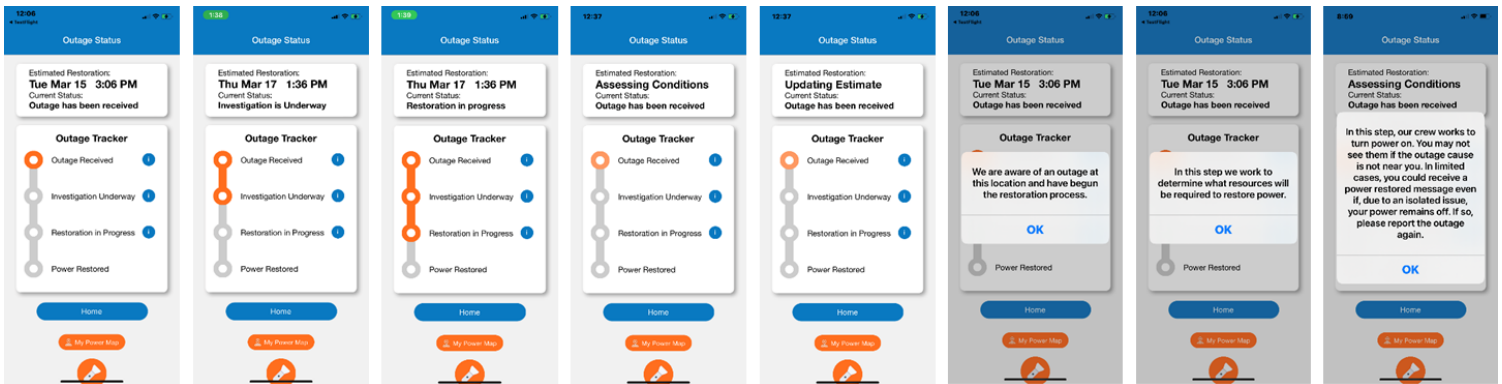
### Summary

- PSEG Long Island submitted a Project Implementation Plan (including expected outcomes) is submitted for LIPA approval-Mobile App Enhancements.
- The objective of the project identified in the project implementation plan was to make the following enhancements to its mobile application by specified date:
  - Outage Tracker:** Display an outage tracker that identifies the stages of the outage restoration process and where the customer currently is in that process. This feature will help manage customer expectations regarding estimated restoration times and provide additional transparency. It will also help customers make decisions about whether it may be necessary to arrange an alternative power source, find other temporary housing or make other logistical decisions based on the status of their outage.
    - Planned Go-Live:** 6/8/2022
    - Actual Go-Live:** 6/8/2022

### Customer with Account:

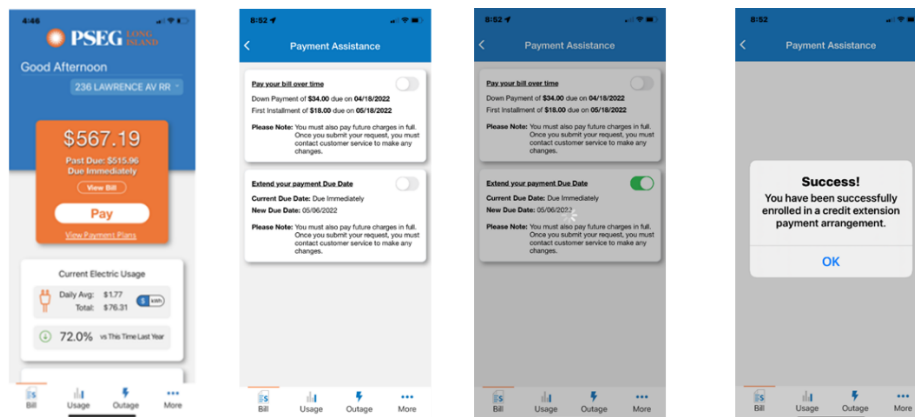


## Guest Customer:



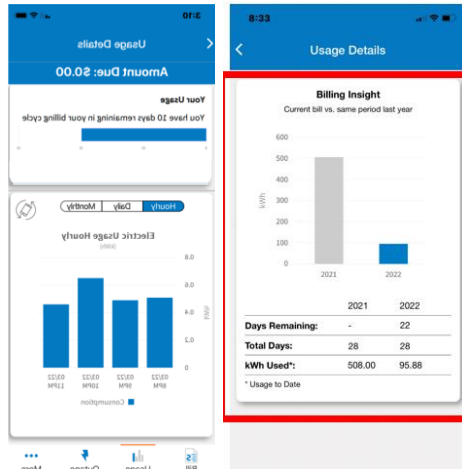
- **Deferred Payment Arrangement:** Display the Deferred Payment Agreement to eligible customers allowing enrollment on the mobile application self-service channel. This will enable eligible customers to quickly and easily set up an agreement that allows them to continue making payments in a more manageable way during times of hardship.
  - **Planned Go-Live:** 8/29/2022
  - **Actual Go-Live:** 8/22/2022

## DPA Enhancement Mobile Screenshots:



- **AMI Usage Data:** Add elements that will display AMI usage data easily to customers to help them manage their energy use by displaying the number of days left in the billing cycle.
  - **Days Remaining in Your Cycle:** This gives the customers an advantage to understand how many days they have left so they can start adjusting how they use electricity over the next few days.
  - **More Insight:** This is a more detailed view for customers to see how their usage compares to this same cycle last year at this time. This chart will change every day so that when a customer checks it they will see their data change reflecting the new day's usage.
    - **Planned Go-Live:** 8/29/2022
    - **Actual Go-Live:** 8/22/2022

## AMI Usage Enhancement Mobile Screenshots:



- PSEG Long Island provided the following for each project prior to go-live:
  - Business Requirements, Requirements Traceability Matrix, Comprehensive test plan document
  - Mock up's of features, Test Results/Artifacts, Test Closure Memo, Go-Live readiness criteria & checklist, Customer marketing/outreach plan and Training/process documentation
- PSEG Long Island made all associated mobile application enhancements by the planned dates but did not display positive voice of the customer (VOC) as outlined in the expected outcomes in the PIP. Below is a summary of the VOC feedback PSEG LI received.
- In terms of VOC feedback:
  - **AMI Tracker:**
    - The survey was conducted online among customers who had logged in to PSEG Long Island mobile app while they had an outage.
    - 50 customers participated in the survey.
    - All respondents, except one, remembered accessing the outage tracker.
    - High overall satisfaction with the outage tracker - nearly 65% (32 out of 49) gave a score of 4 or 5 on a 5 point scale.
  - **AMI Usage Data:**
    - Since this incremental feature is not a transaction, it was not possible to identify specific customers who used the feature for getting direct feedback in regards to the transaction. We did, though, include it in recent focus groups to solicit feedback on the feature, even though the results would not be quantitative as in a survey.
    - Many customers are interested to know more details of their electricity usage and would like more information on how to access that information. However, the number of days remaining in a billing cycle is of little or no relevance to all but a very few.
    - The functionality also provides customers to compare usage patterns compared to prior year cycle.
  - **Deferred Payment Arrangement:**
    - The functionality to sign up for a DPA via self-service on the Mobile App is available as the metric intended. There was an insufficient number of users of this feature at this time to complete a worthwhile survey. With typical response rates, we would not expect enough respondents to gain any insight into customer views on this functionality. We had suggested waiting until participation increases enough to expect a useful sample size of respondents. Also there is a 2023 metric to look at optimizing DPAs through and changes associated with current program requirements, processes and procedures.

## Project #7: Kubra Enhancements

Project Status: **Did Not Achieve**

CS-1.7 Delivery of Strategic Customer Experience & Billing Projects – Kubra Enhancements				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
CS-1.7	Project Implementation Plan (including expected outcomes) is submitted for LIPA approval-Kubra Enhancements	03/31/22	Achieved	Approved
CS-1.7.1	Kubra enhancements implemented to achieve expected outcomes	12/21/22	Did Not Achieve	Declined

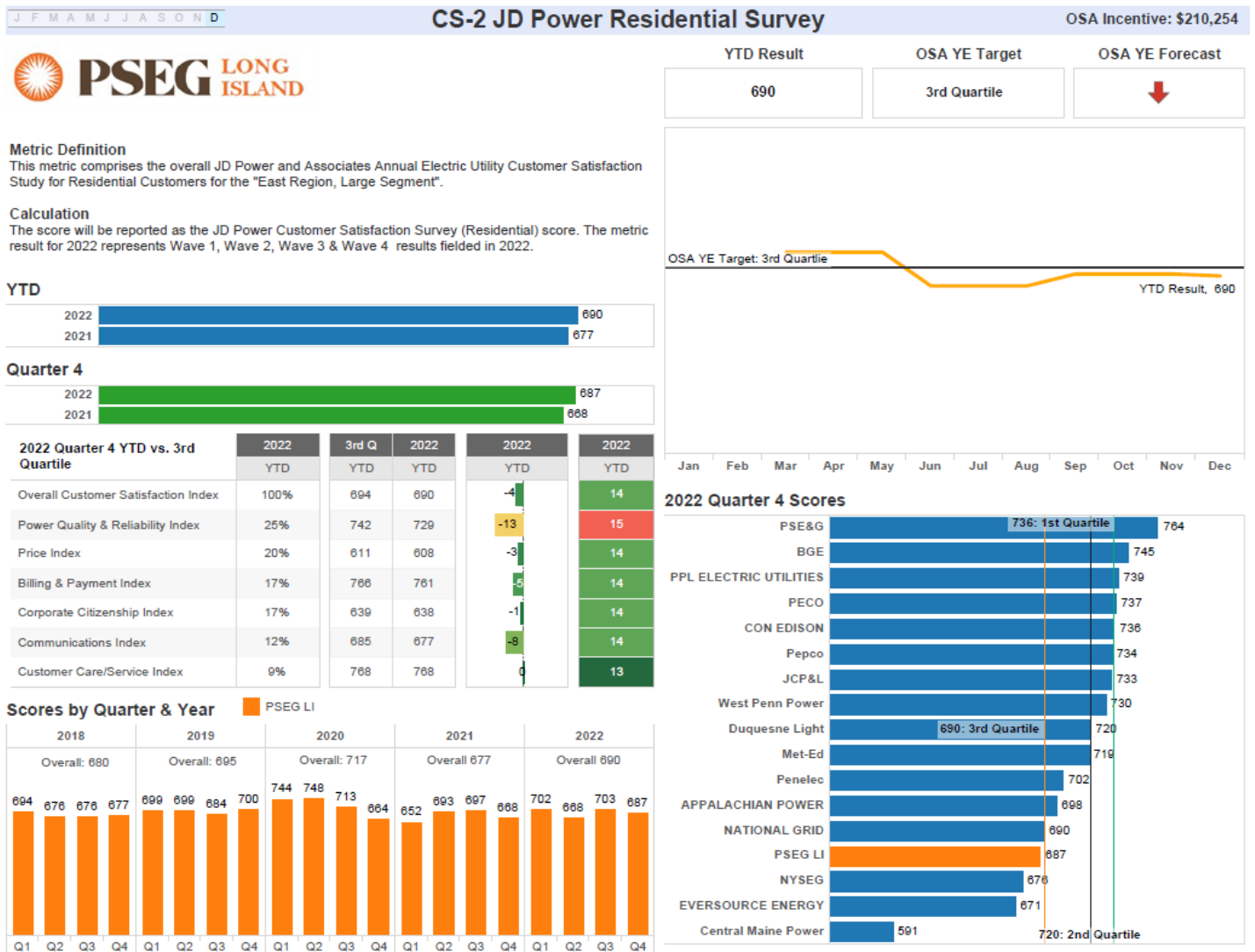
### Summary

- PSEGLI did not deliver the ETR range enhancement in the 2022 performance year. PSEG LI removed an originally in-scope channel (Alexa/Google) from the project because of limited use.



## CS-02 - JD Power Customer Satisfaction Survey (Residential)

Metric Type	Quantitative	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00		



### Summary

- PSEG Long Island finished 2022 with a syndicated score of 690 for J.D. Power Residential survey in 2022. This would put PSEG Long Island in the 4<sup>th</sup> quartile below the 3<sup>rd</sup> quartile target of 694 by 4 points.

## CS-03 - JD Power Customer Satisfaction Survey (Business)

Metric Type	Quantitative	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00		



### Summary

- PSEG Long Island finished 2022 with a syndicated score of 710 for J.D. Power Business survey in 2022. This would put PSEG Long Island in the 4<sup>th</sup> quartile below the 3<sup>rd</sup> quartile target of 745 by 35 points.

## CS-04 - CIS Modernization – Phase 1

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$315,381.14	<b>Comments</b>	Achieved New Scope (50% of Comp)

CS-4	CIS Modernization – Phase 1			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
CS-4.2	Detailed functional and technical requirements document as specified in the Definition section of the attached "CS-4 Customer Information System (CIS) Modernization – Phase 1 " metric document is submitted and approved by LIPA.	04/29/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-4.3	RFP for the procurement of a CIS system/implementer is submitted and approved by LIPA.	04/29/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-4.4	Selection and Procurement of the best-fit CIS solution/implementer through rigorous evaluation to minimize delivery risk to be completed and approved by LIPA	09/30/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-4.5	Executed CIS solution/implementer contracts is submitted to LIPA for verification	09/30/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-4.8	Develop a work plan with tasks and milestones necessary to effectively measure progress on a regular basis for all the 2022 deliverables	09/30/22	Achieved	Approved
CS-4.9	Complete workshop plan and participant list by 10/15/22.	10/14/22	Achieved	Approved
CS-4.10	Document the preliminary list of the in scope and out of scope processes and sub processes and proposed boundaries to be approved by LIPA and PSEG Long Island	10/27/22	Achieved	Approved
CS-4.7	Define, document, and get LIPA approval for CIS project visions, updated project charter, and guiding principles	11/15/22	Achieved	Approved
CS-4.6	Detailed Implementation Plan as specified in the Definition section of the attached "CS-4 Customer Information System (CIS) Modernization – Phase 1" metric document and report submitted to LIPA for approval.	11/30/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-4.1	Complete current environment analysis as specified in the Definition section of the attached "CS-4 Customer Information System (CIS) Modernization – Phase 1" metric document* and report submitted to LIPA for approval. *Note: Perform current environment analysis and deliver a report on how the utility currently operates, including existing technical architecture with potential mapping of product retirement and retained interfaces for the meter to cash and other supporting processes to be completed and approved by LIPA	12/15/22	Achieved	Approved

CS-4 CIS Modernization – Phase 1				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
CS-4.11	<p>Complete business process workshops and receive LIPA approval of associated deliverables in the approved format as prepared for the Move In workshop:</p> <ol style="list-style-type: none"> <li>1. Business Process document that contains: business rules; exceptions and associated responses; data points summary identifying transaction volume and transaction channels; external system(s) used; a list of existing reports; regulatory requirements with specific regulations and the spelled out business requirement that would be part of the RFP, specifically tagged as regulatory, compliance reporting needs, pain points/improvement opportunities, and general improvement opportunities.</li> <li>2. Business Process Mapping Document</li> <li>3. Suppliers, Input, Process, Outputs, and Customers Document</li> <li>4. Associated business requirements to be mapped to the business processes, including additional functionality that can arrive with new CIS or to close gaps.</li> </ol> <p>Due date 12/31/22</p>	12/30/22	Achieved	Reviewing

### Summary

LIPA and PSEG LI agreed to revise the original scope and deliverables of the 2022 CS-4 CIS Modernization metric. The new approach included the documentation of current business process and improvement of the requirements to align with specific PSEG LI work processes rather than generic industry standards provided by AAC. By the end of May, the new scope and execution process was proposed by the joint team. This new approach necessitated a change in the metric and deliverables for 2022 and set the path forward for the 2023 OSA performance metric.

Below highlights the initial scope of the 2022 OSA performance metric and the revised scope that needs to be changed in Smartsheet.

### Smartsheet Changes to the initial scope deliverables:

1. CS-4.1 Modify the date to 12/15/22 and delete this reference, because the business process became a unique deliverable with an expanded definition under a new deliverable. CS-4.11
  - a. “ Perform current environment analysis and deliver a report on how the utility currently operates, including ~~current business processes~~, existing technical architecture with potential mapping of product retirement and retained interfaces for the meter to cash and other supporting processes to be completed and approved by LIPA (approval not to be unreasonably withheld) by March 31, 2022.
2. CS-4.2 Exempt deliverable, due to revised plan
3. CS-4.3 Exempt deliverable, due to revised plan
4. CS-4.4 Exempt deliverable, due to revised plan
5. CS-4.5 Exempt deliverable, due to revised plan
6. CS-4.6 Exempt deliverable, due to revised plan

### Smartsheet Additions for the Revised Scope Metric Deliverables:

1. CS-4.7 Define, document, and get LIPA approval for CIS project visions, updated project charter, and guiding principles 11/15/22
2. CS-4.8 Develop a work plan with tasks and milestones necessary to effectively measure progress on a regular basis for all the 2022 deliverables by 9/30/22
3. CS-4.9 Complete workshop plan and participant list 10/15/22

4. CS-4.10 Document the preliminary list of the in scope and out of scope processes and sub processes and proposed boundaries to be approved by LIPA and PSEG Long Island 10/27/22.
5. CS-4.11 Complete business process workshops and receive LIPA approval of associated deliverables in the approved format as prepared for the Move In workshop by 12/31/22:
  - a. Business Process document that contains: business rules; exceptions and associated responses; data points summary identifying transaction volume and transaction channels; external system(s) used; a list of existing reports; regulatory requirements with specific regulations and the spelled out business requirement that would be part of the RFP, specifically tagged as regulatory, compliance reporting needs, pain points/improvement opportunities, and general improvement opportunities.
  - b. Business Process Mapping Document
  - c. Suppliers, Input, Process, Outputs, and Customers Document
  - d. Associated business requirements to be mapped to the business processes, including additional functionality that can arrive with new CIS or to close gaps.

#### **Allocation for revised scope deliverable:**

Incentive will be allocated as follows for successful projects that meet the metric criteria:

- Base project deliverables (CS-4.7-4.10) are core to execution and are expected to receive and be approved by LIPA to be eligible for any compensation.
- All Business workshop deliverables (CS-4.11) on time and approval by LIPA would result in compensation of \$450,000, if less than all but 20 or more are on time and approved compensation of \$150,000 will be awarded.
- Current Environmental analysis (CS-4.1) on time and approval by LIPA would result in compensation of \$150,000

All dollar figures stated above are in 2021 dollars and would need to be escalated for CPI growth in alignment with the OSA and original metric allocation.

#### **Update on Metric**

- PSEG Long Island developed a work plan with tasks and milestones necessary to effectively measure progress on a regular basis for all the 2022 deliverables
- PSEG Long Island completed workshop plan and participant list
- PSEG Long Island documented the preliminary list of the in scope and out of scope processes and sub processes and proposed boundaries
- PSEG Long Island defined, documented CIS project visions, updated project charter, and guiding principles
- PSEG Long Island completed a Current Environment Analysis
- PSEG Long Island completed 20 business process workshops and provided business process documents
- PSEG LI and LIPA acknowledged that while all targeted 2022 process workshops have been completed, there are various challenges that are delaying the ability to properly complete the review process of the workshop output documentation by the targeted 3/31 date. At the same, it was acknowledged by both parties that a significant amount of time and effort has been dedicated to this initiative, rendering it largely complete. Accordingly, it was agreed that rather than rushing to complete the remaining reviews by 3/31 at the risk of producing a lesser quality product, the team would take the time to properly complete the review process, with LIPA granting approval of the revised 2022 deliverables in this space as being complete.

## CS-05 - Customer Transactional Performance

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$420,508.19		

BS-5	Customer Transactional Performance			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
CS-5.1	Develop a five (5) question monthly survey for the following customer transactions: payments, billing move in/move out (MIMO) and deferred payment agreements. The fifth survey is around outage reporting and we will continue to utilize the Chartwell Outage Communication Benchmarking.	1/31/2022	Achieved	Approved
CS-5.7.1	Survey data will be shared with LIPA for January 2022 transaction survey results	3/31/2022	Achieved	Approved
CS-5.7.2	Survey data will be shared with LIPA for February 2022 transaction survey results	5/31/2022	Achieved	Approved
CS-5.7.3	Survey data will be shared with LIPA for March 2022 transaction survey results	6/30/2022	Achieved	Approved
CS-5.4	Provide the 2021: (1) average cost of each transaction by channel; (2) volume of each transaction by channel. The 2021 cost and transaction volume, by channel will be provided to LIPA by February 28, 2022.	6/30/2022	Achieved	Approved
CS-5.7.4	Survey data will be shared with LIPA for April 2022 transaction survey results	8/1/2022	Achieved	Approved
CS-5.7.5	Survey data will be shared with LIPA for May 2022 transaction survey results	8/31/2022	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-5.7.6	Survey data will be shared with LIPA for June 2022 transaction survey results	8/31/2022	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-5.7.7	Survey data will be shared with LIPA for July 2022 transaction survey results	9/30/2022	Achieved	Approved
CS-5.8	Submit to LIPA the preliminary trends and recommendations based on the data analysis to allow for inclusion in the 2023 budget, IT and metrics completion	9/30/2022	Achieved	Approved
CS-5.7.8	Survey data will be shared with LIPA for August 2022 transaction survey results	9/30/2022	Achieved	Approved
CS-5.7.9	Survey data will be shared with LIPA for September 2022 transaction survey results	10/31/2022	Achieved	Approved
CS-5.7.10	Survey data will be shared with LIPA for October 2022 transaction survey results	11/30/2022	Achieved	Approved
CS-5.7.11	Survey data will be shared with LIPA for November 2022 transaction survey results	12/30/2022	Achieved	Approved
CS-5.8a	Submit to LIPA the final findings and recommendations and recommendations based on the data analysis.	12/30/2022	Achieved	Approved
CS-5.7.12	Survey data will be shared with LIPA for December 2022 transaction survey results	12/30/2022	Achieved	Approved

## **Summary**

- PSEG Long Island developed a five (5) question monthly survey for the following customer transactions: payments, billing move in/move out (MIMO) and deferred payment agreements. The fifth survey is around outage reporting and we will continue to utilize the Chartwell Outage Communication Benchmarking.
- PSEG Long Island provided survey data and transaction survey results to LIPA monthly
  - Note – the month of May and June did not have phone surveys because of an unexpected exit from the space of the vendor who provided those services to PSEG Long Island. An exception was filed and approved due to the unforeseen circumstance.
- PSEG Long Island provided the 2021: (1) average cost of each transaction by channel; (2) volume of each transaction by channel.
- PSEG Long Island submitted a preliminary trends and recommendations based on the data analysis of the survey
- PSEG Long Island submitted a final trends and recommendations based on the data analysis of the survey

## CS-06 - Inactive Accounts Long Term Estimates (LTEs)

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$105,127.05		

### CS-6 Inactive Accounts Long Term Estimates (LTEs) OSA Incentive: \$105,127



#### Metric Definition

Measures the total amount of inactive residential and commercial, meter long term estimates. Inactive accounts are defined as metered accounts that have no current customer of record with energy consumption on the meter or no read.

#### Calculation

Count the number of unresolved inactive meters with 5 or greater estimates as defined above on December 31, 2022 and subtract accounts where completed resolutions were achieved and are still included in the count.

\*The numbers reported are in alignment with LIPA/PSEG LI metric clarification that was approved on May 24.

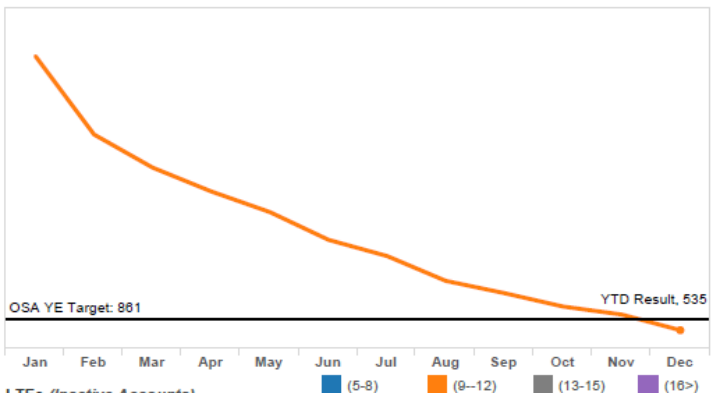
#### YTD

2022	535
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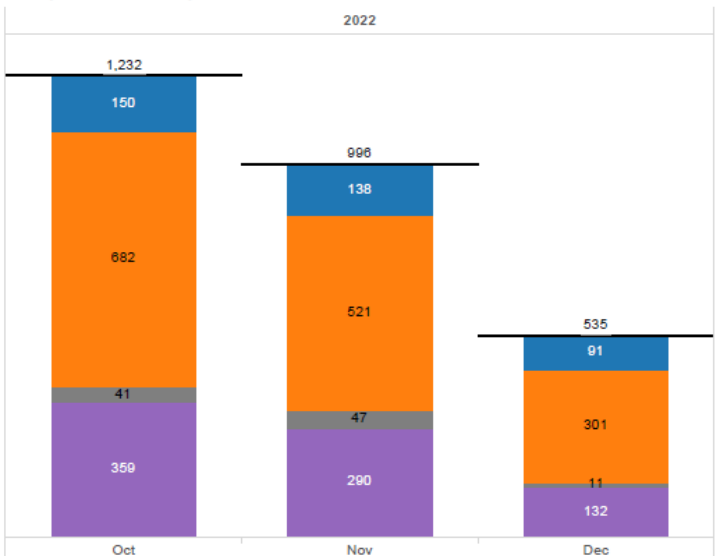
#### Total Inactive Accounts

Total Months	Oct	2022 Nov	Dec
(5-8)	87	74	60
(9-12)	401	304	176
(13-15)	19	32	7
(16>)	325	257	115
<b>Total</b>	<b>832</b>	<b>667</b>	<b>358</b>
(5-8)	63	64	31
(9-12)	281	217	125
(13-15)	22	15	4
(16>)	34	33	17
<b>Total</b>	<b>400</b>	<b>329</b>	<b>177</b>
<b>Inactive Accts LTEs</b>	<b>1,232</b>	<b>996</b>	<b>535</b>

YTD Result	OSA YE Target	OSA YE Forecast
535	861	↑



#### LTEs (Inactive Accounts)



#### Summary

- PSEG Long Island had a baseline of 8,605 inactive account LTEs with five or more consecutive estimates
- PSEG Long Island reduced the baseline to 535 inactive account LTEs with five or more consecutive estimates by year-end achieving the target of 10% of the target population. PSEG Long Island's year-end performance was 6.2% of the baseline inactive accounts.



## CS-07 - Active Accounts Long Term Estimates (LTEs)

Metric Type	Quantitative	Metric Performance
Incentive Compensation Claim	\$105,127.05	↑ Achieved

### CS-7 Active Accounts Long Term Estimates (LTEs) OSA Incentive: \$105,127



#### Metric Definition

Measures the total amount of active residential and commercial, meter long term estimates. Estimated Active accounts are defined as metered accounts that have a current customer of record and the account is not being billed on an actual read.

#### Calculation

Count the number of Active meters with > 3 consecutive estimates as defined above on December 31, 2022.

\*The numbers reported are in alignment with LIPA/PSEG LI metric clarification that was approved on May 24.

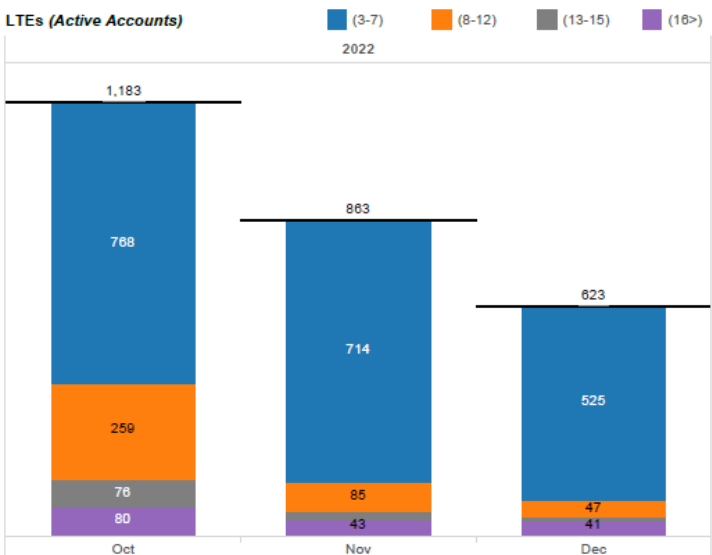
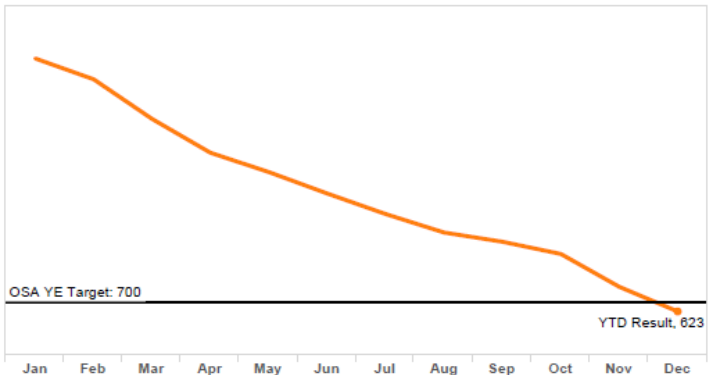
#### YTD



#### Total Active Accounts

Total Months	Oct	2022 Nov	Dec
(3-7)	328	280	214
(8-12)	100	50	34
(13-15)	31	11	4
(16>)	59	37	38
<b>Total</b>	<b>518</b>	<b>378</b>	<b>290</b>
(3-7)	440	434	311
(8-12)	159	35	13
(13-15)	45	10	6
(16>)	21	6	3
<b>Total</b>	<b>665</b>	<b>485</b>	<b>333</b>
<b>Active Accounts LTEs</b>	<b>1,183</b>	<b>883</b>	<b>623</b>

YTD Result	OSA YE Target	OSA YE Forecast
623	700	↑



#### Summary

- PSEG Long Island had a baseline of 3,126 active account LTEs with three or more consecutive estimates
- PSEG Long Island reduced the baseline to 623 inactive account LTEs with five or more consecutive estimates by year-end achieving the target of less than or equal to 700 accounts at year-end.

## CS-08 - Unauthorized Use/Advanced Consumption Resolution

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$105,127.05		

### CS-8 Unauthorized Use/Advanced Consumption Resolution OSA Incentive: \$105,127



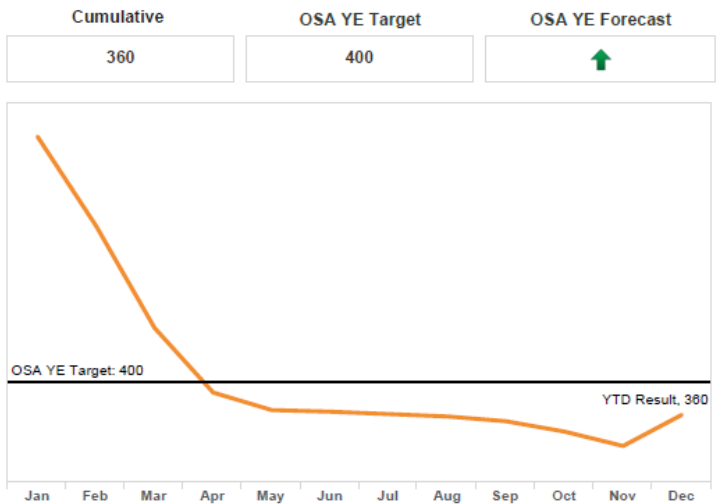
#### Metric Definition

Unauthorized use is when there is no active customer of record and there is consumption on the meter. Unauthorized use can occur when a customer of record moves out, but the physical disconnect does not occur or when an account is locked for non-payment and the customer illegally restores their service.

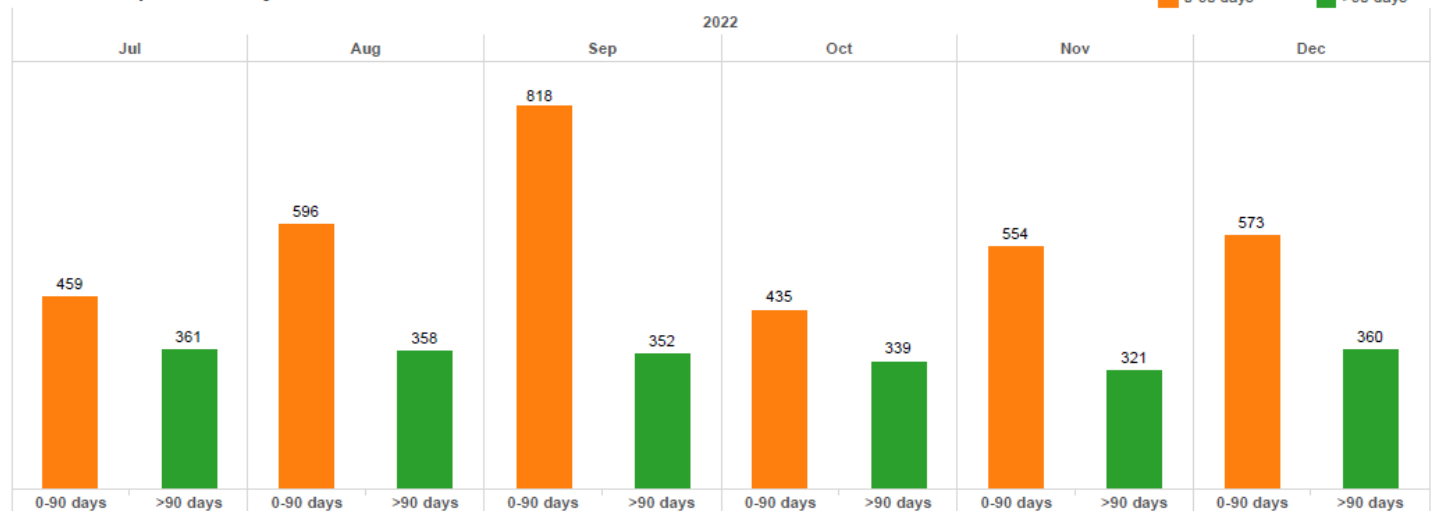
#### Calculation

Count the number of open cases at year end that are over 90 days in the advanced consumption database and open theft referrals.

#### YTD



#### Number of Open Cases by Month - Cumulative

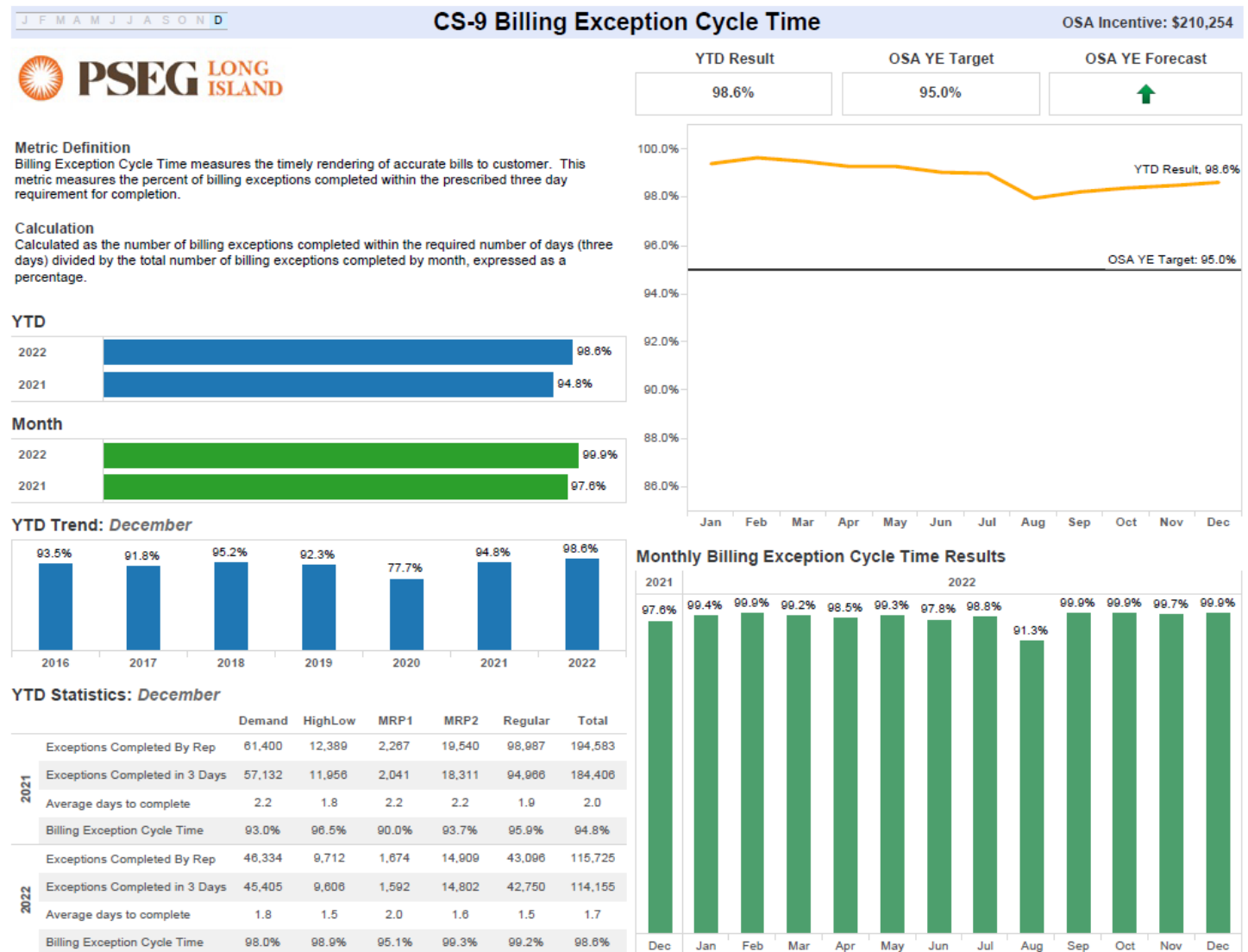


#### Summary

- PSEG Long Island achieved a count of 360 open cases at year-end that were greater than 90 days in the advanced consumption databased and open theft referrals. This was better than the year-end target of 400 cases.

## CS-09 - Billing Exception Cycle Time

<b>Metric Type</b>	Quantitative	<b>Metric Performance</b>	<span style="color: green;">↑</span> <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$210,254.09		

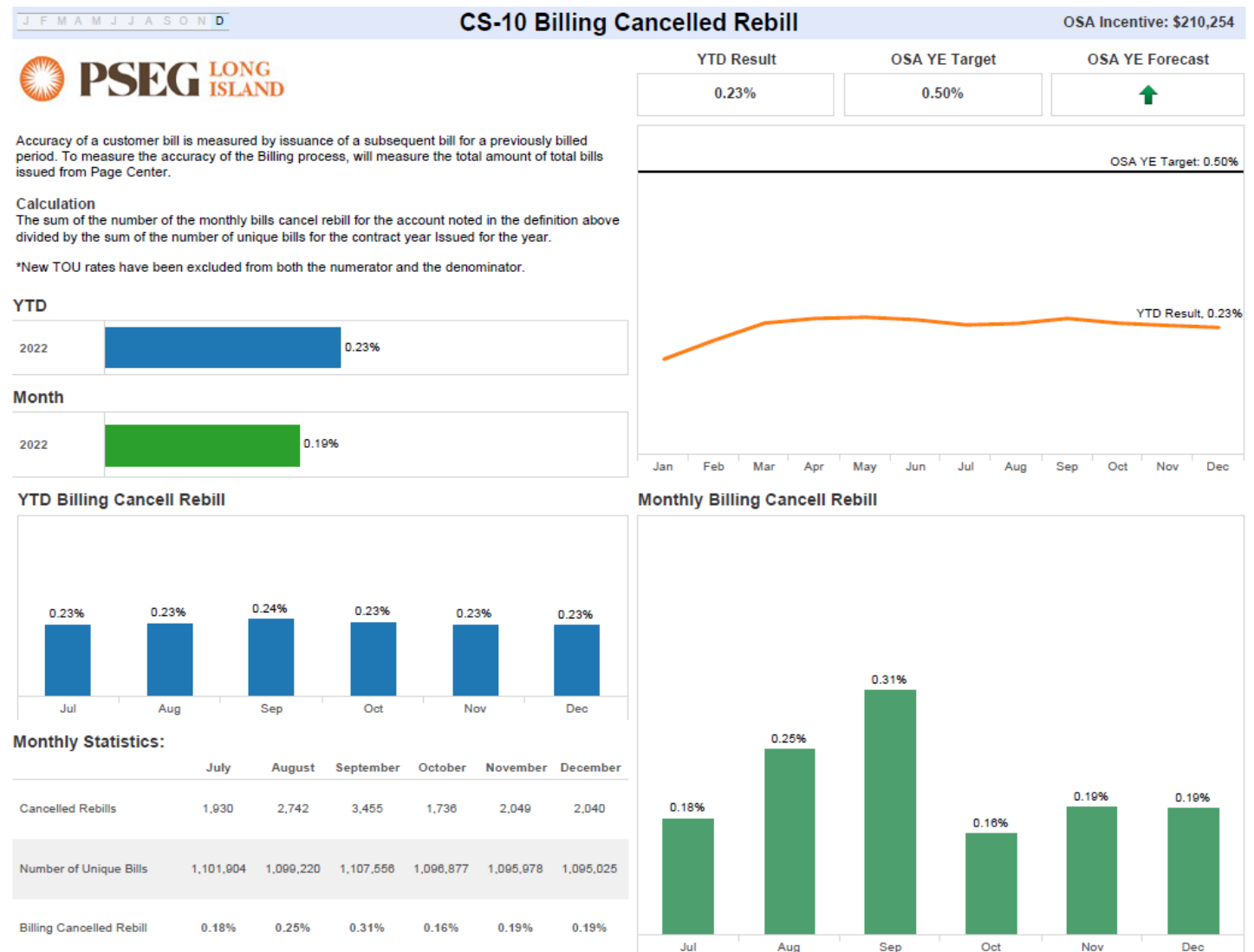


### Summary

- PSEG Long Island achieved a billing exception cycle time of 1.7 days to complete and completed 98.6% of billing exceptions within three days as outlined in the metric.
- PSEG Long Island completed 115,725 billing exceptions by a rep with 114,115 completed within the 3 day targeted window.

## CS-10 - Billing Cancelled Rebill

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$210,254.09		



### Summary

- PSEG Long Island achieved a cancelled rebill percentage of 0.23% of all unique bills.
- PSEG Long Island 29,761 rebills out of 13,217,719 unique bills. A rebill is the issuance of a subsequent bill for a previously billed period.

## CS-11 - Contact Center Service Level with Live Agent Calls

Metric Type	Quantitative	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00		

### CS-11 Contact Center Service Level with Live Agent Calls OSA Incentive: \$183,972



#### Metric Definition

Contact Center Service level for all calls handled by a representative (live agent) from Nice and HVCA. The performance expectation will be: During blue sky days and any storms defined as "non-major", 80% of calls will be answered within 30 seconds. During "major storms", 80% of calls will be answered within 90 seconds.

#### Calculation

Calc= (Storm day calls answered by PSEG LI rep in 90 seconds + HVCA storm calls answered by rep in 90 seconds + Non storm answered by PSEG LI rep + HVCA non storm answered by HVCA provider in 30 seconds) / (HVCA rep offered calls + Nice rep offered calls).

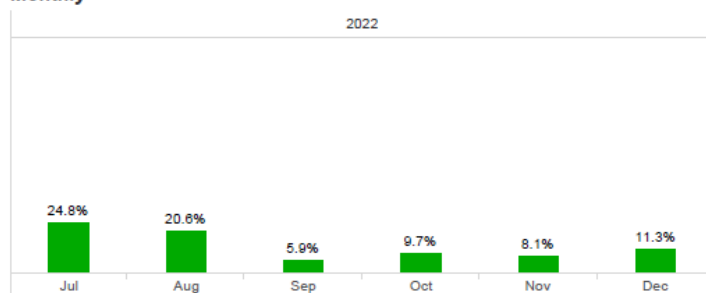
#### YTD

2022	29.2%
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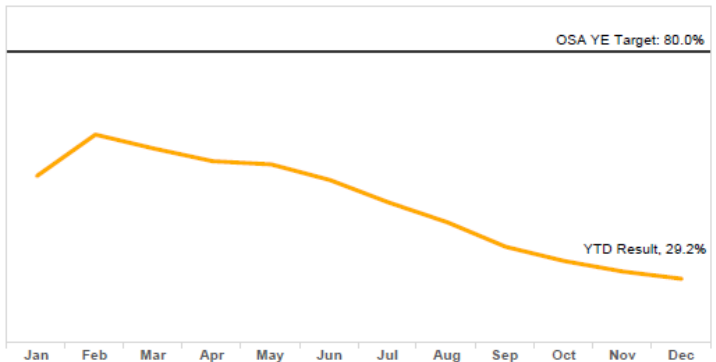
#### Month

2022	11.3%
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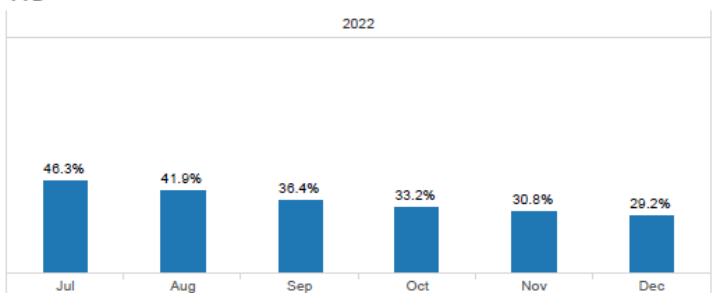
#### Monthly



YTD Result	OSA YE Target	OSA YE Forecast
29.2%	80.0%	↓



#### YTD



#### Call Volumes

		2022					
		Jul	Aug	Sep	Oct	Nov	Dec
Monthly	# Answered Within 30 sec (Rep)	33,794	31,032	9,283	13,506	9,796	13,084
	Storm # Answered Within 90 sec (Rep)	0	0	0	0	0	0
	Rep Calls Offered	136,518	150,614	157,733	139,681	121,039	116,083
YTD	# Answered Within 30 sec (Rep)	335,100	366,132	375,415	388,921	398,717	411,801
	Storm # Answered Within 90 sec (Rep)	0	0	0	0	0	0
	Rep Calls Offered	723,964	874,578	1,032,311	1,171,992	1,293,031	1,409,114

### Summary

- PSEG Long Island did not achieve Contact Center Service Level with Live Agent Calls of 80% of calls answered within 30 seconds during blue sky and non-major storm periods and 90 seconds during major storms
- PSEG Long Island answered 411,801 within 30 second with a live rep out of the 1,409,114 rep answered called in 2022. PSEG Long Island answered 29.2% calls within the defined period not achieving the 80.0% targeted performance level.

## CS-12 - Customer Email Closure Rate

<b>Metric Type</b>	Quantitative	<b>Metric Performance</b>	↓ <b>Did Not Achieve</b>
<b>Incentive Compensation Claim</b>	\$0.00		

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### CS-12 Customer Email Closure Rate

OSA Incentive: \$78,845



#### Metric Definition

Resolve (close) the customer service issue received via email or web within 24 hours. An email or web service inquiry will be considered "Closed" when it is assigned a status of "Closed" in Salesforce because no further work is required on the specific case and the customer does not recontact PSEG LI within 10 business days about the same issue.

#### Calculation

The sum of the number of unique email and web customer service inquiry contacts answered in 2022 within the target threshold divided by the number of unique customer email and web customer service inquiry contacts offered in 2022 as noted in the definitions above which excluded duplicates and non-customer requests

#### YTD

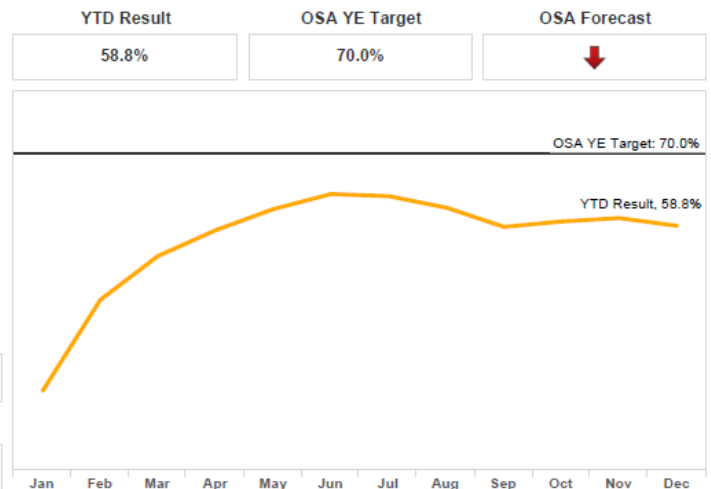
2022	58.8%
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#### Month

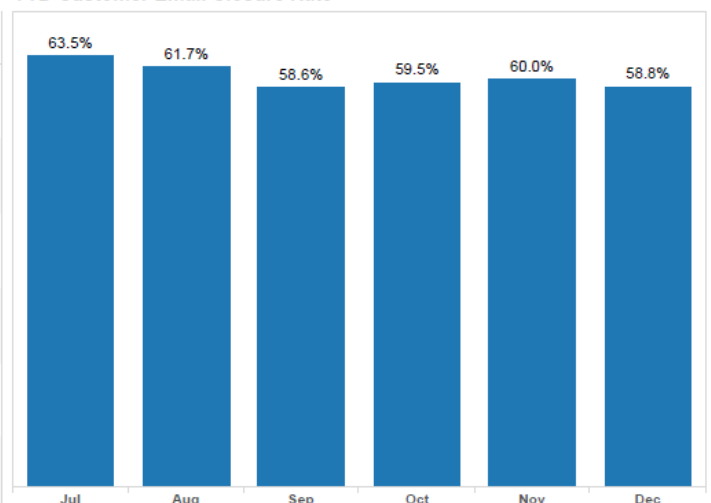
2022	43.2%
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#### Month Summary

	Email	Web	Total Cases	Email Closed in 24 hrs	Web Closed in 24 hrs	Apprec. Case	Total Closed in 24 hrs	Email Closure Rate
Jul	6,813	3,833	10,646	4,517	2,097		6,614	62.1%
Aug	6,270	2,645	8,915	3,281	1,223		4,504	50.5%
Sep	5,309	3,188	8,497	2,431	626	2	3,059	36.0%
Oct	5,059	2,759	7,818	3,392	1,879	3	5,274	67.5%
Nov	4,786	2,324	7,110	3,041	1,640	2	4,683	65.9%
Dec	4,443	2,344	6,787	2,046	888	0	2,934	43.2%



#### YTD Customer Email Closure Rate

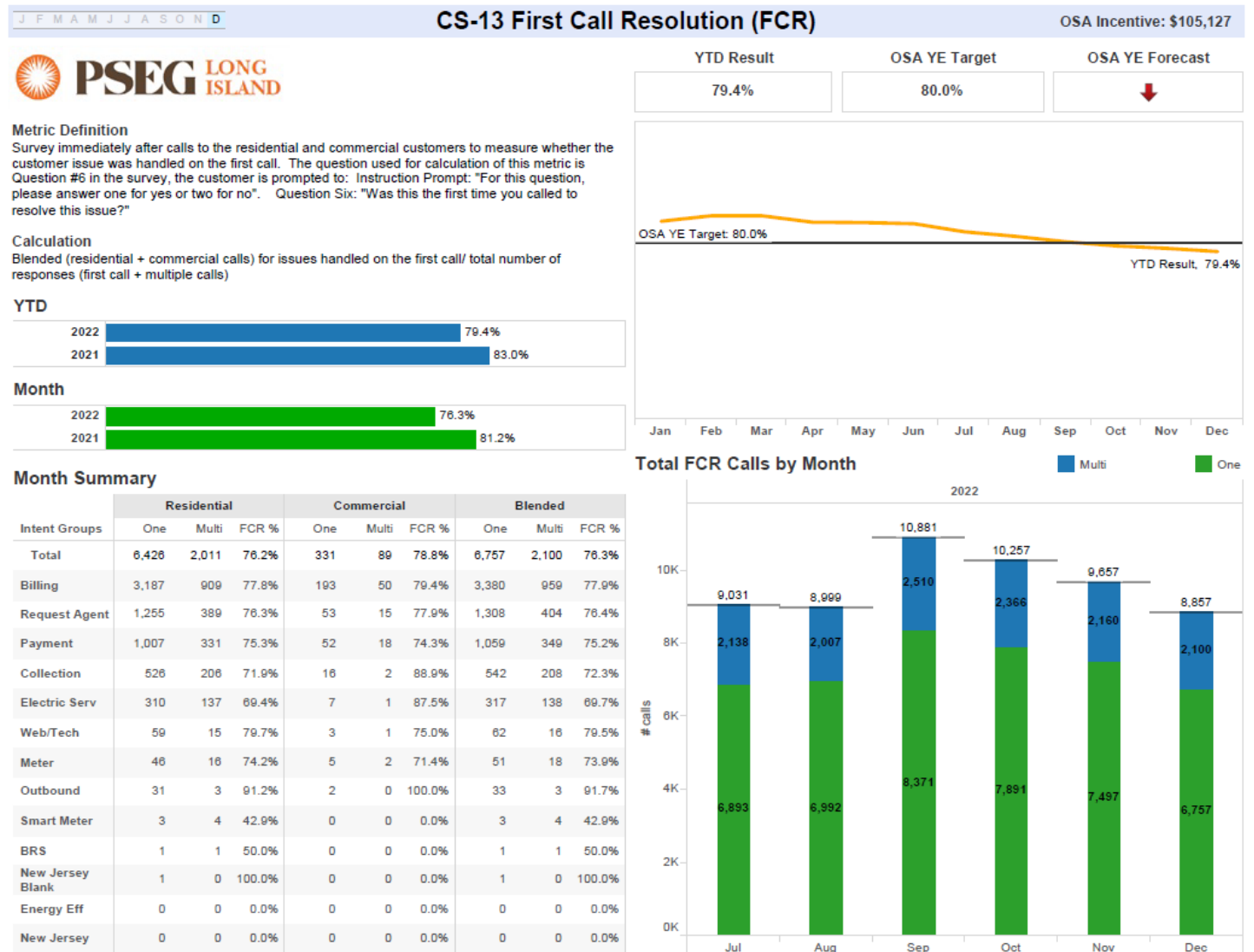


### Summary

- PSEG Long Island did not achieve Customer Email Closure Rate of 70% of the number of unique email and web customer service inquiry contacts answered in 2022 within the target threshold, which excluded duplicates and non-customer request.
- PSEG Long Island closed 54,886 within the 24-hour target out of 93,356 customer e-mails and web cases. PSEG Long Island did not achieve the targeted performance level of 70.0% with year-end performance of 58.8%.

## CS-13 - First Call Resolution (FCR)

Metric Type	Quantitative	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00		



### Summary

- PSEG Long Island did not achieve First Call Resolution (FCR) Rate of 80.0%. FCR is measured via a Survey immediately after calls to the residential and commercial customers to measure whether the customer issue was handled on the first call. The question used for calculation of this metric is Question #6 in the survey, the customer is prompted to Instruction Prompt: "For this question, please answer one for yes or two for no". Question Six: "Was this the first time you called to resolve this issue?" FCR Rate is calculated as a blend of residential and commercial calls that are handled on the first call by the total number or survey responses.
- Out of the 126,163 surveys taken by customers, 100,209 or 79.4% of customers answered that there issue was resolved on the first call.

## CS-14 - Net Write-Offs per \$100 Billed Revenue

Metric Type	Quantitative	Metric Performance
Incentive Compensation Claim	\$262,817.62	↑ Achieved

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### CS-14 Net Write-Offs per \$100 Billed Revenue

OSA Incentive: \$262,818



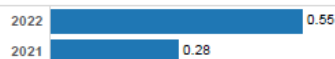
#### Metric Definition

Net Write-Offs per \$100 Billed measures the effectiveness of recovery efforts of uncollectible revenue. This metric is an overall measure of the possibility of the business incurring bad debts and represents a comparison between total sales and those for which payment is not recoverable and therefore written off as losses.

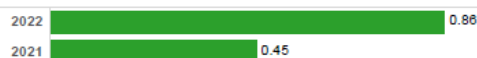
#### Calculation

Measured as the net write-off divided by the electric billed revenues (in multiples of \$100) for a rolling 12 months.

#### Rolling 12-Months



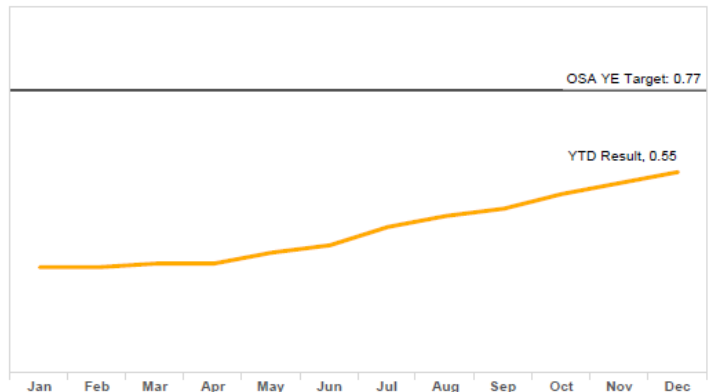
#### Month



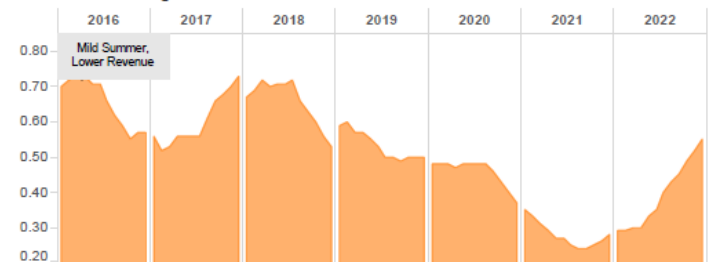
#### Rolling 12 Month Statistics

		Rolling 12 Month Write-Offs YTD	12-month Revolving Billed Revenue YTD	Net Write-offs per \$100 Billed Revenue	
				Month	YTD
2021	December	11,270,944.03	4,046,947,227.25	0.45	0.28
2022	January	11,763,207.64	4,084,823,396.23	0.34	0.29
	February	11,871,397.25	4,126,526,715.81	0.35	0.29
	March	12,475,068.61	4,161,686,345.29	0.48	0.30
	April	12,722,212.22	4,191,888,711.45	0.42	0.30
	May	13,789,826.99	4,219,704,199.26	0.65	0.33
	June	15,020,654.29	4,253,769,745.28	0.58	0.35
	July	17,175,190.19	4,305,374,271.12	0.58	0.40
	August	18,678,784.15	4,386,457,669.07	0.43	0.43
	September	20,387,768.22	4,484,970,517.21	0.49	0.45
	October	22,016,490.07	4,487,290,934.50	0.69	0.49
	November	23,559,259.15	4,523,220,870.47	0.88	0.52
	December	25,003,087.71	4,554,610,109.01	0.86	0.55

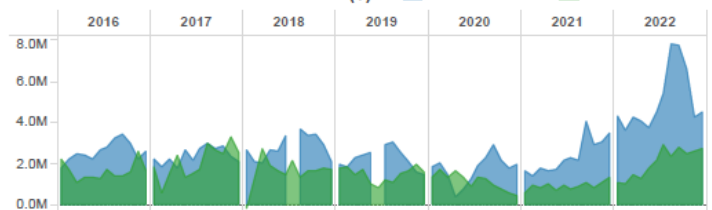
YTD Result	OSA YE Target	OSA YE Forecast
0.55	0.77	↑



#### Historical Rolling 12 Net Write-Offs



#### Final Bill Dollars vs Total Write-Offs (\$)



### Summary

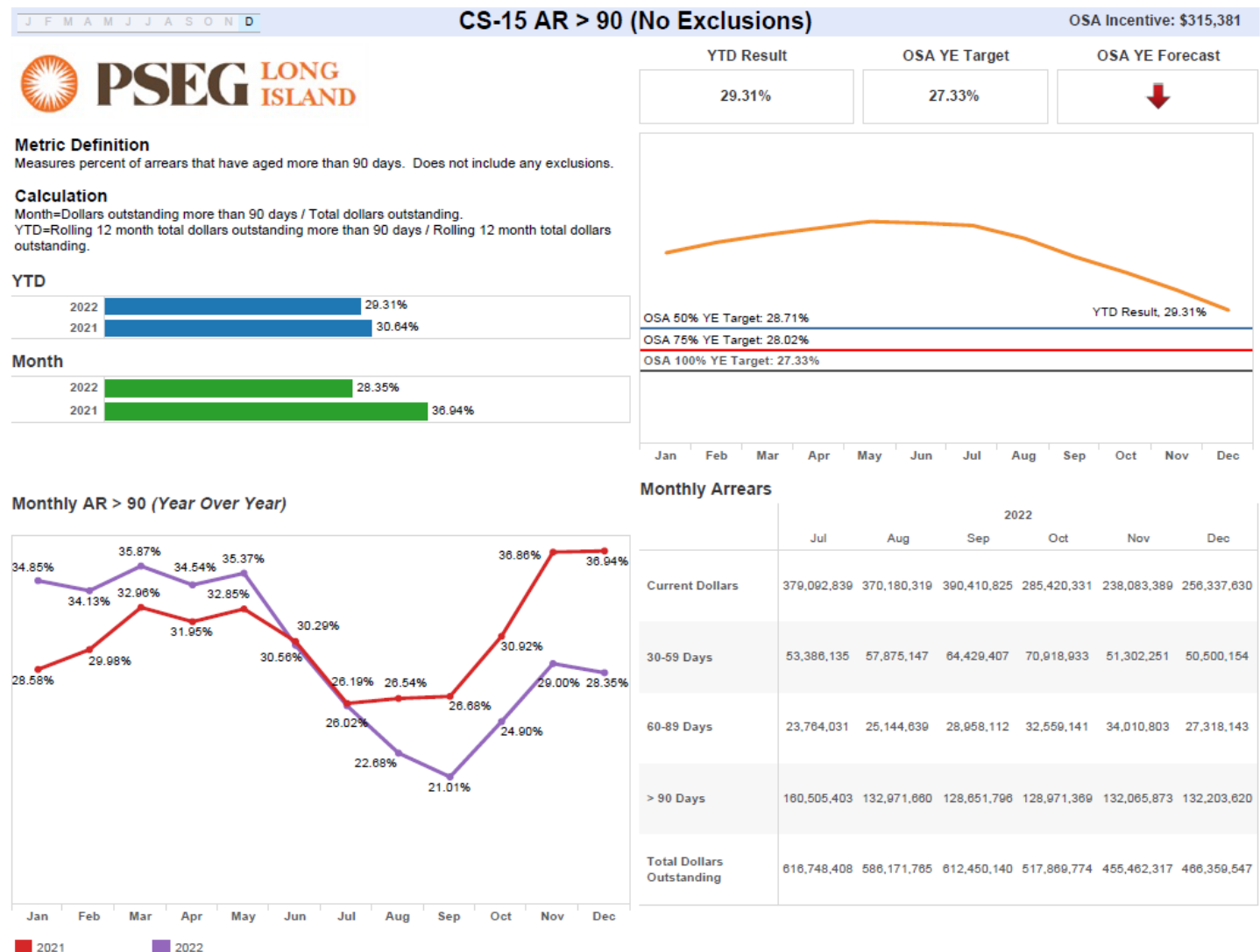
- PSEG Long Island achieved the Net Write-Off per \$100 Billed Revenue target of \$0.77. Net Write-Offs per \$100 Billed measures the effectiveness of recovery efforts of uncollectible revenue. This metric is an overall measure of the possibility of the business incurring bad debts and represents a comparison between total sales and those for which payment is not recoverable and therefore written off as losses. Net Write-Off per \$100 Billed Revenue is measured as the net write-off divided by the electric billed revenues (in multiples of \$100) for a rolling 12 months.
- PSEG Long Island reported performance was positively impacted because of no adjustment to targets. It was assumed in targeted performance levels that PSEG LI would resume residential field collections by January 1, 2022. PSEG Long Island did not resume residential collections until July 12, 2022 in alignment with other NYS utilities. There were also no adjustments made to CS-15 – Accounts Receivable > 90 (AR>90) and CS-16 – Days Sales Outstanding (DSO) which were both negatively impacted from not having adjustments.



- The rolling 12-month write-offs in 2022 were \$25.0M divided by the rolling 12-month billed revenue, which was \$4,554.6M, which equal 0.0055, and then is multiplied by \$100 to year-end reported result of \$0.55.

## CS-15 - AR > 90 (No Exclusions)

Metric Type	Quantitative	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00		



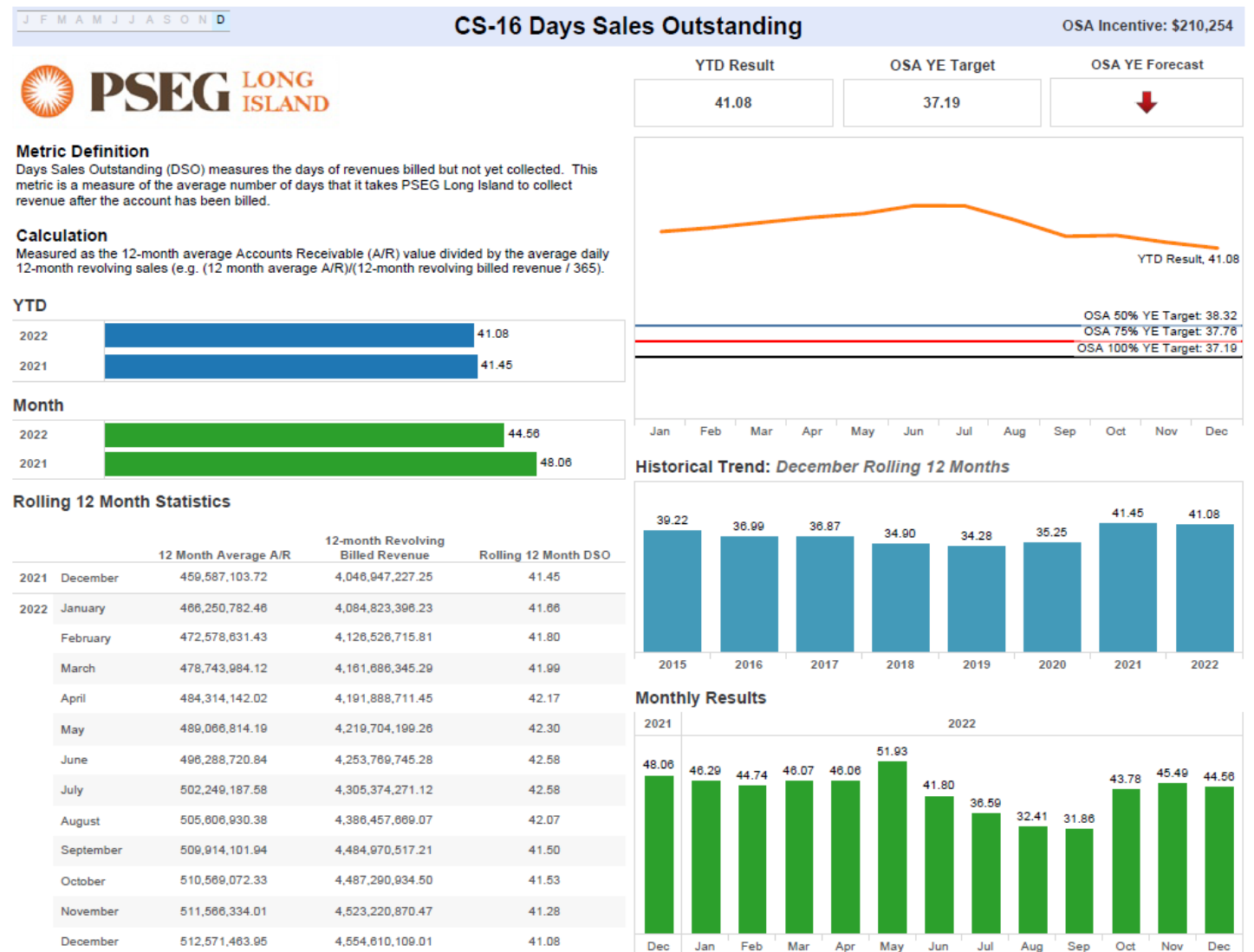
### Summary

- PSEG Long Island did not achieve the Accounts Receivable > 90 Days 100% target of 27.73%. Note there were multiple levels of targets: 50%, 75% and 100%. Targets were also adjusted from beginning of the year for new state or federal energy assistance beyond the base HEAP on a dollar-for-dollar basis. Reductions to the agreed upon forecast will be done based on the timing when funds are received AND will be accounted for dollar for dollar in the appropriate aging buckets. AR>90 is measured as the rolling 12 month total dollars outstanding more than 90 days / Rolling 12 month total dollars outstanding.
- PSEG Long Island reported performance was negatively impacted because of no adjustment to targets. It was assumed in targeted performance levels that PSEG LI would resume residential field collections by January 1, 2022. PSEG Long Island did not resume residential collections until July 12, 2022 in alignment with other NYS utilities. There were also no adjustments made to CS-14 – Net Write-Off per \$100 Billed Revenue, which was positively impacted by not adjusting targets and CS-16 – Days Sales Outstanding (DSO) that was negatively impacted from not having adjustments.

- The metric exclusion language stated if a state mandated moratorium on shut-off is instituted for residential customers for more than 2 months during 2022, target will be adjusted for the period the moratorium exists based on the incremental funds anticipated during that period. Partial months will be calculated based on workdays and the days covered by the moratorium legislation. PSEG Long Island during the year discussed the potential of submitting an exclusion as the targets were based on beginning collection in January. PSEG LI never officially pursued the exclusion but wants to note if targets were adjusted to start of collections PSEG LI performance would in the collections area would have achieved adjusted targets.
- The rolling 12-month arrears > 90 days in 2022 were \$1,808,274,678 divided by the rolling 12-month Total Arrears, which was \$6,168,785,495, which equals an AR>90 of 29.31%.

## CS-16 - Days Sales Outstanding

Metric Type	Quantitative	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00		



### Summary

- PSEG Long Island did not achieve the Days Sales Outstanding 100% target of 37.19 days. Note there were multiple levels of targets: 50%, 75% and 100% of which PSEG LI did not achieve any. Targets were adjusted from beginning of the year for new state or federal energy assistance beyond the base HEAP on a dollar-for-dollar basis. Reductions to the agreed upon forecast will be done based on the timing when funds are received AND will be accounted for dollar for dollar in the appropriate aging buckets. DSO is measured as the 12-month average Accounts Receivable (A/R) value divided by the average daily 12-month revolving sales (e.g. (12 month average A/R)/(12-month revolving billed revenue / 365 days)
- PSEG Long Island reported performance was negatively impacted because of no adjustment to targets for the resumption of field collection. It was assumed in targeted performance levels that PSEG LI would resume residential field collections by January 1, 2022. PSEG Long Island did not resume residential collections until July 12, 2022 in alignment with other NYS utilities. There were also no adjustments made to CS-14 – Net Write-Off

per \$100 Billed Revenue, which was positively impacted by not adjusting targets and CS-15 – Accounts Receivable > 90 Days (AR>90) that was negatively impacted from not having adjustments.

- The metric exclusion language stated if a state mandated moratorium on shut-off is instituted for residential customers for more than 2 months during 2022, target will be adjusted for the period the moratorium exists based on the incremental funds anticipated during that period. Partial months will be calculated based on workdays and the days covered by the moratorium legislation. PSEG Long Island during the year discussed the potential of submitting an exclusion as the targets were based on beginning collection in January. Regardless if an exception was approved or not PSEG LI would not have achieved the targeted levels.
- The 12 month average accounts receivable year end was \$512,571,463.95 divided by the rolling 12 month billed revenue, which was \$4,554,610,109.01 divided by 365 days which is 41.08 days.

## CS-17 - LMI Program Participation

Metric Type	Quantitative	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00		

J F M A M J J A S O N D CS-17 LMI (Low to Moderate Income) Program Participation OSA Incentive: \$105,127



YTD Result OSA YE Target OSA YE Forecast

42,365

55,000



### Metric Definition

The number of unique valid LMI program enrollees in any month during the calendar year 2022.

### Calculation

The number of LMI program enrollees in any month during the calendar year 2022.

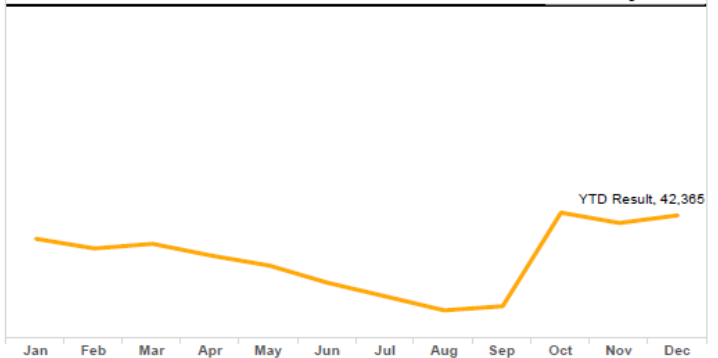
### YTD

2022	42,365
2021	41,942

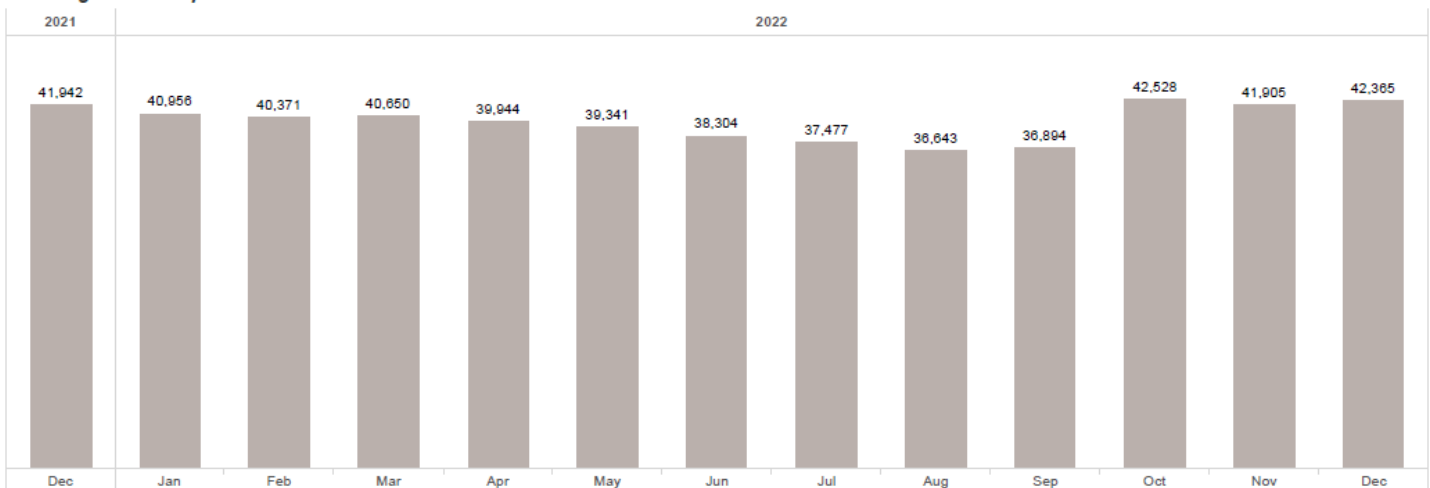
### Month

2022	42,365
2021	41,942

OSA YE Target: 55,000



### LMI Program Participation - Number of Enrollees



### Summary

- PSEG Long Island did not achieve the number of Lowe to Moderate Income Program participant enrollees target of 55,000 during any calendar month in 2022.
- October was the highest number of enrollees which was 42,528 customers enrolled

## CS-18 - Low to Moderate Income Program Automation

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$105,127.05		

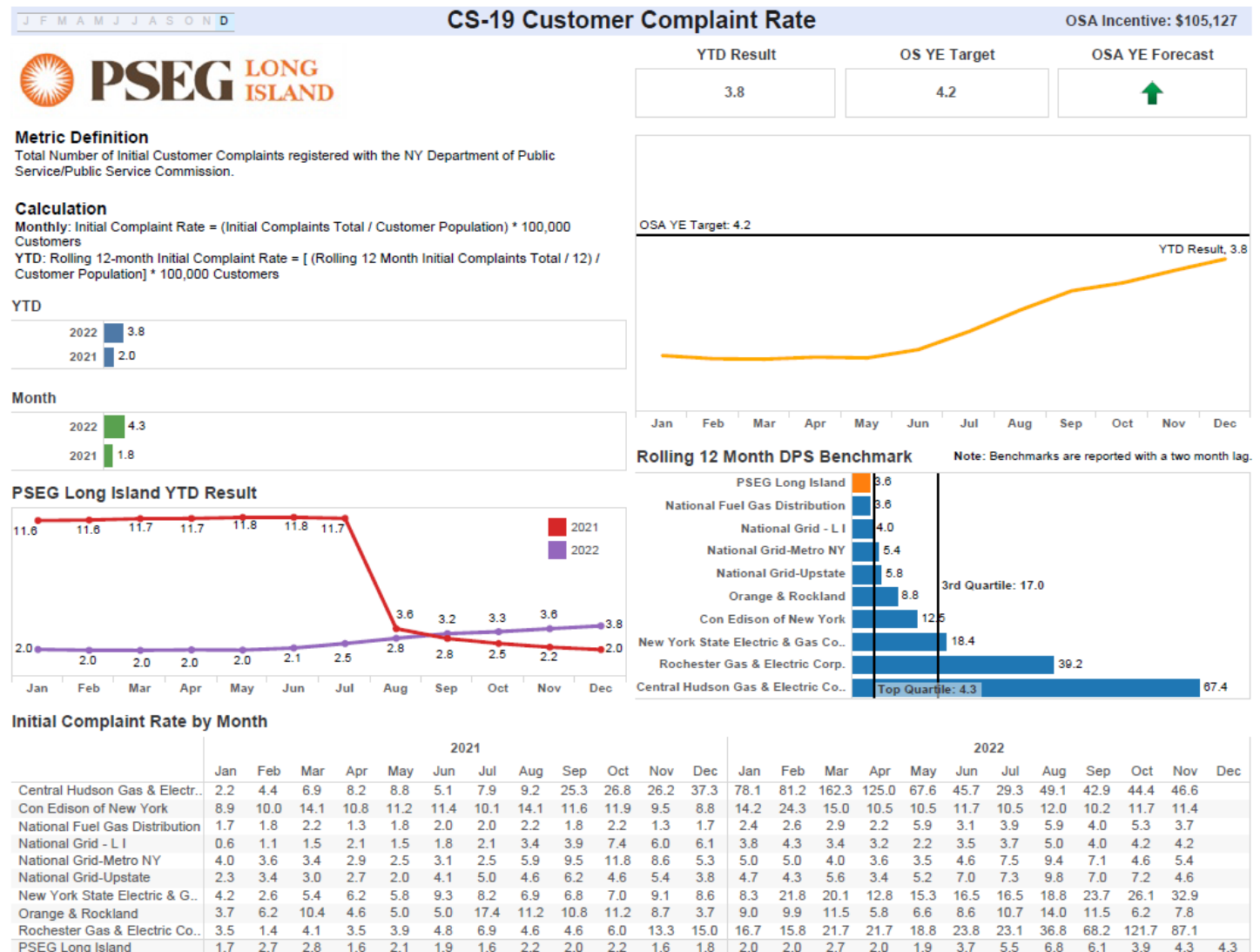
CS-18	Low to Moderate Income (LMI) Program Automation			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
CS-18.1	Provide the current resource requirement utilized to process LMI enrollments by January 31, 2022	1/31/2022	Achieved	Achieved
CS-18.2	Provide a Project Implementation Plan ("PIP") for automated processes for LIPA approval, which shall not be unreasonably withheld, by April 30, 2022.	4/29/2022	Achieved	Achieved
CS-18.3	Implementation of the automated process along with the estimated number of resources saved due to the automation by September 30, 2022.	9/30/2022	Achieved	Achieved

### Summary

- PSEG Long Island provided current resource requirements utilized to process LMI enrollments
- PSEG Long Island provided a Project Implementation Plan ("PIP") for automated processes
- PSEG Long Island implemented the automated process along with the estimated number of resources saved due to the automation

## CS-19 - Customer Complaint Rate

Metric Type	Quantitative	Metric Performance
Incentive Compensation Claim	\$105,127.05	↑ Achieved



### Summary

- PSEG Long Island achieved the Customer Complaint Rate targeted performance level of 4.2 complaints per 100,000 customers. PSEG Long Island's 2022 year-end reported complaint rate was 3.8 complaints/100k customers.
- The Customer Complaint Rate is measured by Total Number of Initial Customer Complaints registered with the NY Department of Public Service/Public Service Commission. The calculation is: Rolling 12-month Initial Complaint Rate = [ (Rolling 12 Month Initial Complaints Total / 12) / Customer Population ] \* 100,000 Customer
- PSEG Long Island had [ (524 initial complaints divided by 12 months) divided by 1,158,156 customers ] times 100,000 customers equals 3.77 complaints per 100K customers.
- PSEG Long Island finished 2022 with the 3<sup>rd</sup> best complaint rate/100k customers among other NYS utilities. PSEG LI was the highest rated utility that was electric only or a combined utility.
  - National Grid - LI - 3.71
  - National Fuel Gas Distribution - 3.72
  - PSEG Long Island - 3.77



4. National Grid-Metro NY - 5.49
5. National Grid-Upstate - 5.94
6. Orange & Rockland - 9.18
7. Con Edison of New York - 12.63
8. New York State Electric & Gas Corp. - 19.93
9. Rochester Gas & Electric Corp. - 42.67
10. Central Hudson Gas & Electric Corp. - 69.36

# Information Technology

## IT-1 - Organizational Maturity Level – Doing

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$262,817.62		

IT-01	Organizational Maturity Level – Doing			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-1.1	PSEG Long Island IT Department reaches Maturity Level 3 in the CMMI V2 Development Model 'Doing' Category. (Consult attached "LIPA-PSEG-2022- IT-1 Organizational Maturity Level-Doing" metric document for Practice Areas to be rated at Level 3)	10/31/2022	<b>Achieved</b>	<b>Approved</b>
IT-1.2	PSEG Long Island IT Department is verified to be at Level 3 in the CMMI V2 Development Model 'Doing' Category via a CMMI Benchmark Appraisal conducted by a mutually agreed upon LIPA consultant. (Consult attached "LIPA-PSEG-2022- IT-1 Organizational Maturity Level-Doing" metric document for Practice Areas to be rated at Level 3)	12/30/2022	<b>Achieved</b>	<b>Reviewing</b>

### Summary

- The objective of the goal is that PSEG Long Island IT Department reaches Maturity Level 3 in the CMMI V2 Development Model 'Doing' Category by October 2022; and is verified to be at Level 3 via a CMMI Benchmark Appraisal conducted by a mutually agreed upon LIPA consultant.
- PSEG Long Island completed an initial assessment with to identify gaps with respect to CMMI level 3 in the "Doing" Category.
- PSEG Long Island identified key gaps in the initial assessment phase and identified recommendations to be resolved for successful CMMI appraisal in October.
- LIPA hired a consultant, Layermark, to performance an evaluation assessment based on the CMMI-DEV v2.0 model for PSEG-LI processes between November 29 and December 19 in 2022.
- Layermark's report stated: "In general, we can safely conclude that the projects satisfy the expectations of the CMMI-DEV v2.0 model on Level 2/3 practice groups of the practice areas in scope."
- There were 62 practices that were studied during Layermark's review in the "Doing" Category – out of the 62 practices review 58 were identified to fully meet the intent and the value of the CMMI "Doing" practice and 4 were identified to largely/partially meet the intent and the value of the CMMI "Doing" practice
- The CMMI Institute defines a Practice Area as achieved/satisfied if the **Intent** and **Value** are met - either Fully Met/Largely Met/Partially Met
  - Standard published content contained in CMMI's Method Description Document (MDD)
- PSEG Long Island's performance aligns with 100% incentive of achieving a maturity level 3 in all seven (7) of the "Doing" Practice Areas.

## IT-2 - Organizational Maturity Level – Managing

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$525,635.23		

IT-02	Organizational Maturity Level – Managing			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-2.1	The PSEG Long Island IT Department reaches Maturity Level 3 in the CMMI V2 Development Model "Managing" Category. (Consult attached "LIPA-PSEG-2022- IT-2 Organizational Maturity Level- Managing" metric document for Practice Areas to be rated at Level 3)	10/31/2022	Achieved	Approved
IT-2.2	PSEG Long Island IT Department is verified to be at Level 3 in the CMMI V2 Development Model "Managing" Category via a CMMI Benchmark Appraisal conducted by a mutually agreed upon LIPA consultant. (Consult attached "LIPA-PSEG-2022- IT-2 Organizational Maturity Level-Managing" metric document for Practice Areas to be rated at Level 3)	12/30/2022	Achieved	Reviewing

### Summary

- The objective of the goal is that PSEG Long Island IT Department reaches Maturity Level 3 in the CMMI V2 Development Model 'Managing' Category by October 2022; and is verified to be at Level 3 via a CMMI Benchmark Appraisal conducted by a mutually agreed upon LIPA consultant.
- PSEG Long Island completed an initial assessment with to identify gaps with respect to CMMI level 3 in the "Managing" Category.
- PSEG Long Island identified key gaps in the initial assessment phase and identified recommendations to be resolved for successful CMMI appraisal in October.
- LIPA hired a consultant, Layermark, to performance an evaluation assessment based on the CMMI-DEV v2.0 model for PSEG-LI processes between November 29 and December 19 in 2022.
- Layermark's stated that: "In general, we can safely conclude that the projects satisfy the expectations of the CMMI-DEV v2.0 model on Level 2/3 practice groups of the practice areas in scope."
- There were 47 practices that were studied during Layermark's review in the "Managing" Category – out of the 47 practices review 36 were identified to fully meet the intent and the value of the CMMI "Doing" practice and 11 were identified to largely/partially meet the intent and the value of the CMMI "Managing" practice
- The CMMI Institute defines a Practice Area as achieved/satisfied if the **Intent** and **Value** are met - either Fully Met/Largely Met/Partially Met
  - Standard published content contained in CMMI's Method Description Document (MDD)
- PSEG Long Island's performance aligns with 100% incentive of achieving a maturity level 3 in all five (5) of the "Managing" Practice Areas.

## IT-3 - System Resiliency

Metric Type	Qualitative	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00		

IT-03	System Resiliency			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-3.1	100% of Wave 1 critical systems, as specified in the attached "LIPA-PSEG-2022- IT-3 System Resiliency" metric document, have Disaster Recovery Plans that have been reviewed, updated, and LIPA-approved.	6/30/2022	Did Not Achieve	Declined
IT-3.2	100% of Wave 1 critical systems/processes, as specified in the attached "LIPA-PSEG-2022- IT-3 System Resiliency" metric document, have Business Continuity Plans that have been reviewed, updated and LIPA-approved.	6/30/2022	Did Not Achieve	Declined
IT-3.3	LIPA-approved Disaster Recovery Plans are successfully exercised for 100% of the critical systems that are specified as in Wave 1 in the attached "LIPA-PSEG-2022- IT-3 System Resiliency" metric document. (Successful exercise of a Disaster Recovery Plan is defined in the attached "LIPA-PSEG-2022- IT-3 System Resiliency" metric document, and entails LIPA-observed real-life testing of the production workload being taken over by failover/recovery systems for a period of time and then subsequently restored to the primary system, in accordance with the Disaster Recovery Plan and LIPA-approved Test Plans.)	6/30/2022	Did Not Achieve	Declined
IT-3.4	LIPA-approved Business Continuity Plans are successfully exercised for 100% of the critical systems/processes that are specified as in Wave 1 in the attached "LIPA-PSEG-2022- IT-3 System Resiliency" metric document. (Successful exercise of a Business Continuity Plan entails LIPA-observed real-life full-scale simulation in accordance with the Business Continuity Plan)	6/30/2022	Did Not Achieve	Declined
IT-3.5	100% of Wave 2 critical systems, as specified in the attached "LIPA-PSEG-2022- IT-3 System Resiliency" metric document, have Disaster Recovery Plans that have been reviewed, updated and LIPA-approved.	10/31/2022	Did Not Achieve	Declined
IT-3.6	100% of Wave 2 critical systems/processes, as specified in the attached "LIPA-PSEG-2022- IT-3 System Resiliency" metric document, have Business Continuity Plans that have been reviewed, updated and LIPA-approved.	10/31/2022	Did Not Achieve	Declined
IT-3.7	LIPA-approved Disaster Recovery Plans are successfully exercised for 100% of the critical systems that are specified as in Wave 2 in the attached "LIPA-PSEG-2022- IT-3 System Resiliency" metric document. (Successful exercise of a Disaster Recovery Plan is defined in the attached "LIPA-PSEG-2022- IT-3 System Resiliency" metric document, and entails LIPA-observed real-life testing of the production workload being taken over by failover/recovery systems for a period of time and then subsequently restored to the primary system, in accordance with the Disaster Recovery Plan and LIPA-approved Test Plans.)	10/31/2022	Did Not Achieve	Declined
IT-3.8	LIPA-approved Business Continuity Plans are successfully exercised for 100% of the critical systems that are specified as in Wave 2 in the attached "LIPA-PSEG-2022- IT-3 System Resiliency" metric document. (Successful exercise of a Business Continuity Plan entails LIPA-observed real-life full-scale simulation in accordance with the Business Continuity Plan)	10/31/2022	Did Not Achieve	Declined
IT-3.9	100% of Wave 3 systems, as specified in the attached "LIPA-PSEG-2022- IT-3 System Resiliency" metric document, are architecturally ready for failover/recovery in accordance with LIPA-approved Disaster Recovery Plans.	10/31/2022	Did Not Achieve	Declined

### **Summary**

- PSEG Long Island did not achieve the deliverables associated with IT-03

## IT-4 - System and Software Lifecycle Management

Metric Type	Qualitative	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00		

IT-04	System Resiliency			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-4.1	IT and OT asset inventory, as specified in the Definition section of the attached "IT-4 System Lifecycle Management" metric document, is approved by LIPA.	6/30/2022	Achieved	Approved
IT-4.2	A plan to replace or upgrade end-of-life assets within two (2) years, as specified in the Definition section of the attached "IT-4 System Lifecycle Management" metric document, is submitted to and approved by LIPA.	6/30/2022	Achieved	Approved
IT-4.3	Assets (Tier 1/Tier 2) identified in the definition section the attached "IT-4 System Lifecycle Management" metric document are replaced or upgraded in 2022.	6/30/2022	Did Not Achieve	Declined

### Summary

- PSEG Long Island provided IT and OT asset inventory, as specified in the definition section
- PSEG Long Island provided a plan to replace or upgrade end-of-life assets within two (2) years
- PSEG Long Island did not complete the identified assets/projects Tier 1 and 2 as identified in the metric. Please see below for a summary of the projects.

## Tier 1

### Citrix HW/SW

- Original estimate was based on a direct upgrade to newer hardware and a newer version of the Citrix application. In order to ensure best practice architecture and implementation, Citrix was brought in to perform an analysis of the new environment. Citrix provided recommendations to improve the architecture as well as configuration changes for better performance. These changes required a re-estimation of time and resources to implement. Additionally there were supply chain issues with receiving the equipment and assessment charges against the project that exceed the original estimates.
- New in service date February 2023

### Corporate Wireless Network

- Delays due to supply chain in 2022. Equipment ordered in 2021. Devices required to perform the upgrades were not available due to chip shortage until December 2022. Requested carry over dollars approved by LIPA for 2023.
- New in service date July 2023

### Oracle DB Exadata Platform

- Delays due to design, license allocation and negotiations on price. Additional power was required to be provisioned in both primary and backup datacenters to accommodate the new equipment. Oracle would not ship the equipment until all power and network requirements were in place.
- New in service date June 2023

### *Oracle DB 11g*

- Dependency on new Oracle Database Exadata Platform. Plan is to migrate existing databases to new environment and perform database version upgrades as the legacy Exadata environment does not support database versions beyond 12c.
- New in service date August 2023

### *CNI PI system*

- Completed December 1, 2022.

### *Switch/Router*

- A majority of the devices were replaced in 2022. Remaining upgrades, 2 core switches in Primary Datacenter, were planned for replacement in December 2022 but were pushed to Q2 2023 due to delay in receiving 4 switch line cards originally planned in November 2022. New expected delivery date for line cards February 2023.
- New in service date April 2023

## **Tier 2**

### *Control room recorder*

- The call recording portion of the Control Rooms was accommodated by the Telecom Optimization upgrade. A new project was recommended for 2023 to conduct a Phase 0 study in order to determine what equipment should be replaced in all of the control rooms and to determine what the new system should consist of. New in service date will be determined upon completion of the Phase 0.
- Completion of Phase 0 March 2023

### *Messageway SFTP solution*

- The project is approved for carry over from 2022 to 2023. The project was unable to get started in 2022 due to lack of resources and technical subject matter expertise required to perform technical assessment on the current application and infrastructure for project planning.
- New in service date December 2023

### *Sitecore*

- The project go live was shifted from December 2022 to January 2023. Penetration testing was completed; issues were identified. High and medium findings were remediated in December 2022; however security review and approval are required.
- Completed January 2023

### *Virtual Host Servers*

- Delayed start and supply chain issues with core components, Fabric Interconnect switches, required for network and storage connectivity resulting in later delivery and installation of equipment. Requested carry over dollars approved by LIPA for 2023.
- New in service date June 2023

### *Windows 2016 Operating System*

- Majority of the Windows 2008 servers were completed by December 2022. 13 servers are still in progress and could not be completed as they had vendor dependencies requiring additional time. Remaining servers that cannot be upgraded due to application and operating system limitations are documented as part of a Security Risk Exception with mitigating controls and a target remediation plan that includes system replacement.
- New in service date February 2023

## IT-5 - System Implementation – 2022 Budget Projects

Metric Type	Qualitative	Metric Performance	↑ Achieved (Partially)
Incentive Compensation Claim	\$630,762.28	Comments	Compensation claim is: <ul style="list-style-type: none"> <li>Tier 1- achievement of 60% incentive for meeting the target for 8 out of 11</li> <li>Tier 2 – achievement of 100% incentive for meeting the target for 75% of projects</li> </ul>

### Tier 1

#### IT-5-T1.01 – GIS – Long Term Plan, Architecture and Technology Stack Upgrade

Project Status: **Achieved**

IT-5-T1.01 GIS – Long Term Plan, Architecture and Technology Stack Upgrade				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-5-T1.01.01	GIS - Detailed Project Implementation Plan, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, submitted to LIPA for approval.	01/05/22	Achieved	Approved
IT-5-T1.01.02	GIS - Monthly Reporting of Project Status and compliance for the month of February 2022.	03/10/22	Achieved	Approved
IT-5-T1.01.04	GIS - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	Achieved	Approved
IT-5-T1.01.03	GIS - Overall GIS long-term architecture with high availability and failover, submitted to LIPA for approval.	04/29/22	Achieved	Approved
IT-5-T1.01.05	GIS - Monthly Reporting of Project Status and compliance for the month of April 2022.	05/10/22	Achieved	Approved
IT-5-T1.01.06	GIS - Monthly Reporting of Project Status and compliance for the month of May 2022.	06/10/22	Achieved	Approved
IT-5-T1.01.07	GIS - Long-Term Strategic Plan and Roadmap, as described in the approved Project Implementation Plan, delivered for LIPA approval.	07/01/22	Achieved	Approved
IT-5-T1.01.08	GIS - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/08/22	Achieved	Approved
IT-5-T1.01.09	GIS - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Achieved	Approved
IT-5-T1.01.10	GIS - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Achieved	Approved
IT-5-T1.01.11	GIS - Monthly Reporting of Project Status and compliance for the month of September 2022.	10/10/22	Achieved	Approved
IT-5-T1.01.12	GIS - Monthly Reporting of Project Status and compliance for the month of October 2022.	11/10/22	Achieved	Approved
IT-5-T1.01.13	GIS - Monthly Reporting of Project Status and compliance for the month of November 2022.	12/09/22	Achieved	Approved
IT-5-T1.01.14	GIS - Upgraded, comprehensively tested and documented system(s) fully deployed in production and the Project End State documented in the LIPA-approved Project Implementation Plan achieved.	12/30/22	Achieved	Reviewing
IT-5-T1.01.15	GIS - All 2022 Project Deliverables specified in the LIPA-approved Project Implementation Plan delivered.	12/30/22	Achieved	Reviewing

### Summary



- PSEG Long Island upgraded, comprehensively tested and documented system(s) fully deployed in production and the Project End State documented in the LIPA-approved Project Implementation Plan for the GIS project
- All 2022 Project Deliverables were delivered for the GIS project.

## IT-5-T1.02 – DER Visibility (U2.0)

Project Status: **Achieved**

IT-5-T1.02 DER Visibility (U2.0)				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-5-T1.02.01	DER - Detailed Project Implementation Plan, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, submitted to LIPA for approval.	03/31/22	Achieved	Approved
IT-5-T1.02.02	DER - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	Achieved	Approved
IT-5-T1.02.03	DER - Monthly Reporting of Project Status and compliance for the month of April 2022.	05/10/22	Achieved	Approved
IT-5-T1.02.04	DER - Monthly Reporting of Project Status and compliance for the month of May 2022.	06/10/22	Achieved	Approved
IT-5-T1.02.05	DER - Planning and Design Phase completed.	07/29/22	Achieved	Approved
IT-5-T1.02.06	DER - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/08/22	Achieved	Approved
IT-5-T1.02.07	DER - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Achieved	Approved
IT-5-T1.02.08	DER - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Achieved	Approved
IT-5-T1.02.09	DER - Cybersecurity Approval, submitted to LIPA.	09/30/22	Achieved	Approved
IT-5-T1.02.10	DER - Monthly Reporting of Project Status and compliance for the month of September 2022.	10/10/22	Achieved	Approved
IT-5-T1.02.11	DER - Monthly Reporting of Project Status and compliance for the month of October 2022.	11/10/22	Achieved	Approved
IT-5-T1.02.12	DER - System Integration, as specified in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, completed.	02/10/23	Achieved	Approved
IT-5-T1.02.13	DER - Monthly Reporting of Project Status and compliance for the month of November 2022.	12/09/22	Achieved	Approved
IT-5-T1.02.14	DER - All 2022 Project Deliverables specified in the LIPA-approved Project Implementation Plan delivered.	12/19/22	Achieved	Approved
IT-5-T1.02.01	DER - Detailed Project Implementation Plan, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, submitted to LIPA for approval.	03/31/22	Achieved	Approved

### Summary

- All 2022 Project Deliverables specified in the LIPA-approved Project Implementation Plan were delivered for the DER Visibility project.

## IT-5-T1.03 – ADMS Network Model and Long-Term Roadmap

Project Status: **Achieved**

IT-5-T1.03 ADMS Network Model and Long-Term Roadmap				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-5-T1.03.01	ADMS - Detailed Project Implementation Plan, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, submitted to LIPA for approval.	06/30/22	Achieved	Approved
IT-5-T1.03.02	ADMS - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/08/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T1.03.03	ADMS - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Achieved	Approved
IT-5-T1.03.04	ADMS - Functional and Technical Requirements, including use cases that map how information will be used, submitted to LIPA for approval.	09/02/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T1.03.05	ADMS - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Achieved	Approved
IT-5-T1.03.06	ADMS - Monthly Reporting of Project Status and compliance for the month of September 2022.	10/10/22	Achieved	Approved
IT-5-T1.03.07	ADMS - Monthly Reporting of Project Status and compliance for the month of October 2022.	11/10/22	Achieved	Approved
IT-5-T1.03.08	ADMS - 3-year Roadmap and Conceptual Architecture Document, as specified in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, delivered for LIPA approval.	12/14/22	Achieved	Approved
IT-5-T1.03.09	ADMS - Monthly Reporting of Project Status and compliance for the month of November 2022.	12/09/22	Achieved	Approved
IT-5-T1.03.10	ADMS - All 2022 Project Deliverables specified in the LIPA-approved Project Implementation Plan delivered.	12/19/22	Achieved	Approved

### Summary

- All 2022 Project Deliverables specified in the LIPA-approved Project Implementation Plan delivered for the ADMS project.
- There was an approved exception for IT-5-T1.03.04 - Functional and Technical Requirements, including use cases that map how information that moved the deliverable into the scope of the 2023 performance metric. PSEG LI requested an extension for Functional & Technical Requirements and Use Cases, with the 2022 IT-5 deliverable moved to the 2023 IT-5 In-flight Projects metric, which has a provision for incorporating 2022 deliverables that have had their Due Date moved from 2022 to 2023 by an approved Exception Request. Both the 2022 IT-5 and the 2023 IT-6 Requirements deliverables discussed above will be required to be submitted in 2023, as distinct deliverables with distinct content.

## IT-5-T1.04 – MEGA – Storm Damage Assessment App

Project Status: **Achieved**

IT-5-T1.04 MEGA – Storm Damage Assessment App				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-5-T1.04.01	MEGA - Detailed Project Implementation Plan, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, submitted to LIPA for approval.	06/30/22	Achieved	Approved
IT-5-T1.04.02	MEGA - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/08/22	Achieved	Approved
IT-5-T1.04.03	MEGA - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T1.04.04	MEGA - Detailed Functional and Technical Requirements submitted to LIPA for approval.	12/30/22	Achieved	Approved
IT-5-T1.04.05	MEGA - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T1.04.06	MEGA - Monthly Reporting of Project Status and compliance for the month of September 2022.	10/10/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T1.04.07	MEGA - Monthly Reporting of Project Status and compliance for the month of October 2022.	11/10/22	Achieved	Approved
IT-5-T1.04.08	MEGA - Long-term MEGA Strategy document, as specified in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, delivered for LIPA approval.	11/30/22	Achieved	Approved
IT-5-T1.04.09	MEGA - Monthly Reporting of Project Status and compliance for the month of November 2022.	12/09/22	Achieved	Approved
IT-5-T1.04.10	MEGA - All 2022 Project Scope and Deliverables specified in the LIPA-approved Project Implementation Plan delivered.	12/23/22	Exempted via Approved Exception Request	Reviewing

### Summary

- All 2022 Project Scope and Deliverables specified in the LIPA-approved Project Implementation Plan delivered for the MEGA – Storm Damage Assessment App
- The Damage Assessment solution was delivered as designed, including all of the functional requirements.
- The MEGA Damage Assessment solution has been tested and deployed per the scope identified in the approved PIP. The deliverable for O&M documentation including an Operations runbook is still pending and an exception was filed that with the requirement that the documentation, including a comprehensive Operations runbook covering the Damage Assessment solution, and any associated DA interfaces or APIs, be completed prior to the start of the 2023 Storm Season (June 30, 2023).

## IT-5-T1.05 – Regulatory Billing Projects

Project Status: **Achieved**

IT-5-T1.05 Regulatory Billing Projects				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-5-T1.05.01	Regulatory Billing - Detailed Project Implementation Plan, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, for the specified Regulatory Billing Projects (CCA/ESCO, SCC-FIT-V, SDSCC) and with the objective of implementing the new rates on January 1, 2023, submitted to LIPA for approval.	03/31/22	Achieved	Approved
IT-5-T1.05.02	Regulatory Billing - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	Achieved	Approved
IT-5-T1.05.03	Regulatory Billing - Functional and Technical Requirements submitted to LIPA for review. LIPA approval required on regulatory requirements and rate design.	04/29/22	Achieved	Approved
IT-5-T1.05.04	Regulatory Billing - Monthly Reporting of Project Status and compliance for the month of April 2022.	05/10/22	Achieved	Approved
IT-5-T1.05.05	Regulatory Billing - Monthly Reporting of Project Status and compliance for the month of May 2022.	06/10/22	Achieved	Approved
IT-5-T1.05.06	Regulatory Billing - Technical Design submitted to LIPA for approval.	07/01/22	Achieved	Reviewing
IT-5-T1.05.07	Regulatory Billing - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/08/22	Achieved	Approved
IT-5-T1.05.08	Regulatory Billing - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Achieved	Approved
IT-5-T1.05.09	Regulatory Billing - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Achieved	Approved
IT-5-T1.05.10	Regulatory Billing - Development completed.	07/01/22	Achieved	Approved
IT-5-T1.05.11	Regulatory Billing - Monthly Reporting of Project Status and compliance for the month of September 2022.	10/10/22	Achieved	Approved
IT-5-T1.05.12	Regulatory Billing - Monthly Reporting of Project Status and compliance for the month of October 2022.	11/10/22	Achieved	Approved
IT-5-T1.05.13	Regulatory Billing - Monthly Reporting of Project Status and compliance for the month of November 2022.	12/09/22	Achieved	Approved
IT-5-T1.05.14	Regulatory Billing - Comprehensively tested and documented solutions ready for January 1, 2023 rate implementation, excluding FITV implementation/UAT and CCA enrollment screen/reporting. (FITV implementation and CCA enrollment screen/reporting will be tracked as part of 2023 deliverable)	12/30/22	Achieved	Reviewing

IT-5-T1.05 Regulatory Billing Projects				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-5-T1.05.15	Regulatory Billing - a. All 2022 Project Deliverables specified in the LIPA-approved Project Implementation Plan delivered, excluding FITV implementation/UAT and CCA enrollment screen/reporting (FITV implementation/UAT and CCA enrollment screen/reporting will be tracked as part of 2023 deliverable). b. Delivery of final IT TOD budget, draft requirements for all IT TOD work, draft TOD architectural diagram, draft TOD test strategy.	12/30/22	Achieved	Reviewing

### Summary

- PSEG Long Island provided 2022 deliverables as per the approved project implementation plans for each regulatory projects: CCA, FitV and the Suspend Daily Rate Charge.
- Time of Day project was introduced during 4<sup>th</sup> Qtr. 2022 and impacted CCA and FitV deliverables – shifting some items to 2023 (with funding approved by LIPA).

## IT-5-T1.06 – Contact Center as a Service (CCaaS) Project

Project Status: **Dispute**

IT-5-T1.06 Contact Center as a Service (CCaaS) Project				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-5-T1.06.01	CCaaS - Detailed Project Implementation Plan, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, submitted to LIPA for approval.	01/31/22	Achieved	Approved
IT-5-T1.06.02	CCaaS - Monthly Reporting of Project Status and compliance for the month of February 2022.	03/10/22	Achieved	Approved
IT-5-T1.06.03	CCaaS - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	Achieved	Approved
IT-5-T1.06.04	CCaaS - Monthly Reporting of Project Status and compliance for the month of April 2022.	05/10/22	Achieved	Approved
IT-5-T1.06.05	CCaaS - Monthly Reporting of Project Status and compliance for the month of May 2022.	06/10/22	Achieved	Approved
IT-5-T1.06.06	CCaaS - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/08/22	Achieved	Approved
IT-5-T1.06.07	CCaaS - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Achieved	Approved
IT-5-T1.06.08	CCaaS - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Achieved	Approved
IT-5-T1.06.09	CCaaS - Monthly Reporting of Project Status and compliance for the month of September 2022.	10/10/22	Achieved	Approved
IT-5-T1.06.10	CCaaS - Monthly Reporting of Project Status and compliance for the month of October 2022.	11/10/22	Achieved	Approved
IT-5-T1.06.11	CCaaS - Monthly Reporting of Project Status and compliance for the month of November 2022.	12/09/22	Achieved	Approved
IT-5-T1.06.12	CCaaS - All 2022 Project Scope and Deliverables specified in the LIPA-approved Project Implementation Plan delivered.	12/30/22	Achieved	Declined

### Summary

- PSEG Long Island obtained an approved project implementation plan by 12/30/2022.
- For item IT-5 T1.06.12 - PSEG Long Island approved plan did not contain tangible releases (into production). Deliverables included documentation – which was provided and constantly changing. The performance test was delayed.

### *IT-5-T1.07 – Outage and Incident Communications - Phase 2*

Project was deferred – The project stated: “Implement DPS requirements for data transfer for outage and incident management.” – PSEG Long Island did not receive any requirements from the DPS to be implemented in 2022.



*IT-5-T1.08 – Billing Capability for Standby Rates, to be optional for all commercial customers*

Project deferred because of the emergent work and reprioritization associated with Time of Use/Time of Day Rate implementation.

## IT-5-T1.09 – Community Distributed Generation (CDG) Automated Billing

Project Status: **Dispute**

IT-5-T1.09 Community Distributed Generation (CDG) Automated Billing				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-5-T1.09.01	CDG Automated Billing - Detailed Project Implementation Plan, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, with the objective of completing the project by June 30, 2023, submitted to LIPA for approval.	03/31/22	Achieved	Approved
IT-5-T1.09.02	CDG Automated Billing - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	Achieved	Approved
IT-5-T1.09.03	CDG Automated Billing - Monthly Reporting of Project Status and compliance for the month of April 2022.	05/10/22	Achieved	Approved
IT-5-T1.09.04	CDG Automated Billing - Monthly Reporting of Project Status and compliance for the month of May 2022.	06/10/22	Achieved	Approved
IT-5-T1.09.05	CDG Automated Billing - Functional and Technical Requirements submitted to LIPA for approval.	06/30/22	Achieved	Reviewing
IT-5-T1.09.06	CDG Automated Billing - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/08/22	Achieved	Approved
IT-5-T1.09.07	CDG Automated Billing - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Achieved	Approved
IT-5-T1.09.08	CDG Automated Billing - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Achieved	Approved
IT-5-T1.09.09	CDG Automated Billing - Technical Design submitted to LIPA for approval.	09/30/22	Achieved	Overdue
IT-5-T1.09.10	CDG Automated Billing - Monthly Reporting of Project Status and compliance for the month of September 2022.	10/10/22	Achieved	Approved
IT-5-T1.09.11	CDG Automated Billing - Monthly Reporting of Project Status and compliance for the month of October 2022.	11/10/22	Achieved	Approved
IT-5-T1.09.12	CDG Automated Billing - Monthly Reporting of Project Status and compliance for the month of November 2022.	12/09/22	Achieved	Approved
IT-5-T1.09.13	CDG Automated Billing - All 2022 Project Scope and Deliverables specified in the LIPA-approved Project Implementation Plan delivered.	12/30/22	Achieved	Reviewing

### Summary

- For CDG Automated Billing, the initial submission, we submitted design documents on 6/30/2022. An updated version was submitted to LIPA on 2/8/2023, feedback was provided and a recent submission was provided on 3/21/2023.

## IT-5-T1.10 – Enterprise Time and Attendance System (Planning)

Project Status: **Dispute**

IT-5-T1.10 Enterprise Time and Attendance System (Planning)				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-5-T1.10.01	Enterprise Time and Attendance - Current State Analysis, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, submitted to LIPA for approval.	08/15/22	Achieved	Declined
IT-5-T1.10.02	Enterprise Time and Attendance - Monthly Reporting of Project Status and compliance for the month of February 2022.	03/10/22	Achieved	Approved
IT-5-T1.10.03	Enterprise Time and Attendance - Preliminary Detailed Project Implementation Plan, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, submitted to LIPA for approval.	06/30/22	Achieved	Approved
IT-5-T1.10.04	Enterprise Time and Attendance - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	Exception Approved. This Report is Exempted	Exception Approved. This Report is Exempted
IT-5-T1.10.05	Enterprise Time and Attendance - Monthly Reporting of Project Status and compliance for the month of April 2022.	05/31/22	Exception Approved. This Report is Exempted	Exception Approved. This Report is Exempted
IT-5-T1.10.06	Enterprise Time and Attendance - Monthly Reporting of Project Status and compliance for the month of May 2022.	06/10/22	Exception Approved. This Report is Exempted	Exception Approved. This Report is Exempted
IT-5-T1.10.07	Enterprise Time and Attendance - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/07/23	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T1.10.08	Enterprise Time and Attendance - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Achieved	Approved
IT-5-T1.10.09	Enterprise Time and Attendance - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Achieved	Approved
IT-5-T1.10.10	Enterprise Time and Attendance - Monthly Reporting of Project Status and compliance for the month of September 2022.	10/10/22	Achieved	Approved
IT-5-T1.10.11	Enterprise Time and Attendance - Monthly Reporting of Project Status and compliance for the month of October 2022.	11/10/22	Achieved	Approved
IT-5-T1.10.12	Enterprise Time and Attendance - Software Solution and Implementer RFP, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, developed and submitted for pre-issuance LIPA approval.	12/19/22	Achieved	Approved
IT-5-T1.10.13	Enterprise Time and Attendance - Monthly Reporting of Project Status and compliance for the month of November 2022.	12/09/22	Achieved	Approved
IT-5-T1.10.14	Enterprise Time and Attendance - LIPA-approved Software Solution and Implementer RFP issued.	12/30/22	Achieved	Approved
IT-5-T1.10.15	Enterprise Time and Attendance - All 2022 Project Deliverables specified in the LIPA-approved Project Implementation Plan delivered.	12/30/22	Achieved	Approved

## Summary

- PSEG Long Island delivered Current State Analysis in October of 2022, which was passed the revised August due date. This was communicated as reported on a weekly basis in the Core Team touchpoints, and from mid-August in the Steering Committee meetings when T&A was added to the EAMS status deck. As this was the first year working under this new metric process PSEG LI would have requested an extension to the deliverable to allow for complex collaboration including Union communication and to account for vacation period which ultimately also impacted when the deliverable was provided.
- PSEG Long Island understands the deliverable was late, but is challenging the relative weight of this document versus all other deliverables
- All 2022 Project Deliverables specified in the LIPA-approved Project Implementation Plan were delivered for Enterprise Time and Attendance

## IT-5-T1.11 – Enterprise Mobile Strategy including Field Work Management

Project Status: **Achieved**

IT-5-T1.11 Enterprise Mobile Strategy including Field Work Management				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-5-T1.11.01	Enterprise Mobile Strategy - Detailed Project Implementation Plan, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, with the objective of completing the project by November 2022, submitted to LIPA for approval.	06/30/22	Achieved	Approved
IT-5-T1.11.02	Enterprise Mobile Strategy - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	Exception Approved. This Report is Exempted	Exception Approved. This Report is Exempted
IT-5-T1.11.03	Enterprise Mobile Strategy - Monthly Reporting of Project Status and compliance for the month of April 2022.	06/30/22	Exception Approved. This Report is Exempted	Exception Approved. This Report is Exempted
IT-5-T1.11.04	Enterprise Mobile Strategy - Monthly Reporting of Project Status and compliance for the month of May 2022.	06/10/22	Exception Approved. This Report is Exempted	Exception Approved. This Report is Exempted
IT-5-T1.11.05	Enterprise Mobile Strategy - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/08/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T1.11.06	Enterprise Mobile Strategy - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Achieved	Approved
IT-5-T1.11.07	Enterprise Mobile Strategy - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Achieved	Approved
IT-5-T1.11.08	Enterprise Mobile Strategy - Long-term Enterprise Mobile Plan with sequencing and prioritization, submitted for LIPA approval.	11/25/22	Achieved	Reviewing
IT-5-T1.11.09	Enterprise Mobile Strategy - Monthly Reporting of Project Status and compliance for the month of September 2022.	10/10/22	Achieved	Approved
IT-5-T1.11.10	Enterprise Mobile Strategy - Monthly Reporting of Project Status and compliance for the month of October 2022.	11/10/22	Achieved	Approved
IT-5-T1.11.11	Enterprise Mobile Strategy - Long-term Field Work Management/Mobile App Strategy document, as specified in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, delivered for LIPA approval.	12/30/22	Achieved	Reviewing
IT-5-T1.11.12	Enterprise Mobile Strategy - Monthly Reporting of Project Status and compliance for the month of November 2022.	12/09/22	Achieved	Approved
IT-5-T1.11.13	Enterprise Mobile Strategy - All 2022 Project Deliverables specified in the LIPA-approved Project Implementation Plan delivered.	12/30/22	Achieved	Reviewing

### Summary

- PSEG Long Island delivered all 2022 Project Deliverables specified in the LIPA-approved Project Implementation for the Enterprise Mobile Strategy project.

## Tier 2

### IT-5-T2.01 – CAD & OMS Operational Enhancements

Project Status: **Achieved**

IT-5-T2.01 CAD & OMS Operational Enhancements				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-5-T2.01.01	CAD and OMS Enhancements - Detailed Project Implementation Plan, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, with the objective of completing the project by the end of 2022, submitted to LIPA for approval.	03/31/22	Achieved	Approved
IT-5-T2.01.02	CAD and OMS Enhancements - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	Achieved	Approved
IT-5-T2.01.03	CAD and OMS Enhancements - Monthly Reporting of Project Status and compliance for the month of April 2022.	05/10/22	Achieved	Approved
IT-5-T2.01.04	CAD and OMS Enhancements - Monthly Reporting of Project Status and compliance for the month of May 2022.	06/10/22	Achieved	Approved
IT-5-T2.01.05	CAD and OMS Enhancements - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/08/22	Achieved	Approved
IT-5-T2.01.06	CAD and OMS Enhancements - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Achieved	Approved
IT-5-T2.01.07	CAD and OMS Enhancements - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Achieved	Approved
IT-5-T2.01.08	CAD and OMS Enhancements - Monthly Reporting of Project Status and compliance for the month of September 2022.	10/10/22	Achieved	Approved
IT-5-T2.01.09	CAD and OMS Enhancements - Monthly Reporting of Project Status and compliance for the month of October 2022.	11/10/22	Achieved	Approved
IT-5-T2.01.10	CAD and OMS Enhancements - Monthly Reporting of Project Status and compliance for the month of November 2022.	12/09/22	Achieved	Approved
IT-5-T2.01.11	CAD and OMS Enhancements - Comprehensively tested, documented and fully deployed scope, as specified in the LIPA-approved Project Implementation Plan and to be consistent with the scope described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, delivered.	12/30/22	Achieved	Approved
IT-5-T2.01.12	CAD and OMS Enhancements - All 2022 Project Deliverables specified in the LIPA-approved Project Implementation Plan delivered.	12/30/22	Achieved	Approved
IT-5-T2.01.01	CAD and OMS Enhancements - Detailed Project Implementation Plan, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, with the objective of completing the project by the end of 2022, submitted to LIPA for approval.	03/31/22	Achieved	Approved

#### Summary

- PSEG Long Island delivered all 2022 Project Deliverables specified in the LIPA-approved Project Implementation for the CAD and OMS Enhancements project.

## IT-5-T2.02 – CyberArk for CNI

Project Status: **Achieved**

IT-5-T2.02 CyberArk for CNI				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-5-T2.02.01	CyberArk for CNI - Detailed Project Implementation Plan, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, with the objective of completing the project by the end of 2022, submitted to LIPA for approval.	03/31/22	Achieved	Approved
IT-5-T2.02.02	CyberArk for CNI - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	Exception Approved. This Report is Exempted	Exception Approved. This Report is Exempted
IT-5-T2.02.03	CyberArk for CNI - Monthly Reporting of Project Status and compliance for the month of April 2022.	05/10/22	Exception Approved. This Report is Exempted	Exception Approved. This Report is Exempted
IT-5-T2.02.04	CyberArk for CNI - Monthly Reporting of Project Status and compliance for the month of May 2022.	06/10/22	Exception Approved. This Report is Exempted	Exception Approved. This Report is Exempted
IT-5-T2.02.05	CyberArk for CNI - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/08/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T2.02.06	CyberArk for CNI - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T2.02.07	CyberArk for CNI - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T2.02.08	CyberArk for CNI - Monthly Reporting of Project Status and compliance for the month of September 2022.	10/10/22	Achieved	Approved
IT-5-T2.02.09	CyberArk for CNI - Monthly Reporting of Project Status and compliance for the month of October 2022.	11/10/22	Achieved	Approved
IT-5-T2.02.10	CyberArk for CNI - Monthly Reporting of Project Status and compliance for the month of November 2022.	12/09/22	Achieved	Approved
IT-5-T2.02.11	CyberArk for CNI - Comprehensively tested, documented and fully deployed test and redundant production CyberArk environments for DSCADA and SCADA EMS, as specified in the LIPA-approved Project Implementation Plan, delivered.	10/24/24	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T2.02.12	CyberArk for CNI - All 2022 Project Deliverables specified in the LIPA-approved Project Implementation Plan delivered.	12/30/22	Achieved	Approved

### Summary

- PSEG Long Island delivered all 2022 Project Deliverables specified in the LIPA-approved Project Implementation for the CAD and OMS Enhancements project.



## IT-5-T2.03 – Cybersecurity Program

Project Status: **Did Not Achieve**

IT-5-T2.03 Cybersecurity Program				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-5-T2.03.01	Cybersecurity Program - Detailed Project Implementation Plan, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, with the objective of completing the project by November 2022, submitted to LIPA for approval.	03/31/22	Submitted Late	Declined
IT-5-T2.03.02	Cybersecurity Program - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	Exception Approved. This Report is Exempted	Exception Approved. This Report is Exempted
IT-5-T2.03.03	Cybersecurity Program - Monthly Reporting of Project Status and compliance for the month of April 2022.	05/10/22	Exception Approved. This Report is Exempted	Exception Approved. This Report is Exempted
IT-5-T2.03.04	Cybersecurity Program - Monthly Reporting of Project Status and compliance for the month of May 2022.	06/10/22	Exception Approved. This Report is Exempted	Exception Approved. This Report is Exempted
IT-5-T2.03.05	Cybersecurity Program - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/08/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T2.03.06	Cybersecurity Program - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T2.03.07	Cybersecurity Program - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T2.03.08	Cybersecurity Program - Monthly Reporting of Project Status and compliance for the month of September 2022.	10/10/22	Achieved	Approved
IT-5-T2.03.09	Cybersecurity Program - Monthly Reporting of Project Status and compliance for the month of October 2022.	11/10/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T2.03.10	Cybersecurity Program - All 2022 scope identified in the LIPA-approved Project Implementation Plan, to include scope specified in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, delivered.	11/30/22	Achieved	Approved
IT-5-T2.03.11	Cybersecurity Program - Monthly Reporting of Project Status and compliance for the month of November 2022.	10/06/23	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T2.03.12	Cybersecurity Program - All 2022 Project Deliverables specified in the LIPA-approved Project Implementation Plan delivered.	12/30/22	Achieved	Approved

### Summary

- PSEG Long Island was late in delivering Detailed Project Implementation Plan for the Cybersecurity Program.



## IT-5-T2.04 – Dragos for CNI

Project Status: **Achieved**

IT-5-T2.04 Dragos for CNI				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-5-T2.04.01	Dragos for CNI - Detailed Project Implementation Plan, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, with the objective of completing the project by the end of 2022, submitted to LIPA for approval.	06/30/22	Achieved	Approved
IT-5-T2.04.02	Dragos for CNI - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/08/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T2.04.03	Dragos for CNI - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T2.04.04	Dragos for CNI - Technical Design and Architecture, submitted to LIPA for approval.	09/07/22	Achieved	Approved
IT-5-T2.04.05	Dragos for CNI - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T2.04.06	Dragos for CNI - Monthly Reporting of Project Status and compliance for the month of September 2022.	10/10/22	Achieved	Approved
IT-5-T2.04.07	Dragos for CNI - Monthly Reporting of Project Status and compliance for the month of October 2022.	11/10/22	Achieved	Approved
IT-5-T2.04.08	Dragos for CNI - Monthly Reporting of Project Status and compliance for the month of November 2022.	12/09/22	Achieved	Approved
IT-5-T2.04.09	Dragos for CNI - Comprehensively tested and documented deployment as specified in the LIPA-approved Project Implementation Plan, to be consistent with the scope described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, delivered.	10/04/23	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T2.04.10	Dragos for CNI - All 2022 Project Deliverables specified in the LIPA-approved Project Implementation Plan delivered.	12/30/22	Achieved	Approved

### Summary

- PSEG Long Island delivered all 2022 Project Deliverables specified in the LIPA-approved Project Implementation for the Dragos for CNI project.

## IT-5-T2.05 – Industrial Defender for DSCADA

Project Status: **Achieved**

IT-5-T2.05 Industrial Defender for DSCADA				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-5-T2.05.01	Industrial Defender for DSCADA - Detailed Project Implementation Plan, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, with the objective of completing the project by the end of 2022, submitted to LIPA for approval.	03/31/22	Achieved	Approved
IT-5-T2.05.02	Industrial Defender for DSCADA - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	Exception Approved. This Report is Exempted	Exception Approved. This Report is Exempted
IT-5-T2.05.03	Industrial Defender for DSCADA - Monthly Reporting of Project Status and compliance for the month of April 2022.	05/10/22	Exception Approved. This Report is Exempted	Exception Approved. This Report is Exempted
IT-5-T2.05.04	Industrial Defender for DSCADA - Monthly Reporting of Project Status and compliance for the month of May 2022.	06/10/22	Exception Approved. This Report is Exempted	Exception Approved. This Report is Exempted
IT-5-T2.05.05	Industrial Defender for DSCADA - Technical Design and Architecture, submitted to LIPA for approval.	11/07/22	Achieved	Approved
IT-5-T2.05.06	Industrial Defender for DSCADA - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/08/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T2.05.07	Industrial Defender for DSCADA - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Achieved	Approved
IT-5-T2.05.08	Industrial Defender for DSCADA - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Achieved	Approved
IT-5-T2.05.09	Industrial Defender for DSCADA - Monthly Reporting of Project Status and compliance for the month of September 2022.	10/10/22	Achieved	Approved
IT-5-T2.05.10	Industrial Defender for DSCADA - Monthly Reporting of Project Status and compliance for the month of October 2022.	11/10/22	Achieved	Approved
IT-5-T2.05.11	Industrial Defender for DSCADA - Monthly Reporting of Project Status and compliance for the month of November 2022.	12/09/22	Achieved	Approved
IT-5-T2.05.12	Industrial Defender for DSCADA - Comprehensively tested and documented deployment as specified in the LIPA-approved Project Implementation Plan, to be consistent with the scope described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, delivered.	04/24/23	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T2.05.13	Industrial Defender for DSCADA - All 2022 Project Deliverables specified in the LIPA-approved Project Implementation Plan delivered.	12/30/22	Achieved	Approved

### Summary

- PSEG Long Island delivered all 2022 Project Deliverables specified in the LIPA-approved Project Implementation for the Industrial Defender for DSCADA project.

## IT-5-T2.06 – AVLS Integration with Physical ID Badge System

Project Status: **Achieved**

IT-5-T2.06 AVLS Integration with Physical ID Badge System				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-5-T2.06.01	AVLS Integration with Physical ID Badge System - Minimum viable product that meets pre-storm reimbursement requirements deployed, as specified in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, delivered.	06/01/22	Achieved	Approved
IT-5-T2.06.02	AVLS Integration with Physical ID Badge System - Detailed Project Implementation Plan, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, submitted to LIPA for approval.	06/30/22	Achieved	Approved
IT-5-T2.06.03	AVLS Integration with Physical ID Badge System - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/08/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T2.06.04	AVLS Integration with Physical ID Badge System - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Achieved	Approved
IT-5-T2.06.05	AVLS Integration with Physical ID Badge System - Business Requirements, submitted to LIPA for approval.	08/29/22	Achieved	Reviewing
IT-5-T2.06.06	AVLS Integration with Physical ID Badge System - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Achieved	Approved
IT-5-T2.06.07	AVLS Integration with Physical ID Badge System - Monthly Reporting of Project Status and compliance for the month of September 2022.	10/10/22	Achieved	Approved
IT-5-T2.06.08	AVLS Integration with Physical ID Badge System - Monthly Reporting of Project Status and compliance for the month of October 2022.	11/10/22	Achieved	Approved
IT-5-T2.06.09	AVLS Integration with Physical ID Badge System - Comprehensively tested, documented integration fully deployed, as specified in the LIPA-approved Project Implementation Plan, to be consistent with the scope described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, delivered.	12/14/22	Achieved	Reviewing
IT-5-T2.06.10	AVLS Integration with Physical ID Badge System - Monthly Reporting of Project Status and compliance for the month of November 2022.	12/09/22	Achieved	Approved
IT-5-T2.06.11	AVLS Integration with Physical ID Badge System - All 2022 Project Deliverables specified in the LIPA-approved Project Implementation Plan delivered.	12/30/22	Achieved	Reviewing

### Summary

- PSEG Long Island delivered all 2022 Project Deliverables specified in the LIPA-approved Project Implementation for the AVLS Integration with Physical ID Badge System project.

## IT-5-T2.07 – AMI System Enhancements

Project Status: **Achieved**

IT-5-T2.07 AMI System Enhancements				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-5-T2.07.01	AMI System Enhancements - Detailed Project Implementation Plan, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, submitted to LIPA for approval.	03/31/22	Achieved	Approved
IT-5-T2.07.02	AMI System Enhancements - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	Achieved	Approved
IT-5-T2.07.03	AMI System Enhancements - Monthly Reporting of Project Status and compliance for the month of April 2022.	05/10/22	Achieved	Approved
IT-5-T2.07.04	AMI System Enhancements - Monthly Reporting of Project Status and compliance for the month of May 2022.	06/10/22	Achieved	Approved
IT-5-T2.07.05	AMI System Enhancements - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/08/22	Achieved	Approved
IT-5-T2.07.06	AMI System Enhancements - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Achieved	Approved
IT-5-T2.07.07	AMI System Enhancements - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Achieved	Approved
IT-5-T2.07.08	AMI System Enhancements - Monthly Reporting of Project Status and compliance for the month of September 2022.	10/10/22	Achieved	Approved
IT-5-T2.07.09	AMI System Enhancements - Monthly Reporting of Project Status and compliance for the month of October 2022.	11/10/22	Achieved	Approved
IT-5-T2.07.10	AMI System Enhancements - Monthly Reporting of Project Status and compliance for the month of November 2022.	12/09/22	Achieved	Approved
IT-5-T2.07.11	AMI System Enhancements - All 2022 scope identified in the LIPA-approved Project Implementation Plan, to be consistent with the scope described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, delivered.	12/30/22	Achieved	Approved
IT-5-T2.07.12	AMI System Enhancements - All 2022 Project Deliverables specified in the LIPA-approved Project Implementation Plan delivered.	12/30/22	Achieved	Approved

### Summary

- PSEG Long Island delivered all 2022 Project Deliverables specified in the LIPA-approved Project Implementation for the AMI System Enhancements project.

## IT-5-T2.08 – Suffolk County Sewage Billing Project

Project Status: **Dispute**

IT-5-T2.08 Suffolk County Sewage Billing Project				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-5-T2.08.01	Suffolk County Sewage Billing Project - Detailed Project Implementation Plan, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, with the objective of completing the project by Q2 2023, submitted to LIPA for approval.	03/31/22	Achieved	Approved
IT-5-T2.08.02	Suffolk County Sewage Billing Project - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	Achieved	Approved
IT-5-T2.08.03	Suffolk County Sewage Billing Project - Monthly Reporting of Project Status and compliance for the month of April 2022.	05/10/22	Achieved	Approved
IT-5-T2.08.04	Suffolk County Sewage Billing Project - Monthly Reporting of Project Status and compliance for the month of May 2022.	06/10/22	Achieved	Approved
IT-5-T2.08.05	Suffolk County Sewage Billing Project - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/08/22	Achieved	Approved
IT-5-T2.08.06	Suffolk County Sewage Billing Project - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Achieved	Approved
IT-5-T2.08.07	Suffolk County Sewage Billing Project - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Achieved	Approved
IT-5-T2.08.08	Suffolk County Sewage Billing Project - Monthly Reporting of Project Status and compliance for the month of September 2022.	10/10/22	Achieved	Approved
IT-5-T2.08.09	Suffolk County Sewage Billing Project - Functional and Technical Requirements submitted to LIPA for approval.	10/31/22	Achieved	Approved
IT-5-T2.08.10	Suffolk County Sewage Billing Project - Monthly Reporting of Project Status and compliance for the month of October 2022.	11/10/22	Achieved	Approved
IT-5-T2.08.11	Suffolk County Sewage Billing Project - Monthly Reporting of Project Status and compliance for the month of November 2022.	12/09/22	Achieved	Approved
IT-5-T2.08.12	Suffolk County Sewage Billing Project - All 2022 Project Scope and Deliverables specified in the LIPA-approved Project Implementation Plan delivered.	12/30/22	Achieved	Declined

### Summary

- PSEG Long Island provided the deliverables outlined for 2022 as per the approved project implementation plan. The rate was not scheduled to be released until April 2023.

## IT-5-T2.09 – Rate Change Enhancements

Project Status: **Achieved**

IT-5-T2.09 Rate Change Enhancements				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-5-T2.09.02	Rate Change Enhancements - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/08/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-5-T2.09.03	Rate Change Enhancements - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Achieved	Approved
IT-5-T2.09.04	Rate Change Enhancements - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Achieved	Approved
IT-5-T2.09.05	Rate Change Enhancements - Monthly Reporting of Project Status and compliance for the month of September 2022.	10/10/22	Achieved	Approved
IT-5-T2.09.06	Rate Change Enhancements - Monthly Reporting of Project Status and compliance for the month of October 2022.	11/10/22	Achieved	Approved
IT-5-T2.09.07	Rate Change Enhancements - Monthly Reporting of Project Status and compliance for the month of November 2022.	12/09/22	Achieved	Approved
IT-5-T2.09.08	Rate Change Enhancements - All 2022 Project Scope and Deliverables identified in the LIPA-approved Project Implementation Plan delivered.	12/30/22	Achieved	Reviewing

### Summary

- PSEG Long Island delivered all 2022 Project Deliverables specified in the LIPA-approved Project Implementation for the Rate Change Enhancements project.



## IT-5-T2.10 – New Business Portal

Project Status: **Exempt**

The New Business Portal project was removed from the 2022 metrics by LIPA based on a change in priorities and scope. In addition, the successful conclusion of several other projects that are underway and proposed will affect the eventual requirements and need for the New Business Portal.

IT-5-T2.10 New Business Portal				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-5-T2.10.01	New Business Portal - Detailed Project Implementation Plan, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, submitted to LIPA for approval.	03/31/22	Exempted Via Approved Exception Request	Exempted Via Approved Exception Request
IT-5-T2.10.02	New Business Portal - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	Exempted Via Approved Exception Request	Exempted Via Approved Exception Request
IT-5-T2.10.03	New Business Portal - Monthly Reporting of Project Status and compliance for the month of April 2022.	05/10/22	Exempted Via Approved Exception Request	Exempted Via Approved Exception Request
IT-5-T2.10.04	New Business Portal - Monthly Reporting of Project Status and compliance for the month of May 2022.	06/10/22	Exempted Via Approved Exception Request	Exempted Via Approved Exception Request
IT-5-T2.10.05	New Business Portal - Functional and Technical Requirements (RTM) submitted to LIPA for approval.	07/28/23	Exempted Via Approved Exception Request	Exempted Via Approved Exception Request
IT-5-T2.10.06	New Business Portal - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/08/22	Exempted Via Approved Exception Request	Exempted Via Approved Exception Request
IT-5-T2.10.061	Rate Change Enhancements - Detailed Project Implementation Plan, as described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, submitted to LIPA for approval.	06/30/22	Exempted Via Approved Exception Request	Exempted Via Approved Exception Request
IT-5-T2.10.07	New Business Portal - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Exempted Via Approved Exception Request	Exempted Via Approved Exception Request
IT-5-T2.10.08	New Business Portal - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Exempted Via Approved Exception Request	Exempted Via Approved Exception Request
IT-5-T2.10.09	New Business Portal - Functional and Technical Design, submitted to LIPA for approval.	09/30/22	Exempted Via Approved Exception Request	Exempted Via Approved Exception Request
IT-5-T2.10.10	New Business Portal - Monthly Reporting of Project Status and compliance for the month of September 2022.	10/10/22	Exempted Via Approved Exception Request	Exempted Via Approved Exception Request

IT-5-T2.10 New Business Portal				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-5-T2.10.11	New Business Portal - Monthly Reporting of Project Status and compliance for the month of October 2022.	11/10/22	Exempted Via Approved Exception Request	Exempted Via Approved Exception Request
IT-5-T2.10.12	New Business Portal - Monthly Reporting of Project Status and compliance for the month of November 2022.	12/09/22	Exempted Via Approved Exception Request	Exempted Via Approved Exception Request
IT-5-T2.10.13	New Business Portal - All 2022 scope identified in the LIPA-approved Project Implementation Plan, to be consistent with the scope described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, delivered.	12/30/22	Exempted via Approved Exception Request	Exempted via Approved Exception Request



## IT-6 - System Implementation – Board PIPs

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$525,635.23		

### Tier 1

#### IT-6-T1.01 – 3.2.2.3

Project Status: **Achieved**

IT-6-T1.01	3.2.2.3			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-6 T1.1.1	3.2.2.3 - Project Implementation Plan (PIP 3.2.2.3) is submitted to LIPA: Work with CGI to obtain and implement fixes for identified application defects, including upgrading to a more recent version of the OMS software.	02/04/22	<b>Achieved</b>	<b>Approved</b>
IT-6 T1.1.2	3.2.2.3 - Monthly Reporting of Project Status and compliance for the month of February 2022.	03/10/22	<b>Achieved</b>	<b>Approved</b>
IT-6 T1.1.3	3.2.2.3 - Implementation of Board adopted recommendation (3.2.2.3): Completed root cause analysis, remediated issues and recommended application performance items, fully tested and deployed 6.7 system (hardware and application) as described in the approved Project Implementation Plan, delivered for LIPA approval.	03/31/22	<b>Achieved</b>	<b>Approved</b>
IT-6 T1.1.4	3.2.2.3 - All Project Deliverables specified in the LIPA-approved Project Implementation Plan delivered.	03/31/22	<b>Achieved</b>	<b>Approved</b>
IT-6 T1.1.5	3.2.2.3 - Post-deployment 30-day monitoring issue log delivered.	03/31/22	<b>Achieved</b>	<b>Approved</b>
IT-6 T1.1.6	3.2.2.3 - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	<b>Achieved</b>	<b>Approved</b>

#### Summary

- PSEG Long Island implemented the Board adopted recommendation (3.2.2.3): Completed root cause analysis, remediated issues and recommended application performance items, fully tested and deployed 6.7 system (hardware and application) as described in the approved Project Implementation Plan, delivered for LIPA approval.

## IT-6-T1.02 – 4.01

Project Status: **Dispute**

IT-6-T1.02 4.01				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-6 T1.2.1	4.01 - Project Implementation Plan (PIP 4.01) is submitted to LIPA: Develop and execute a comprehensive and strategic technology plan for outage reporting and communications.	03/31/22	Achieved	Approved
IT-6 T1.2.2	4.01 - Monthly Reporting of Project Status and compliance for the month of February 2022.	03/10/22	Achieved	Approved
IT-6 T1.2.3	4.01 - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	Achieved	Approved
IT-6 T1.2.4	4.01 - Monthly Reporting of Project Status and compliance for the month of April 2022.	05/10/22	Achieved	Approved
IT-6 T1.2.5	4.01 - Monthly Reporting of Project Status and compliance for the month of May 2022.	06/10/22	Achieved	Approved
IT-6 T1.2.6	4.01 - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/08/22	Achieved	Approved
IT-6 T1.2.7	4.01 - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Achieved	Approved
IT-6 T1.2.8	4.01 - Implementation of Board adopted recommendation (4.01): Business-driven Strategic Technology Plan for Outage Reporting and Communications, as described in the approved Project Implementation Plan, delivered for LIPA approval.	08/31/22	Change of Scope from Initial ITF Recommendation – Exception Processed	Declined
IT-6 T1.2.9	4.01 - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Achieved	Approved

### Summary

- PSEG Long Island provided Strategic Communications plan as per guidelines presented by LIPA stemming from February 2022 meeting. The October 2022 submission received feedback in December 2022 from LIPA with comments and feedback beyond the intended original scope.
- PSEG Long Island supports the PIP submission supplied in 2022 to address the original targets of PIP 4.01. Updates were made based on the feedback received from LIPA in December 2022. Stemming from the follow up discussion held on 1/3/2023, it was determined that the scope and focus of PIP 4.01 needed to be re-assessed and revised. PSEG Long Island requested an extension to obtain clarity about the targeted scope – the exception has not been responded to by LIPA and is still in the project manager phase for approval.

## IT-6-T1.03 – 4.14

Project Status: **Dispute**

IT-6-T1.03 4.14				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-6 T1.3.1	4.14 - Project Implementation Plan (PIP 4.14), as described in the attached "LIPA-PSEG-2022-IT-6 System Implementation Board Project Improvement Plans (PIPs) (Tier 1 and 2)" metric document, with full deployment to be completed by 2023 Q2 (prior to the storm season), is submitted to LIPA for Board Approval: Complete the Mobile Workforce Solution for foreign crews and crew guides, ensuring that procedures are integrated into the ERP.	03/31/22	Submitted Exception	Declined
IT-6 T1.3.2	4.14 - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	Achieved	Approved
IT-6 T1.3.3	4.14 - Monthly Reporting of Project Status and compliance for the month of April 2022.	05/10/22	Achieved	Approved
IT-6 T1.3.4	4.14 - Monthly Reporting of Project Status and compliance for the month of May 2022.	06/10/22	Achieved	Approved
IT-6 T1.3.5	4.14 - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/08/22	Achieved	Approved
IT-6 T1.3.6	4.14 - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Achieved	Approved
IT-6 T1.3.7	4.14 - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Achieved	Approved
IT-6 T1.3.8	4.14 - Monthly Reporting of Project Status and compliance for the month of September 2022.	10/10/22	Achieved	Approved
IT-6 T1.3.9	4.14 - Monthly Reporting of Project Status and compliance for the month of October 2022.	11/10/22	Achieved	Approved
IT-6 T1.3.10	4.14 - Monthly Reporting of Project Status and compliance for the month of November 2022.	12/09/22	Achieved	Approved
IT-6 T1.3.11	4.14 - All 2022 Work and Deliverables identified in the LIPA-approved Project Implementation Plan, to be consistent with the scope described in the attached "LIPA-PSEG-2022-IT-6 System Implementation Board Project Improvement Plans (PIPs) (Tier 1 and 2)" metric document, delivered for LIPA approval, including completing and validating Solution deployment with a test group as specified in the attached metric document.	12/30/22	Submitted Exception	Overdue

### Summary

- PSEG Long Island submitted an exception that was rejected by LIPA. PSEG Long Island believes that PIP 4.14 deliverables should be integrated with EAMs planning rather than forcing a CGI solution that would not be technically supported by the outage management system vendor for integration.
- PSEG Long Island did the work associated with the project but the optimal solution does not align with what was intended in the performance metrics developed in 2022 and also with the ITF recommendation that
- The original Project Implementation Plan submitted for the Mobile Workforce/CAD solution for Foreign Crews, LI Contractors and Crew Guides, focused on work required in 2022 and 2023 to enable a long-term solution for full two-way integration with the FM mobile app and CGI CAD. However, the original project implementation plan is no longer viable based upon the following reasons:
  - PSEG LI currently utilizes version 6.7.8 CGI OMS/CAD, which does not support two-way integration with the FM Mobile app. CGI has also confirmed that if any modifications are made to version 6.7.8

OMS/CAD by PSEGLI to achieve two-way integration with the FM mobile app, they will not provide technical support related to these changes nor warrant system performance.

2. Recently, as part of the deliverables for PIP 4.14, PSEG LI completed a Proof of Solution (POS) evaluation. The objective of the POS was to assess the viability of extending CGI's PField app for use by Foreign Crews, LI Contractors and Crew Guides as it natively provides two-way integration to CGI CAD. In the final analysis, the POS assessment concluded that the extension of the CGI PField app to Foreign Crews, LI Contractors and Crew Guides during storms is not recommended due to multiple technical and business factors.
- The Enterprise Mobility Strategy Project led by ISG recommends:
    1. The PSEGLI FM mobile app is unique in the value it provides for Foreign Crews, LI Contractors and Crew Guides. Although it's not fully integrated with CGI CAD (two-way integration), it should continue to be utilized since the FM mobile app provides a BYOD solution that helps PSEGLI to quickly assign jobs to Foreign Crews, LI Contractors and Crew Guides, thus accelerating the storm restoration process.
  - The future Enterprise Mobility Strategy recommended by ISG proposes that the CGI CAD product should be replaced by a new Enterprise Asset Management System (EAMS) which will centralize all work assignments and dispatching to enable a mobile workforce. In that future state, the FM mobile app can achieve two-way integration directly with the EAMS system and update the status of restoration orders electronically completed by foreign crews.

## IT-6-T1.04 – 5.4.2b

Project Status: **Achieved**

IT-6-T1.04 5.4.2b				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-6 T1.4.1	5.4.2b - Project Implementation Plan (PIP 5.4.2b), as described in the attached "LIPA-PSEG-2022-IT-6 System Implementation Board Project Improvement Plans (PIPs) (Tier 1 and 2)" metric document, and incorporating end-state and all deliverables specified in said document, is submitted to LIPA for approval: AMI Integration and Operation with OMS (Integration component of 5.4.2	02/04/22	<b>Achieved</b>	<b>Approved</b>
IT-6 T1.4.2	5.4.2b - Monthly Reporting of Project Status and compliance for the month of February 2022.	03/10/22	<b>Achieved</b>	<b>Approved</b>
IT-6 T1.4.3	5.4.2b - Project Implementation Plan (PIP 5.4.2b) is Board Approved.	03/31/22	<b>Achieved</b>	<b>Approved</b>
IT-6 T1.4.4	5.4.2b - Implementation of Board adopted recommendation (5.4.2b): All Scope and Deliverables per Board-approved PIP delivered for LIPA approval.	06/10/22	<b>Achieved</b>	<b>Approved</b>
IT-6 T1.4.5	5.4.2b - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	<b>Achieved</b>	<b>Approved</b>

### Summary

- PSEG Long Island implemented recommendation 5.4.2b and delivered all scope and deliverables per the Board-approved project implementation plan.

## IT-6-T1.05 – DIA-01

Project Status: **Dispute**

IT-6-T1.05 DIA-01				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-6 T1.5.1	DIA-01 - Project Implementation Plan (DIA-01), as described in the attached "LIPA-PSEG-2022-IT-6 System Implementation Board Project Improvement Plans (PIPs) (Tier 1 and 2)" metric document, is submitted to LIPA for approval: Develop a Standardized Data Access Platform consisting of an enterprise-wide data warehouse, a broader data lake, and provisioning and development of tools to support reporting and analytics.	02/04/22	Achieved	Approved
IT-6 T1.5.2	DIA-01 - Monthly Reporting of Project Status and compliance for the month of February 2022.	03/10/22	Submitted Late	Declined
IT-6 T1.5.3	DIA-01 - Master Data Analytics Project Plan, providing a plan and long-term roadmap as specified in the attached "LIPA-PSEG-2022-IT-6 System Implementation Board Project Improvement Plans (PIPs) (Tier 1 and 2)" metric document, and including a Phase 1 deployment by the end of 2022, is developed and submitted to LIPA for approval.	03/31/22	Achieved	Reviewing
IT-6 T1.5.4	DIA-01 - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	Achieved	Approved
IT-6 T1.5.5	DIA-01 - Monthly Reporting of Project Status and compliance for the month of April 2022.	05/10/22	Achieved	Approved
IT-6 T1.5.6	DIA-01 - Monthly Reporting of Project Status and compliance for the month of May 2022.	06/10/22	Achieved	Approved
IT-6 T1.5.7	DIA-01 - Monthly Reporting of Project Status and compliance for the month of June 2022.	07/08/22	Achieved	Approved
IT-6 T1.5.8	DIA-01 - Monthly Reporting of Project Status and compliance for the month of July 2022.	08/10/22	Achieved	Approved
IT-6 T1.5.9	DIA-01 - Monthly Reporting of Project Status and compliance for the month of August 2022.	09/09/22	Achieved	Approved
IT-6 T1.5.10	DIA-01 - Monthly Reporting of Project Status and compliance for the month of September 2022.	10/10/22	Achieved	Approved
IT-6 T1.5.11	DIA-01 - Monthly Reporting of Project Status and compliance for the month of October 2022.	11/10/22	Achieved	Approved
IT-6 T1.5.12	DIA-01 - Monthly Reporting of Project Status and compliance for the month of November 2022.	12/09/22	Achieved	Approved
IT-6 T1.5.13	DIA-01 - Complete the deployment of Phase 1 of the Master Data Analytics Project Plan per the Board recommendation, including all 2022 scope and deliverables identified in the LIPA-approved plan.	12/30/22	Achieved	Reviewing

### Summary

- This Metric scope was revised in July/August 2022 with LIPA and the revised PIP was submitted to LIPA on 11/14/2022. This revised scope included Phase 1, which included the delivery of LI SAP Financial Data which was delivered in December of 2022. The PJD submitted for 2023 also reflected these updates.

### PJD ON SDAP that was submitted for 2023 Plan

- This project includes phased delivery based on agile methodology. Phase 1 in 2022 included ingestion of SAP financial data and sourcing out data and requirements for Customer Data Warehouse and Call Center data as the next priority

- Phase 2 in 2023 will prioritize migrating Customer Data Warehouse (CDW) into the data lake as the current platform (Oracle DB and Informatica) is no longer supported and reached end of life. In addition, pipeline for Call Center data sources will also be ingested into the data lake.
- The following workstreams will work in parallel to identify and continue to implement
  - Platform & Architecture
  - Data Migration & Sources
  - Data Governance
- PSEG Long Island completed the deployment of Phase 1 of the Master Data Analytics Project Plan per the Board recommendation, including all 2022 scope and deliverables identified in the LIPA-approved plan
- PSEG Long Island was late in delivering the monthly reporting requirement for the month of February but provided all subsequent monthly reports timely. The project also had a significant change of scope that was identified later in the year so the February monthly status report was superfluous information anyway as the final project scope was yet to be defined.

## Tier 2

### IT-6-T2.01 – 4.13

Project Status: **Achieved**

IT-6-T2.01 4.13				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-6 T2.1.1	4.13 - Project Implementation Plan (PIP 4.13) is submitted to LIPA: After the OMS faults are diagnosed and repaired, thoroughly stress-test the CAD system and the ESB to ensure there are no independent defects affecting either system.	02/04/22	Achieved	Approved
IT-6 T2.1.2	4.13 - Monthly Reporting of Project Status and compliance for the month of February 2022.	03/10/22	Achieved	Approved
IT-6 T2.1.3	4.13 - Implementation of Board adopted recommendation (4.13): Stress testing of CAD and ESB against the repaired OMS 6.7 system, as specified in the attached "LIPA-PSEG-2022-IT-6 System Implementation Board Project Improvement Plans (PIPs) (Tier 1 and 2)" metric document, delivered for LIPA approval.	03/31/22	Achieved	Approved
IT-6 T2.1.4	4.13 - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	Achieved	Approved

#### Summary

- PSEG Long Island implemented 4.13 Stress testing of CAD and ESB against the repaired OMS 6.7 system, as specified in the attached "LIPA-PSEG-2022-IT-6 System Implementation Board Project Improvement Plans (PIPs) (Tier 1 and 2)" metric document, delivered for LIPA approval.



## IT-6-T2.02 – 4.15

Project Status: **Did Not Achieve**

IT-6-T2.02 4.15				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-6 T2.2.1	4.15 - Project Implementation Plan (PIP 4.15) is submitted to LIPA: Performance test OMS and feeder systems to establish peak capacity.	02/04/22	Achieved	Approved
IT-6 T2.2.2	4.15 - Monthly Reporting of Project Status and compliance for the month of February 2022.	03/10/22	Achieved	Declined
IT-6 T2.2.3	4.15 - Implementation of Board adopted recommendation (4.15): Performance testing of the OMS and feeder systems to establish peak capacity, as described in the LIPA-approved Project Implementation Plan, completed, and all specified Deliverables delivered.	12/30/22	Never Completed Exercise	Overdue
IT-6 T2.2.4	4.15 - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	Achieved	Approved

### Summary

- PSEG Long Island submitted an exception to move this out to Q4 of 2023. PSEG Long Island never delivered on this project.

## IT-6-T2.03 – 4.18

Project Status: **Achieved**

IT-6-T2.03 4.18				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-6 T2.3.1	4.18 - Project Implementation Plan (PIP 4.18) is submitted to LIPA: Monitor application performance and error logs of all mission critical application systems, such as OMS, CAD, SCADA, ESB, etc.	02/04/22	Achieved	Approved
IT-6 T2.3.2	4.18 - Monthly Reporting of Project Status and compliance for the month of February 2022.	03/10/22	Achieved	Approved
IT-6 T2.3.3	4.18 - Project Implementation Plan (PIP 4.18) is Board Approved.	03/31/22	Achieved	Approved
IT-6 T2.3.4	4.18 - Implementation of Board adopted recommendation (4.18): Implementation of the system monitoring for performance and error logs of all mission critical application systems, such as OMS, CAD, SCADA, ESB, etc., as specified in the LIPA-approved Project Implementation Plan, completed; and all Deliverables specified in the LIPA-approved plan delivered to LIPA.	03/31/22	Achieved	Approved
IT-6 T2.3.5	4.18 - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	Achieved	Approved

### Summary

- PSEG Long Island implemented Board adopted recommendation (4.18): Implementation of the system monitoring for performance and error logs of all mission critical application systems, such as OMS, CAD, SCADA, ESB, etc., as specified in the LIPA-approved Project Implementation Plan, completed; and all Deliverables specified in the LIPA-approved plan delivered to LIPA.

## IT-6-T2.04 – 3.2.2.4

Project Status: **Achieved**

IT-6-T2.04 3.2.2.4				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-6 T2.4.1	3.2.2.4 - Project Implementation Plan (PIP 3.2.2.4) is submitted to: 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.	02/04/22	Achieved	Approved
IT-6 T2.4.2	3.2.2.4 - Monthly Reporting of Project Status and compliance for the month of February 2022.	03/10/22	Achieved	Approved
IT-6 T2.4.3	3.2.2.4 - Project Implementation Plan (PIP 3.2.2.4) is Board Approved.	03/31/22	Achieved	Approved
IT-6 T2.4.4	3.2.2.4 - Implementation of Board adopted recommendation (3.2.2.4): Implementation automation of monitoring OMS and CAD performance at the application level to detect application failures, including allowing administrators to adjust the configuration settings that affect performance, as specified in the LIPA-approved Project Implementation Plan, completed; and all Deliverables specified in the LIPA-approved plan delivered to LIPA.	03/31/22	Achieved	Approved
IT-6 T2.4.5	3.2.2.4 - Monthly Reporting of Project Status and compliance for the month of March 2022.	04/08/22	Achieved	Approved

### Summary

- PSEG Long Island implemented of Board adopted recommendation (3.2.2.4): Implementation automation of monitoring OMS and CAD performance at the application level to detect application failures, including allowing administrators to adjust the configuration settings that affect performance, as specified in the LIPA-approved Project Implementation Plan, completed; and all Deliverables specified in the LIPA-approved plan delivered to LIPA.

## IT-7 - System Segregation

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$262,817.62		

IT-07	System Segregation			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-7.2	The PSEG Long Island System Segregation Plan, as specified in the attached "LIPA-PSEG-2022-IT-7 System Segregation" metric document, is submitted for LIPA approval.	07/29/22	Achieved	Approved
IT-7.3	All planned work for 2022 in the LIPA-approved PSEG Long Island System Segregation Plan is completed in 2022.	12/30/22	Achieved	Approved

### Summary

- LIPA and PSEG Long Island submitted a joint IT System Separation Plan (the "Plan") to the Department of Public Service ("DPS") for review and recommendation to the LIPA Board on July 29, 2022.
- In the Second Amended and Restated Operations Services Agreement ("OSA") between LIPA and PSEG Long Island, the parties agreed that it would be beneficial for all IT Systems serving LIPA to be separate and distinct from the system, data, reports, and information of PSEG Long Island and its Affiliates ("IT System Separation").
- Section 4.2(A)(1)(q) of the OSA required LIPA and PSEG Long Island to form a joint cross functional team (the "IT Team") to develop the Plan for IT System Separation by July 29, 2022.
- In developing the Plan, the IT Team considered, among other things, the cost of IT Separation, ongoing operations and maintenance, impact on Operations Services and customers, minimizing the impact on PSEG Long Island's ability to meet its obligations under the OSA, schedule, and prioritization among different IT Systems.
- The joint IT Team Proposal identified the IT Systems to undergo separation and the schedule for doing so. The proposal structure minimized the cost and business disruption, by categorizing the systems into bundles, planning to separate systems in conjunction with planned upgrades or replacements (where possible), and selecting the "system carve out" method of separation of the Enterprise Resource Planning System, as further described herein.
- All planned work for 2022 was completed as outlined in the plan.

# Power Supply and Clean Energy

## PS&CE-1 - Integrated Resource Plan (IRP)

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$394,226.43		

PS&CE-1	Integrated Resource Plan (IRP)			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
PS&CE-1.1	Base assumptions on or about January 15, 2022.	01/14/22	Achieved	Approved
PS&CE-1.2	Complete preliminary draft results on or about August 31, 2022, to include: ranking of scenarios, outcome of results and action plan for existing and future resources through 2030	08/31/22	Achieved	Approved
PS&CE-1.3	Completion of an initial draft of the final report on or about October 31, 2022.	10/31/22	Achieved	Approved
PS&CE-1.4	Completion of the final draft on or about (i.e., no more than 10 days beyond) November 30, 2022.	11/30/22	Achieved	Approved

### Summary

- PSEG Long Island provided LIPA with base assumptions for IRP
- PSEG Long Island provided preliminary draft results on August 31, 2022, which included: ranking of scenarios, outcome of results and action plan for existing and future resources through 2030
- PSEG Long Island provided an initial draft of the final report on October 31, 2022.
- PSEG Long Island provided the final draft of the report on November 30, 2022.

## PS&CE-2 - Energy Storage Request for Proposal (RFP)

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$394,226.43		

PS&CE-2	Energy Storage Request for Proposal (RFP)			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
PS&CE-2.1	Complete evaluation of proposals to the Energy Storage RFP and recommend selections; Phase 2 – on or about March 31, 2022	03/31/22	<b>Achieved</b>	<b>Approved</b>
PS&CE-2.2	Complete evaluation of proposals to the Energy Storage RFP and recommend selections; Phase 3 – no more than 10 days beyond August 31, 2022 target delivery date for the final evaluation and selection recommendations.	08/31/22	<b>Achieved</b>	<b>Approved</b>

### Summary

- PSEG Long Island completed evaluation of proposals to the Energy Storage RFP and recommend selections; Phase 2 questions, which allowed LIPA to complete IV&V of Phase 2 in mid-April.
- PSEG Long Island complete evaluation of proposals to the Energy Storage RFP and recommend selections; Phase 3 – no more than 10 days beyond August 31, 2022 target delivery date for the final evaluation and selection recommendations

## PS&CE-3 - Energy Efficiency Annualized Energy Savings

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$210,254.09		

### PS&CE-3 Energy Efficiency Annualized Energy Savings OSA Incentive: \$210,254



#### Metric Definition

Energy Efficiency program annualized energy savings in comparison to the annual goal for each contract year.

#### Calculation

Annual MMBtu saved; gross savings at the meter.

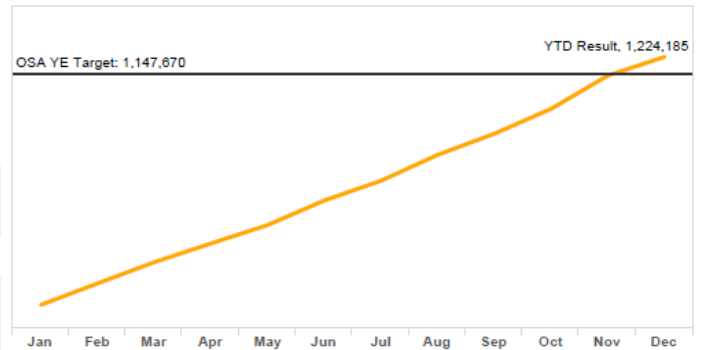
#### YTD

2022	1,224,185
2021	1,266,176

#### Month

2022	84,099
2021	124,426

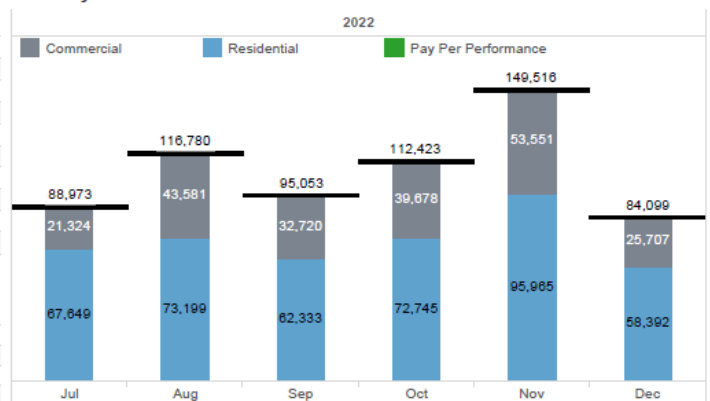
YTD Result	OSA YE Target	OSA YE Forecast
1,224,185	1,147,670	↑



#### Annualized Energy Savings (MMBtu) vs. Target Program

Customer Type	Program	YTD Value	YTD Target
Residential	Efficient Products	605,812	612,027
	Home Comfort	117,803	129,673
	Home Energy Management	113,362	101,952
	Home Performance w/ENERGY STAR	25,113	31,917
	Residential Energy Affordability Partnership (REAP)	6,007	5,953
	All Electric homes	80	500
Commercial	Commercial Efficiency	337,244	262,559
	Multi Family Homes	18,763	2,423
Pay Per Performance	Pay Per Performance	0	606
Grand Total		1,224,185	1,147,670

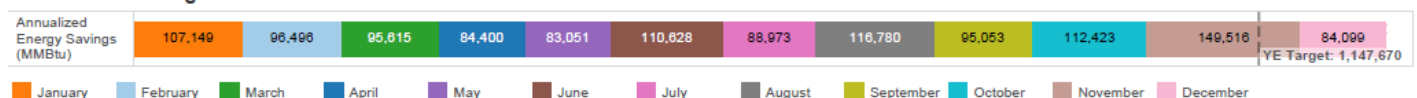
#### Monthly MMBtu



#### Annualized Energy Savings (MWh)

Customer Type	YTD Value	YTD Target
Residential	258,352	243,678
Commercial	70,373	83,193
Pay Per Performance	0	178
Grand Total	328,724	327,049

#### YTD Value vs. Target



### Summary

- PSEG Long Island achieved 2022 Energy Efficiency Annualized Energy Savings (MMBtu) target of 1,147,670 MMBtu with year-end performance of 1,224,185 MMBtu.

## PS&CE-4 - Utility 2.0 - DER Hosting

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$157,690.57		

PS&CE-4	Utility 2.0 - DER Hosting			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
PS&CE-4.1	Select distribution circuits, estimated to be between (30-50) circuits based on 80% penetration ratio and obtain LIPA and DPS agreement, final number to be determined prior to February 28, 2022	02/28/22	Achieved	Approved
PS&CE-4.2	Complete a hosting capacity study of selected distribution circuits, estimated to be between (30-50) circuits based on 80% penetration ratio. (As selected by PSEG LI and agreed upon by LIPA and DPS, final number to be determined prior to February 28, 2022 at which time LIPA and DPS will complete their review), as proposed in 2021 Utility 2.0 filing, including evaluation and prioritization of all LIPA Phase 2 Accelerated Renewable Energy Growth and Community Benefit Act (AREGCBA) proposals with respect to their use as solutions to the constraints, as applicable.	12/30/22	Achieved	Approved

### Summary

- PSEG Long Island selected 48 distribution circuits, based on 80% penetration ratio and obtained LIPA and DPS agreement
- PSEG Long Island completed a hosting capacity study of 48 selected distribution circuits



## PS&CE-5 - Beneficial Electrification

<b>Metric Type</b>	Quantitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$157,690.57 (75% of compensation)	<b>Comments</b>	Achieved 3 of 4 Sub-metric (75% of compensation)

J F M A M J J A S O N D

### PS&CE-5 Beneficial Electrification

OSA Incentive: \$210,254



Achieve the following implementation targets by December 31, 2022:

1. Pay rebates for 6,000 new heat pumps in incentive programs.
2. Enroll 20 homes in the all-electric homes rebate program.
3. Achieve at least 5,953 MMBTU of energy savings from the low income REAP program.
4. Enroll 10 buildings in the multi-family (more than 4 dwelling units per building) rebate program.

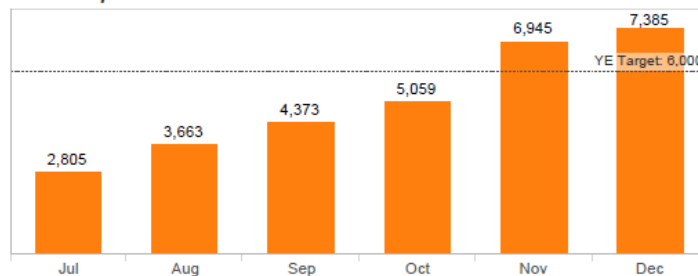
#### Calculation

Each target above is worth 25% of the total incentive and is measured on a pass/fail basis. A pass is earned by full completion of that target.

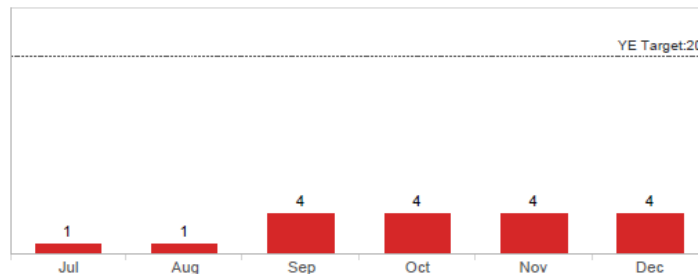
#### YTD



#### Heat Pumps - YTD



#### All-Electric Homes - YTD

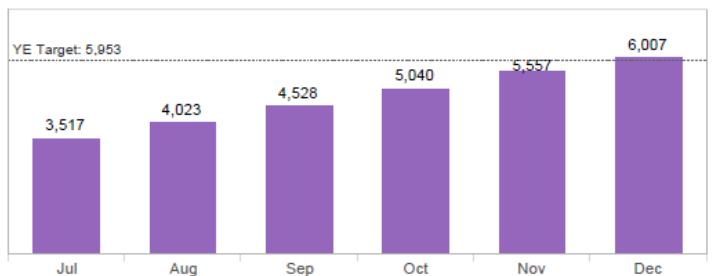


<b>YTD Result</b>	<b>OSA YE Target</b>	<b>OSA YE Forecast</b>
75.0%	100.0%	↑

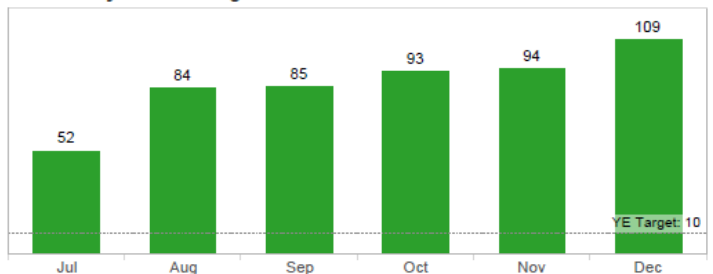
#### Beneficial Electrification - YTD vs Target

	YTD Value	YTD Target	YTD %	Pass/Fail	Pass/Fail %
Heat Pumps	7,385	6,000	123.1%	Pass	100.0%
MMBTU Low Income REAP	6,007	5,953	100.9%	Pass	100.0%
All-Electric Homes	4	20	20.0%	Fail	0.0%
Multi-family # of Buildings	109	10	1090.0%	Pass	100.0%

#### MMBTUs Low Income REAP - YTD



#### Multi-family # of Buildings - YTD



- PSEG Long Island achieved 3 of the 4 Beneficial Electrification targets. Each target above is worth 25% of the total incentive and is measured on a pass/fail basis. A pass is earned by full completion of that target.

## Heat Pump Rebates

- PSEG Long Island paid rebates for 7,385 new heat pumps versus target 6,000 heat pumps – target achieved.

## All Electric Homes

- PSEG enrolled only 4 homes in the All-Electric Home Program below the target of 20 – target not achieved.

## MMBTU of Energy Savings from the low income REAP Program

- PSEG Long Island achieved MMBtu energy savings of 6,007 MMBtus versus target of 5,953 MMBtus in the Low Income REAP program – target achieved.

## Multi-family (more than 4 dwelling units per building) Rebate Program

- PSEG Long Island enrolled 109 Multi-family buildings (more than 4 dwelling units per building) in the multi-family rebate program – target achieved.

## PS&CE-6 - Electric Vehicle (EV) Make Ready

<b>Metric Type</b>	Quantitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$52,563.52 (50% of compensation)	<b>Comments</b>	Achieved 2 of 4 Sub-metric (50% of compensation)

### PS&CE-6 Electric Vehicles (EV) Make Ready OSA Incentive: \$105,127



#### Metric Definition

Achieve the following implementation targets by December 31, 2022:

1. Enroll 75 DCFC ports in make-ready infrastructure incentive
2. Energize 50 DCFC Ports;
3. Enroll 637 Level 2 ports in make-ready infrastructure incentives
4. Energize 450 Level 2 Ports.

#### Calculation

Each target above is worth 25% of the incentive and is measured on a pass/fail basis. A pass is earned by full completion of that target.

#### YTD

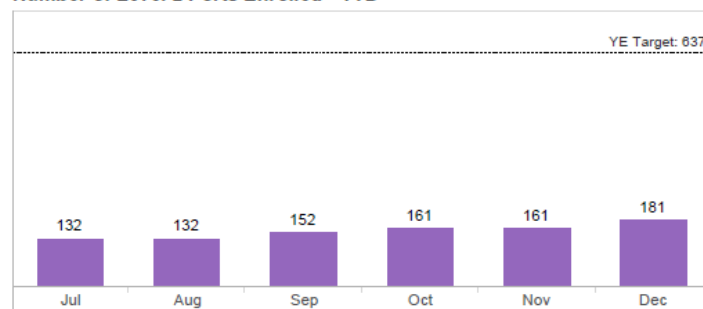


<b>YTD Result</b>	<b>OSA YE Target</b>	<b>OSA YE Forecast</b>
50.0%	100.0%	↑

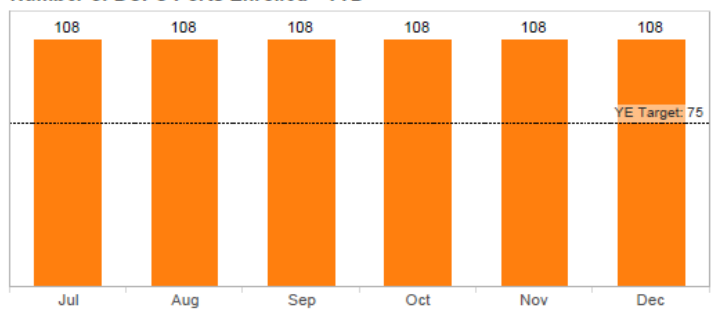
#### EV Make Ready - YTD vs Target

	YTD Value	YTD Target	YTD % Target	Pass/Fail	Pass/Fail %
DCFC Ports Enrolled	108	75	144.0%	Pass	100.0%
DCFC Ports Energized	78	50	156.0%	Pass	100.0%
Level 2 Ports Enrolled	181	637	28.4%	Fail	0.0%
Level 2 Ports Energized	63	450	14.0%	Fail	0.0%

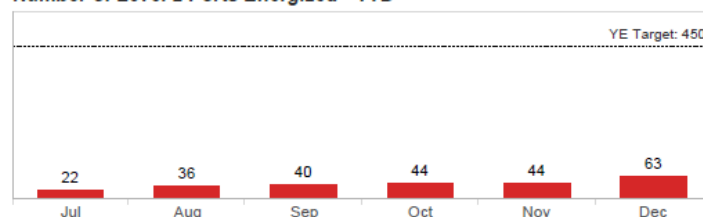
#### Number of Level 2 Ports Enrolled - YTD



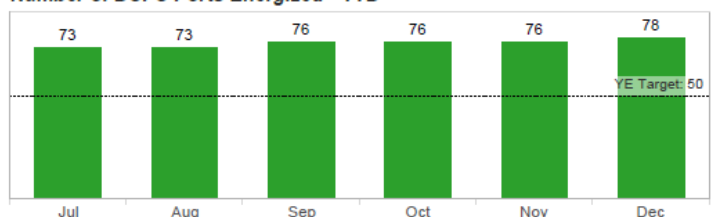
#### Number of DCFC Ports Enrolled - YTD



#### Number of Level 2 Ports Energized - YTD



#### Number of DCFC Ports Energized - YTD



- PSEG Long Island achieved 2 of the 4 Electric Vehicle (EV) Make Ready targets. Each target above is worth 25% of the total incentive and is measured on a pass/fail basis. A pass is earned by full completion of that target.
- Note – there was a restatement of the number of energized DCFC and Level 2 reports following an IV&V meeting with LIPA staff. It had no overall impact on the achievement PSEG LI claimed at year end and in this document.

### Enrollment of DCFC ports in make-ready infrastructure incentive

- PSEG Long Island enrolled 108 DCFC ports in make-ready infrastructure incentive vs target of 75 enrollments – target achieved.

### Energizing of DCFC Ports

- PSEG Long Island energized 78 DCFC Ports vs target of 50 energized ports – target achieved.

### Enrollment of Level 2 ports in make-ready infrastructure incentives

- PSEG Long Island enrolled 181 Level 2 ports in make-ready infrastructure incentives vs target of 637 enrollments – target not achieved.

### Energizing of Level 2 Ports.

- PSEG Long Island energized 63 Level 2 ports vs target of 450 energized ports – target not achieved.

## PS&CE-7 - DER Interconnection Process

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$210,254.09		

PS&CE-7	DER Interconnection Process			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
PS&CE-7.1	PSEG Long Island should ensure an independent review of escalated interconnection cases by changing the organizational placement of the Interconnection Ombudsperson to be outside of the group that administers the SGIP, and for this activity will report directly to the VP – Power Markets. PSEG Long Island to develop a process for escalated interconnection cases, consistent with other NYS utility practices and in agreement with LIPA, and provide to LIPA by February 28, 2022. Once agreed upon, will be included in the SGIP.	02/28/22	Achieved	Approved
PS&CE-7.2	Make developer community aware of all payment options including check, on-line check payment, and electronic wire transfer, by updating the SGIP website and FAQs regarding the payment options. This will be completed by March 31, 2022	03/31/22	Achieved	Approved
PS&CE-7.3	PSEG Long Island will investigate an option to make interconnection payments by credit-card via telephone or other non-complex manner, and provide a cost estimate to LIPA by June 1, 2022.	06/01/22	Achieved	Approved
PS&CE-7.5	Develop, in collaboration with LIPA and issue a survey to determine effectiveness and efficiency of the interconnection process and containing questions designed to identify customer satisfaction or dissatisfaction with the process and potential improvements. PSEG LI will schedule and conduct two meeting sessions with LIPA prior to completing the survey. By no later than July 1, 2022	07/01/22	Achieved	Approved
PS&CE-7.6	By July 1, 2022, PSEG LI will develop, with LIPA's input, with 2 meeting sessions as scheduled by PSEG LI, a plan to encourage participation in the survey, in agreement with LIPA, which will use reasonable efforts to educate developers on the value of the survey.	07/01/22	Achieved	Approved
PS&CE-7.4	If Deliverable PS&CE-7.3 is acceptable to LIPA, PSEG Long Island will implement and update the SGIP website and FAQs with the new credit card option, by August 15, 2022.	08/15/22	Achieved	Approved
PS&CE-7.7	July Monthly Satisfaction Survey results will be reported to LIPA on a monthly rolling basis beginning on August 31, 2022, for the prior month.	08/31/22	Achieved	Approved
PS&CE-7.8	August Monthly Satisfaction Survey results will be reported to LIPA on a monthly rolling basis.	09/30/22	Achieved	Approved
PS&CE-7.9	September Monthly Satisfaction Survey results will be reported to LIPA on a monthly rolling basis.	10/31/22	Achieved	Approved
PS&CE-7.10	October Monthly Satisfaction Survey results will be reported to LIPA on a monthly rolling basis.	11/30/22	Achieved	Approved
PS&CE-7.11	November Monthly Satisfaction Survey results will be reported to LIPA on a monthly rolling basis.	12/30/22	Achieved	Approved

PS&CE-7 DER Interconnection Process				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
PS&CE-7.12	Establish and obtain LIPA Board approval for an interconnection cost sharing process consistent with the statewide Public Service Commission process.	12/30/22	Achieved	Approved

### Summary

- PSEG Long Island ensured an independent review of escalated interconnection cases by changing the organizational placement of the Interconnection Ombudsperson to be outside of the group that administers the SGIP, and for this activity will report directly to the VP – Power Markets.
- PSEG Long Island developed a process for escalated interconnection cases, consistent with other NYS utility practices and in agreement with LIPA, and provided to LIPA prior to February 28, 2022.
- PSEG Long Island made the developer community aware of all payment options including check, on-line check payment, and electronic wire transfer, by updating the SGIP website and FAQs regarding the payment options. This was completed on March 9, 2022
- PSEG Long Island will investigate options to make interconnection payments by credit-card via telephone or other non-complex manner, and provided a cost estimate to LIPA on March 17, 2022.
- PSEG Long Island developed, in collaboration with LIPA a survey to determine effectiveness and efficiency of the interconnection process and containing questions designed to identify customer satisfaction or dissatisfaction with the process and potential improvements. PSEG Long Island completed and conducted meetings prior to June 16, 2022.
- PSEG Long Island develop, with LIPA's input, with 2 meeting sessions as scheduled by PSEG LI, a plan to encourage participation in the survey, in agreement with LIPA, which will use reasonable efforts to educate developers on the value of the survey. This activity was completed on 6/23/2022.
- PSEG Long Island provided Monthly Satisfaction Survey results to LIPA on a monthly rolling beginning in July 2022.
- On December 14, 2022, the LIPA BOT approved the cost sharing proposal and changes to the SGIP as submitted. Effective January 1, 2023.

## PS&CE-8 - TOU Pricing Options - Space Heating & Large Commercial

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$210,254.09	Comments	Dispute of performance between parties
Additional Comments	LIPA decline deliverable PS&CE-8.7 on 2/01/2023 because PSEG LI didn't provide any artifacts demonstrating completion. PSEG LI was unaware what to provide from an artifacts perspective as the new Rate 294: Commercial, Large, Time Of Use, 4 hour Peak was operationalized on January 1, 2023. When PSEG LI saw that the deliverable was declined we discussed what artifacts would be needed to satisfy metric deliverable. PSEG LI subsequently uploaded aforementioned artifacts for LIPA review. The metric owner from LIPA, is no longer with LIPA and the new SME area was notified that documents were provided for review. When asked to review the only note was that there was an indefinite extension on the space heating rate which was not being questioned. DPS on March 30, 2023 recommended not to proceed with the space heating rate as there were multiple concerns.		

PS&CE-8	TOU Pricing Options - Space Heating & Large Commercial			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
PS&CE-8.1	The draft rate designs and draft tariff leaves will be provided to LIPA staff by January 31, 2022.	01/31/22	Achieved	Approved
PS&CE-8.2	Revised rate designs and tariff leaves reflecting LIPA's comments will be provided to LIPA staff and DPS staff by February 28, 2022.	02/28/22	Achieved	Approved
PS&CE-8.3	The final Tariff proposal will be provided to LIPA and DPS staff by March 31, 2022	03/31/22	Achieved	Approved
PS&CE-8.4	The IT requirements to operationalize customer enrollment and billing of the rate designs must be delivered to IT by March 31, 2022.	03/31/22	Achieved	Approved
PS&CE-8.5	The SAPA filing must be issued by April 6, 2022	04/06/22	Achieved	Approved
PS&CE-8.6	The proposal will receive a recommendation from the Department of Public Service for adoption of the proposed rates and receive approval from the LIPA Board to modify the Tariff by the July LIPA Board meeting (on or about July 13th).	07/13/22	Achieved	Approved
PS&CE-8.7	PSEG LI will complete all of the billing changes, enrollment processes, accounting processes, and customer service requirements to enable enrollment and billing of the new rates on or before January 1, 2023	12/30/22	Achieved	Declined

### Summary

- PSEG Long Island provided draft rate designs and draft tariff leaves to LIPA staff prior to January 31, 2022. This was prior to Metric Tracking System rollout and noted as received by the LIPA Metric Owner.
- On March 31, 2023 – PSEG Long Island submitted an exception because DPS opposition to the Space Heating TOU rate. PSEG Long Island only moved forward with development and operationalizing Rate 294: Commercial, Large, Time of Use, 4 hour Peak.
- PSEG Long Island met all other interim deliverables – LIPA's project manager did note that they recommended approval with comments for technical requirements. LIPA's comments on requirements: Going forward, requirements need to be comprehensive and provided in enough detail for LIPA SME to determine whether the bill computations are complete and accurate. In LIPA's view, the requirements provided for this deliverable should have been more detailed.
- LIPA declined the final deliverable PS&CE-8.7 on 2/01/2023 because PSEG LI didn't provide any artifacts demonstrating completion. PSEG LI was unaware what to provide from an artifacts perspective as the new Rate 294: Commercial, Large, Time of Use, 4 hour Peak was operationalized on January 1, 2023. PSEG LI provided noted Smartsheet on 12/30/2022 that Rate 294 would be operationalized on January 1, 2023. LIPA then moved this to reviewing on 1/17/2022 and then eventually rejected the deliverable on 02/01/2023 because there was no artifacts. When PSEG LI saw that the deliverable was declined we discussed what artifacts would be needed to satisfy metric deliverable. PSEG LI subsequently uploaded aforementioned

artifacts for LIPA review. The metric owner from LIPA, is no longer with LIPA and the new metric owner/project manager was notified that documents were provided for review. A LIPA manager stated that they "reviewed the MyAccount test results provided for the rate comparison tool and the new 294 rate is appearing there for customer selection. I also went to the PSEGLI website and 294 is included in the commercial rate booklet. From a customer perspective, I would consider this complete." When asked to review further review the only note was that there was an indefinite extension on the space heating rate which was not being questioned and is irrelevant. PSEG LI requested LIPA further evaluate artifacts provided to be review and a response to the open item.

- After a requested response for a further review, LIPA on 3/15/2023 provided additional comments and requests for PSEG LI to address by 3/31/2023.
- PSEG Long Island responded to LIPA's 3/15/2023 with supporting files and documents requested on 3/30/2023.
- PSEG Long Island asserts that the rate was operationalized on or before January 1, 2023 and all support processes and documents were developed and operationalized.

## PS&CE-9 - Time of Use Pricing Pilot - Year 1 Marketing

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$210,254.09		

J F M A M J J A S O N D

### PS&CE-9 TOU Pricing Pilot - Year 1 Marketing

OSA Incentive: \$210,254



#### Metric Definition

Execute proactive outbound direct marketing and engagement campaign to attract customers for new optional time-of-use rates for residential and small commercial customers. Attracting a significant number of customers will enable the analysis of energy and demand savings as well as refine engagement channels, frequency, and target segments to realize benefits to customers, the community, and the utility.

#### Calculation

This metric will measure the number of customers enrolled in the five new TOU rates (190, 191, 192, 193, and 292) as of December 31, 2022.

#### YTD

2022	13,434
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#### Month

2022	N/A
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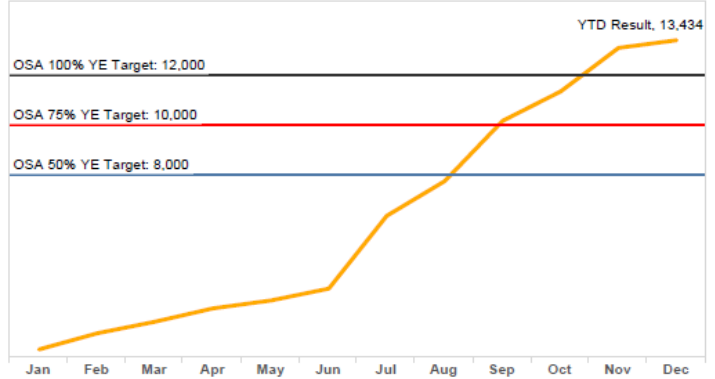
#### Cumulative Result

13,434

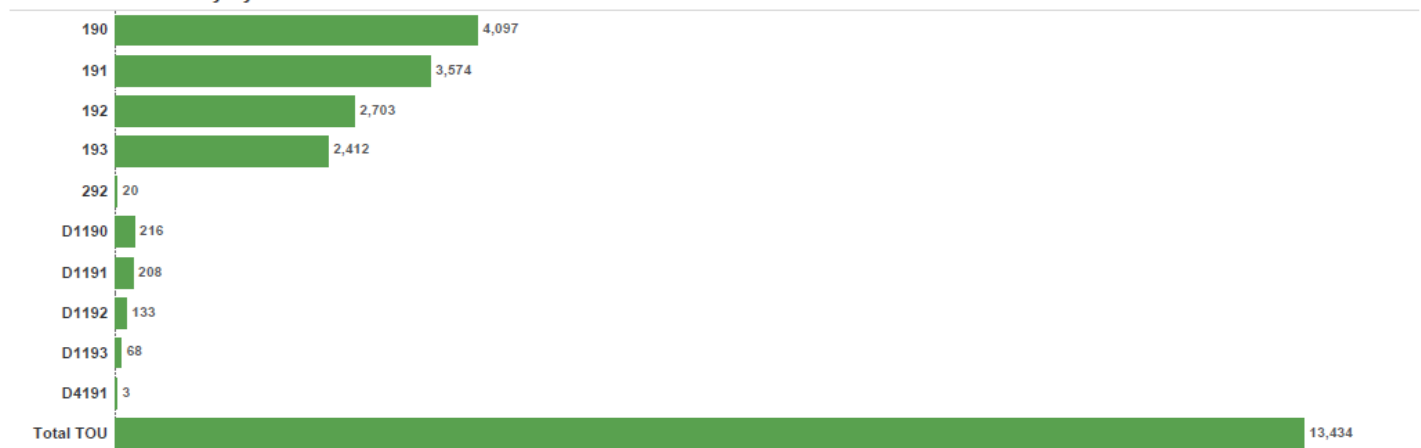
#### OSA YE Target

12,000

#### OSA Forecast



#### Cumulative Summary by TOU Rates



\* The Methodology of the report has changed. There are two different reports that are best suited based on the definition of the metric. The two reports include: those customers that have already been converted to the new rate (per GridX rate report) with the addition of the PSEG LI Salesforce report filtered for those still pending rate conversion by the billing team.

### Summary

- PSEG Long Island executed a successful proactive outbound direct marketing and engagement campaign to attract customers for new optional time-of-use rates for residential and small commercial customers. Attracting a significant number of customers will enable the analysis of energy and demand savings as well as refine engagement channels, frequency, and target segments to realize benefits to customers, the community, and the utility.
- PSEG Long Island achieved the 100% targeted performance level of greater than 12,000 customers on Time of Use Rates as of December 31, 2022. As of December 31, 2022, PSEG Long Island had 13,434 customers enrolled in TOU rates as of yearend.



# Electric T&D

## T&D-01 - Asset Management Program Implementation - Asset Inventory

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↓ <b>Did Not Achieve</b>
<b>Incentive Compensation Claim</b>	\$0.00		

T&D-01	Asset Management Program Implementation - Asset Inventory			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-1.1	Develop a Data Governance Plan for appropriately managing the asset data to be captured during the field verification of LIPA outside plant assets (See Definitions #2, #3, and #4) including LIPA comments to be completed by March 31, 2022. Basic elements shall include: Data Stewardship, Data Standards, Data Management and maintenance, and Data Quality Management.	03/15/22	Achieved	Approved
T&D-1.2	Field verify and inspect the condition of 97% of the ~15,521 OSP wood transmission poles in the 2022 Program. QA/QC the pole condition data and timely update validated asset information in EGIS. PSEG LI to provide LIPA with quarterly updates on the data collection effort.	03/31/22	Achieved	Approved
T&D-1.3	Issue and award RFP for field verification of the Outside Plant (OSP) T&D assets (PIP AM-2 Initiative #1) by May 1, 2022.	04/29/22	Achieved	Approved
T&D-1.4	Capture the desired asset attributes for each asset class as established in Recommendation No. AM-2. QA/QC the new asset data and timely update validated asset information in EGIS. PSEG LI to provide LIPA with quarterly updates on the data collection effort.	06/28/22	Achieved	Approved
T&D-1.5	Field verify and inspect the condition of 97% of the ~15,521 OSP wood transmission poles in the 2022 Program. QA/QC the pole condition data and timely update validated asset information in EGIS. PSEG LI to provide LIPA with quarterly updates on the data collection effort.	06/28/22	Achieved	Approved
T&D-1.6	Develop and issue an RFP subject to LIPA approval for field verification and condition assessment of LIPA's steel transmission structures by June 1, 2022 including LIPA's comments	05/31/22	Achieved	Approved
T&D-1.7	Capture the desired asset attributes for each asset class as established in Recommendation No. AM-2. QA/QC the new asset data and timely update validated asset information in EGIS. PSEG LI to provide LIPA with quarterly updates on the data collection effort.	09/26/22	Achieved	Approved
T&D-1.8	Field verify and inspect the condition of 97% of the ~15,521 OSP wood transmission poles in the 2022 Program. QA/QC the pole condition data and timely update validated asset information in EGIS. PSEG LI to provide LIPA with quarterly updates on the data collection effort.	09/26/22	Achieved	Approved
T&D-1.9	Capture the desired asset attributes for each asset class as established in Recommendation No. AM-2. QA/QC the new asset data and timely update validated asset information in EGIS. PSEG LI to provide LIPA with quarterly updates on the data collection effort.	12/29/22	Achieved	Approved



T&D-01 Asset Management Program Implementation - Asset Inventory				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-1.10	LIPA to verify via an audit the completion of at least 20% of the OSP T&D assets are updated in EGIS by December 31, 2022, with at least 98% accuracy.	12/29/22	Did Not Achieve	Declined
T&D-1.11	Field verify and inspect the condition of 97% of the ~15,521 OSP wood transmission poles in the 2022 Program. QA/QC the pole condition data and timely update validated asset information in EGIS. PSEG LI to provide LIPA with quarterly updates on the data collection effort.	12/29/22	Did Not Achieve	Declined
T&D-1.12	LIPA to verify via an audit that the field inspections for a minimum of 97% of ~15,521 wood transmission poles are completed and entered into EGIS by December 31, 2022 with at least 98% accuracy.	12/29/22	Did Not Achieve	Declined

### Summary

- PSEG LI's Asset Strategy, Training & Contractor Services, and IS groups worked to draft the required Data Governance Plan. The initial draft of this plan was sent to LIPA on March 7<sup>th</sup> for comments. LIPA returned their comments on March 15<sup>th</sup> and the Draft Plan was updated based on these comments received.
- The RFP for the Field Verification program was issued in February 2022, and closed in March. The Internal Project Team had follow up bidder meetings with the bidding vendors during the week of March 14<sup>th</sup>. After these meetings, the team completed all required technical evaluations of the submitted bids. Procurement reviewed all Commercial terms of the received bids, and a final vendor was chosen to receive the award for this project. Procurement subsequently made a contract award to K&A Engineering on 4/26/22 (meeting the 5/1/22 due date). Note: On 4/18/22, LIPA called a meeting and added a new requirement of having unique Asset ID numbers affixed to all poles. This needed to be handled through a contract amendment. Details on how to generate a unique ID (which will be utilized in EAMS) were finalized with LIPA in May & subsequently presented to K&A. PSEGLI requested pole tagging options and pricing from K&A, and K&A presented this info to PSEGLI on 6/15/22. The information from K&A was then sent to LIPA on 6/16/22 for review & a final decision on what option to proceed with. On 6/22/22, LIPA responded with the specific pole tag option which they preferred and gave concurrence to a revised schedule which accounts for completing a minimum of ~14%\* of all outside plant structures (including all transmission structures) by the end of 2022. Work on amending the Field Verification contract was completed in August, allowing for the start of Field Verification activities. In September, the initial QA/QC review of collected data indicated that the data collection application was not functioning correctly and the field data was not being captured correctly. In response, the project team worked along with the contractor to troubleshoot the application and also pursued possible alternative data collection applications. The application was updated and data collection activities resumed in November. Unfortunately, due to issues with the data collection application, the revised target of 14.28% of poles was not met. The year-end total of poles field verified was 12,000, which represents 2.2% of the installed pole plant.
- The required inspection contract with Osmose was finalized and pole inspection work started in January 2022. PSEGLI successfully completed the physical inspection of more than 99% of wood transmission poles, and this data was forwarded to IS to have GIS updated by the end of 2022. The field verification component of this metric will be covered under the Field Verification Program (awarded on by 4/26/22). The requirement to have all transmission poles field verified by the end of 2022 was included in the Program's statement of work and the chosen contractor presented a draft plan and schedule to address all required transmission pole verifications using a dedicated team. Work on amending the Field Verification contract was completed in August, allowing for the start of Field Verification activities. As noted above, issues with the data collection application hampered these field verification activities. While a priority was placed on the verification of transmission poles, by year's end only 11,300 transmission poles were field verified. This represents 72.8% of the targeted 15,521 wood transmission poles.
- Asset Strategy compiled the draft Statement of work for this RFP and sent to LIPA on March 1<sup>st</sup> to review and provide comments. LIPA returned their comments to PSEGLI on March 22<sup>nd</sup>. The draft statement of work was updated based on these comments and forwarded to Procurement on 3/28/22 to begin the RFP process. Procurement reviewed all documents and launched the RFP for this work on 4/14/22 (ahead of the 6/1/22 due date). This contract was subsequently awarded to K&A Engineering. All required funding for this work was included in Asset Strategy's 2023 Budget Book submittal, and work is scheduled to begin in the first quarter of 2023.

## T&D-02 - Asset Management Program Implementation - AM Governance

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	<span style="color: green;">↑</span> <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$210,254.09		

T&D-02	Asset Management Program Implementation - AM Governance			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-2.1	Modify the Asset Management Implementation Plan and resubmit to LIPA for review and approval (approval not to be unreasonably withheld) within 60 days of receipt of LIPA's comments	02/14/22	Achieved	Approved
T&D-2.2	The RFP for the Strategic Asset Management Plan (SAMP) to be issued by January 31, 2022.	01/31/22	Achieved	Approved
T&D-2.3	PSEG Long Island to provide LIPA with quarterly reports on work associated with ISO-55000 Implementation Plan	03/31/22	Achieved	Approved
T&D-2.4	PSEG Long Island to provide LIPA with quarterly reports on work associated with ISO-55000 Implementation Plan	06/30/22	Achieved	Approved
T&D-2.5	Develop the Strategic Asset Management Plan (SAMP) – Develop and finalize the SAMP per the agreed to format, including LIPA comments to be presented for LIPA's approval (approval not to be unreasonably withheld) by October 1, 2022	12/09/22	Achieved	Approved
T&D-2.6	Submission of the 2021 Annual Reliability Assessment of Asset Performance by August 31, 2022 reporting the results of an annual reliability assessment of asset performance and including a plan to address identified deficiencies.	08/31/22	Achieved	Approved
T&D-2.7	PSEG Long Island to provide LIPA with quarterly reports on work associated with ISO-55000 Implementation Plan	09/30/22	Achieved	Approved
T&D-2.8	Develop 10 Overhead specific Asset Management Plans (AMPs) – Develop and finalize the specific AMPs for Overhead assets per the agreed to format including LIPA's comments to be presented to LIPA (approval not to be unreasonably withheld) by December 31, 2022	02/10/23	Achieved	Approved
T&D-2.9	PSEG Long Island to provide LIPA with quarterly reports on work associated with ISO-55000 Implementation Plan	12/30/22	Achieved	Approved

### Summary

- LIPA's Comments on the Implementation Plan were received on 12/15/21. PSEG LI re-engaged with UMS on a limited contract to provide the updated Implementation Plan which incorporated LIPA's comments and accounts for the current LIPA ISO AM metrics. PSEG LI delivered this updated Plan to LIPA on 2/11/22 (within the required 60 days). After their subsequent review, LIPA requested additional changes based on comments received on 3/1/22. These comments were address and the document was revised (Revision 3) and submitted to LIPA on 4/7/22. LIPA again requested additional changes to the document (including the removal of all IS related initiatives). PSEG LI updated the document (Revision 4) based on these comments and resubmitted to LIPA on 5/6/22. After reviewing Revision 4, LIPA once again provided additional comments and required revisions to the document. PSEG LI addressed all comments / requested revisions and updated the Implementation Plan (Revision 5). Revision 5 was completed and submitted to LIPA on 6/21/22. This version (Rev 5) of the Implementation Plan served as both the statement of work (SOW) and preliminary estimate of costs for the RFP to address all required ISO-55001 support work. The RFP for the LIPA requested ISO 55001-alignment work in 2023 was issued and is currently in the bidder evaluation phase.
- PSEG Long Island's Asset Strategy organization compiled all required bid documents (which included all comments received from LIPA on 12/15/21) for required work on the SAMP and sent to Procurement in January. Procurement finalized these documents and issued the RFP on 01/25/2022 (ahead of the 1/31/22 due date). All bids were received back and follow up

meetings with a short list of vendors were conducted during the week of March 21st. All Technical scores for these bids were provided (with a recommended vendor specified) to Procurement on 3/28/22. Procurement then moved forward with finalizing the contract terms and on 4/7/22 requested confirmation on inclusion of Optional contract work in 2023 (remaining AMPs). This additional work was discussed with LIPA on 4/15/22, and LIPA indicated that they would like all remaining AMP's completed by 6/30/23. Procurement had been working to finalize contract with Accenture, when LIPA requested to meet with Accenture on 6/7/22. Based on this additional review, Accenture's proposed ISO55000 team lead was rejected. Asset Strategy and Procurement then worked with all final bidders to set up another round of interviews with LIPA for the week of 6/27/22. During these reviews, the additional requirements to support Change Management & Communications were added to the scope of work by LIPA. Asset Strategy updated the required scope of work and transmitted this info back to the bidders for review and re-submittal of their proposals. PSEGLI & LIPA then completed all follow up interviews with the consultants to review the revised scopes of work. Based on the subsequent revised bids from the consultants, a new contractor was selected (PWC). Procurement worked with PWC to finalize the contract for this work by the end of October. The project kickoff meeting was held on 11/1/22, and a revised set of dates for the project deliverables (noted above) was shared with LIPA on 11/2/22. The draft SAMP document was shared with LIPA on 12/21/22, and an updated SAMP document was transmitted to LIPA on 12/29/22.

- PSEG Long Island provided LIPA with all quarterly reports on work associated with ISO-55000 Implementation Plan timely
- PSEG Long Island submitted the 2021 Annual Reliability Assessment of Asset Performance on August 26, 2022 reporting the results of an annual reliability assessment of asset performance and including a plan to address identified deficiencies.

## T&D-03 - Enterprise Asset Management System Implementation Plan

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$630,762.28		

T&D-03	Enterprise Asset Management System Implementation Plan			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-3.1	Comprehensive EAMS Implementation Plan as specified in the Definition section of the attached "T&D-3 Enterprise Asset Management System (EAM) Implementation Plan" metric document, is submitted to LIPA.	06/30/22	Achieved	Approved
T&D-3.2	Detailed functional and technical requirements document as specified in the Definition section of the attached "T&D-3 Enterprise Asset Management System (EAM) Implementation Plan" metric document, is submitted and approved by LIPA.	07/29/22	Achieved	Approved
T&D-3.3	RFP for the procurement of an Enterprise Asset Management System/implementer is submitted and approved by LIPA.	07/29/22	Achieved	Approved
T&D-3.4	Selection and Procurement of the best-fit EAMS solution/implementer through rigorous evaluation to minimize delivery risk to be completed and approved by LIPA	12/30/22	Achieved	Approved
T&D-3.5	Executed EAMS solution/implementer contracts verified by LIPA	03/03/23	Deferred to 2023	Deferred to 2023
T&D-3.6	Detailed Implementation Plan as specified in the Definition section of the attached "T&D-3 Enterprise Asset Management System (EAM) Implementation Plan" metric document, is submitted and approved by LIPA.	12/30/22	Achieved	Approved

### Summary

- PSEG Long Island completed a comprehensive EAMS Implementation Plan as specified in the Definition section of the attached "T&D-3 Enterprise Asset Management System (EAM) Implementation Plan" metric document
- Detailed functional and technical requirements were documented
- An RFP for procurement of the EAMs System was submitted to LIPA for review and release
- IBM Maximo was the selected platform from the System RFP
- A subsequent RDP was issued for a System Integrated which will be executed in 2023
- LIPA and PSEG LI mutually agreed to defer T&D-3.5 the SI selection to a 2023 metric deliverable
- A detailed Project Implementation Plan (PIP) was submitted

## T&D-04 - T&D System Relay Operations - Relay Mis-Operations

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$105,127.05		

### J F M A M J J A S O N D T&D-4 T&D System Relay Operations - Relay Mis-Operations OSA Incentive: \$105,127



#### Metric Definition

Relay mis-operations occur when:

- Any failure of a Protection System element to operate within the specified time when a fault or abnormal condition occurs within a zone of protection.
- Any operation for a fault not within a zone of protection (other than operation as backup protection for a fault in an adjacent zone that is not cleared within a specified time for the protection for that zone).
- Any unintentional Protection System operation when no fault or other abnormal condition has occurred unrelated to on-site maintenance and testing activity.
- Protection System operations due to non-field resource design and settings error.

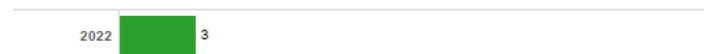
#### Calculation

Percent improvement as recorded by the number of relay operations on the Transmission system in 2022 compared to the previous 3-year average (2019-2021). LIPA to audit year-end performance...

#### YTD

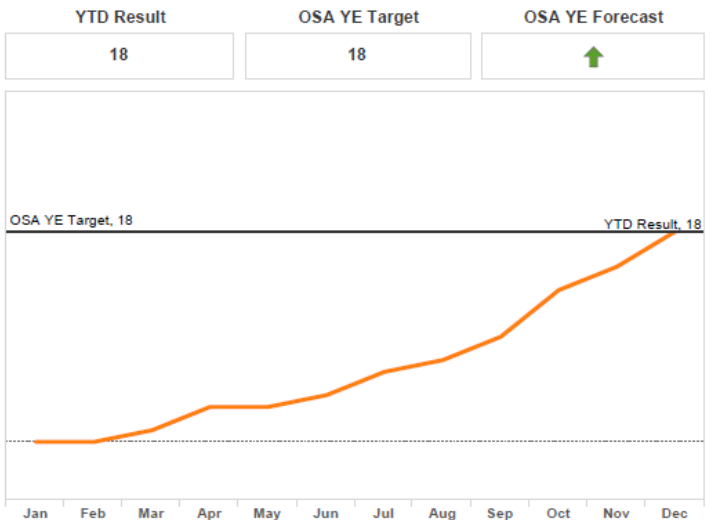


#### Month



#### YTD Events

Month of Incident Date	Substation	Description
December	6D Smithtown	On 12/16/22 at 0445, a fault occurred on 6HL-815 due to a pole fire. The feeder went through trip and reclose cycles and finally locking out. At the same time (0445), GCB 640 @ 6D S...
	6HL Indian Head	Multi was pulling secondary fuses associated with 69KV PT 2 and the 3V0 protection operated tripping 13KV Bus 2...
	9E Buell	Buell Bank 4 differential operated simultaneous to 9E-934 feeder trip. The Bank 4 a-phase IJD had a target and 9E-934. The transmission line and bus relays did not trigger to capture...
November	2W Central Ave	On 11/28/22 at 1312, an MVA caused a lockout on 2W-443 feeder. Attempts to close breaker with the exit LBD opened made and the feeder breaker was tripping. ...
	9A Riverhead	On 11/27/22, a district operator gave a supervisory close to an already closed breaker and the breaker tripped. The SEL-311L events confirmed the breaker opened and the CSR chan...
October	2WB Barrett	On 10/26/22 at 1016, Barrett 1300 tripped dropping Bank 11 and causing loss of load on 13KV Bus 3 and 13KV Bus 1 feeders. Bank 8 (a/w 13KV Bus 1) was de-energized for a cleara...
	3J Whiteside	On 10/9/22 at 1730, 3J Whiteside 640 a/w 69-266 tripped opening the line single ended. The remote end line breaker at 2AB Corona Ave did not trip. Preliminary investigation indicate...
	4GH Glen head	On 10/19/22, 13KV Bus 2 diff operated and tripped 4GH-4P9 during investigation of 4GH-120 tripping. The 13KV bus 2 was backed from 4GH-4P9 which was the configuration during ...
	8J Southold	On 10/14/22 at 2132, 8J Southold 690 a/w 69-948 tripped immediately when closed via supervisory in restoring the line from a clearance. The breaker was opened for a clearance on ...
September	7M Macarthur	On 9/18/22 at 1932, Bayport 630 a/w 69-779 tripped (7MM Watson 620 was open during this event) and the Macarthur capacitor bank tripped at the same time. The targets reported o...
August	5U Massapequa	On 8/20/22 at 0416 hours an A phase to ground fault occurred within the 5U Massapequa 69kV bus #2 differential relay's zone of protection. The bus #2 protection correctly operated ...
	9U Montauk	On 8/3/22 at 2030, 9K Culloden cap bank tripped as a result of a fault on the Cap switcher and 9U Montauk 240 tripped dropping Culloden Bank 1 and 2. Initial investigation appears to ...
July	2AB Corona	On 7/23/22 at 17:14, Corona feeder 2AB-519 locked out and was tripping free when returning after exit cable testing. Investigation found the initial trip, reclose, and trip was for a fault ...
	3D Manhasset	On 7/11/22 at 0926, the normally close Manhasset 13KV Bus tie breaker 3D-150 opened while a tech was working in the substation. Targets found on the 187L/DTTR AR relay and th...
June	6U Ruland Road	On 6/13/22 at 1510, Ruland Road 6900 Capacitor Bank and 69KV Bus 2 tripped. Investigation found the 6900 Capacitor Bank tripped on imbalance due to blown fuses a/w capacitor c...
April	4H East Garden ..	Relay tech completed calibration of JBCG relay. The relay cover was put on and caused 1370/1380 to trip. Investigation found an issue on the JBCG relay where the time delay target c...
	8AX Patchogue	8AX Patchogue 650 appears to have overtrip for a fault on 69-776 7RM Bayport to 7M Macarthur. Clearance taken to investigate and the cause of the trip was not found.
March	8J Southold	8WR Orient Point Bank 1 diff trip as a result of animal contact on the high side bank lightning arrester. At the same time, 8J Southold 210 tripped. 8WR Bank 1 diff trip caused custom...



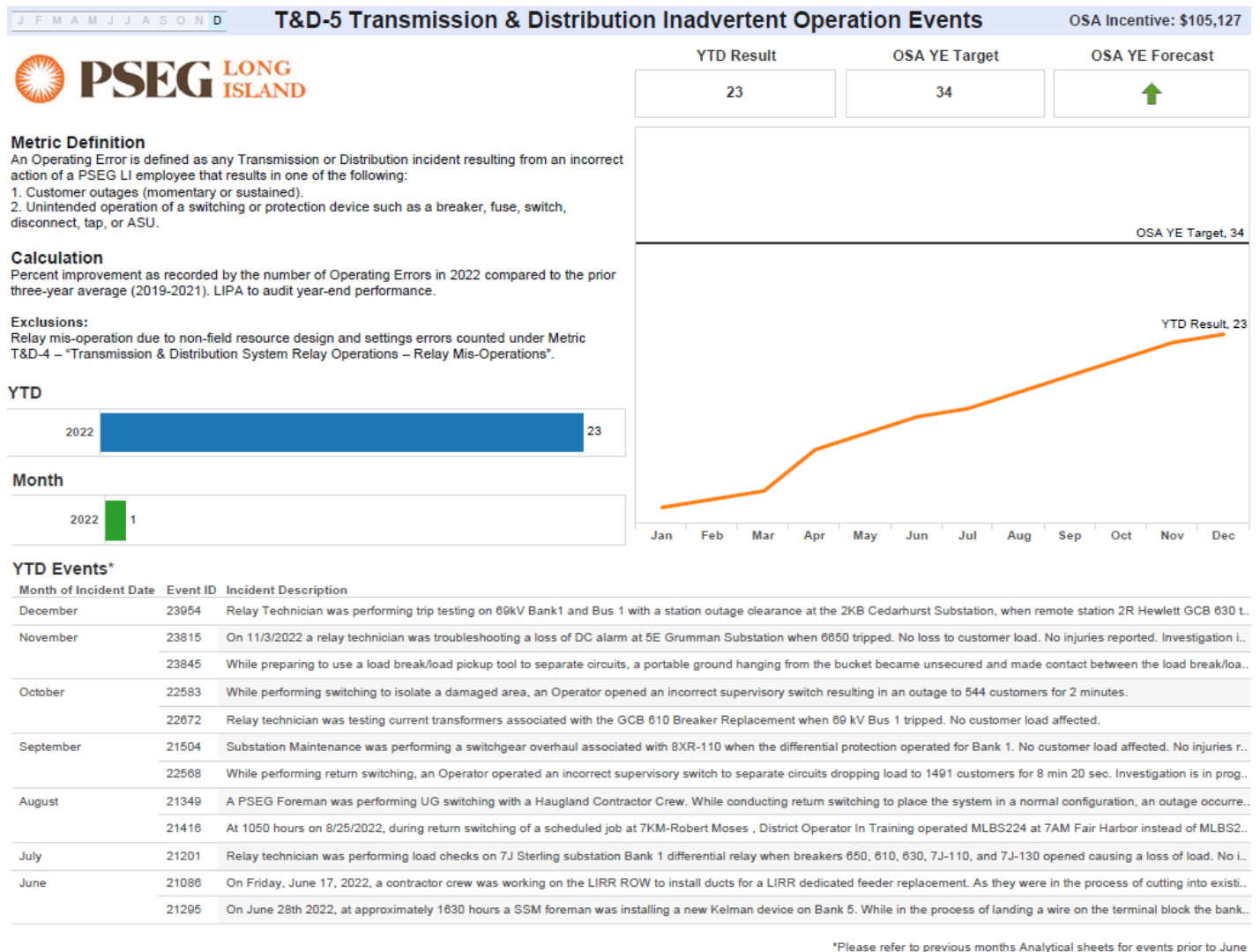
## Summary

- Relay mis-operations occur when:
  - Any failure of a Protection System element to operate within the specified time when a fault or abnormal condition occurs within a zone of protection.
  - Any operation for a fault not within a zone of protection (other than operation as backup protection for a fault in an adjacent zone that is not cleared within a specified time for the protection for that zone).
  - Any unintentional Protection System operation when no fault or other abnormal condition has occurred unrelated to on-site maintenance and testing activity.
  - Protection System operations due to non-field resource design and settings error.
- The targeted level of performance for relay mis-operations was a 5.0% better than the previous 3-year average (2019-2021). The prior year mis-operations from 2019-2021 were: 19, 21 and 17. The 3-year average was of those is 19.0 mis-operations. A 5.0% improvement target is 18.05 mis-operations.
- PSEG Long Island had 18 mis-operations in 2022 which achieved targeted performance levels.



## T&D-05 - T&D Inadvertent Operating Events

<b>Metric Type</b>	Quantitative	<b>Metric Performance</b>	↑ Achieved
<b>Incentive Compensation Claim</b>	\$105,127.05		



### Summary

- Operating Errors are defined as any Transmission or Distribution incident resulting from an incorrect action of a PSEG LI employee that results in one of the following:
  - Customer outages (momentary or sustained).
  - Unintended operation of a switching or protection device such as a breaker, fuse, switch, disconnect, tap, or ASU.
- The targeted level of performance for inadvertent operating errors was a 5.0% better than the previous 3-year average (2019-2021). The prior year inadvertent operations from 2019-2021 were: 33, 42 and 31. The 3-year average was of those is 35.3 inadvertent operations. A 5.0% improvement target is 33.56 inadvertent operations.
- PSEG Long Island had 23 inadvertent operations in 2022, which achieved targeted performance levels.

## T&D-06 - PTCC/ATCC Replacement

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$262,817.62		

T&D-06	PTCC/ATCC Replacement			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-6.1	Phase 1 Strategic Considerations - June 1, 2022	06/01/22	Achieved	Approved
T&D-6.2	Phase 2 Conceptual Facility Design - September 1, 2022	10/28/22	Achieved	Approved
T&D-6.3	Phase 3 Roadmap - December 1, 2022	12/01/22	Achieved	Approved

### Summary

- On April 29, 2022 – PSEG Long Island delivered Phase 1 – Strategic Considerations for PTCC/ATCC replacement to LIPA
- On September 30, 2022 – PSEG Long Island delivered Phase 2 - Conceptual Facility Design. Initially this was due September 1, 2022 and there was an approved exception to move the deliverable date to October 1, 2022 because there was a change from a single story unrestricted layout to a two story stacked design. This additional time requested and approved was for further due diligence to be completed on the blocking plan and allow the team to further build out and finalize the accompanying narrative.
- For Phase 3 of the Roadmap there was another exception request, T&D-6 PTCC/ATCC Phase 3 Response, which is the development of the roadmap / systematic procedure, to implement the relocation of supporting operational IT systems from the existing control centers to the new Primary Transmission Control Center. The exception request was because were awaiting some key EMS related feedback from third party vendors, before putting together our final recommendation. With this information, the team has committed to providing the LIPA team with a draft presentation for their feedback the week of December 12<sup>th</sup> and will be meeting weekly at LIPA's request to provide updates on this open item. Once concurrence to the recommendation is received a final report with will be provided, with high-level cost and schedule estimates prior to January 15<sup>th</sup>, 2023. PSEG Long Island provided this report on January 12, 2023.

## T&D-07 - System Average Interruption Duration Index (SAIDI)

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$420,508.19		

### J F M A M J J A S O N D T&D-7 System Average Interruption Duration Index (SAIDI) Reliability OSA Incentive: \$420,508



#### Metric Definition

Total duration of interruption for the average customer during each Contract Year, computed in accordance with IEEE Standard 1366, Section 4.2.2. Exclusions for Major Storms will be applied as per NY Department of Public Service and NYCRR 97.1. OSA Metric includes all outages, whereas Part A Metric excludes single and secondary outages.

#### Calculation

SAIDI (System Average Interruption Duration Index) =  $\sum (ri * Ni) / NT$   
Where,

ri = Restoration time, minutes.  
Ni = Total number of customers interrupted 5 minutes or more.  
NT = Total number of customers served.

#### YTD

2022	56.0
2021	54.7

#### Month

2022	4.5
2021	2.3

#### YTD SAIDI by Cause

	2022	Non-Intentional	Intentional
Equipment	21,583		7.5%
Vegetation	15,881		-1.4%
Accident	8,942		-0.4%
Unknown	2,054		-11.9%
Lightning	1,407		-35.7%
Substandard Conditions	1,365		54.3%
Overload	0.526		9.0%
Customer Equipment	0.134		25.5%
Error	0.008		-64.5%

#### Transmission and Distribution SAIDI

Transmission/Substation & TBD	0.73
Distribution	55.26

#### YTD Result OSA YE Target OSA YE Forecast

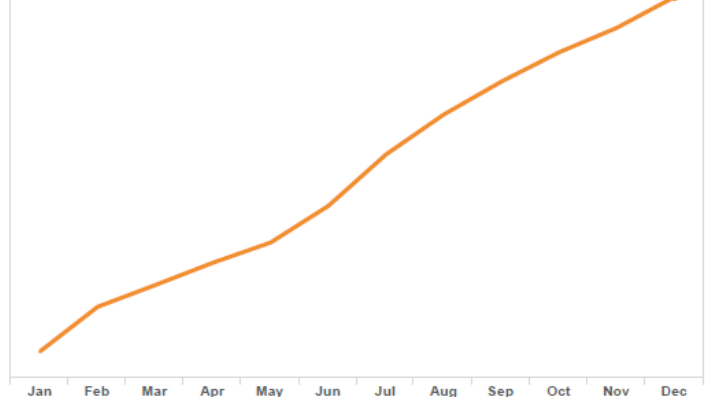
56.0

59.0



OSA YE Target: 59.0

YTD Result: 56.0



#### YTD SAIDI: Cause Codes

	Equipment	Vegetation	Accident
Primary underground cable failure	3,788		
Primary wire burned down (reason undeterminable)	2,599		
Transformer failed internally	2,534		
Primary line tap broken or burned open	1,750		
Cutout failure	1,268		
Pin type insulator or tie wire failure	1,097		
Defective aluminum secondary bolted connector	1,017		
Aluminum secondary or service burned open midspan	0,802		
Large overhanging green limb fell on wire		7,375	
Entire tree fell over onto wire		5,737	
Broken small limb/branch or tree growth contacted wire		1,899	
Intentional - taken to repair impending tree fault		0,346	
Primary covered wire insulation worn through by tree		0,331	
Motor vehicle hit pole or guy wire			3,461
Animal contacted transformer			1,513
Bird nest contacted wire or other equipment			0,933
All other accidents for which the company is not respo..			0,897
Animal contacted wire or other equipment			0,806
Contractor contacted underground line			0,586
Motor vehicle hit other overhead equipment			0,268
Contractor contacted overhead line			0,233

Note: (1) Outage data for prior days is still being reviewed by Electric Service Department  
(2) Reliability Management is still reviewing outage data for coding criteria

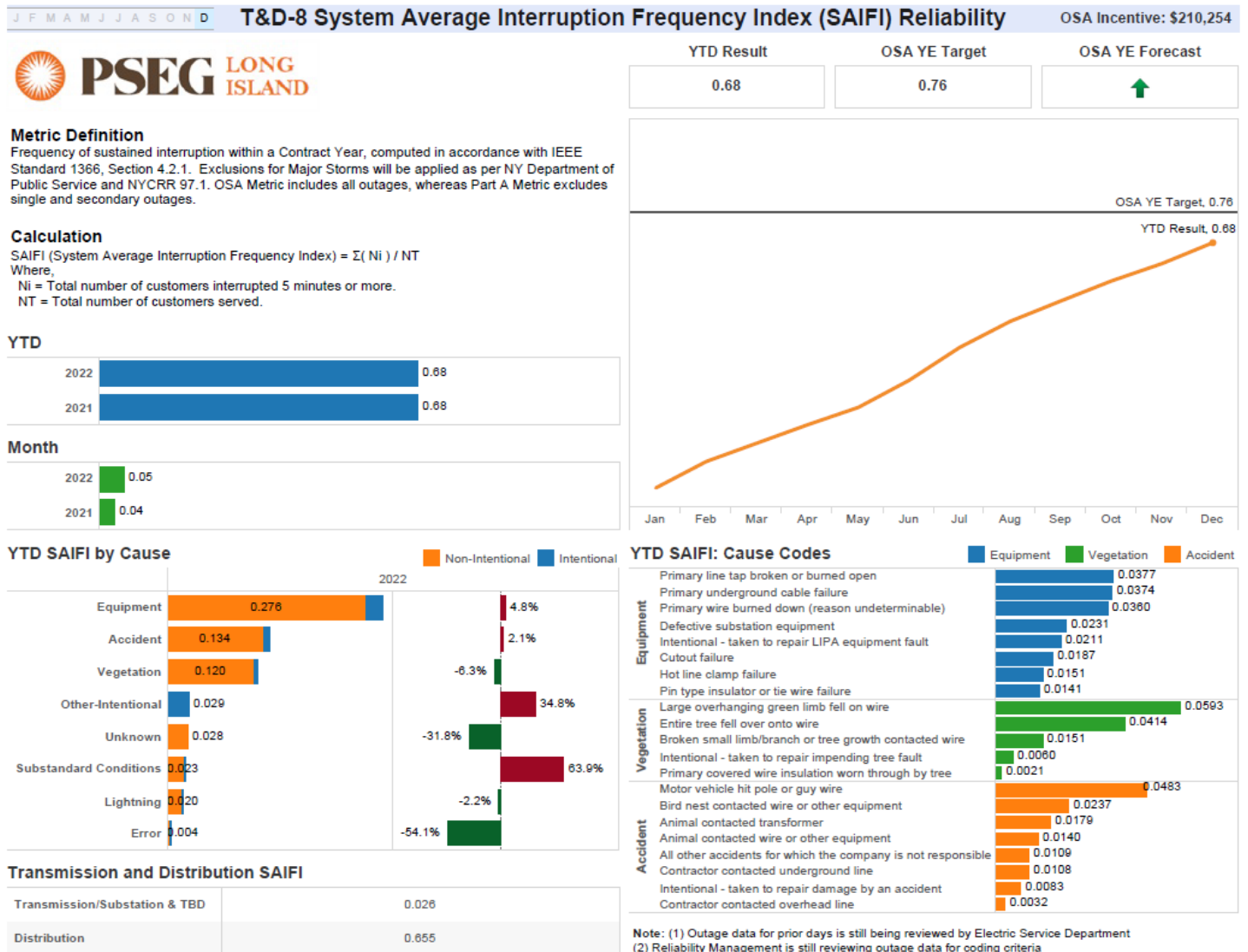
## Summary

- PSEG Long Island achieved a System Average Interruption Duration Index (SAIDI) of 56.0 minutes in 2022 achieving the targeted performance level of 59.0.
- There was 64,063,967 Customer Minutes Interrupted in 2023
- The customers served in 2022 was 1,144,195
- The calculation for SAIDI performance is 64,063,967 Customer Minutes Interrupted divided by 1,144,195 customers served



## T&D-08 – System Average Interruption Frequency Index (SAIFI)

Metric Type	Quantitative	Metric Performance
Incentive Compensation Claim	\$210,254.09	↑ Achieved



### Summary

- PSEG Long Island achieved a System Average Interruption Frequency Index (SAIFI) of 0.68 in 2022 achieving the targeted performance level of 0.76
- There was 779,221 Sustained Customers Interrupted in 2023
- Sustained Customers Interrupted is Total number of customers interrupted for more than 5 minutes
- The customers served in 2022 was 1,144,195
- The calculation for SAIFI performance is 779,221 Sustained Customers Interrupted divided by 1,144,195 customers served

## T&D-09 - Momentary Average Interruption Frequency Index (MAIFI)

<b>Metric Type</b>	Quantitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$210,254.09		

J F M A M J J A S O N D **T&D-9 Momentary Average Interruption Frequency Index (MAIFI) Reliability** OSA Incentive : \$210,254



### Metric Definition

Frequency of momentary interruption within a Contract Year.

### Calculation

Total number of customer momentary interruptions (<5 minutes) during the reporting period / Total number of customers served.  
Excludes only Major Storms as defined by NY Department of Public Service and NYCRR 97.1

### YTD

2022	1.67
2021	1.78

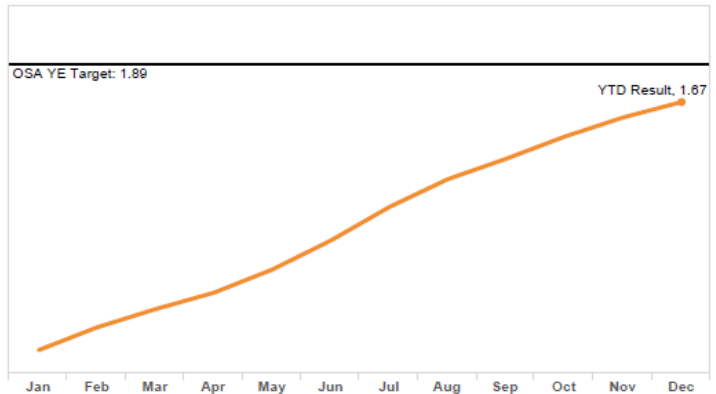
### Month

2022	0.09
2021	0.09

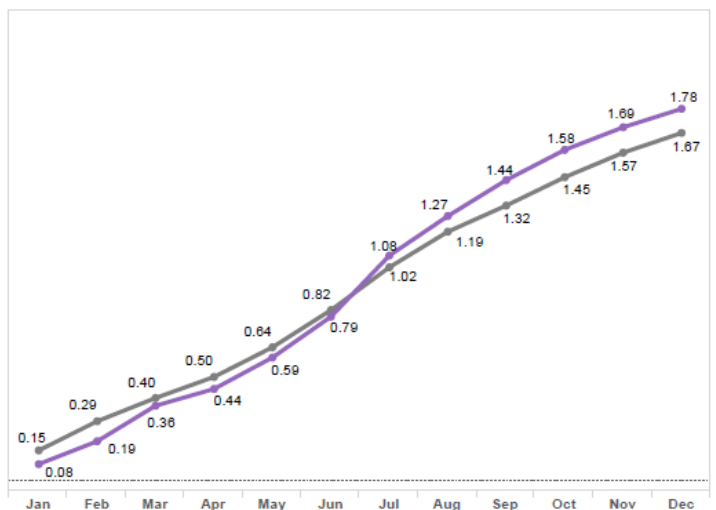
### Monthly Statistics

	2021		2022	
	Interruptions	MAIFI	Interruptions	MAIFI
January	91,237	0.08	106,838	0.15
February	124,565	0.11	159,557	0.14
March	193,724	0.17	127,565	0.11
April	91,414	0.08	115,350	0.10
May	171,201	0.15	162,439	0.14
June	222,014	0.20	203,316	0.18
July	333,374	0.29	234,425	0.20
August	215,049	0.19	194,929	0.17
September	198,082	0.17	143,307	0.13
October	164,444	0.14	154,978	0.14
November	123,167	0.11	134,346	0.12
December	100,722	0.09	108,201	0.09
<b>Total</b>	<b>2,026,993</b>	<b>1.78</b>	<b>1,905,251</b>	<b>1.67</b>
Customers Served	1,138,340		1,144,195	

YTD Result	OSA YE Target	OSA YE Forecast
1.67	1.89	↑



### YTD Trend

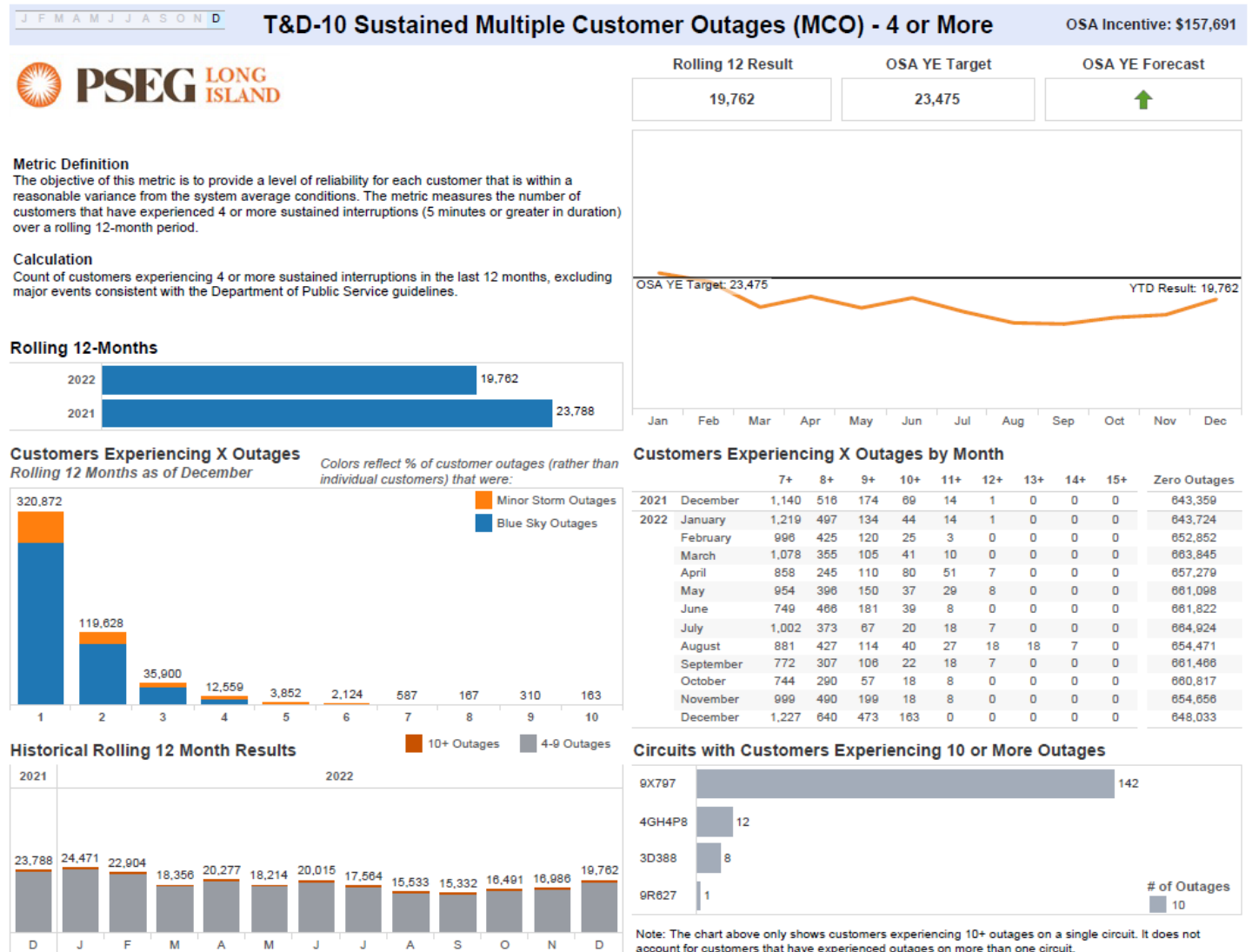


## Summary

- PSEG Long Island achieved a Momentary Average Interruption Frequency Index (MAIFI) of 1.67 in 2022 achieving the targeted performance level of 1.89
- There was 1,905,251 Momentary Customer Interruptions in 2023
- Momentary Customers Interrupted is Total number of customers interrupted for less than 5 minutes
- The customers served in 2022 was 1,144,195
- The calculation for MAIFI performance in 2022 is 1,905,251 Momentary Customers Interrupted divided by 1,144,195 customers served

## T&D-10 - Sustained Multiple Customer Outages (MCO) - 4 or more

<b>Metric Type</b>	Quantitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$157,690.57		



### Summary

- Sustained Multiple Customer Outages (S-MCO) is the count of customers experiencing 4 or more sustained interruptions in the last 12 months, excluding major events consistent with NYCRR 97.1.
- Sustained Customers Interruptions is total number of customers interruptions more than 5 minutes
- PSEG Long Island's 2022 S-MCO performance was 19,762 customers, which was better than the YE target of 23,475 customers.

## T&D-11 - Reduce Repeat Customer Sustained Multiple Customer Outages

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$210,254.09		

J F M A M J J A S O N D

T&D-11 Reduce Repeat Customer Sustained Multiple Customer Outages (S-MCOs)

OSA Incentive: \$210,254



### Metric Definition

Provide an improved level of reliability for multi-year repeat customers that have experienced 4 or more sustained interruptions (> 5 minutes or greater in duration) over a multi-year period. The metric measures a defined number of multi-year repeat S-MCO customers (231 customers) who have experienced 4 or more sustained interruptions (> 5 minutes or greater in duration) over a multiyear period. The targeted performance level would be to reduce the current customer set (as of September 30, 2021) by 80% of S-MCO customers. Computed in accordance with IEEE Standard 1366, Section 4.2.1. Exclusions for Major Storms will be applied as per NYS Department of Public Service (NYS DPS) and NYCRR 97.1.

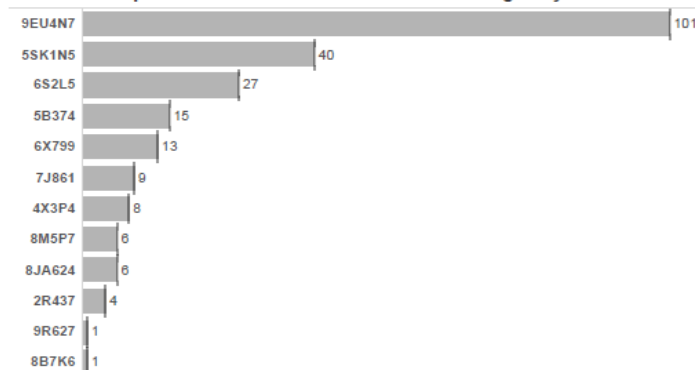
### Calculation

% Change - Count of 2022 YE S-MCO Customers from defined population - 231 Customers) / 231 Customers

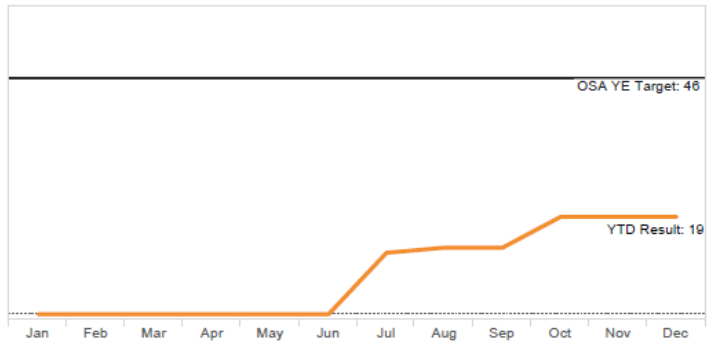
### YTD



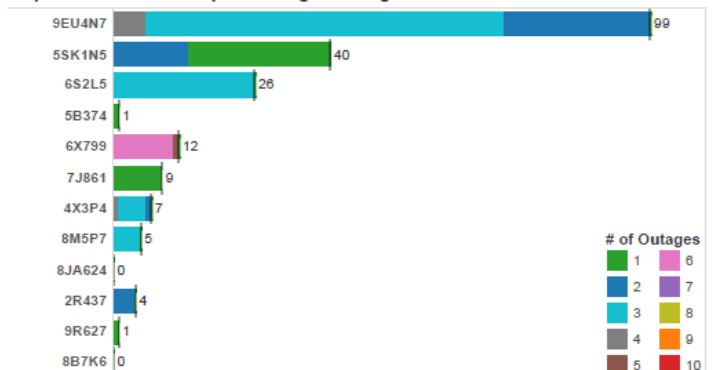
### 2019-2021 Repeat Customers with 4+ Sustained Outages by Circuit



YTD Result	OSA YE Target	OSA YE Forecast
19	46	↑



### Repeat Customers Experiencing X Outages



### Customers with X Outages



## Summary

- Reduced Repeat Customers Sustaining Multiple Customer Outages ( repeat S-MCO) provides an improved level of reliability for multi-year repeat customers that have experienced 4 or more sustained interruptions (> 5 minutes or greater in duration) over a multi-year period. The metric measures a defined number of multi-year repeat S-MCO customers (231 customers) who have experienced 4 or more sustained interruptions (> 5 minutes or greater in duration) over a three year period. The targeted performance level would be to reduce the current customer set by 80% of repeat S-MCO customers. Computed in accordance with IEEE Standard 1366, Section 4.2.1. Exclusions for Major Storms will be applied as per NYS Department of Public Service (NYS DPS) and NYCRR 97.1.Sustained Customers Interruptions is total number of customers interruptions for more than 5 minutes
- PSEG Long Island's 2022 repeat S-MCO performance was 19 customers, which was better than the YE target of 46 customers. PSEG Long Island's target was to reduce customer set by 80%. Based on performance level, the reduction was 91.8%.

## T&D-12 - Momentary Multiple Customer Outages- 6 or more

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$157,690.57		

J F M A M J J A S O N D

### T&D-12 Momentary MCO (6 or More)

OSA Incentive: \$157,691



#### Metric Definition

Provide a level of reliability for each customer that is within a reasonable variance from the system average conditions. The metric measures the number of customers that have experienced 6 or more momentary interruptions (< 5 minutes in duration) over a rolling 12-month period. Computed in accordance with IEEE Standard 1366, Section 4.2.1. Exclusions for Major Storms will be applied as per NYS Department of Public Service (NYS DPS) and NYCRR 97.1.

#### Calculation

M-MCO = Total count of customers experiencing 6 or more interruptions of < 5 minutes in the last 12 months, excluding major events consistent with NYS DPS guidelines.  
The M-MCO metric is stated in number of customers (###,### customers).

#### Exclusions

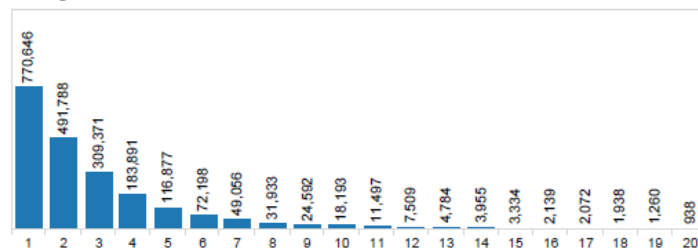
Excludes only Major Storms as defined by NY Department of Public Service and NYCRR 97.1.

#### Rolling 12-Months

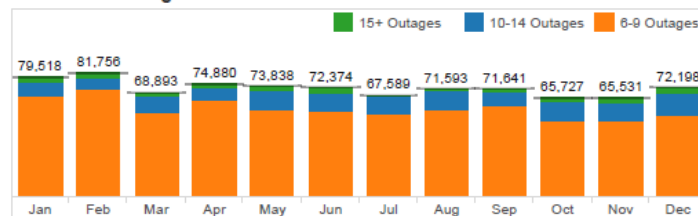


#### Customers Experiencing X Outages

Rolling 12 Months as of December



#### Historical Rolling 12 Month Results



#### Rolling 12 Result

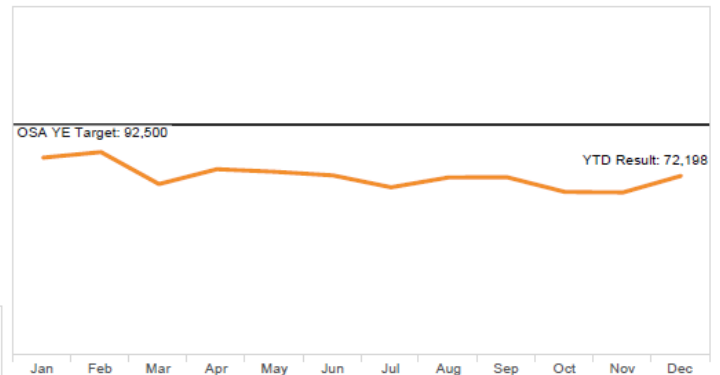
72,198

#### OSA YE Target

92,500

#### OSA YE Forecast

↑



#### Customers Experiencing X Outages by Month

	16+	17+	18+	19+	20+	21+	22+	23+	24+	No Outages
Dec	3,886	2,647	2,464	2,459	2,185	1	0	0	0	308,753
Jan	3,181	2,539	2,446	2,441	2,170	1	0	0	0	290,475
Feb	3,070	2,434	2,362	2,345	2,323	2,252	2,024	1,169	0	323,839
Mar	2,435	2,419	2,347	2,330	2,308	2,237	2,011	1,167	0	323,910
Apr	2,430	2,420	2,339	2,322	2,300	2,231	2,012	1,167	0	321,802
May	3,081	2,691	1,163	0	0	0	0	0	0	323,165
Jun	1,911	617	1	0	0	0	0	0	0	320,193
Jul	635	1	0	0	0	0	0	0	0	335,142
Aug	1	0	0	0	0	0	0	0	0	337,822
Sep	1,102	1	0	0	0	0	0	0	0	355,529
Oct	1,298	1	0	0	0	0	0	0	0	354,985
Nov	2,286	1,628	979	947	940	0	0	0	0	360,204
Dec	2,139	2,072	1,938	1,260	938	0	0	0	0	373,549

#### Circuits with Customers Experiencing 15 or More Outages

6RL766	30	945	984
4GH4P8			844
9E991			866
3LG311		520	
7LM1R6	314	318	
4GH186	1		

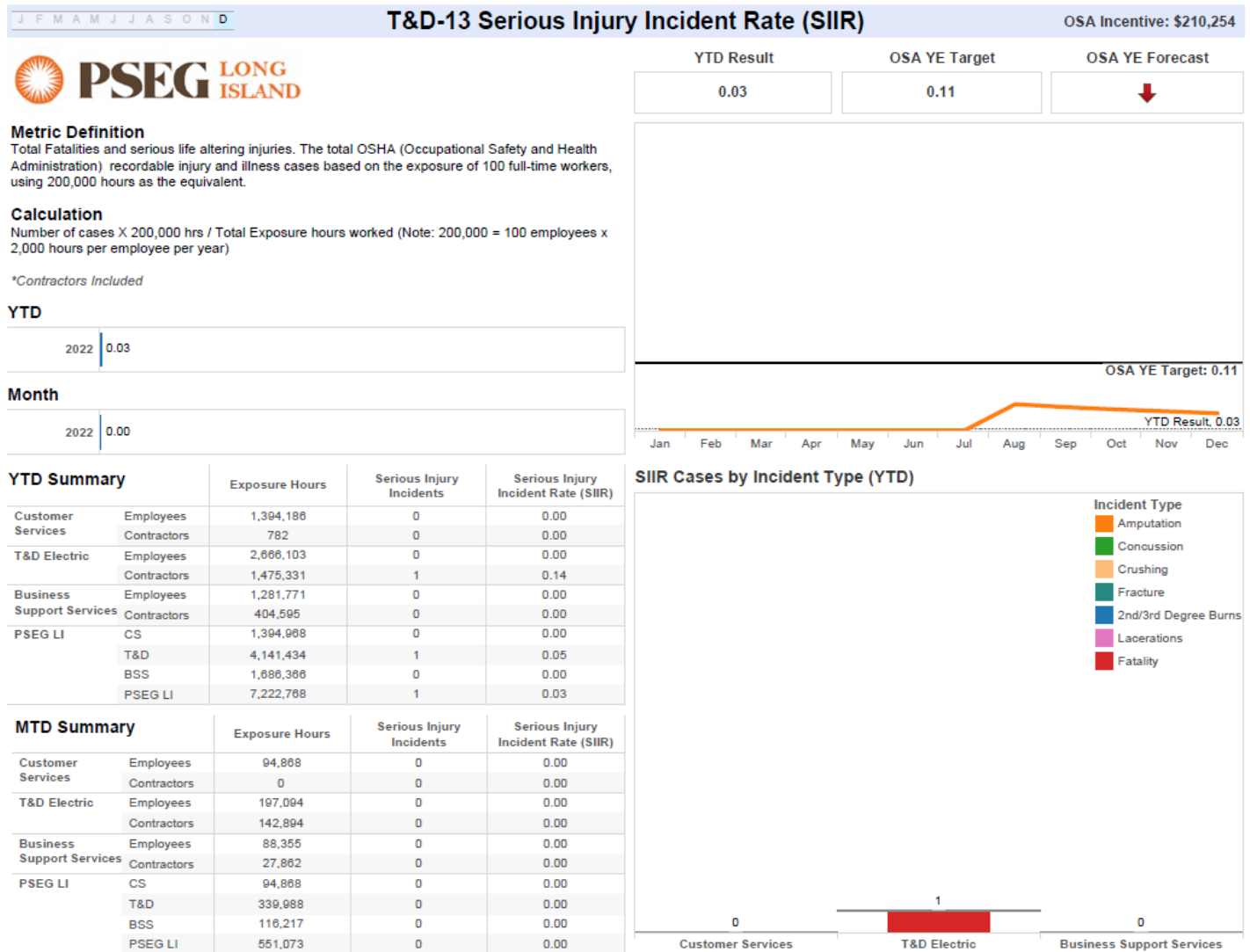
Note: The chart above only shows customers experiencing 15+ outages on a single circuit. It does not account for customers that have experienced outages on more than one circuit.

### Summary

- Momentary Multiple Customer Outages (M-MCO) is the count of customers experiencing 6 or more momentary interruptions in the last 12 months, excluding major events consistent with NYCRR 97.1.
- Momentary Customers Interruptions is total number of customers interruptions less than 5 minutes
- PSEG Long Island's 2022 M-MCO performance was 72,198 customers, which was better than the YE target of 92,500 customers.

## T&D-13 - Serious Injury Incident Rate (SIIR)

Metric Type	Quantitative	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00		



### Summary

- Serious Injury Incident Rate (SIIR) measures the prevention of fatalities and serious life altering injuries to a contractor employee or a PSEG LI employee associated with the operation, construction and/or maintenance of the Long Island Electric T&D System that are within the control of the employee in performance of their duties and/or the employer.
- Life altering injuries include the following:
  - Amputation (loss of all or part of a bodily appendage, which includes the loss of bone).
  - Concussion.
  - Crushing (internal, even though skin surface may be intact).
  - Fracture (simple or compound), excluding any hairline fractures
  - 2nd (10% body surface) or 3rd degree burns
  - Lacerations resulting in severed tendons and/or a deep wound requiring internal sutures.
- PSEG Long Island had one serious injury in 2023. The incident involved a contractor fatality, which constituted automatic metric failure.
- On August 23, 2022, A PSEG LI line clearance contractor (All Reliable Services Corp) was clearing vegetation in the rear property of a lumber facility. The work was being performed just north of the Long Island Rail Road (LIRR) tracks. LIRR Power Engineering Group and Flaggers were on-site to support. The ARS Corp crew consisted of a general foreman, a working foreman and a 4-man ground crew. The ARS Corp working foreman was the only employee working from an aerial lift, the

remainder of the crew served as ground support. While attempting to remove branches, the ARS Corp working foreman fell from the aerial lift approximately 30' to the ground.



## T&D-14 - OSHA Recordable Incidence Rate

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$262,817.62		

### T&D-14 OSHA Recordable Incidence Rate

OSA Incentive: \$262,818



#### Metric Definition

Total illness and injury rate. The total OSHA (Occupational Safety and Health Administration) recordable injury and illness cases based on the exposure of 100 full-time workers, using 200,000 hours as the equivalent. This metric includes hearing loss.

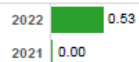
#### Calculation

Number of OSHA cases X 200,000 hrs / Total hours worked (Note: 200,000 = 100 employees x 2,000 hours per employee per year)

#### YTD



#### Month

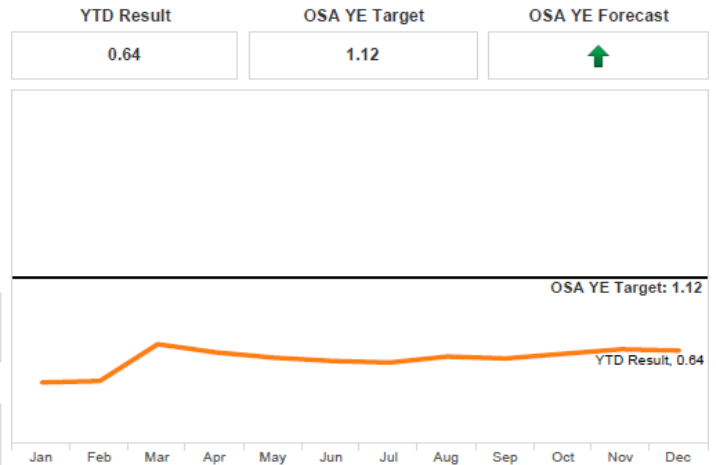


#### YTD Summary

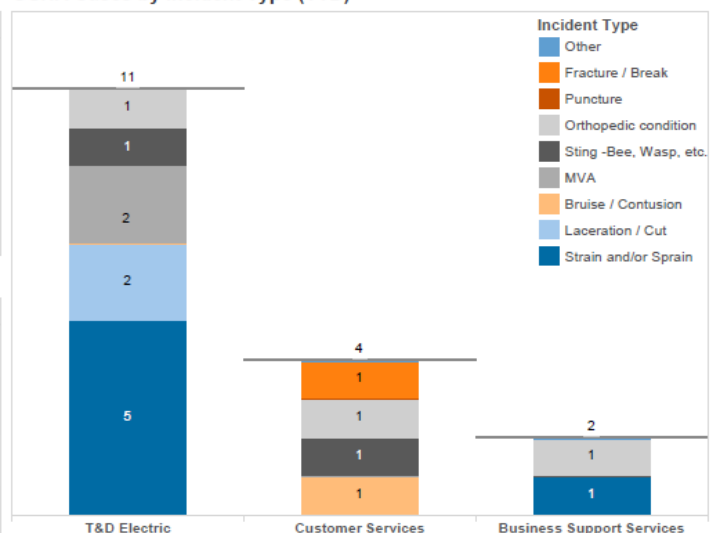
	Exposure Hours	OSHA Incidents	Incidence Rate
Customer Services	1,394,188	4	0.57
T&D Electric	2,866,103	11	0.83
Business Support Services	1,281,771	2	0.31
PSEG LI	5,342,060	17	0.64

#### Month Summary

	Exposure Hours	OSHA Incidents	Incidence Rate
Customer Services	94,868	0	0.00
T&D Electric	197,094	1	1.01
Business Support Services	88,355	0	0.00
PSEG LI	380,317	1	0.53



#### OSHA Cases by Incident Type (YTD)



## Summary

- PSEG Long Island achieved an OSHA Recordable incident rate of 0.64 vs a targeted rate a 1.12.
- Total illness and injury rate. The total OSHA (Occupational Safety and Health Administration) recordable injury and illness cases based on the exposure of 100 full-time workers, using 200,000 hours as the equivalent. This metric includes hearing loss.
- There was 5,342,060 exposure hours from PSEG LI employees in 2022
- There was a total of 17 OSHA recordable incidents in 2022
- The incident rate performance was (17 OSHA recordable incidents times 200,000 hours) divided by 5,342,060 exposure hours for a rate a 0.64 incidents.
- PSEG Long Island's performance of 0.64 was the best performance on record and a 33.3% improvement on our second best performance achieved in 2021 of 0.96.



## T&D-15 - OSHA Days Away Rate (Severity)

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$262,817.62		

### T&D-15 OSHA Days Away Rate (Severity) OSA Incentive: \$262,818



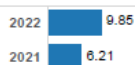
#### Metric Definition

The severity of OSHA (Occupational Safety and Health Administration) incidents that have occurred as measured by the number of lost workdays that can be attributed to an OSHA incident.

#### Calculation

Total number of Lost Time Days due to injury x 200,000 / Total hours worked.

#### YTD



#### Month



#### YTD Summary

	Exposure Hours	Lost Time Days	Days Away Rate
Customer Services	1,394,186	89	12.77
T&D Electric	2,666,103	63	4.73
Business Support Services	1,281,771	111	17.32
PSEG LI	5,342,060	263	9.85

#### Month Summary

	Exposure Hours	Lost Time Days	Days Away Rate
Customer Services	94,868	0	0.00
T&D Electric	197,094	4	4.06
Business Support Services	88,355	0	0.00
PSEG LI	380,317	4	2.10

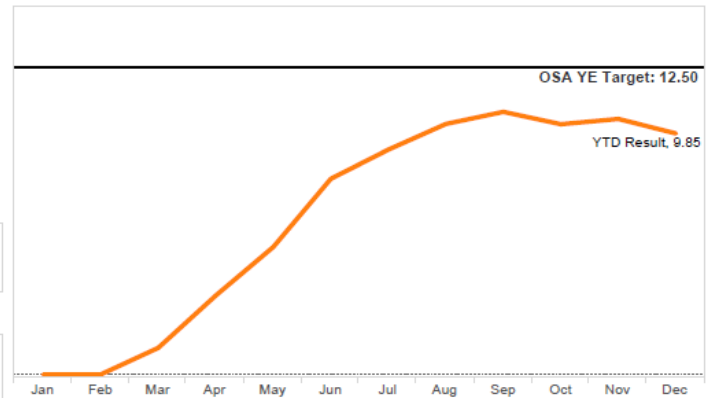
#### YTD Result

9.85

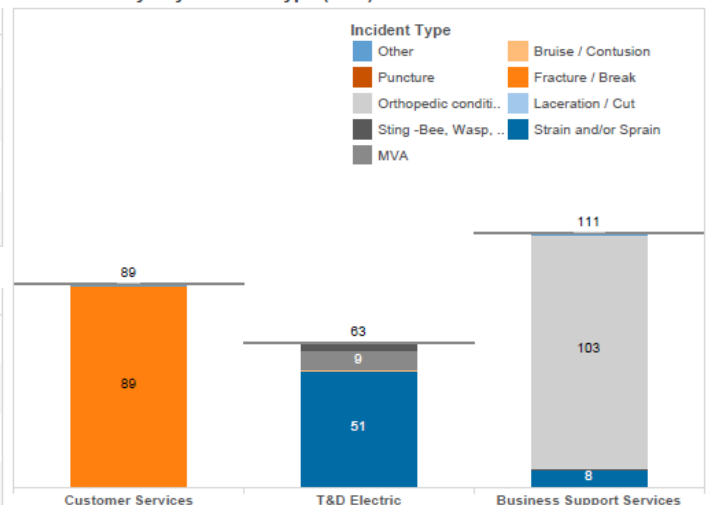
#### OSA YE Target

12.50

#### OSA YE Forecast



#### Lost Time Days by Incident Type (YTD)



### Summary

- PSEG Long Island achieved an OSHA Days Away Severity rate of 9.85 days vs a targeted rate a 12.50 days.
- The severity of OSHA (Occupational Safety and Health Administration) incidents that have occurred as measured by the number of lost workdays that can be attributed to an OSHA incident. The calculation is Total number of Lost Time Days due to injury x 200,000 / Total hours worked.
- There was 5,342,060 exposure hours from PSEG LI employees in 2022
- There was a total of 263 lost time days due to injury in 2022
- The Days Away Severity rate performance was (263 lost time days due to injury times 200,000 hours) divided by 5,342,060 exposure hours for a rate a 9.85 days.

## T&D-16 - Motor Vehicle Accident Rate

<b>Metric Type</b>	Quantitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$105,127.05		

### T&D-16 Motor Vehicle Accident (MVA) Rate OSA Incentive: \$105,127



#### Metric Definition

A safety measure, this rate compares the total number of motor vehicle accidents relative to the total number of miles driven for a given period of time. This number is inclusive of all motor vehicle accidents.

#### Calculation

(Total Number of MVAs) x 1,000,000 / Miles Driven

#### YTD

2022	8.40
2021	7.67

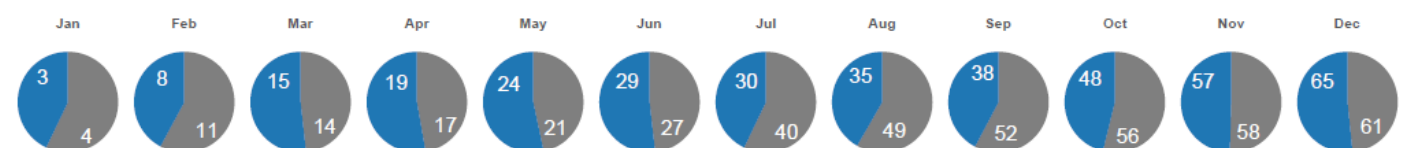
#### Month

2022	34.84
2021	2.41

#### PSEG LI YTD Summary

	Miles Driven	Motor Vehicle Accidents	Motor Vehicle Accident Rate
Electric Operations	4,948,994	43	8.69
Customer Services	2,029,448	19	9.36
Business Support Services	780,490	3	3.94
<b>PSEG Long Island</b>	<b>7,738,932</b>	<b>65</b>	<b>8.40</b>

#### YOY Accidents - YTD



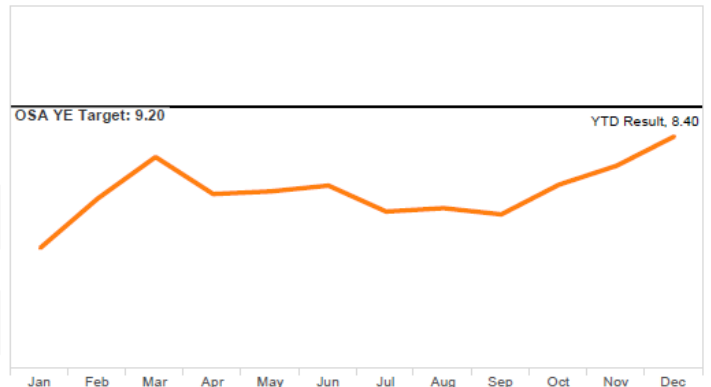
#### YTD Result

8.40

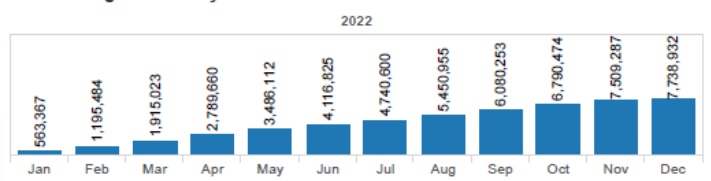
#### OSA YE Target

9.20

#### OSA YE Forecast



#### YTD Mileage Summary - PSEG LI



#### Red Light Tickets

		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2021	Month Value	5	9	9	5	8	9	8	6	7	9	10	8
	YTD Value	5	14	23	28	36	45	53	59	66	75	85	93
2022	Month Value	6	10	3	10	3	16	8	10	3	14	11	4
	YTD Value	6	16	19	29	32	48	56	66	69	83	94	98

### Summary

- PSEG Long Island achieved a Motor Vehicle Accident (MVA) rate of 8.40 accidents vs a targeted rate a 9.20 accidents.
- The MVA Rate is a safety measure rate that compares the total number of motor vehicle accidents relative to the total number of miles driven for a given period. This number is inclusive of all motor vehicle accidents whether PSEG LI or the other vehicle is at fault in the accident. The rate is based on number of incidents per 1,000,000 miles driven.
- There was 7,738,932 miles driven by PSEG LI employees in 2022
- There was 65 motor vehicle accidents in 2022 regardless if fault.
- The Motor Vehicle Accident (MVA) rate performance was (65 motor vehicle accidents times 1,000,000 miles) divided by 7,738,932 miles driver, which equals a rate of 8.40.

## T&D-17 - Work Mgmt Enhancements - Short-Term Scheduling


<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$157,690.57		

T&D-17	Work Mgmt Enhancements - Short-Term Scheduling			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-17.1	PSEG Long Island to implement process for Short-Term scheduling by July 1, 2022.	07/01/22	Achieved	Approved
T&D-17.2	PSEG LI to Demonstrate the Development and utilization of integrated work tool by December 31, 2022.	12/30/22	Achieved	Approved

### Summary

- The objective of this metric was to enhance work management process by developing an integrated work tool that will consolidate all work that is aligned with the annual budget and work plan and will provide the following functionality to improve the ability to create short term plans and schedules by December 31, 2022:
  - PSEG Long Island implemented a process for Short-Term scheduling prior July 1, 2022.
  - PSEG Long Island demonstrated the development and utilization of integrated work tool prior to December 31, 2022 with LIPA.

## T&D-18 - Work Mgmt Enhancements - Workforce Mgmt Plans

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	 <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$262,817.62		

T&D-18	Work Mgmt Enhancements - Workforce Mgmt Plans			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-18.1	Submission of 2022 Workforce Management Plan for LIPA Approval by February 1, 2022 (Approval not to be unreasonably withheld). The Workforce Management Plan shall include monthly and annual resource plans for all Capital and O&M work to be completed.	02/01/22	<b>Achieved</b>	<b>Approved</b>
T&D-18.2	Submission of 2023 Workforce Management Plan for LIPA approval by August 1, 2022 (Approval not to be unreasonably withheld) The Workforce Management Plan shall include monthly and annual resource plans for all Capital and O&M work to be completed.	08/01/22	<b>Achieved</b>	<b>Approved</b>
T&D-18.3	Successfully execute all elements of the 2022 Workforce Management Plan by December 31, 2022.	12/30/22	<b>Achieved</b>	<b>Approved</b>

### Summary

- PSEG Long Island submitted a 2022 Workforce Management Plan. The Workforce Management Plans included monthly and annual resource plans for all Capital and O&M work to be completed. The metric calls to successfully execute all elements of the 2022 Workforce Management Plan by December 31, 2022. The elements of the 2022 Workforce Management Plan include:
  - Histogram by labor source (in-house / Contractor) and functional area (Divisions, P&C)
  - Histogram by settlement (Capital, O&M)
  - Hours by High Level Settlement
  - Hours by Low Level Settlement
  - Monthly work plan at a division level (for each of the four divisions) providing planned units for proactive blankets and programs and planned hours for reactive (emergent) programs
    - Includes monthly actual units completed for variance purposes
- PSEG Long Island submitted a 2023 Workforce Management Plan. The Workforce Management Plans included monthly and annual resource plans for all Capital and O&M work to be completed.
- PSEG Long Island successfully executed all elements of the 2022 Workforce Management Plan by providing:
  - Histogram by labor source (in-house / Contractor) and functional area (Divisions, P&C)
  - Histogram by settlement (Capital, O&M)
  - Hours by High Level Settlement
  - Hours by Low Level Settlement
  - Monthly work plan at a division level (for each of the four divisions) providing planned units for proactive blankets and programs and planned hours for reactive (emergent) programs
    - Includes monthly actual units completed for variance purposes
- PSEG Long Island met with LIPA on an ongoing cadence to discuss the programs measured, variances and any issues

## T&D-19 - WME - Improve Planning & Tracking of Work

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$105,127.05		

T&D-19	WME - Improve Planning & Tracking of Work			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-19.1	Perform an assessment of the existing Work Breakdown Structure (WBS) structure focused on all Capital and O&M work utilized in the divisional area	06/30/22	Achieved	Approved
T&D-19.2	Implement any noted enhancements to the WBS by December 31, 2022 for use in the 2023 plan – Update SAP with any new WBS and run SAP report to confirm adoption of new structures.	12/30/22	Achieved	Approved
T&D-19.3	Create formal procedure to identify owner of the WBS structure and define the governance/maintenance process by December 31, 2022.	12/30/22	Achieved	Approved

### Summary

- PSEG Long Island performed an assessment of the existing Work Breakdown Structure (WBS) structure focused on all Capital and O&M work utilized in the divisional area
- PSEG Long Island implemented noted enhancements to the WBS by December 31, 2022 for use in the 2023 plan – Update SAP with any new WBS and run SAP report to confirm adoption of new structures.
- PSEG Long Island created formal procedures to identify owner of the WBS structure and define the governance/maintenance process by December 31, 2022.

## T&D-20 - WME - Improve and Standardize Compatible Unit Estimating

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$105,127.05		

T&D-20	WME - Improve and Standardize Compatible Unit Estimating			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-20.1	Establish process/governance for maintaining CUEs by June 30, 2022.	06/30/22	Achieved	Approved
T&D-20.2	Complete assessment of existing CUEs and refine standards by October 1, 2022	09/30/22	Achieved	Approved
T&D-20.3	Publish revised CUE library by October 31, 2022.	10/31/22	Achieved	Approved
T&D-20.4	LIPA to verify review and acceptance of process/governance documents and review and acceptance of published CUE library by December 31, 2022.	12/30/22	Achieved	Approved

### Summary

- PSEG Long Island established process/governance for maintaining CUEs
- PSEG Long Island completed assessment of existing CUEs and refine standards
- PSEG Long Island published revised CUE library for LIPA review

## T&D-21 - WME - Work Mgmt KPIs & Dashboards

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$105,127.05		

T&D-21	WME - Work Mgmt KPIs & Dashboards			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-21.1	Implement KPI dashboard review by July 31, 2022 with documented meeting minutes.	06/30/22	<b>Achieved</b>	<b>Approved</b>

### Summary

- PSEG Long Island implemented work management KPI dashboards. The KPI dashboards that were developed included:
  - Capacity and Utilization rates
  - Overtime rates (with underlying cause codes)
  - Actual versus Estimate for specific work types
  - Work plan Variance
  - Productivity

## T&D-22 - WME - Clarify and Rationalize Work Mgmt Roles

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$52,563.52		

T&D-22	WME - Clarify and Rationalize Work Mgmt Roles			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-22.1	Standardize and publish PSEG Long Island work management roles/positions (e.g. planner, scheduler, work coordinator, router) and implement consistently across yards.	03/31/22	Achieved	Approved
T&D-22.2	Develop formal job descriptions for critical work management positions and educate employees on roles and responsibilities for these positions.	03/31/22	Achieved	Approved
T&D-22.3	Create process flow charts that depict work management workflow with swim lane detail for each work management role.	03/31/22	Achieved	Approved
T&D-22.4	LIPA to verify via a review and acceptance of the Work Management process documentation	03/31/22	Achieved	Approved

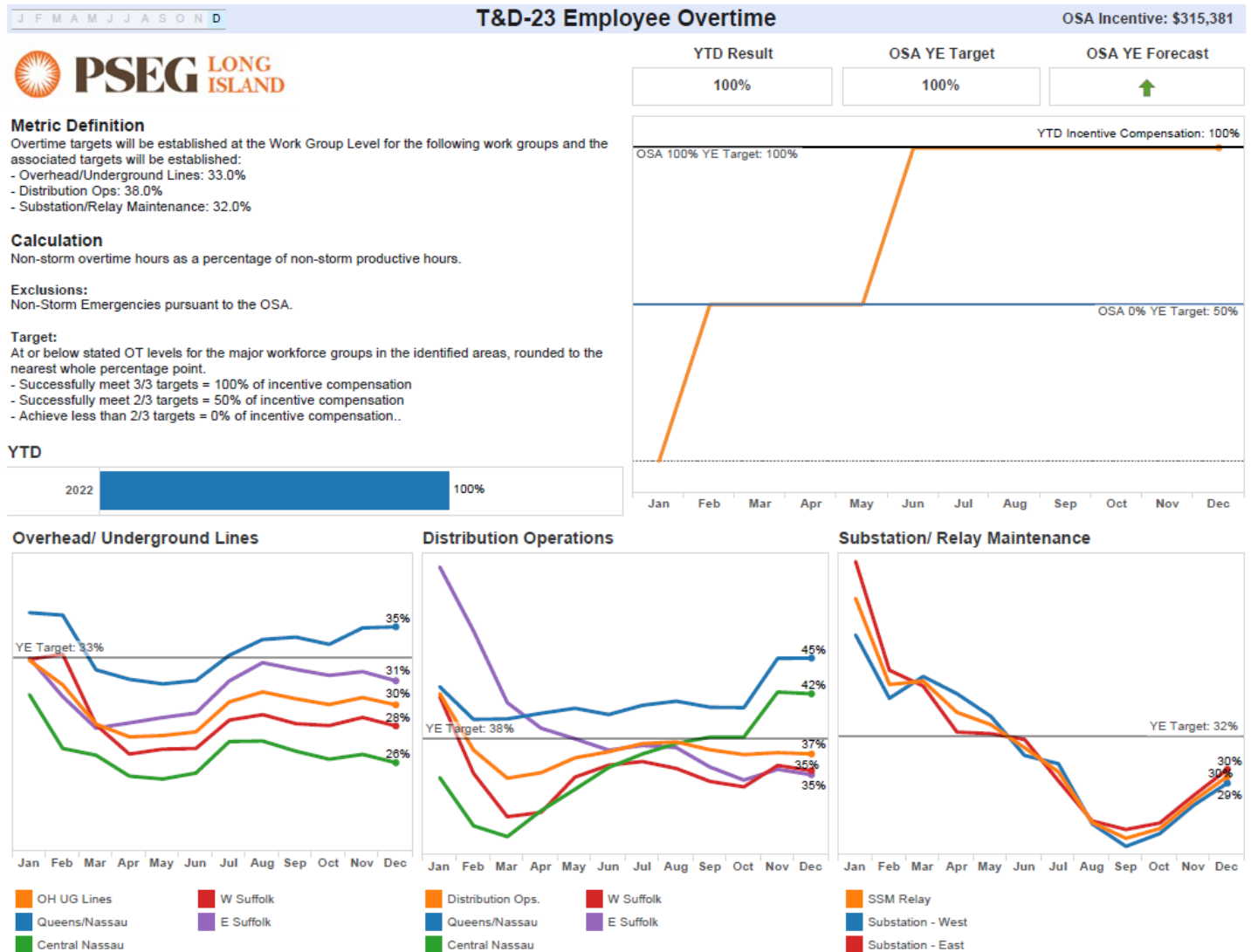
### Summary

- PSEG Long Island standardized and published work management roles/positions (e.g. planner, scheduler, work coordinator, router) and implement consistently across yards.
- PSEG Long Island developed formal job descriptions for critical work management positions and educate employees on roles and responsibilities for these positions
- PSEG Long Island created process flow charts that depict work management workflow with swim lane detail for each work management role.



## T&D-23 - Employee Overtime

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$315,381.14		



### Summary

- PSEG Long Island successfully met 3/3 overtime targets. This achievement allocates 100% of incentive compensation.
- PSEG Long Island Overhead/Underground Lines organization finished 2022 with an Overtime percentage of 30% vs a target of 33%. PSEG Long Island overtime hours were 162,306 and straight time hours were 544,142.
- PSEG Long Island Distribution Ops organization finished 2022 with an Overtime percentage of 37% vs a target of 38%. PSEG Long Island overtime hours were 101,418 and straight time hours were 276,418.
- PSEG Long Island Substation and Relay Maintenance organization finished 2022 with an Overtime percentage of 30% vs a target of 32%. PSEG Long Island overtime hours were 71,484 and straight time hours were 241,130.

## T&D-24 - Veg Mgmt Work Plan - Cycle Tree Trim with Veg Intelligence

<b>Metric Type</b>	Quantitative	<b>Metric Performance</b>	↓ <b>Did Not Achieve</b>
<b>Incentive Compensation Claim</b>	\$0.00		

T&D-24	Veg Mgmt Work Plan - Cycle Tree Trim with Veg Intelligence			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-24.1	The 2022 Vegetation Work Plans identifying the minimum of 225 circuits (or approximately ¼ of the total circuit miles) and budgets shall be provided to LIPA for approval, which shall not be unreasonably withheld, by January 31, 2022. Work plans shall include annual and monthly work and resource plans. Work plans should be coordinated with maintenance and construction work plans, where possible.	01/31/22	Achieved	Approved
T&D-24.2	The 2023 Vegetation Work Plans identifying the minimum of 225 circuits (or approximately ¼ of the total circuit miles) and budgets shall be provided to LIPA for approval, which shall not be unreasonably withheld, by August 31, 2022. Work plans shall include annual and monthly work and resource plans. Work plans should be coordinated with maintenance and construction work plans, where possible.	08/31/22	Achieved	Approved
T&D-24.3	Fully execute the 2022 deliverables specified below as per the 2022 Vegetation Management Work Plan.  1. Identify 2022 circuit list for trimming each year (minimum of 225 circuits per year, or approximately ¼ of total circuit miles, including schedules and cost estimates).	01/12/23	Achieved	Approved
T&D-24.4	Actual spending that is within (-10% or up to +5%) of the established budget target, as applied to the actual number of units (circuits) completed in Target item (iii) above.	01/12/23	Did Not Achieve	Declined

### Units Completed

Metric #	Program	YTD Status		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Actual	YTD Plan	YTD % Complete	YE Plan	YE Forecast	YE Target
T&D-24	Cycle Trim (Circuit Miles)		Plan	210	196	213	216	221	219	217	219	226	218	204	201	2,560	2,560	100.0%	2,560	2,560	2,304
			Forecast	159	173	228	251	304	240	170	202	141	227	299	166						
			Actual	159	173	228	251	304	240	170	202	141	227	299	166						
	Cycle Trim (Circuits)		Forecast	12	11	22	28	46	30	16	27	11	46	53	27	329	N/A	N/A	N/A	329	203
			Actual	12	11	22	28	46	30	16	27	11	46	53	27						

### Summary:

- PSEG Long Island completed 2,560 miles and 329 circuits for 100% of the vegetation management plan exceeding the target of 2,304 miles
- PSEG Long Island achieved the: "Execution of > 90.0% of the 2022 Vegetation Management Work Plan identified in #1 in the Definition section by December 31, 2022."

## Budget Performance

Metric #	Program	YE Status		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Actual	YTD Plan	YTD % Complete	YE Plan	YE Forecast	YE Target (Low End)	YE Target (High End)
T&D-24	Cycle Trim		Plan	\$1.825	\$1.825	\$1.825	\$1.825	\$1.825	\$1.825	\$1.825	\$1.825	\$1.825	\$1.825	\$1.825	\$1.825							
			Forecast	\$1.519	\$1.766	\$2.314	\$2.182	\$2.702	\$2.226	\$1.609	\$1.844	\$1.247	\$2.381	\$2.694	\$1.619	\$24.104	\$21.900	110.1%	\$21.900	\$24.104	\$19.710	\$22.995
			Actual	\$1.519	\$1.766	\$2.314	\$2.182	\$2.702	\$2.226	\$1.609	\$1.844	\$1.247	\$2.381	\$2.694	\$1.619							

### Summary:

- PSEG Long Island YE spend for Cycle Tree Trim was \$24.104M compared to the target budget of \$21.900M with a high-end target threshold of \$22.995M.
- PSEG Long Island exceeded the high end budget target by \$1.109M or 10.1% from the target budget plan thus exceeding the +5.0% threshold

### Additional Comments

- PSEG LI submitted an exception request for a budget target amendment on cycle trim work (TD-24) of \$2.2M for the following reasons:
  - Costs associated with Fire Island tree trim was \$565K over forecast.
  - Redistribution of suspended contractor work cost an additional \$516K.
  - Actual prices were \$1.1M more than forecast in the Budget Board Book. This is due to timing of the budget cycle and the contractor price evaluation cycle.
- This was communicated to LIPA via monthly meetings where YE forecasts were covered that the budget that was set through the budget briefing process was not sufficient based on actual bid prices that were received later
- LIPA rejected PSEG Long Island's exception

## T&D-25 - Veg Mgmt Work Plan - Trim-To-Sky (TTS) Circuits

Metric Type	Quantitative	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00		

T&D-25	Veg Mgmt Work Plan - Trim-To-Sky (TTS) Circuits			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-25.1	The 2022 Vegetation Work Plans identifying the minimum of 225 circuits (or approximately ¼ of the total circuit miles) and budgets shall be provided to LIPA for approval, which shall not be unreasonably withheld, by January 31, 2022. Work plans shall include annual and monthly work and resource plans. Work plans should be coordinated with maintenance and construction work plans, where possible.	01/31/22	Achieved	Approved
T&D-25.2	The 2023 Vegetation Work Plans identifying the minimum of 225 circuits (or approximately ¼ of the total circuit miles) and budgets shall be provided to LIPA for approval, which shall not be unreasonably withheld, by August 31, 2022. Work plans shall include annual and monthly work and resource plans. Work plans should be coordinated with maintenance and construction work plans, where possible.	08/31/22	Achieved	Approved
T&D-25.3	By December 31, 2022, fully execute all 2022 deliverables specified in below as per the 2022 Vegetation Management Work Plan.  1. Identify Trim-to-Sky (TTS) circuits to the first protective device each year (Minimum of 225 circuits per year, or approximately ¼ of the total circuit miles including schedules and cost estimates).	01/12/23	Achieved	Approved
T&D-25.4	Actual spending that is within (-10% or up to +5%) of the established budget target, as applied to the actual number of units (circuits) completed in Target item (iii) above.	01/12/23	Did Not Achieve	Declined

### Units Completed

Metric #	Program	YTD Status		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Actual	YTD Plan	YTD % Complete	YE Plan	YE Forecast	YE Target
T&D-25	Trim to Sky (Circuits)		Plan	35	33	29	27	19	25	27	39	25	19	23	25	215	326	66.0%	326	215	203
			Forecast	8	17	16	15	30	15	8	19	68	48	23	6						
			No Work	6	0	0	1	17	7	0	0	10	17	0	0						
			Actual	2	17	16	14	13	8	8	19	58	31	23	6						

### Summary:

- PSEG Long Island completed 215 circuits versus and exceeded the year-end target of 203 circuits
- PSEG Long Island achieved the: "Execution of > 90.0% of the 2022 Vegetation Management Work Plan identified in #1 in the Definition section by December 31, 2022."

### Budget Performance

Metric #	Program	YE Status		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Actual	YTD Plan	YTD % Complete	YE Plan	YE Forecast	YE Target (Low End)	YE Target (High End)
T&D-25	Trim to Sky		Plan	\$0.117	\$0.117	\$0.117	\$0.117	\$0.117	\$0.117	\$0.117	\$0.117	\$0.117	\$0.117	\$0.117	\$0.117	\$2.224	\$1.400	158.8%	\$1.400	\$2.224	\$1.260	\$1.470
			Forecast	\$0.007	\$0.064	\$0.149	\$0.099	\$0.096	\$0.066	\$0.089	\$0.454	\$0.415	\$0.477	\$0.273	\$0.035							
			Actual	\$0.007	\$0.064	\$0.149	\$0.099	\$0.096	\$0.066	\$0.089	\$0.454	\$0.415	\$0.477	\$0.273	\$0.035							

*Summary:*

- PSEG Long Island YE spend for TTS was \$2.224M compared to the target budget of \$1.400M with a high-end target threshold of \$1.470M.
- PSEG Long Island exceeded the high end budget target by \$0.754M or 58.8% from the target budget plan thus exceeding the +5.0% threshold
- PSEG Long Island had limited history dealing with this program and initially was requesting \$5.0M to support the program but the approved budget was set at \$1.4M.

*Additional Comments*

- PSEG LI submitted an exception request for a budget target amendment on TTD (TD-25) of \$1M for the following reason:
  - Since no historical data existed for this program on a full year basis, a cost model of \$6,500/circuit was used. Actual costs have since come in at \$11,500/circuit.
- This was communicated to LIPA via monthly meetings where YE forecasts were covered that the budget that was set through the budget briefing process was not sufficient based on actual bid prices that were received later
- LIPA rejected PSEG Long Island's exception

## T&D-26 - Veg Mgmt Work Plan - Hazard Tree Removal

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	<span style="color: green;">↑</span> <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$420,508.19		

T&D-26	Veg Mgmt Work Plan - Hazard Tree Removal			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-26.1	The 2022 Vegetation Work Plans identifying the costs and resources associated with a workplan of 12,000 hazard trees. Workplan and associated budgets shall be provided to LIPA for approval, which shall not be unreasonably withheld, by January 31, 2022	01/31/22	Achieved	Approved
T&D-26.2, 3, 5	Subsequent quarterly updates on workplan <i>Note: PSEG LI met with LIPA month and provided entire year workplan prior to start of 2022 and met monthly to discuss completion</i>	03/01/22 06/01/22 09/01/22	Achieved	Approved
T&D-26.4	The 2023 Vegetation Work Plans identifying the costs and resources associated with a workplan of 12,000 hazard trees. Workplan and associated budgets shall be provided to LIPA for approval, which shall not be unreasonably withheld, by August 31, 2022.	08/31/22	Achieved	Approved
T&D-26.6	By December 31, 2022, fully execute all 2022 deliverables specified in #1 above as per the 2022 Vegetation Management Work Plan	12/30/22	Achieved	Approved
T&D-26.7	Actual spending that is within (-10% or up to +5%) of the established budget target, as applied to the actual number of units (hazard trees) completed in Target item (iii) above.	12/30/22	Achieved	Approved

### Units Completed

Metric #	Program	YTD Status		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Actual	YTD Plan	YTD % Complete	YE Plan	YE Forecast	YE Target
T&D-26	Hazard Tree Program (Base)	Plan		183	112	61	106	157	126	204	198	198	234	263	158	2,774	2,000	138.7%	2,000	2,774	1,800
		Forecast		119	180	167	96	107	221	397	256	855	179	111	86						
		Actual		119	180	167	96	107	221	397	256	855	179	111	86						
	Hazard Tree Program (Incremental)	Plan		1,407	736	559	602	877	539	1,004	860	903	951	940	629	10,396	10,007	103.9%	10,007	10,396	9,006
		Forecast		498	629	1,112	1,323	1,704	1,942	1,479	1,339	370	0	0	0						
		Actual		498	629	1,112	1,323	1,704	1,942	1,479	1,339	370	0	0	0						
	Hazard Tree Program (Total)	Plan		1,590	848	620	708	1,034	665	1,208	1,058	1,101	1,185	1,203	787	13,170	12,007	109.7%	12,007	13,170	10,806
		Forecast		617	809	1,279	1,419	1,811	2,163	1,876	1,595	1,225	179	111	86						
		Actual		617	809	1,279	1,419	1,811	2,163	1,876	1,595	1,225	179	111	86						

### Summary:

- PSEG Long Island completed 13,170 hazard trees (2,774 base and 10,396 incremental) and exceeded the year-end target of 10,806 trees
- PSEG Long Island achieved the: "Execution of > 90.0% of the 2022 Vegetation Management Work Plan identified in #1 in the Definition section by December 31, 2022."

## Budget Performance

Metric #	Program	YE Status		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Actual	YTD Plan	YTD % Complete	YE Plan	YE Forecast	YE Target (Low End)	YE Target (High End)
T&D-26	Hazard Tree Program (Base)		Plan	\$0.203	\$0.202	\$0.202	\$0.202	\$0.202	\$0.202	\$0.202	\$0.203	\$0.202	\$0.202	\$0.202	\$0.202							
			Forecast	\$0.045	\$0.092	\$0.096	\$0.029	\$0.042	\$0.094	\$0.329	\$0.087	\$0.260	\$0.125	\$0.119	\$0.110	\$1.431	\$2.428	58.9%	\$2.428	\$1.431	\$2.185	\$2.549
			Actual	\$0.045	\$0.092	\$0.096	\$0.029	\$0.042	\$0.094	\$0.329	\$0.087	\$0.260	\$0.125	\$0.119	\$0.110							
	Hazard Tree Program (Incremental)		Plan	\$0.775	\$0.773	\$0.774	\$0.773	\$0.773	\$0.774	\$0.773	\$0.774	\$0.774	\$0.773	\$0.774	\$0.774							
			Forecast	\$0.671	\$0.548	\$0.982	\$0.827	\$1.186	\$1.700	\$1.398	\$1.663	\$0.763	\$0.000	\$0.000	\$0.000	\$9.738	\$9.283	104.9%	\$9.283	\$9.738	\$8.355	\$9.747
			Actual	\$0.671	\$0.548	\$0.982	\$0.827	\$1.186	\$1.700	\$1.398	\$1.663	\$0.763	\$0.000	\$0.000	\$0.000							
	Hazard Tree Program (Total)		Plan	\$0.977	\$0.975	\$0.976	\$0.975	\$0.976	\$0.975	\$0.975	\$0.977	\$0.976	\$0.975	\$0.976	\$0.976							
			Forecast	\$0.716	\$0.640	\$1.079	\$0.855	\$1.228	\$1.795	\$1.727	\$1.750	\$1.023	\$0.125	\$0.119	\$0.110	\$11.168	\$11.711	95.4%	\$11.711	\$11.168	\$10.540	\$12.296
			Actual	\$0.716	\$0.640	\$1.079	\$0.855	\$1.228	\$1.795	\$1.727	\$1.750	\$1.023	\$0.125	\$0.119	\$0.110							

### Summary:

- PSEG Long Island YE spend for Hazard Tree was \$11.168M compared to the target budget range of \$10.540M-\$12.296M. PSEG LI achieved the budget targets within the targeted range.

### Additional Comments

- There was an additional 890 Hazard Trees that were completed in 2022 with incremental funding outside of the scope of the metric

## T&D-27 - Storm Hardening Work Plan - Overhead Hardening

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$262,817.62		

T&D-27	Storm Hardening Work Plan - Overhead Hardening			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-27.1	Development of the 2022 Storm Hardening Work Plan – Overhead Hardening for LIPA approval, which shall not be unreasonably withheld, by January 31, 2022.	01/31/22	Achieved	Approved
T&D-27.2	Development for LIPA approval, which shall not be unreasonably withheld, by August 31, 2022 of a 2023 Storm Hardening Work Plan – Overhead Hardening with PJDs per the specifications in the Metric document.	08/31/22	Achieved	Approved
T&D-27.3	Execution of all 2022 work identified in the Storm Hardening Work Plan by December 31, 2022. Storm hardening of 44 mainline circuits.	12/30/22	Achieved	Approved
T&D-27.4	Project budget within -10% or up to 5%.	12/30/22	Achieved	Approved

### T&D-27 - Overhead Hardening Units



Metric #	SOS ID	Program	YE Status		Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec	YTD Actual	YTD Plan	YE Plan	YE Target (90%)
T&D-27	1891	Overhead Hardening		Actual	5.4	4.5	8.1	5.4	8.0	7.3	5.9	6.9	9.8	6.4	7.6	5.2	80.4	81.9	81.9	73.7

### T&D-27 - Overhead Hardening Spend

Metric #	SOS ID	Program	YE Status	YE Actual Spend	YE Plan	Target Range (Low End)	Target Range (High End)
T&D-27	1891	Overhead Hardening		\$71,036,139.00	\$71,949,202	\$64,754,282	\$75,546,662

### Summary

- PSEG Long Island developed, provided & discussed 2022 Work Plan with 48 circuits in 2021. We also provided LIPA with resource loaded schedules with work plan.
- PSEG Long Island developed and provided 2023 work plan schedule, mileage/labor hours by month, and updated PJD including 2023 units & budget.
- Completed 80.41 miles of 81.88 miles of overhead hardening or 98.2% of approved PJD units.
- Final 2022 Spend \$71,039,139.00, 98.7% of the approved PJD budget of \$71,949,202 and was in the threshold requirement of -10/+5% of planned budget.
- Note: The metric language says -2/+4 of approved work – This work is planned in miles and there was meeting held between the parties that the measurement would be based on completed planned mileage.



## T&D-28 - Storm Hardening Work Plan - Underground Hardening

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$157,690.57		

T&D-28	Storm Hardening Work Plan - Underground Hardening			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-28.1	By March 31, 2022, submit a 2022 Underground Pilot Plan for a minimum of 4 locations.	03/31/22	Achieved	Approved
T&D-28.2	By August 31, 2022, submit a 2023 Underground Plan based on the 2022 pilot program.	08/31/22	Achieved	Approved
T&D-28.3	By December 31, 2022 execute the work identified in the latest LIPA approved PJD documentation (4 locations: +/- 1 location).	12/30/22	Achieved	Approved
T&D-28.4	Project budget within -10% or up to 5%.	12/30/22	Achieved	Approved

### Summary

- PSEG Long Island submitted a 2022 Underground Pilot Program for a minimum of 4 locations
- PSEG Long Island provided high-level engineering, design, schedule and cost estimates for an Underground Pilot for rear-lot services. Develop customer engagement plans, and commence obtaining easements. Prepare PJD for 2022 pilot program (4 locations)
- PSEG Long Island developed a PJD document for LIPA to review.
- LIPA reviewed estimated costs of 4 locations selected for 2022 pilot per “Findings and Recommendations” document dated 2022.08.22. Due to high estimated costs, LIPA requested change in scope from 4 locations of primary/secondary underground to 1 location primary underground only for 2023 work plan. Fuse selected for 2023 work plan is one of 4 original 2022 selected fuse locations, Fuse-81406 (Old Bethpage). Design and estimate of updated scope of work will be completed in house and an RFP will be developed to bid out construction work as defined by 2023 T&D 28 Underground Storm Hardening Metric. Note fuse number referenced in 2023 T&D 28 metric is incorrect (typo).

## T&D-29 - Storm Hardening Work Plan - Transmission Load Pockets

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$157,690.57		

T&D-29	Storm Hardening Work Plan - Transmission Load Pockets			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-29.1	By January 31, 2022, submit a 2022 Storm Hardening Work Plan for a minimum of 8 load pockets	01/31/22	Achieved	Approved
T&D-29.2	By August 31, 2022, submit a 2023 Storm Hardening Work Plan that creates PJDs to harden supply for each of the 8 load pockets identified in item #1 of this Target section.	08/31/22	Achieved	Approved

### Summary

- PSEG Long Island submitted a Storm Hardening Work Plan for a minimum of 8 load pockets
- PSEG Long Island developed a PJD documents to harden supply to each of the 8 load pockets and identifies candidate(s) for 2023 project start.

## T&D-30 - Storm Hardening Work Plan - ACRV Commissioning Program

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	<span style="color: green;">↑</span> <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$262,817.62		

T&D-30	Storm Hardening Work Plan - ACRV Commissioning Program			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-30.1	By January 31, 2022, submit a 2022 Storm Hardening Work Plan for operationalizing ASUVs for a minimum of 10 circuits	01/31/22	Achieved	Approved
T&D-30.2	By August 31, 2022, submit a 2023 Storm Hardening Work Plan and budget that identifies locations, schedules, cost estimates, and creates PJDs for ACRVs to be commissioned as tripping devices for 2023.	08/31/22	Achieved	Approved
T&D-30.3	By December 31, 2022, completion of ACRV Commissioning on the latest LIPA approved PJD (+/- 10%).	12/30/22	Achieved	Approved
T&D-30.4	Project budget within -10% or up to 5%.	12/30/22	Achieved	Approved

### T&D-30 Storm Hardening - ACRV Commissioning Program Units



Metric #	SOS ID	Program	YE Status		Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec	YTD Actual	YTD Plan	YE Plan	YE Target (90%)
T&D-30	1293-C	ACRV Commissioning Program		Actual	0	0	2	9	Program Complete as of 4/27/2022								11	11	10	9

### Summary

- PSEG Long Island submitted a Storm Hardening Work Plan for operationalizing ASUVs for a minimum of 10 circuits
- PSEG Long Island submitted a 2023 Storm Hardening Work Plan and budget that identifies locations, schedules, cost estimates, and creates PJDs for ACRVs to be commissioned as tripping devices for 2023
- PSEG Long Island commissioned 11 ACRV's by 4/27/2022

## T&D-31 - Storm Hardening Work Plan - LT5H (ASUV) Program

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$157,690.57		

T&D-31	Storm Hardening Work Plan - LT5H (ASUV) Program			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-31.1	By January 31, 2022, submit a 2022 Storm Hardening Work Plan – LT5H (ASUV) that identifies installation locations, schedules, and cost estimates, and creates PJDs for ~150 ASUVs to be installed and commissioned in 2022.	01/31/22	Achieved	Approved
T&D-31.2	By August 31, 2022, submit a 2023 Storm Hardening Work Plan and budget that identifies the installation locations, schedules, cost estimates, and creates PJDs for ~150 ASUVs.	08/31/22	Achieved	Approved
T&D-31.3	By December 31, 2022, execution of all 2022 work identified in the Storm Hardening Work Plan – LT5H (ASUV) Program per the latest approved LIPA PJD (-10% or up to +5%).	12/30/22	Achieved	Approved
T&D-31.4	Project budget within -10% or up to 5%.	12/30/22	Achieved	Approved

### T&D-31 Storm Hardening - LT5H (ASUV) Commissioning Program - Units



Metric #	SOS ID	Program	YE Status		Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec	YTD Actual	YTD Plan	YE Plan	YE Target (90%)
T&D-31	1293-A	LT5H (ASUV) Commissioning Program		Installed	10	5	6	0	14	27	12	20	15	23	16	6	149	150	150	135
				Commissioned	1	4	5	4	1	19	22	18	10	19	23	23				

### T&D-31 Storm Hardening - LT5H (ASUV) Commissioning Program - Spend



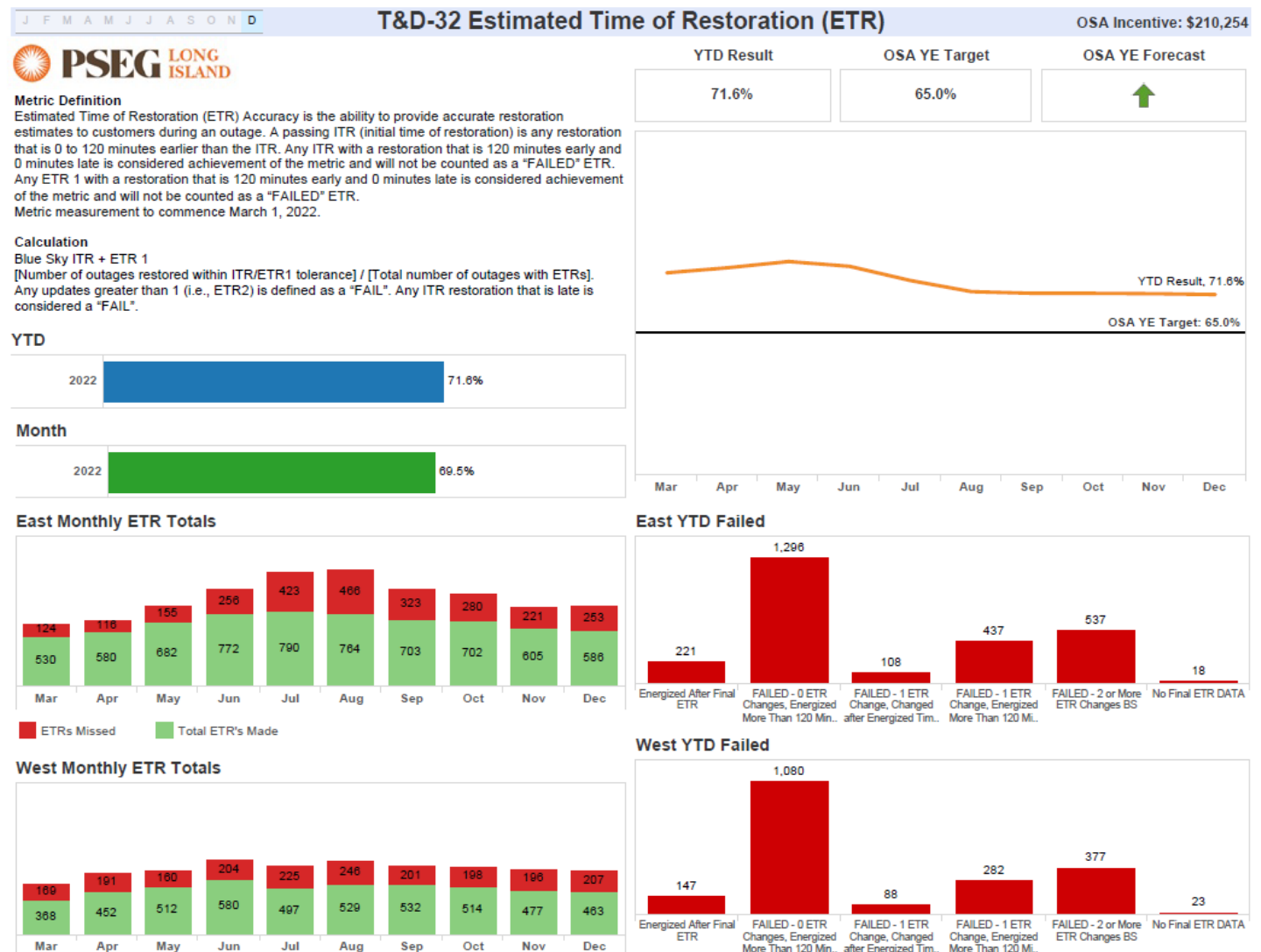
Metric #	SOS ID	Program	YE Status	YE Actual Spend	YE Plan	Target Range (Low End)	Target Range (High End)
T&D-31	1293-A	LT5H (ASUV) Commissioning Program		\$9,175,351.00	\$9,600,000	\$8,640,000	\$10,080,000

### Summary

- PSEG Long Island submitted a 2022 Storm Hardening Work Plan – LT5H (ASUV) that identified installation locations, schedules, and cost estimates, and creates PJDs for ~150 ASUVs to be installed and commissioned in 2022.
- PSEG Long Island submitted a 2022 Storm Hardening Work Plan – LT5H (ASUV) that identified installation locations, schedules, and cost estimates, and creates PJDs for ~150 ASUVs
- PSEG Long Island installed 154 ASUVs and commissioned 149 of the ones that were installed which was better than the YE target of 136 (90% of the approved LIPA PJD)
- PSEG Long Island spend \$9.2M vs. Plan of \$9.6M or 95.6% of planned budget which was in the -10/+5% threshold target

## T&D-32 - Estimated Time of Restoration (ETR)

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$210,254.09		



### Summary

- PSEG Long Island achieved an Estimated Time of Restoration (ETR) of 71.6% vs. a target of 65.0%.
- Estimated Time of Restoration (ETR) Accuracy is the ability to provide accurate restoration estimates to customers during an outage. A passing ITR (initial time of restoration) is any restoration that is 0 to 120 minutes earlier than the ITR. Any ITR with a restoration that is 120 minutes early and 0 minutes late is considered achievement of the metric and will not be counted as a "FAILED" ETR. Any ETR 1 with a restoration that is 120 minutes early and 0 minutes late is considered achievement of the metric and will not be counted as a "FAILED" ETR. Metric measurement to commence March 1, 2022.
- ETR metric is calculated as: Blue Sky ITR + ETR 1 [Number of outages restored within ITR/ETR1 tolerance] / [Total number of outages with ETRs]. Any updates greater than 1 (i.e., ETR2) is defined as a "FAIL". Any ITR restoration that is late is considered a "FAIL".
- For 2022, for the 11,638 ETRs that were made in align with achievement of the metric – 8,892 were achieved with the Initial Time of Restoration Window and 2,746 were achieved within the ETR1 tolerance. PSEG Long

Island was out of tolerance with 4,614 ETRs. For the ETRs where PSEG LI was out of tolerance the reason for failure and volume of each are:

- FAILED - 0 ETR Changes, Energized More Than 120 Min. From Final ETR BS – 2,376
  - FAILED - 1 ETR Change, Changed after Energized Time BS - 196
  - FAILED - 1 ETR Change, Energized More Than 120 Min. From Final ETR BS - 719
  - FAILED - 2 or More ETR Changes BS - 914
  - FAILED - Energized After Final ETR - 368
  - FAILED - No Final ETR DATA – 41
- YTD (Beginning with March), 90.65% of jobs were restored at or prior to the ETR. Of the 4, 614 missed ETRs, 67.08% (3,095 ETR1, ETR2) were missed by being too early (120 minutes prior to ITR or ETR1) which may result in a positive customer experience but the metric objective is to improve accuracy of information provided to customers.

## T&D-33 - Real Estate Strategy

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$105,127.05		

T&D-33	Real Estate Strategy			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-33.3	Notification to National Grid on Early Lease Termination for Patchogue	01/31/22	Achieved	Approved
T&D-33.4	Patchogue One Year Hold Over Impact Analysis	03/11/22	Achieved	Approved
T&D-33.1	By March 31, 2022, PSEG LI shall deliver a project specific PIP based on office space need requirements per line of business and informed by recommendations issued by Colliers under the 2021 master plan subject to LIPA approval, which shall not be unreasonably withheld.  LIPA approval, which shall not be unreasonably withheld, of Project Implementation Plan (PIP) by April 15, 2022, with implementation of mutually approved and funded deliverables by the date(s) specified in the PIP.	03/31/22	Achieved	Approved
T&D-33.5	Non-Binding Letter of Intent (LOI) and NDA for property	03/31/22	Achieved	Approved
T&D-33.6	Desktop Environmental Review Report (includes a review of available federal, state, and local agency records, and available historical documents (i.e., topographic maps, aerial photographs, Sanborn maps, and city directories) of the project site(s) and relevant adjoining properties	03/31/22	Achieved	Approved
T&D-33.7	URB and Record of Decision Approval Documents for Property Purchase in 2022	03/31/22	Achieved	Approved
T&D-33.8	Due Diligence – Property Appraisal	04/29/22	Achieved	Approved
T&D-33.10	SOW for Site Development Consultant	05/31/22	Achieved	Approved
T&D-33.9	SOW for Architectural & Engineering (A&E) firm	05/31/22	Achieved	Approved
T&D-33.11	Purchase & Sale Agreement (PSA)	06/10/22	Achieved	Approved
T&D-33.12	Submission of 2023 Project Budget detail to Finance	07/01/22	Achieved	Approved
T&D-33.13	Property Due Diligence documents as per PSA	07/29/22	Achieved	Approved
T&D-33.14	Contract for A&E firm	07/29/22	Achieved	Approved

T&D-33 Real Estate Strategy				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-33.15	Contract for Site Development Consultant	07/29/22	Achieved	Approved
T&D-33.18	Final 2023 Project Budget Submitted to Finance	09/16/22	Achieved	Approved
T&D-33.19	External Affairs Strategy document	09/30/22	Achieved	Approved
T&D-33.16	High Level New Operation Center Program Development (staffing, vehicles, laydown area)	11/30/22	Achieved	Approved
T&D-33.17	Fleet Process for New Operations Center (fueling onsite or offsite; vehicle repairs)	11/30/22	Achieved	Approved
T&D-33.21	Project Work Plan for 2023	11/30/22	Achieved	Approved
T&D-33.2	By December 31, 2022, execute all mutually approved, 2022 funded deliverables identified in the proposed PIP.	12/30/22	Achieved	Approved
T&D-33.20	Preliminary schematic operations center design and site layout	04/21/23	Deferred to 2023	Deferred to 2023
T&D-33.22	Property Closing documents	06/30/23	Deferred to 2023	Deferred to 2023

### Summary

- PSEG LI delivered a project specific PIP based on office space need requirements per line of business and informed by recommendations issued by Colliers under the 2021 master plan subject to LIPA
- PSEG LI executed all mutually approved and funded deliverables in the PIP that could be completed in 2022
- Several items related to the Medford property were deferred via approved metric exception requests because of extended due diligence and other issues



## T&D-34 - Construction – Quality and Timely Completion of PJDs

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$210,254.09		

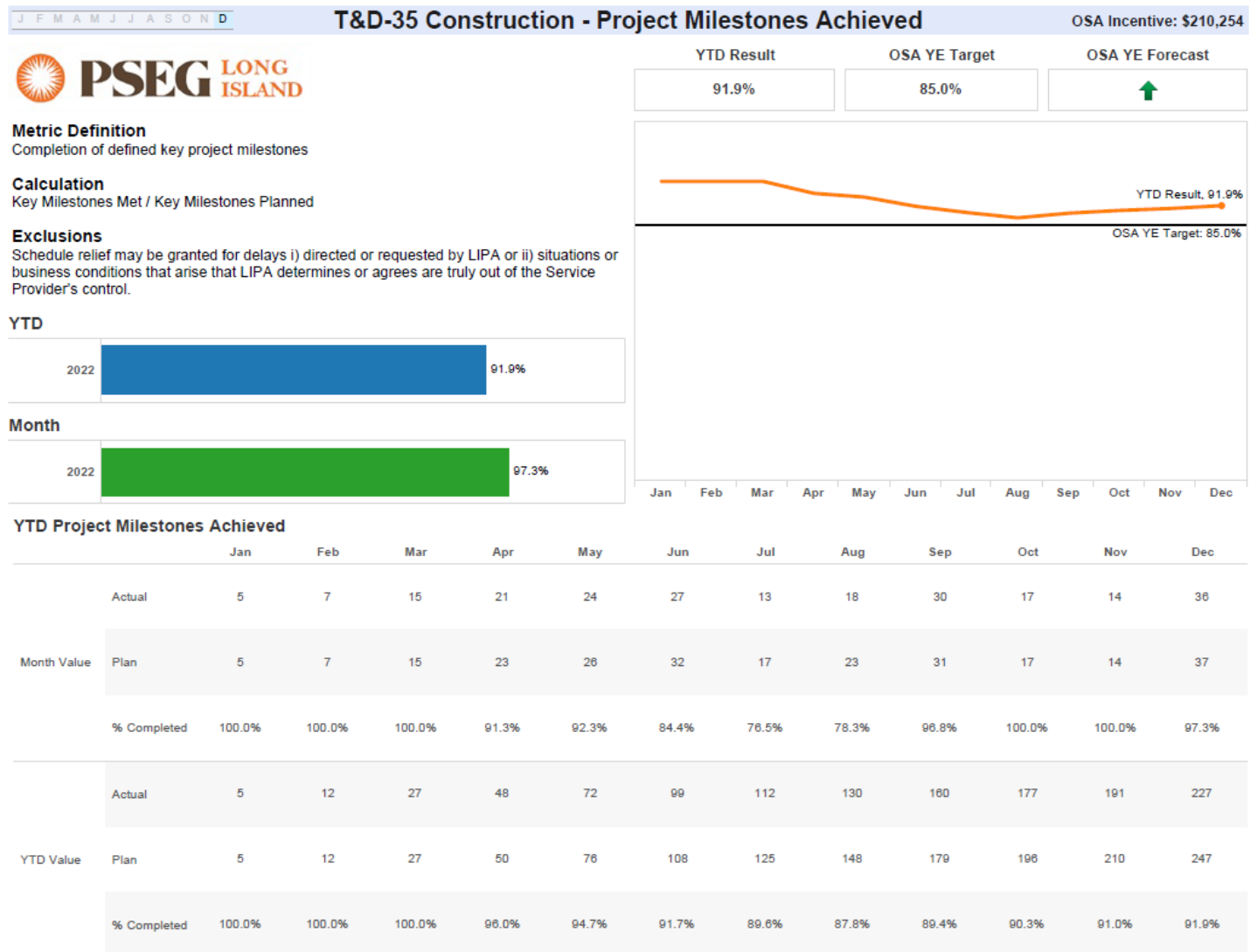
T&D-34	Construction – Quality and Timely Completion of PJDs			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-34.1	Preliminary 2023 T&D Capital budget submitted to LIPA July 1, 2022	07/01/22	Achieved	Approved
T&D-34.2	PJDs substantiating the budget request submitted to LIPA by July 21, and finalized by August 15	08/15/22	Achieved	Approved
T&D-34.3	PJDs substantiating the budget request finalized by August 15.	08/15/22	Achieved	Approved

### Summary

- PSEG LI delivered a preliminary 2023 T&D Capital budget submitted to LIPA on July 1, 2022
- PSEG Long submitted PJDs substantiating the budget request beginning on a rolling basis by July 21, and finalized by August 15. PSEG Long Island submitted PJDs on a rolling basis through 5 batches beginning on July 29, 2022 and completed final batch on August 15, 2022 along with a final consolidated Capital Budget proposal.

## T&D-35 - Construction - Project Milestones Achieved

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$210,254.09		



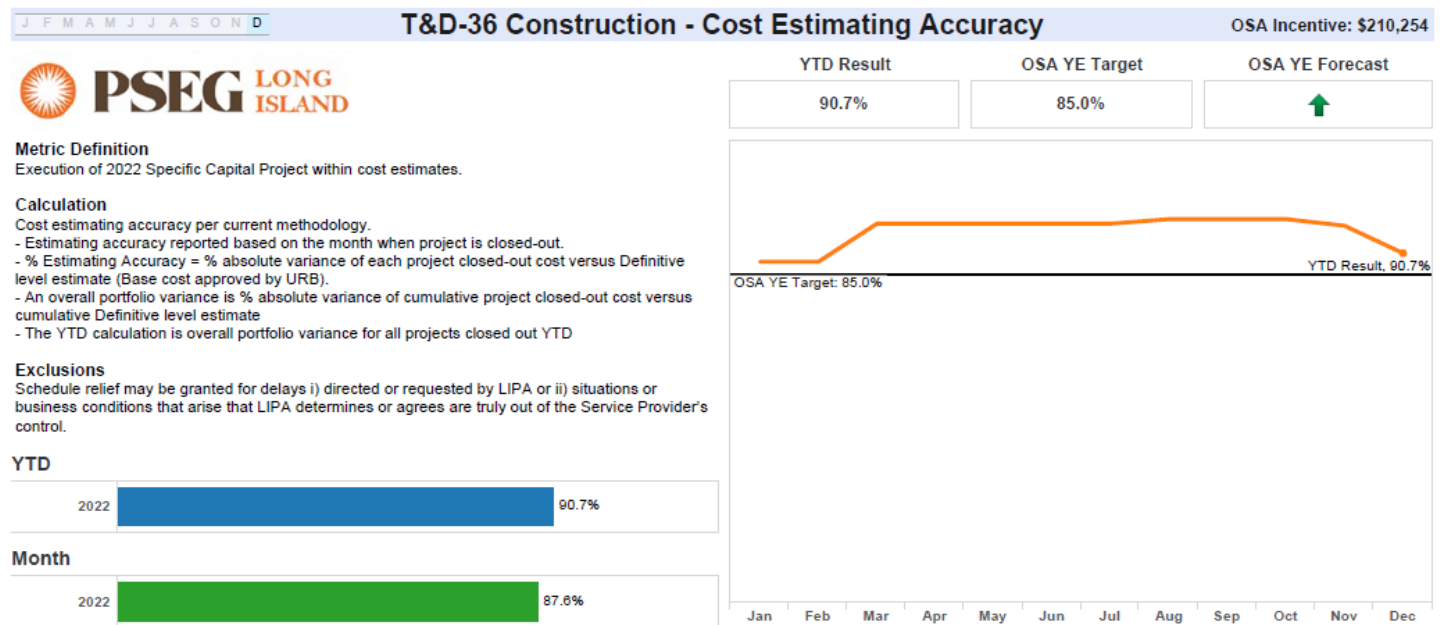
### Summary

- PSEG Long Island achieved 91.9% of 2022 project milestones achieved vs YE target accuracy is 85.0% of planned milestones. A total of 247 milestones have been planned to be accomplished by YE. As of December 2022, 227 milestones out of 247 planned milestones have been met on time.
- Occasionally, specific project schedules are adjusted throughout the year to account for permit delays, easement or municipality approvals, storms, etc. These project schedule updates are submitted by the Project Manager for approval by the Manager of Project Management and the Project Sponsor.
- PSEG Long Island has a structured process for milestone changes, "Key Milestone Change Process" that was followed for any changes of dates to the baseline milestones submitted to LIPA in January 2022 which will need approval and highlighted any changes to the baseline. These Key Milestone Change Forms were approved by PSEG Long Island's Mg Dir & VP Construction & Ops Svcs and then were subsequently reviewed and approved by LIPA.

- PSEG Long Island's initial baseline was 297 milestones. PSEG Long Island rebaselined milestones at four different points throughout the year where PSEG LI met with LIPA and discussed reasons adjusting the baseline and received LIPA's approval
  - May Changes – reduction of 10 Key Project Milestones
  - July Changes – reduction of 18 Key Project Milestones
  - September Changes – reduction of 16 Key Project Milestones
  - October Changes – reduction of 5 Key Project Milestones

## T&D-36 - Construction - Cost Estimating Accuracy

<b>Metric Type</b>	Quantitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$210,254.09		



### YTD Cost Estimating Projects Closed Out

Project Title/Description	Definitive Estimate Cost (Base)	Closeout Costs	Cost Estimating Accuracy
Far Rockaway New Feeders	6,474,648	5,731,833	88.5%
West Bartlett	16,729,000	17,102,430	97.8%
Far Rockaway Bank Upgrade Phase 1	9,131,000	9,364,769	97.5%
Eastport Reconnector C&R	1,504,070	1,503,076	99.9%
Bridgehampton New Control and Battery Enclosure	2,954,608	2,978,175	99.2%
Park Place Distr Feeders, C&R, and Exit Feeders	9,896,000	9,167,080	94.5%
Stewart Manor Reinforcements 13kV UG	4,090,876	3,658,982	89.4%
Fire Island New 4kV Feeder	14,436,551	11,771,373	81.5%
9B Southampton New Feeder C&R	6,885,762	5,789,933	84.1%
Captree to Robert Moses Transmission Cable 23-738	7,174,685	5,784,804	80.6%
Newbridge Road Bank #1 Failure	7,674,903	7,631,862	99.4%
Northport ABB Phase Shifter LTC Controls	336,719	357,170	94.3%
2G Rockaway Beach 4kV Conversion and New UG Feeder	9,561,852	9,587,361	99.7%
Ruland-Plainview 69kV+2SS	39,140,278	34,068,562	87.0%
Q678 Calverton 138kV SS 8ED Solar Interconnect	4,483,760	4,500,375	99.6%
Round Swamp - New 69/13kV Substation & Trans/Dist Ckts	25,438,816	21,383,833	84.1%

### Summary

- Cost estimating accuracy per current methodology.
  - Estimating accuracy reported based on the month when project is closed-out.
  - % estimating Accuracy = % absolute variance of each project closed-out cost versus Definitive level estimate (Base cost approved by URB).
  - An overall portfolio variance is % absolute variance of cumulative project closed-out cost versus cumulative Definitive level estimate
  - The YTD calculation is overall portfolio variance for all projects closed out YTD
- PSEG Long Island closed out 16 projects in 2022 and had an estimating accuracy of 90.7% vs. YE target of 85.0%.
- There was a combined final definitive estimate cost of \$165,713,528 across the 16 projects in scope for 2022. PSEG Long Island closed out the with closeout costs of \$150,381,618 for the 16 projects.

## T&D-37 - Completion of Program Planned Units per Workplan

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$420,508.19		

Program	2022 Latest PJD Units	2022 Target Units	2022 Complete Units	% Complete vs. Target Units	Achieved (Y/N)
Distribution Circuit Improvement Program	401	361	409	113.3%	
Transmission Breaker Replacement	15	14	15	111.1%	
Underground Distribution Cable Upgrades	13.3	11.9	12.2	102.5%	
Distribution Multiple Customer Outages (MCO)	73	66	78	118.7%	
Residential Underground Cables	13.3	12.0	12.9	107.8%	
Replacement of Non-restorable Distribution Pole Rejects	1,050	945	1,057	111.9%	
Transfer Distribution Facilities to New Telephone Poles (Blanket)	2,058	1,852	1,330	71.8%	
Transformer Monitoring (Purchases and Installations)	79	71	79	111.1%	

### Summary

- PSEG Long Island completed 7 of 8 programs within the > 90.0% of the planned units/miles for a for the listed Proactive Programs within the established target and based on the latest LIPA approved PJD documentation
- Note for the Transfer Distribution Facilities to New Telephone Pole is a blanket and is reactive work based on Verizon Osmose program - PSEG LI Planned based on historical levels. PSEG Long Island did submit a revised PJD to align to actual work load from the Verizon osmose program but did it late in the year as PSEG Long Island did not find it was beneficial to make multiple updates to the PJD for reactive work that was subject to change from external parties. PSEG Long Island did verbalize this through the different variance explanations but never submitted an exception. LIPA did not approve the PJD update as it was deemed to be too late in the year. PSEG Long Island believes the exception should have been approved as PSEG Long Island completed work that was available.

## T&D-38 - Program Unit Cost Variance

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$210,254.09		

Program	Latest PJD Cost/Unit	Actual Cost/Unit	Cost/Unit Comparison	2022 Target Cost/Unit (Low)	2023 Target Cost/Unit (High)	Cost/Unit in Range (Y/N)	Achieved (Y/N)
Distribution Circuit Improvement Program	\$15,000.00	\$15,506.91	103.4%	\$13,500.00	\$16,500.00	Yes	
Transmission Breaker Replacement	\$230,000.00	\$224,246.60	97.5%	\$207,000.00	\$253,000.00	Yes	
Underground Distribution Cable Upgrades	\$1,255,785.00	\$1,277,709.18	101.7%	\$1,130,206.50	\$1,381,363.50	Yes	
Distribution Multiple Customer Outages (MCO)	\$103,150.68	\$105,810.36	102.6%	\$92,835.62	\$113,465.75	Yes	
Residential Underground Cables	\$856,472.00	\$777,521.29	90.8%	\$770,824.80	\$942,119.20	Yes	
Replacement of Non-restorable Distribution Pole Rejects	\$12,200.00	\$11,342.14	93.0%	\$10,980.00	\$13,420.00	Yes	
Transfer Distribution Facilities to New Telephone Poles (Blanket)	\$6,220.00	\$8,208.82	132.0%	\$5,598.00	\$6,842.00	No	
Transformer Monitoring (Purchases and Installations)	\$46,924.05	\$47,813.47	101.9%	\$42,231.65	\$51,616.46	Yes	

### Summary

- PSEG Long Island completed 7 of 8 programs within the +/- 10% of the planned cost per unit the listed Proactive Programs within the established target and based on the latest LIPA approved PJD documentation

## T&D-39 - Project Completion Consistent with Project Design

<b>Metric Type</b>	Qualitative	<b>Metric Performance</b>	↑ <b>Achieved</b>
<b>Incentive Compensation Claim</b>	\$105,127.05		

T&D-39	Project Completion Consistent with Project Design			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
T&D-39.1	Annual audit conducted by LIPA, or a third party designated by LIPA, that finds all construction projects completed in 2022 and placed in service in 2022 were consistent with project design and specifications.	12/30/22	<b>Achieved</b>	<b>Approved</b>

### Summary

- PSEG Long Island met monthly with LIPA in 2022 to discuss capital projects' design/construction approach and adherence to the requirements of SEQRA permits. This metric applied to projects requiring a SEQRA permit. In limited cases, a municipality dictated a change mid-project and PSEG LI revised all SEQRA request accordingly.

## T&D-40 - Double Woods

Metric Type	Quantitative	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00		

J F M A M J J A S O N D

### T&D-40 Double Wood Poles

OSA Incentive: \$52,564



#### Metric Definition

Amount of double wood poles, as recorded in the National Joint Utilities Notification System (NJUNS), on Dec 31, 2022.

#### Calculation

Count of double wood poles per NJUNS, on December 31, 2022.

#### YTD

2022	6,477
2021	6,295

#### MTD

2022	-314
2021	-300

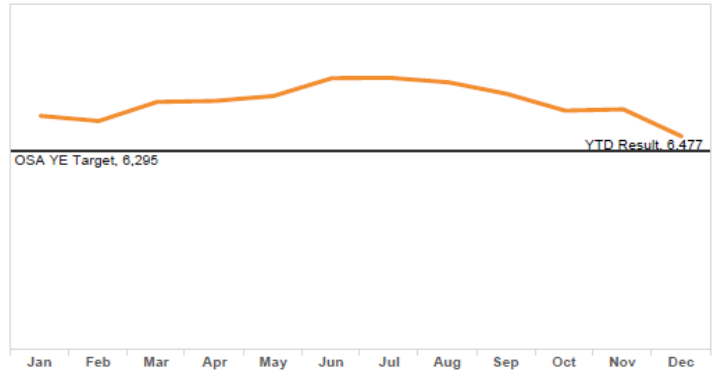
YTD Result

6,477

OSA YE Target

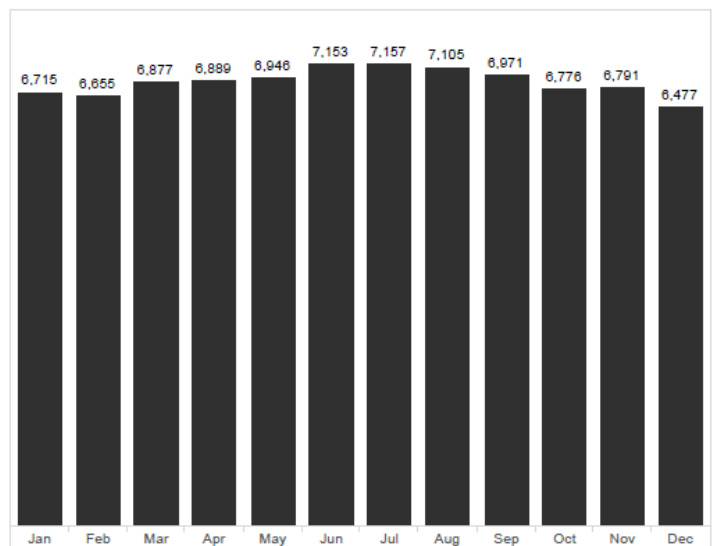
6,295

OSA YE Forecast



#### 2022 Net Double Woods

	PSEG - Total Set	VZ - Total Set	Total Poles Set	PSEG - Total Removed	VZ - Total Removed	Total Poles Removed	Net Double Wood
2021	January	471	123	594	55	719	774
	February	348	102	450	51	637	688
	March	617	192	809	39	906	945
	April	552	120	672	136	931	1,068
	May	472	161	633	56	994	1,050
	June	343	181	524	51	922	973
	July	297	192	491	53	561	614
	August	332	142	474	30	725	755
	September	220	125	345	46	1,097	1,143
	October	379	97	476	45	667	713
	November	369	99	468	83	468	551
	December	296	73	369	108	532	640
2022	January	428	74	502	69	539	608
	February	386	86	472	46	488	532
	March	756	102	858	37	599	636
	April	436	152	588	50	526	576
	May	475	161	636	43	536	579
	June	528	183	711	49	455	504
	July	371	154	525	65	456	521
	August	551	147	699	71	680	751
	September	604	119	723	52	805	857
	October	526	90	616	60	751	811
	November	467	94	561	55	491	546
	December	192	115	307	51	570	621



### Summary

- PSEG Long Island YE Double Wood poles as reported in National Joint Utilities Notification System (NJUNS) was 6,477 vs. a target of 6,295. PSEG Long Island did not achieve targeted performance levels.
- PSEG Long Island continues to meet with Verizon and Altice as coordination between the parties and cooperation from the communications utilities is necessary to achieve the targeted performance levels.