



2024 YTD Progress Report: PSEG Long Island Performance Metrics

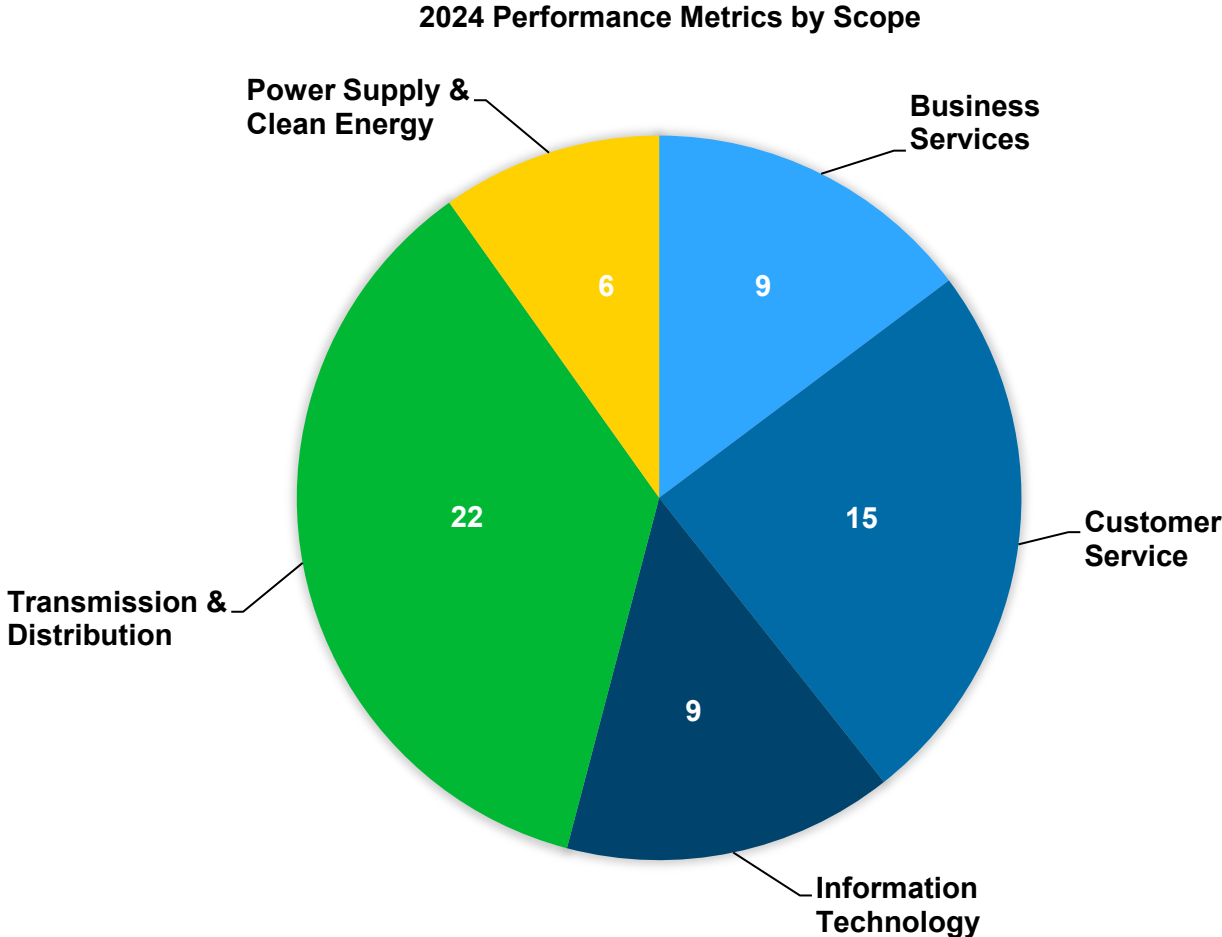
Presented by: Jessica Bretana, *Senior Manager of Performance Management*

September 25, 2024



PSEG Long Island 2024 Metrics

- For 2024, the Board approved 61 [PSEG Long Island Performance Metrics](#), distributed across all the management services provided by PSEG Long Island to LIPA and its customers.
- Metrics are designed to be reasonably achievable levels of performance that are objectively verifiable, with budgeted funds to achieve this performance.
- \$21 million of PSEG Long Island Variable Compensation* is at risk based on these performance standards



*2021 dollars indexed for the Consumer Price Index



Performance Metric Monitoring

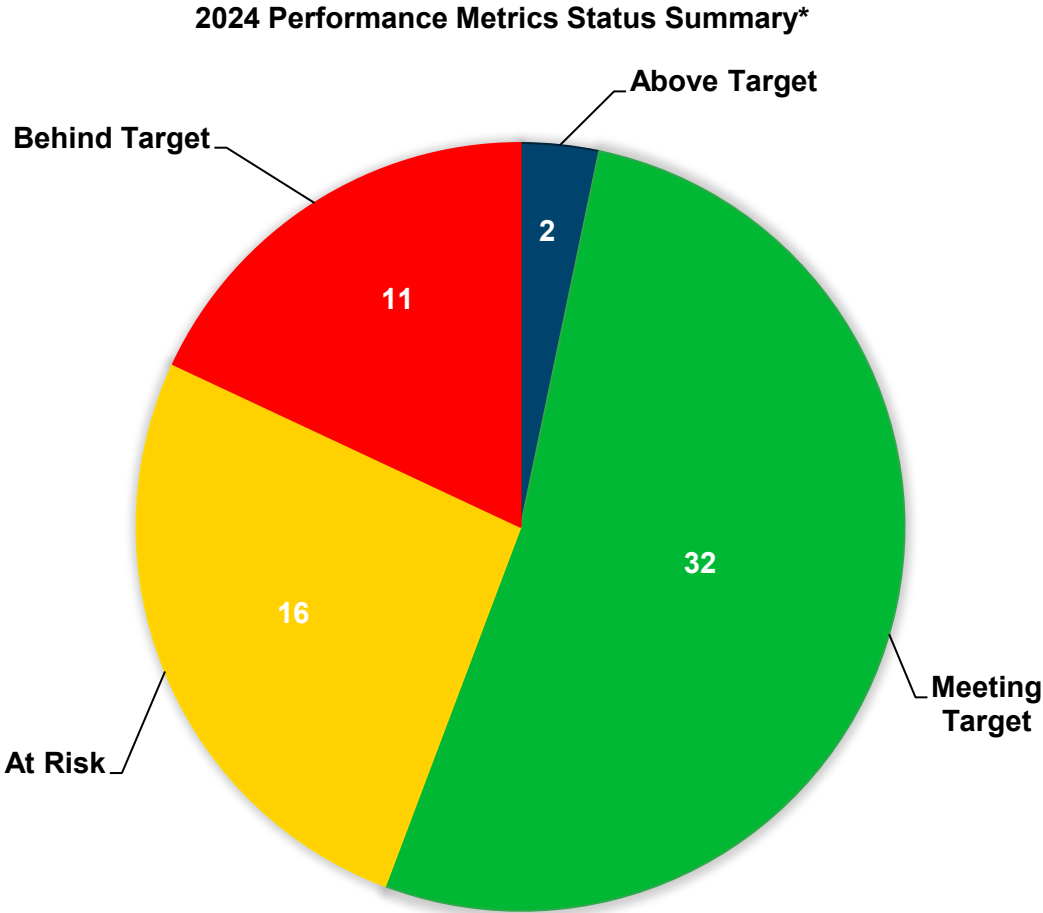
Each metric is monitored by a LIPA team made up of an Executive Sponsor from LIPA's Senior Management, a Project Manager, and Subject Matter Experts.

All metrics fall into one of two categories:

- **23 Quantitative Metrics** that specify **predefined numerical measurements** of performance.
- **38 Qualitative Metrics** that are **project-oriented initiatives** incorporating one or more required deliverables with defined target dates. This also includes Hybrid Metrics, which have both Qualitative and Quantitative deliverables.

Overall Performance Status

- Year-to-date, PSEG Long Island is **meeting approximately 53%** of Performance Metrics, while **26% are at risk**, and **18% are behind the target**.
- These results reflect the performance through June 30, 2024. Results and current projections are expected to change throughout the year.
- LIPA, PSEG Long Island, and DPS work collaboratively to ensure that metrics are actively evaluated, and customer value is obtained through each.



*Above Target = YTD Actual >5% of YTD Target; Meeting Target = YTD Actual is 5% over or under YTD Target; At Risk = YTD Actual is 5%-15% below YTD Target; Behind Target = YTD Actual is >15% below YTD Target; Not Started = initiative has not started during reporting period.



Key Performance by Corporate Objective

21 key performance metrics have been selected to highlight those most critical for operations and customer service. These metrics directly support LIPA's vision and purpose.

Reliability/Safety

Metric #	Metric Name	Metric Type	YTD Actual	YE Target	YTD Rating
T&D-07	System Average Interruption Duration Index (SAIDI)	Quantitative	30.80	56.50	At Risk
T&D-08	System Average Interruption Frequency Index (SAIFI)	Quantitative	0.37	0.67	At Risk
T&D-09	Momentary Average Interruption Frequency Index (MAIFI)	Quantitative	0.81	1.50	At Risk
T&D-10	Reduce Sustained Multiple Customer Outages (S-MCOs)	Quantitative	0%	100%	At Risk
T&D-12	Reduce Momentary Multiple Customer Outages (M-MCOs)	Quantitative	70,321	54,000	At Risk
T&D-13	Serious Injury Incident Rate (SIIR)	Quantitative	0.11	0	Behind Target
T&D-24	Improve Reliability Through Vegetation Management Work Plan - Cycle Trim & Trim-to-Sky	Hybrid	100%	100%	Meeting Target
T&D-26	Improve Reliability Through Vegetation Management Work Plan - Hazard Tree Removal	Hybrid	39%	100%	At Risk



Key Performance by Corporate Objective

Reliability/Safety (continued)

Metric #	Metric Name	Metric Type	YTD Actual	YE Target	YTD Rating
T&D-30	Improve Resiliency Through Storm Hardening Work Plan - ACRV Commissioning Program	Hybrid	30%	100%	At Risk
T&D-31	Improve Resiliency Through Storm Hardening Work Plan - LT5H (ASUV) Program	Hybrid	100%	100%	Meeting Target
T&D-50	Storm Outage Response Performance	Hybrid	100%	100%	Meeting Target
T&D-52	Triennial Safety Assessment	Qualitative	100%	100%	Meeting Target

Customer Service

Metric #	Metric Name	Metric Type	YTD Actual	YE Target	YTD Rating
CS-02	J.D. Power Customer Satisfaction Survey (Residential)	Hybrid	695 11 th Rank	1st Quartile or 5 th Rank	Behind Target
CS-11	Contact Center Service Level with Live Agent Calls	Quantitative	36.8%	77.0%	Behind Target
CS-21	Outage Information Satisfaction	Quantitative	71.42%	71.12%	Meeting Target
CS-31	Call Average Handle Time (AHT)	Hybrid	459	376	Behind Target

Key Performance by Corporate Objective

Clean Energy

Metric #	Metric Name	Metric Type	YTD Actual	YE Target	YTD Rating
PS&CE-05	Beneficial Electrification – Building Electrification	Quantitative	115%	100%	Above Target
PS&CE-13	Heat Pump Strategy to Address Barriers to Customer Adoption	Qualitative	100%	100%	Meeting Target

Affordability

Metric #	Metric Name	Metric Type	YTD Actual	YE Target	YTD Rating
PS&CE-08	Transition to New "Standard" Time of Day Residential Rates on an Opt-Out Basis	Qualitative	50%	100%	At Risk
CS-17	Low to Moderate Income (LMI) Program Participation	Quantitative	38,716	50,000	At Risk

Information Technology

Metric #	Metric Name	Metric Type	YTD Actual	YE Target	YTD Rating
IT-07	System Segregation	Qualitative	30%	100%	Behind Target

Questions?

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lipower.org



September 25, 2024

2024 Q2 Progress Report: PSEG Long Island Performance Metrics



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EXECUTIVE SUMMARY

The LIPA Board of Trustees provides strategic direction to LIPA's Executive Management through Governance Policies. The Board's policies define LIPA's purpose and vision and set expectations for the strategic outcomes that management will deliver. LIPA's 5-Year Roadmaps then establish a set of multi-year projects to deliver specified business objectives that fulfill the Board's Policies. Roadmaps for Customer Experience, Transmission and Distribution, Information Technology, Performance Management, and Finance have been reviewed and approved by the Board, and those for Business Services, Power Supply, and Clean Energy are under development.

The Board's strategic policy objectives and long-range plans are translated annually into PSEG Long Island Performance Metrics.

The PSEG Long Island Performance Metrics ensure that PSEG Long Island's compensation is tied to delivering meaningful results for LIPA's electric customers. These performance standards 1) advance the Board's strategic direction, as outlined in LIPA's [5-Year Strategic Roadmap](#); and 2) target levels of service the Board has established in [Board Policy](#) or address identified gaps between those levels of service and the current level of service. LIPA oversees PSEG Long Island's progress toward achievement of the sixty-one (61) [2024 Performance Metrics](#) on an ongoing basis. **This report is the second year-to-date report on 2024 performance metrics. It summarizes the status of the metrics from April 1, 2024, through June 30, 2024.**

2024 PERFORMANCE METRICS OVERVIEW

The Second Amended and Restated Operations Services Agreement (OSA) between LIPA and PSEG Long Island includes \$21 million¹ of Variable Compensation at risk based on performance standards. In 2022, the performance standards were negotiated between LIPA and PSEG Long Island as part of the reformed OSA. Starting in 2023, the performance standards are set by LIPA, with an independent recommendation to the LIPA Board of Trustees (Board) by the Department of Public Service (DPS), the staff arm of the State's Public Service Commission.

Metrics are designed to be achievable, objectively verifiable performance levels. The Board budgets the funds to achieve this performance, tying realistic plans and budgets to measurable yearly outcomes. **These performance standards ensure that PSEG Long Island's compensation is tied to delivering meaningful results for LIPA's customers.**

PSEG Long Island will submit to LIPA its evaluation of its performance on each metric within 90 days of the close of the contract year. Under the LIPA Reform Act, LIPA is responsible for IV&V (Independent Verification and Validation) of PSEG Long Island's performance and then providing its evaluation to DPS, who independently reviews LIPA's evaluation before LIPA pays any Variable Compensation. PSEG Long Island can utilize dispute resolution procedures when setting performance metrics and budgets at the beginning of each year and in the final dispensation of whether a metric was achieved.

In 2024, LIPA decreased the number of metrics from 93 to 61 due to improvements in Transmission and Distribution, Customer Service performance, and other scope areas. For instance, PSEG Long Island has base programs to meet top decile scores for the OSHA Recordable Incidence and Days Away rates. The implementation of smart meters discontinued the need for the following metrics: Billing – Inactive Accounts Long-Term Estimates (LTEs) (CS-06), Billing – Active Accounts Long Term Estimates (LTEs) (CS-07), Unauthorized Use/Advanced Consumption Resolution (CS-08), and Billing Exception Cycle Time (CS-09).

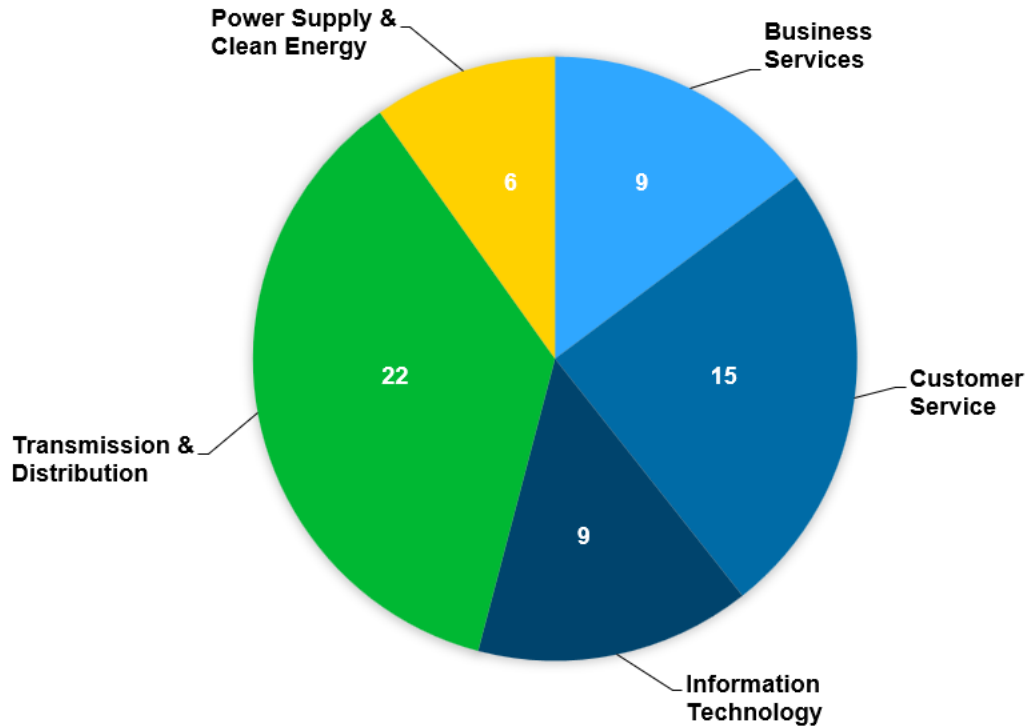
PSEG Long Island also implemented improvements that strengthened their performance in Utility Marketing Effectiveness (BS-18), Reputation Management and Positive Media Sentiment (BS-19), Reputation Management – Share of Voice (BS-20), and Social Mediate Engagement and Following (BS-21). Additionally, PSEG Long Island implemented improvements in outside plant asset records (BS-24) and updated the Low and Moderate Income (LMI) Tariff and Billing at the end of 2023 (BS-32).

The **61 performance standards** that constitute the [2024 Performance Metrics](#) are distributed across all the management services provided to LIPA and its customers. They include numerous improvements to customer service, reliability, resiliency, information technology, clean energy, and

¹ The amount of Variable Compensation including the CPI for 2024 is \$22,976,000.00

other customer improvements distributed across five scopes. The details of the 61 metrics are available on the [LIPA Website](#). Appendix A summarizes the individual metrics for each contract scope and the current status toward the year-end goal.

FIGURE 1: 2024 PERFORMANCE METRICS DISTRIBUTION BY SCOPE



PERFORMANCE METRIC REVIEW PROCESS

All metrics fall into one of two categories – Qualitative or Quantitative:

- The 38 **Qualitative Metrics** are project-oriented initiatives incorporating one or more required deliverables with defined target dates. This also includes Hybrid Metrics, which have both Qualitative and Quantitative deliverables.
- The 23 **Quantitative Metrics** specify predefined numerical measurements of performance.

LIPA staff continuously monitors PSEG Long Island’s progress on the metrics throughout the year. LIPA has assigned a Project Manager (PM) to lead IV&V for each metric and appropriate Subject Matter Experts (SMEs) to assist with the metric. In addition, an Executive Sponsor (ES) from LIPA’s senior management oversees the work of the IV&V team.

Qualitative Metrics are monitored and tracked via a process overseen and supported by the LIPA Performance Management team.

The Performance Management team (formally known as the Enterprise Project Management Office) has developed an automated tracking system to manage the hundreds of deliverables required by the metrics. PSEG Long Island staff uploads deliverables directly to the system, which initiates workflows for LIPA review. A LIPA PM and the appropriate SMEs review each deliverable. Each metric's status is reported to LIPA senior management continuously on an ongoing basis through a dashboard. The performance management system provides transparency and traceability, with time-stamped deliverables, activity history and comments, and real-time LIPA, PSEG Long Island, and DPS access.

Deliverables for Qualitative Metrics go through the following main stages of review:

- PSEG Long Island Submission: To meet the metric standards, PSEG Long Island must submit the required deliverables to the tracking system by the target due date, per all requirements specified in the metric. LIPA allows PSEG Long Island to submit an Exception Request to any deliverable. LIPA reviews all Exception Requests and grants them if deemed reasonable, justified, and in the best interests of achieving the metric objective.
- LIPA Review: LIPA reviews all submitted deliverables for compliance with metric standards and requirements. Since metrics aim to improve performance, LIPA will return unsatisfactory deliverables to PSEG Long Island for revision and resubmission if deemed necessary to achieve the metric objective.

Deliverables can have the following statuses:

- Review in Progress
- Approved
- Rejected
- Exception Requested
- Overdue

LIPA principally tracks **Quantitative Metrics** using scorecards submitted monthly by PSEG Long Island. LIPA conducts Scorecard Review Meetings at a scope or lower level with PSEG Long Island staff and DPS. PSEG Long Island also provides underlying data files for each Quantitative Metric, which LIPA staff reviews and validates.

The assigned PM and SMEs review Quantitative Metrics via an IV&V process for year-to-date (YTD) performance versus target, trending, and outlook for year-end performance. Further, LIPA monitors compliance with metric standards, requirements, calculations, and agreed-upon exceptions.

LIPA's IV&V leads to the rendering of one of the following statuses for Quantitative Metrics:

- Meeting Target (YTD)
- Behind Target (YTD)
- Missed Target (i.e., the YTD performance is such that PSEG Long Island cannot make the metric)
- TBD (i.e., the basis of the metric measurement has yet to occur during the year, or there is a situation where LIPA and PSEG Long Island are reexamining the metric parameters).

PERFORMANCE METRIC EXCEPTIONS

PSEG Long Island may request an exception to metric deliverable requirements; LIPA can provide consideration where requests are adequately justified. To date, PSEG Long Island has asked for 142 Exceptions. LIPA has approved 105 of the requested Exceptions, thirty-five (35) have been rejected, and two (2) are under LIPA review. To the extent an Exception has been granted, performance is reported relative to the agreed-upon standards of the Performance Metric as modified by the Exception.

Exception Requests seek extensions to due dates and changes to project scopes, requirements, or methodology. For example, LIPA regularly provides PSEG Long Island with opportunities for corrective actions and resubmission of a deliverable, which may result in Exceptions when that resubmission occurs after a due date. PSEG Long Island has also sought extensions to due dates, citing delays due to external dependencies, among other reasons.

Exception Requests may also seek an exemption or waiver of a deliverable, making it no longer required. This can occur, for instance, when an extension to a project start is approved, rendering periodic status reporting before the new start date unnecessary.

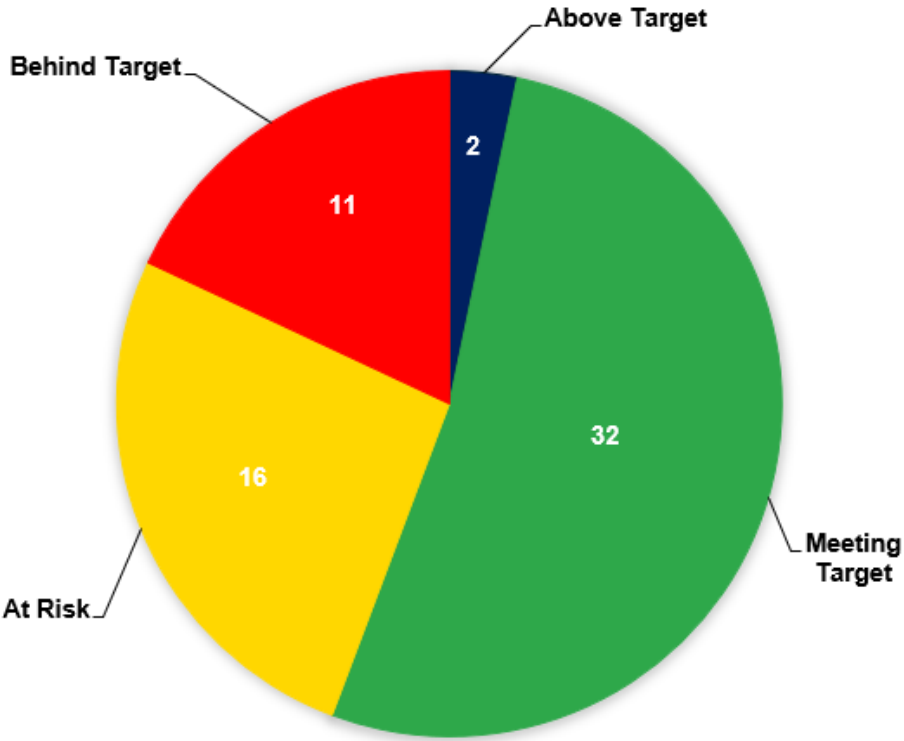
Exception Requests have also sought more fundamental changes to scope, requirements, or methodology. These changes are typically the result of further analysis or discovery as an initiative commences.

LIPA reviews all Exception Requests and grants them if deemed reasonable, justified, or in the best interests of achieving the metric objective. LIPA's primary goal is to utilize metrics to drive customer benefit and value throughout the year.

OVERALL PERFORMANCE STATUS

The overall status of all 61 Performance Metrics as of June 30, 2024, is summarized in Figure 2. Year-to-date, PSEG Long Island is meeting approximately 53% of Performance Metrics, while 26% are at risk, and 18% are behind the target. It is important to note that these results reflect the results of the year's first six months, and results and current projections are subject to change. LIPA, PSEG Long Island, and DPS are working collaboratively to ensure that metrics are actively evaluated and customer value is obtained through each.

FIGURE 2: 2024 PERFORMANCE METRICS STATUS SUMMARY²



² Above Target = YTD Actual >5% of YTD Target; Meeting Target = YTD Actual is 5% over or under YTD Target; At Risk = YTD Actual is 5%-15% below YTD Target; Behind Target = YTD Actual is >15% below YTD Target; Not Started = initiative has not started during reporting period

KEY METRIC PERFORMANCE BY CORPORATE OBJECTIVE

For 2024, LIPA and PSEG Long Island have agreed to sixty-one (61) metrics across five scope areas critical to utility performance. Of the sixty-one (61) metrics, twenty-one (21) key performance metrics have been selected to highlight those most critical for operations and customer service. These metrics directly support LIPA’s vision and purpose. Appendix A summarizes the high-level Year-to-date status of all sixty-one (61) Performance Metrics.

Reliability/Safety

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

Metric Type	YTD Actual	YE Target	YTD Rating
Quantitative	30.80	56.50	At Risk

SAIDI is a standard utility reliability metric that measures the average sustained outage of five minutes or more in duration for each customer served. The SAIDI metric is featured prominently in the LIPA Board of Trustees’ Transmission & Distribution Operations Policy and the 2nd Amended & Restated Operations Services Agreement (OSA) as a gating metric. For this and other reliability metrics, the objective is to reach or maintain top decile performance as measured against industry peers, and the respective metric targets have been set accordingly. This metric provides a clear and quantifiable measure of reliability, which is directly tied to customer experience and can help inform decisions around investments in the grid. The June Year-to-Date SAIDI was higher (unfavorable) than the 2024 Year End target due to:

- Equipment failures: PSEG Long Island reports incidents of primary wire down, primary line tap broken, intentional outages to make repairs, and other miscellaneous accidents such as Motor Vehicle Accidents and animal contacts.
- Increased Storm Activity: The eight (8) storm events in 2024 are above recent comparable YTD averages. More active weather is typically detrimental to reliability performance.

To meet the intended metric target, PSEG Long Island continues its Power-On Program, which consists of hardening distribution mainlines by replacing/ upgrading poles, conductors, and equipment and converting existing lines to narrower profile design lines. The Tree Trim Program has been expanded, and the Circuit Improvement Program will continue the comprehensive inspection of poles, wires, and equipment in addition to reviewing historical outage patterns.

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

Metric Type	YTD Actual	YE Target	YTD Rating
Quantitative	0.37	0.67	At Risk

SAIFI is a standard utility metric that measures the average number of sustained interruptions of five minutes or more for each customer served. This metric provides a clear and quantifiable measure of reliability, which is directly tied to customer experience and can help inform decisions around

investments in the grid. PSEG Long Island’s June Year-to-Date SAIFI for 2024 was 0.37, higher than the June 2023 Year-to-Date result of 0.28. The leading causes were equipment failures (primary wire down, primary line tap broken, etc.) and intentional and accident (MVA, animal contacts, etc.). Eight (8) storms occurred in the first six months of 2024.

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

Metric Type	YTD Actual	YE Target	YTD Rating
Quantitative	0.81	1.50	At Risk

MAIFI is another standard utility metric measuring the average number of momentary interruptions (defined as less than five minutes) for each customer served. This metric provides a clear and quantifiable measure of reliability, which is directly tied to customer experience and can help inform decisions around investments in the grid.

Customers have experienced a slight uptick in momentary interruptions this year compared to the same period in 2023, primarily due to increased storm activity. The 2024 Year-to-Date MAIFI for June is 0.81, 23.6% higher than the Year-to-Date 2023 MAIFI for June of 0.65. PSEG Long Island will continue its Power On, Tree Trim, Circuit Improvement, and other initiatives to maintain and decrease the MAIFI level.

T&D-10 - Reduce Sustained Multiple Customer Outages (S-MCOs)

Metric Type	YTD Actual	YE Target	YTD Rating
Quantitative	0%	100%	At Risk

S-MCOs measure sustained outages of five minutes or more in duration over a twelve-month rolling basis. These outages are likely to cause inconvenience and disruption to customers. As of the end of Q2, and measured over the last twelve months, 3,199 customers experienced six (6) or more outages, which exceeded the target of 2,275. Four hundred and ninety-two (492) customers had eight (8) or more outages, which exceeds the target of 375, and eighty-eight (88) customers experienced ten (10) or more outages, which is greater than the target of fifty (50). Additionally, one (1) customer experienced twelve (12) or more outages, with the target at zero (0). Thus, in 2024, PSEG Long Island is meeting 0% of the targets for each of the four identified groups of customers. Along with PSEG Long Island’s other reliability-related programs, a specific MCO program addresses local areas of deficient performance, focusing on customers experiencing the most significant number of sustained and momentary outages in the past twelve months.

T&D-12 – Reduce Momentary Multiple Customer Outages (M-MCOs)

Metric Type	YTD Actual	YE Target	YTD Rating
Quantitative	70,321	54,000	At Risk

M-MCOs are another reliability metric used to monitor the frequency of power interruptions of less than five minutes in duration (“momentary outages”) over a rolling twelve-month basis. This metric provides

insight into the frequency of brief interruptions that can disrupt sensitive electronic equipment and customer activities. As of June 30, 2024, 70,321 customers experienced six (6) or more momentary outages during the previous 365-day rolling period. This represents approximately 6.11% of all customers served, an increase of nearly 20,000 customers since the end of 2023. In conjunction with other reliability initiatives listed previously, PSEG Long Island also conducts a specific Multiple Customer Outage (MCO) program, which addresses local areas of poor performance, both overhead and underground. The focus will be placed on those customers experiencing the greatest number of outages in the past twelve months.

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

Metric Type	YTD Actual	YE Target	YTD Rating
Quantitative	0.11	0	Behind Target

SIIR is a crucial safety metric component of the LIPA Board’s Safety Policy. This metric is used by OSHA and peer utilities to measure the frequency of severe injuries incurred by the workforce. This rate is essential for assessing the overall safety environment within utility operations and implementing measures to protect employees and contractors. In the second quarter, there were two (2) incidents under review by PSEG Long Island where employees in both instances were admitted to the hospital.

T&D-24 - Improve Reliability Through Vegetation Management Work Plan - Cycle Trim & Trim-to-Sky

Metric Type	YTD Actual	YE Target	YTD Rating
Hybrid	100%	100%	Meeting Target

The Vegetation Management Work Plans identify scheduled work on at least one-quarter of the overhead distribution system, which equals about 2,200 miles of power lines. This work, also referred to as Cycle Trim, ensures that equipment failures do not occur due to regular vegetation maintenance. This project is on track to achieve the goal. All deliverables have been received on time and approved by LIPA. The total miles completed in June Year-to-Date is 1,199. The target for distribution cycle trim is 2,258. The Trim-to-Sky plan for 2024 is a minimum of 175 circuits by year’s end. June Year-to-Date PSEG Long Island has completed eighty-one (81) circuits.

T&D-26 - Improve Reliability Through Vegetation Management Work Plan - Hazard Tree Removal

Metric Type	YTD Actual	YE Target	YTD Rating
Hybrid	39%	100%	At Risk

This metric is part of the Grid Resiliency Improvement Program. To meet the year-end target, the work plan must include removing 14,000 trees and limbs (9,000 trees + 5,000 limbs). June Year-to-Date actual numbers are 1,790 limbs (base and incremental) and 3,714 trees (base and incremental) removed, totaling 5,504. PSEG Long Island has completed approximately 39% of the target, which puts them at risk of meeting the year-end target. The forecast for the last two quarters of the year will

need to be increased to meet the goal. LIPA and PSEG Long Island continue to meet monthly to review progress, budgets, and upcoming schedules.

T&D-30 - Improve Resiliency Through SHWP - ACRV Commissioning Program

Metric Type	YTD Actual	YE Target	YTD Rating
Hybrid	30%	100%	At Risk

This metric is part of the overall Storm Hardening that PSEG Long Island is completing to enhance the distribution system's reliability. Although all deliverables have been received on time and approved by LIPA, the approved 2024 Storm Hardening Work Plan requires a year-end target of a minimum of 300 Automatic Sectionalizing Unit Vipers (ASUVs) being “operationalized” to become Automatic Circuit Recloser Vipers (ACRVs). Year-to-Date, only thirty-nine (39) have been completed. This project is at risk of achieving its goal.

T&D-31 - Improve Resiliency Through Storm Hardening Work Plan - LT5H (ASUV) Program

Metric Type	YTD Actual	YE Target	YTD Rating
Hybrid	100%	100%	Meeting Target

This metric is also part of the overall Storm Hardening that PSEG Long Island is completing to enhance the distribution system's reliability. The project is on track to achieve the goal. As per the 2024 Storm Hardening Work Plan, at least 150 LT5H (ASUV) must be “operationalized” so that the ASUV operates as an ACRV. Construction of twenty-six (26) units has been completed, with twelve (12) units commissioned in the first quarter, which aligns with projected targets. PSEG Long Island submitted a Q2 status report for this deliverable before the target due date. This program has completed the construction of eighty-one (81) ASUVs as of June 30, 2024. Sixty-nine (69) ASUVs remain to be installed, with fifty-nine (59) of those being commissioned to date. PSEG Long Island is currently on track to complete all 150 ASUVs funded in the capital budget by the end of the year.

T&D-50 - Storm Outage Response Performance

Metric Type	YTD Actual	YE Target	YTD Rating
Hybrid	100%	100%	Meeting Target

This metric measures and improves outage management and response effectiveness during storms, with customer outages lasting twenty-four to forty-eight hours. PSEG Long Island had its first applicable storm on June 26, 2024 (storm #8), consisting of two (2) jobs where outage durations exceeded the 24-hour threshold. Locust Ln, Upper Brookville - three (3) Verizon poles, four (4) sections of primary down, two (2) transformers, multiple secondary sections, and services. 40 Cecilia Dr, Syosset trees took eight (8) sections of primary and secondary down. The overall score was 755/855, and potential points were achieved (88.3%), which meets the target of 80%.

T&D-52 – Triennial Safety Assessment

Metric Type	YTD Actual	YE Target	YTD Rating
Qualitative	100%	100%	Meeting Target

Per the Board of Trustees Policy on Safety, which focuses on the actions and welfare of employees, contractors, and the public, an independent third-party review is occurring to assess PSEG Long Island's overall safety performance. The Safety Assessment was completed, and a draft report was issued. LIPA and PSEG Long Island met on September 4, 2024, to discuss the findings and determine steps to address areas of deficiency noted in the report.

Customer Service

CS-02 - J.D. Power Customer Satisfaction Survey (Residential)

Metric Type	YTD Actual	YE Target	YTD Rating
Hybrid	695 11 th Rank	1 st Quartile or 5 th Rank	Behind Target

The J.D. Power Customer Satisfaction Survey enables LIPA to verify that our service provider, PSEG Long Island, meets our customers' needs and aligns with a key Board Policy. PSEG Long Island has moved up one ranking since the first quarter to 11th, but is still below target. Although the Power Quality & Reliability and Billing & Payment scores increased, the Customer Care Price Communications and Corporate Citizenship scores dropped. As part of this metric, PSEG Long Island developed a tactical plan for the year to improve customer perception and track progress on the delivery. The Call Center QA team evaluates calls and email transactions and reviews email templates. The Call Center QA team met with new hire class B after they passed the final exam to provide a refresher on QA expectations and review all QA forms. PSEG Long Island continues to promote its energy efficiency programs, and the Time-of-Day campaign for migration group 1 was a success. The J.D. Power Customer Satisfaction Survey is released quarterly; these plans are designed to impact the overall score positively.

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

Metric Type	YTD Actual	YE Target	YTD Rating
Quantitative	36.8%	77.0%	Behind Target

This metric measures customer service representatives' response to customer calls to increase customer satisfaction and promote efficient staffing. PSEG Long Island is behind target on this metric. Service levels improved in April and May but decreased in June compared to the prior two months. Attrition in June was higher than usual (11 agents). Increased hold times contributed to repeat callers, resulting in increased call volume. Currently, fifty-five (55) agents are in training. PSEG Long Island will continue to focus on service levels.

CS-21 - Outage Information Satisfaction

Metric Type	YTD Actual	YE Target	YTD Rating
Quantitative	71.42%	71.12%	Meeting Target

This metric aims to improve customer satisfaction with PSEG Long Island's proficiency in providing information for customers who experience an outage. PSEG Long Island is monitoring recent Cause Code adjustments that went into production in Q4 2023 and are analyzing the results of low performers from the second quarter of 2024 to identify trends and support ongoing training. A permanent banner will be added to the outage map to educate customers on the restoration process during blue sky days.

CS-31 - Call Average Handle Time (AHT)

Metric Type	YTD Actual	YE Target	YTD Rating
Hybrid	459	376	Behind Target

The PSEG Long Island Call Center is a key customer interface where performance excellence is expected. Recent data shows that recent actions have resulted in a positive change in trajectory; to date, performance still needs to meet the established target. Average Handle Time (AHT) increased by 2.3% in June compared to May. Increased handle times were experienced across most call types. Call Center supervisors are listening to two (2) calls per month, focusing on calls with longer silence time. PSEG Long Island is also reviewing internal processes to identify opportunities that could be improved to help decrease AHT.

Clean Energy

PS&CE-05 – Beneficial Electrification

Metric Type	YTD Actual	YE Target	YTD Rating
Quantitative	115%	100%	Above Target

PSEG Long Island must achieve the Beneficial Electrification targets from the Utility 2.0 filing, including any LIPA and DPS recommended changes to the targets in alignment with the LIPA portion of the two million home clean energy goals for the whole home electrification and home electrification ready target. Beneficial Electrification for LIPA primarily focuses on electrifying home heating via converting fossil fuel-fired equipment to electric heat pumps. New York State's long-term goal for building decarbonization is unachievable without widespread heat pump adoption. During the second quarter, 2,082 heat pumps were installed, 115% of the year-to-date goal. 54% of the total incentive spend was in DAC (Disadvantaged Communities) communities, exceeding the 35% spend target. LIPA generally outperforms most other utilities in New York State in terms of heat pump installations.

PS&CE-13 – Heat Pump Strategy to Address Barriers to Customer Adoption

Metric Type	YTD Actual	YE Target	YTD Rating
Qualitative	100%	100%	Meeting Target

This project is on track to achieve the goal. All deliverables have been received on time and approved by LIPA. Key deliverables include developing a detailed plan for 2025 to achieve statewide heat pump electrification targets by 2030 broken down by segments (single-family, multi-family, LMI, and new construction). As discussed in PS&CE-05 above, New York State’s decarbonization goals involve widespread penetration of heat pumps. In general, residential customers can save money and achieve investment paybacks quickly by converting to a heat pump system. This metric seeks to build upon our success so far and lay the groundwork for accelerated adoption over the coming decade.

Affordability

PS&CE-08 – Transition to New Std TOD Residential Rates on an Opt-Out Basis

Metric Type	YTD Actual	YE Target	YTD Rating
Qualitative	50%	100%	At Risk

The new standard Time-of-Day Rate initiative is a crucial LIPA Board priority, whose success is critically important for the Grid of the Future. In June 2024, PSEG Long Island successfully transitioned the first migration group of approximately 30,000 customers to the TOD rate. IT Release 4, to address enhancements identified in the Post-Production Needs Assessment prior to scaling the TOD program, is at risk. The Release 4 implementation is currently behind schedule and requires funding above the approved 2024 budget amount. LIPA and PSEG Long Island are discussing options.

CS-17 – Low-to Moderate-Income (LMI) Program Participation

Metric Type	YTD Actual	YE Target	YTD Rating
Quantitative	38,716	50,000	At Risk

This metric incentivizes PSEG Long Island to increase customer enrollment in Low-to Moderate-income programs. Affordability for customers is a LIPA Board priority, and ensuring awareness of these programs is critical. At the end of the second quarter, enrollment rates were below the Year-to-date target. PSEG Long Island has worked to meet the target in several ways:

- PSEG Long Island Consumer Advocacy hosted bi-monthly webinars on June 17th. Approximately 290 customers attended the webinars so far this year.
- An additional thirty (30) outreach events were conducted throughout Nassau and Suffolk counties, including non-profit organizations such as the Family Service League, local food pantries, and the Department of Social Services.
- Marketing outreach has continued with financial assistance signage on local buses and bus stations.

- Vendor agreements with Nassau and the New York City Human Resource Association are still in the discussion/development phase to afford the automation portion of the metric when completed. As reported by PSEG Long Island, neither party has refused to enter into an automation vendor agreement.

Information Technology

IT-07 – System Segregation

Metric Type	YTD Actual	YE Target	YTD Rating
Qualitative	30%	100%	Behind Target

System Segregation was a core reform negotiated as part of the 2022 2nd Amended & Restated Operations Services Agreement (OSA), and progress has been tracked in performance metrics since then. This metric ensures that LIPA has stand-alone systems from PSEG Corporate. PSEG Long Island has completed all necessary deliverables, and LIPA has either approved them or is in the process of reviewing them. However, the initial deadlines have shifted from the second quarter to the fourth quarter. Due to these exceptions and schedule changes, the metric has fallen behind its target. Additionally, recent technical issues have cast doubt on the Q4 delivery date, making a Q1 2025 launch for Bundle 1 appear more probable.

APPENDIX A:

The table below summarizes the status of all 61 Performance Metrics as of June 30, 2024². The approved [2024 Performance Metric Report](#) provides additional details, including specific deliverables for each metric.

TRANSMISSION & DISTRIBUTION						
Metric #	Metric Name	Metric Type	YTD Actuals	YE Target	YTD Rating	Comments
T&D-01	Asset Management Program Implementation - Asset Inventory	Hybrid	67%	100%	Meeting Target	As of June 2024, PSEG Long Island has verified 237,034 assets. By year-end, it will need to verify 354,416 assets to meet the target of 65% of the total pole field. PSEG Long Island has onboarded a consultant to address the current backlog of GIS updates. The consultant will begin work in July.
T&D-06	Primary Transmission Control Center (PTCC) Replacement	Qualitative	33%	100%	Meeting Target	The RFP was issued on May 23, 2024, and LIPA has received and approved 33% of the deliverables. The project is on track to be completed by December 24, 2024.
T&D-07	System Average Interruption Duration Index (SAIDI)	Quantitative	30.80	56.50	At Risk	The June YTD SAIDI for 2024 was 30.8, higher than the June 2023 YTD result of 20.5. The leading known causes were equipment failures, and intentional and accident. The extended customer minutes of interruptions in June was 6,452,987 minutes, which was higher than the 5-year average of 5,664,719. One storm event in June added to eight storm events in 2024. The eight storm events accounted for 132,050 customers interrupted and 16,252,333 customer minutes. PSEG Long Island will continue its Power On Program, which consists of hardening distribution mainlines by replacing/upgrading poles, conductors, and equipment and converting existing lines to narrower profile design lines. The Tree Trim Program has been expanded, and the Circuit Improvement Program will continue the comprehensive inspection of poles, wires, and equipment in addition to reviewing historical outage patterns.
T&D-08	System Average Interruption Frequency Index (SAIFI)	Quantitative	0.37	0.67	At Risk	The June YTD SAIFI for 2024 was 0.37, with a total extended customer interruption of 426,504. This result was higher than the June 2023 YTD result of 0.28. The leading known causes were equipment failures, and intentional and accident. The extended customer interruption for June was 91,450, higher than the 5-year average of 71,537.

T&D-09	Momentary Average Interruption Frequency Index (MAIFI)	Quantitative	0.81	1.50	At Risk	The 2024 YTD MAIFI for June is 0.81, 23.6% higher than the YTD 2023 MAIFI for June of 0.65. Eight (8) storm events in 2024 have accounted for 227,247 momentary customers interrupted. PSEG Long Island will continue its Power On, Tree Trim, Circuit Improvement, and other initiatives to maintain and decrease the MAIFI level.
T&D-10	Reduce Sustained Multiple Customer Outages (S-MCOs)	Quantitative	0%	100%	At Risk	S-MCOs measure sustained outages of five minutes or more in duration over a 12-month rolling basis. As of June 2024, 3,199 customers experienced six (6) or more outages, which exceeded the target of 2,275. 492 customers experienced eight (8) or more outages in 2024, greater than the metric target of 375. Eighty-eight (88) customers experienced ten (10) or more outages compared to the target of fifty (50) customers. Finally, one (1) customer experienced twelve (12) or more outages, with the target at zero (0). PSEG Long Island is meeting 0% of the targets for each of the four identified groups of customers and will continue their Power On, Tree Trim, Circuit Improvement, and other initiatives to maintain and decrease this level.
T&D-12	Reduce Momentary Multiple Customer Outages (M-MCOs)	Quantitative	70,321	54,000	At Risk	M-MCOs monitor the frequency of power interruptions of less than five minutes in duration over a rolling 12-month basis. As of June 30, 2024, 70,321 customers experienced six (6) or more momentary outages during the previous 365-day rolling period. This represents 6.11% of all customers served (1,151,740) in 2024. Year-end 2023 M-MCO customers stood at 50,502, an increase of 39.24% year-to-date. In conjunction with the initiatives listed previously, PSEG Long Island also initiated a Multiple Customer Outage (MCO) program, which addresses local areas of poor performance, both overhead and underground. The focus will be placed on those customers experiencing the greatest number of outages in the past twelve months.
T&D-13	Serious Injury Incident Rate (SIIR)	Quantitative	0.11	0	Behind Target	SIIR is a crucial safety metric used by OSHA and peer utilities to measure the frequency of severe injuries incurred by the workforce. This rate is essential for assessing the overall safety environment within utility operations and implementing measures to protect employees and contractors. In the second quarter, there were two (2) incidents under review by PSEG Long Island where employees in both instances were admitted to the hospital.
T&D-18	Improve Reliability Through Work Management Enhancements - Workforce Management Plans	Qualitative	100%	100%	Meeting Target	This project is on track to achieve the goal. All deliverables have been received on time and approved by LIPA. LIPA has also approved the 2025 Workforce Management Plan, including monthly and annual resource plans for all Capital and O&M work.

T&D-24	Improve Reliability Through Vegetation Management Work Plan - Cycle Trim & Trim-to-Sky	Hybrid	100%	100%	Meeting Target	The total miles completed in June YTD is 1,199, with a total cost of \$11.4 million. The target for distribution cycle trim is 2,258, with a cost of \$22.4 million. The Trim-to-Sky plan for 2024 YE is a minimum of 175 circuits costing \$1.6 million. June YTD PSEG Long Island has completed eighty-one (81) circuits with a total cost of \$440,000. They have completed approximately 50% of their YE goal by Quarter 2.
T&D-26	Improve Reliability Through Vegetation Management Work Plan - Hazard Tree Removal	Hybrid	39%	100%	At Risk	YTD Actual 1790 limbs (base and incremental) and 3,714 trees (base and incremental) removed, totaling 5,504. The 2024 target is 14,000 limbs/trees in total. PSEG Long Island has completed approximately 39% of the target, which puts them behind for the YTD. PSEG Long Island must increase its forecast for the last two quarters of the year to meet its goal. They have spent \$5,761,191, approximately 41% of their allocated budget of \$14,123,550.
T&D-30	Improve Resiliency Through Storm Hardening Work Plan - ACRV Commissioning Program	Hybrid	30%	100%	At Risk	This metric is part of the overall Storm Hardening that PSEG Long Island is completing to enhance the distribution system's reliability. Although all deliverables have been received on time and approved by LIPA, the approved 2024 Storm Hardening Work Plan requires a year-end target of a minimum of 300 Automatic Sectionalizing Unit Vipers (ASUVs) being "operationalized" to become Automatic Circuit Recloser Vipers (ACRVs). Year-to-Date, thirty-nine (39) have been completed. This project is at risk of achieving its goal.
T&D-31	Improve Resiliency Through Storm Hardening Work Plan - LT5H (ASUV) Program	Hybrid	100%	100%	Meeting Target	This metric is also part of the overall Storm Hardening that PSEG Long Island is completing to enhance the reliability of the distribution system. The project is on track to achieve the goal. All deliverables have been received on time and approved by LIPA. As per the 2024 Storm Hardening Work Plan, at least 150 LT5H (ASUV) must be "operationalized" so that the ASUV operates as an ACRV. This program has completed the construction of eighty-one (81) ASUVs as of June 30, 2024. Sixty-nine (69) ASUVs remain to be installed, with fifty-nine (59) of those being commissioned to date. PSEG Long Island is currently on track to complete all 150 ASUVs.
T&D-36	Construction - Cost Estimating Accuracy	Quantitative	81.3%	90.0%	At Risk	Year-to-date, PSEG Long Island is at 81.3% cost estimating accuracy. We encourage them to continue their processes to reach the 90% target.
T&D-37	Improve Reliability Through Completion of Program Plan Units & Unit Cost	Quantitative	100%	100%	Meeting Target	PSEG Long Island is meeting targets for all eight (8) targeted program planned units and unit costs.

T&D-40	Reduce Double Wood Poles	Quantitative	7,460	6,810	At Risk	The overall system-level double wood pole count and PSEG Long Island's "next-to-go" backlog are running behind target for the year. Discussions between Verizon, Altice, and PSEG Long Island continue to work towards better communication and coordination of efforts to reduce the overall system double wood count.
T&D-41	Program Effectiveness - Vegetation Management	Quantitative	30.4%	-50.0%	Behind Target	PSEG Long Island did not achieve minimum metric targets for any tiered compensation.
T&D-44	Regulatory Compliance	Quantitative	0	0	Meeting Target	PSEG Long Island has not reported any instances of non-compliance. They are operating within all applicable rules and regulations and meeting all local, state, and federal compliance reporting regulations as defined in this metric.
T&D-46	Root Cause Analysis (RCA) Execution and Compliance	Qualitative	100%	100%	Meeting Target	This project is on track to achieve the goal. All deliverables have been received on time and approved by LIPA.
T&D-49	Work Management Effectiveness	Quantitative	50%	100%	Behind Target	PSEG Long Island met the target for Productivity for Specific Work Types and Utilization/Work Plan Variance but only partially met the target for Overtime Rates and Schedule Attainment. The metric is currently behind the target. PSEG Long Island is only meeting five (5) of eight (8) targets.
T&D-50	Storm Outage Response Performance	Hybrid	100%	100%	Meeting Target	This metric measures and improves outage management and response effectiveness during storms with customer outage durations of twenty-four to forty-eight hours. PSEG Long Island had its first applicable storm on June 26, 2024 (storm #8), consisting of two (2) jobs where outage durations exceeded the 24-hour threshold. Locust Ln, Upper Brookville - three (3) Verizon poles, four (4) sections of primary down, two (2) transformers, multiple secondary sections, and services. 40 Cecilia Dr, Syosset trees took eight (8) sections of primary and secondary down. The overall score was 755/855 potential points (88.3%), meeting the target.

T&D-52	Triennial Safety Assessment	Qualitative	100%	100%	Meeting Target	The Safety Assessment was completed, and a draft report was issued. LIPA and PSEG Long Island will meet on September 4, 2024, to discuss the findings and determine steps to address areas of deficiency noted in the report.
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CUSTOMER SERVICES						
Metric #	Metric Name	Metric Type	YTD Actual	YE Target	YTD Rating	Comments
CS-01	Delivery of Strategic Customer Experience & Billing Projects	Qualitative	5 projects	5 projects	Meeting Target	All five (5) projects are being worked on at this time. The Kiosk and Credit Card Improvement projects, carried over from 2023, are on target to be completed in 2024. Bidgely My Account/Mobile App Integration, Move In Move Out Mobile App Enhancement, and CCaaS IVR Enhancements are being worked on and hopefully will be completed this year.
CS-02	J.D. Power Customer Satisfaction Survey (Residential)	Hybrid	695 11 th Rank	1st Quartile or 5th Rank	Behind Target	PSEG Long Island has moved up one place since Q1 to 11 th rank, but they are still far from the 5 th rank they need to meet by the end of the year with only six months to go. The Power Quality & Reliability and Billing & Payment scores increased, but Customer Care, Price, Communications, and Corporate Citizenship decreased.
CS-03	J.D. Power Customer Satisfaction Survey (Business)	Hybrid	720 11 th Rank	6th Rank	Behind Target	The J.D. Power Customer Satisfaction Survey (Business) is only issued twice yearly, with July as the first report. The first wave results showed 720, 11 th rank.
CS-05	Customer Transactional Performance Measurement & Analysis	Qualitative	66%	100%	At Risk	Two (2) of the three (3) initiatives are on track to achieve the goal. The enhancement to append the survey data with operational data will not be implemented in 2024. The Customer Transactional Performance Survey results YTD for digital are 81.5%, and for Non-Digital, YTD is 93.0%.
CS-10	Billing - Cancelled Rebill	Quantitative	0.15%	0.15%	Meeting Target	Year-to-Date, the total number of unique bills was 6,728,941, with 9,868 canceled rebills, which is 0.15%. PSEG Long Island is meeting the target.

CS-11	Contact Center Service Level with Live Agent Calls	Quantitative	36.8%	77.0%	Behind Target	The service level improved in April and May but decreased in June compared to the prior two months. Attrition in June was higher than usual (11 agents). Increased hold times contributed to repeat callers, resulting in increased overall volume. Fifty-five (55) agents are currently in training.
CS-14	Net Dollars Written Off	Quantitative	11,512,684	20,836,630	Meeting Target	2024 June YTD result of \$11,512,684 shows a decrease from 2023 June YTD result of \$22,370,092. The final bill email RPA initiative runs weekly, increasing emails sent, payments received, and dollars collected. Final Bill Work Queue Database enables daily automatic account assignment based on resources available and data-driven findings. This allows the team to work on the most up-to-date accounts and follow up with customers while reviewing other factors, including customers' payment history and accounts with larger balances.
CS-15	Arrears Aging Percent > 90 Days Past Due (Arrears %>90)	Quantitative	52.82%	48.58%	At Risk	PSEG Long Island has several 2024 initiatives. The Difficult to Access Accounts with Arrears process was developed in January 2024 in coordination with Field Collections. The Commercial Account Management Team launched in January 2024, focusing on commercial arrears, and worked with managed account representatives to resolve arrears. The Email RPC Re-branding project was completed in January 2024 and went live on February 28, 2024—the rebranding effort aligned outbound email collection communications with corporate branding and redesign. The Senior Impaired Customer Termination processes between field and back office collections began on April 17, 2024. This effort must follow the Home Energy Fair Practices Act guidelines for termination for non-payment arrears.
CS-17	Low-to Moderate-Income (LMI) Program Participation	Quantitative	38,716	50,000	At Risk	Consumer Advocacy hosted a monthly webinar on June 17, 2024. Approximately 290 customers have attended webinars year-to-date. The Consumer Advocates also conducted over thirty (30) outreach events throughout June. Additional marketing outreach has continued with financial assistance signage on local buses and bus stations. Vendor Agreements with Nassau and the New York City Human Resource Association are still in the discussion/development phase to afford the automation portion of the metric when completed. Neither party has been refused to enter into an automation vendor agreement, as reported by PSEG Long Island.
CS-19	DPS Customer Complaint Rate	Quantitative	1st Rank /3.2	1st Rank	Meeting Target	PSEG Long Island is educating case managers, providing refresher training as needed, and monthly reporting to each line of business to create awareness and insight into the complaints.

CS-21	Outage Information Satisfaction	Quantitative	71.42%	71.12%	Meeting Target	The goal is to improve customer satisfaction by enhancing PSEG Long Island's proficiency in providing information for customers who experience an outage. PSEG Long Island continues to analyze low survey scores and conduct deep dives to support ongoing training and improvement opportunities for T&D outage jobs. A permanent banner will be added to the outage map to educate customers on the restoration process during blue sky days.
CS-25	Interactive Voice Response (IVR) Containment Rate	Quantitative	56.34%	62.08%	At Risk	PSEG Long Island's NICE IVR project with the IT team is in progress, with recommendations being provided on IVR improvements.
CS-28	Move Process Improvement	Qualitative	TBD	100%	Behind Target	LIPA and PSEG Long Island are working on an updated Project Implementation Plan to streamline the residential move process and complete the transaction in one efficient interaction. However, PSEG Long Island is still determining whether they can complete all the required work by the end of the year.
CS-30	Optimize Contact Center Resource Utilization	Qualitative	0%	100%	Behind Target	PSEG Long Island and LIPA have met monthly to discuss the metric and definition of the Utilization Report, which comprises two measurements: adherence and schedule efficiency. PSEG Long Island identified a canned report (Intraday) that was initially assumed to provide schedule efficiency, but upon further review, it was discovered that it did not. The metric deliverables are currently being declined as the dates are past due, and the work was not planned or completed. LIPA is open to approving an exception to extend the deliverable dates to accommodate a new execution schedule.
CS-31	Call Average Handle Time (AHT)	Hybrid	459	376	Behind Target	The PSEG Long Island Call Center is a key customer interface where performance excellence is expected. The Average Handle Time (AHT) increased by 2.3% in June compared to May. Increased handle times were experienced across most call types. Call Center supervisors are listening to two (2) calls per month, focusing on calls with longer silence times. PSEG Long Island is also reviewing internal processes to identify opportunities that could be improved to help decrease AHT.

POWER SUPPLY & CLEAN ENERGY						
Metric #	Metric Name	Metric Type	YTD Actual	YE Target	YTD Rating	Comments
PS&CE-01	Complete Integrated Resource Plan (IRP) Follow-on Activities	Qualitative	100%	100%	Meeting Target	PSEG Long Island has submitted its Draft Steam Deactivation Study for LIPA comments, developed solutions, and produced a final report. LIPA has approved all deliverables.
PS&CE-03	Energy Efficiency Plan Savings	Quantitative	353,626	791,725	Above Target	Both Residential and Commercial programs are on track. Home Comfort continues to drive Residential MMBTU savings to the year-end goal. Overall, MMBTU savings, including Commercial, are at the year-to-date target MMBTUs. As defined by the Draft DAC Guidance document, 36.9% of total incentive spend was in DAC communities, slightly exceeding the 35% spend target.
PS&CE-05	Beneficial Electrification – Building Electrification	Quantitative	115%	100%	Meeting Target	PSEG Long Island must achieve the Beneficial Electrification targets from the Utility 2.0 filing, including any LIPA, and DPS recommended changes to the targets in alignment with the LIPA portion of the two million home clean energy goals for the whole home electrification and home electrification ready targets. During the second quarter, 2,082 Heat Pumps have been installed, which is 115% of the YTD goal. 54% of the total incentive spend was in DAC communities, which exceeds the 35% spend target. LIPA generally outperforms most other utilities in NYS in terms of heat pump installations.
PS&CE-08	Transition to New “Standard” Time of Day Residential Rates on an Opt-Out Basis	Qualitative	50%	100%	At Risk	The new standard Time of Day Rate initiative is a crucial LIPA Board priority whose success is critically important for the Grid of the Future. In June 2024, PSEG Long Island successfully transitioned the first migration group of approximately 30,000 customers to the TOD rate. IT Release 4, to address enhancements identified in the Post-Production Needs Assessment prior to scaling the TOD program, is at risk. The Release 4 implementation is currently behind schedule and requires funding above the approved 2024 budget amount to complete. LIPA and PSEG Long Island are discussing options.
PS&CE-13	Heat Pump Strategy to Address Barriers to Customer Adoption	Qualitative	100%	100%	Meeting Target	This project is on track to achieve the goal. All deliverables have been received on time and approved by LIPA. Key deliverables include developing a detailed plan for 2025 to achieve statewide heat pump electrification targets by 2030, broken down by segments (single-family, multifamily, LMI, and new construction).

PS&CE-14	Transportation Electrification Strategic Initiatives	Qualitative	100%	100%	Meeting Target	This project is on track to achieve the goal. All deliverables have been received on time and approved by LIPA.
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BUSINESS SERVICES						
Metric #	Metric Name	Metric Type	YTD Actual	YE Target	YTD Rating	Comments
BS-05	Full-Time Vacancy Rate	Quantitative	60%	100%	At Risk	The Business Support Services and Information Technology departments are not meeting the vacancy rate. Efforts are underway to staff the Information Technology organization, which has a 26.7% vacancy rate.
BS-07	Implement Affiliate Service Remediation Plans and Transition Plans	Quantitative	10%	100%	Behind Target	This metric ensures that PSEG Long Island implements the remediation plans or, to the extent required, transition plans for affiliate services provided by PSEG Services Corporation efficiently and effectively. Eighteen (18) deliverables are overdue at this time. LIPA and PSEG Long Island discuss this metric regularly.
BS-13	Information Request (IR) Responses	Quantitative	100%	94%	Above Target	PSEG Long Island has received fifty-seven (57) Information Requests (IR) total year-to-date. Fourteen (14) of the fifty-seven (57) IR responses received an approved extension and were submitted within the approved extension dates. Eight (8) were voided by LIPA, and thirty-five (35) IR responses were submitted within ten days.
BS-22	Timely, Accurate, and Supported Storm Event Invoicing	Hybrid	100%	100%	Meeting Target	This project is on track to achieve the goal. Monthly status reports have been received on time and approved by LIPA.
BS-34	Improve Budgeting, Billing, and Collection Efforts for Reimbursable Projects	Hybrid	100%	100%	Meeting Target	PSEG Long Island started this project and submitted deliverables on time. LIPA is reviewing and approving the deliverables.

BS-35	Implement Budget Process Improvements	Qualitative	79%	100%	Meeting Target	This project is on track to achieve the goal. All deliverables have been received on time and are being reviewed by LIPA.
BS-38	Improve the Rate and Tariff Change Implementation Process	Qualitative	85%	100%	Meeting Target	The project is on track to achieve the goal. The project implementation plan has been submitted and was approved by LIPA. LIPA has also provided feedback on the draft SOP document and is awaiting PSEG Long Island's final version.
BS-40	Implement Improvements to Budget Process Using New Budget System	Qualitative	3	3 process improvements	Meeting Target	The project is on track to achieve the goal. The project implementation plan was submitted on time and approved. PSEG Long Island's three proposed value-added budget improvements are 1) Produce monthly deliverable reports from Hyperion, 2) Load O&M Access Database information into Hyperion for reporting, and 3) Load Capital Database information into Hyperion for reporting.
BS-41	PJD (Project Justification Document) and Capital Budget Process Improvements	Qualitative	100%	100%	Meeting Target	This project is on track to achieve the goal. All deliverables have been received on time and approved by LIPA. The deliverables include a PSEG Long Island training guidance document, a PJD Quality checklist, and policies and procedures documents to ensure PJDs are reviewed for quality, accuracy, and completeness before submission to LIPA.

INFORMATION TECHNOLOGY						
Metric #	Metric Name	Metric Type	YTD Actual	YTD Target	YTD Rating	Comments
IT-01	IT Organizational Maturity	Qualitative	TBD	CMMI Level 3	Meeting Target	PSEG Long Island has fully supported and cooperated with the appraisal's planning, conduct, and reporting, including making all requested personnel available and providing all requested artifacts, information, and data in a timely manner.
IT-03	System Resiliency - Business Continuity Plans and Functional Drills	Qualitative	50%	100%	Meeting Target	PSEG Long Island participated in the assessment. June Year-to-Date: All other deliverables have yet to be created.

IT-04	System and Software Lifecycle Management	Qualitative	100%	100%	Meeting Target	All deliverables due in the second quarter of 2024 have been received on time and approved by LIPA.
IT-05	Project Performance - In-flight Projects	Qualitative	75%	100%	At Risk	PSEG Long Island has submitted all required deliverables, and LIPA provided feedback on all the submitted deliverables. However, LIPA is waiting for updated artifacts based on LIPA's feedback. Some of these deliverables are overdue and have not met metric requirements, and the metric is at risk of missing the target.
IT-06	Project Performance – New 2024 Projects	Qualitative	100%	100%	Meeting Target	This metric includes several projects. PSEG Long Island has submitted all required deliverables, and LIPA has approved or is currently reviewing them.
IT-07	System Segregation	Qualitative	30%	100%	Behind Target	PSEG Long Island has completed all necessary deliverables, and LIPA has either approved them or is in the process of reviewing them. However, the initial deadlines have shifted from the second quarter to the fourth quarter. Due to these exceptions and schedule changes, the metric has fallen behind its target. Additionally, recent technical issues have cast doubt on the Q4 delivery date, making a Q1 2025 launch for Bundle 1 appear more probable.
IT-08	Cyber Security Organization - Implementation	Qualitative	100%	100%	Meeting Target	This project is on track to achieve the goal. All deliverables have been received on time and approved by LIPA. LIPA is waiting for the Affiliate drawdown plan, which is pending.
IT-09	IT Planning - Ransomware Readiness and Response	Qualitative	100%	100%	Meeting Target	This project is on track to achieve the goal. All deliverables have been received on time and approved or are under review by LIPA.
IT-10	System Resiliency - Disaster Recovery Plans and Testing	Qualitative	100%	100%	Meeting Target	This project is on track to achieve the goal. All deliverables have been received on time and approved by LIPA.