



2024 Operations Services Agreement Incentive Compensation Claim

March 31, 2025

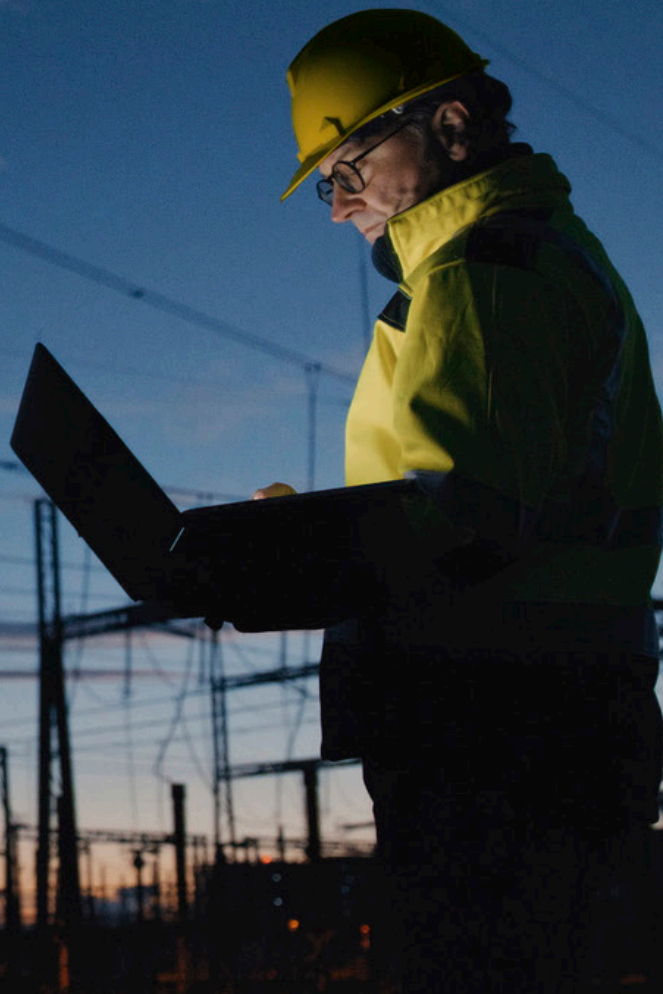


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Executive Summary

The Second Amended & Restated Operations Services Agreement (“2nd 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 2024, the Annual Variable Compensation Component is \$22,975,641.36.

For 2024, PSEG Long Island and LIPA agreed to 62 performance metrics, distributed across five scope functions outlined in the 2nd 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 2nd 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, 2025 its calculation of the incentive compensation due for 2024. 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 Act¹:

- 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, 2025 (45 days after receipt).
- The DPS is required to make recommendations to LIPA by June 14, 2025 (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, 2025 (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 62 Scope-Specific performance metrics. PSEG LI’s incentive compensation claim for 2024 is \$15,744,919.83 out of the potential \$22,975,641.36. Below is the support for the calculation and metric by metric overview of PSEG Long Island’s incentive compensation claim position.

¹ 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.

2024 Incentive Compensation Claim Calculation

Metric Number	Metric Name	Initial Base Incentive (excluding CPI)	Initial Base Incentive (including CPI)	Reallocated Base Incentive (including CPI)	Achieved Incentive Allocation	Claimed Status	Claimed Incentive
BS-05	Full Time Vacancy Rate	\$800,000.00	\$919,025.65	\$919,025.65	75.0%	↑(Partial)	\$689,269.24
BS-07	Implement Affiliate Service Remediation Plans and Transition Plans	\$800,000.00	\$919,025.65	\$919,025.65	69.0%	↑(Partial)	\$634,127.70
BS-13	Information Request (IR) Responses	\$300,000.00	\$344,634.62	\$344,634.62	100.0%	↑	\$344,634.62
BS-22	Timely, Accurate, and Supported Storm Event Invoicing	\$150,000.00	\$172,317.31	\$172,317.31	100.0%	↑	\$172,317.31
BS-34	Improve Budgeting, Billing, and Collection Efforts for Reimbursable Projects	\$150,000.00	\$172,317.31	\$172,317.31	20.0%	↑(Partial)	\$34,463.46
BS-35	Implement Budget Process Improvements	\$350,000.00	\$402,073.72	\$402,073.72	70.0%	↑(Partial)	\$281,451.61
BS-38	Improve the Rate and Tariff Change Implementation Process	\$150,000.00	\$172,317.31	\$172,317.31	100.0%	↑	\$172,317.31
BS-40	Implement Improvements to Budget Process Using New Budget System	\$150,000.00	\$172,317.31	\$172,317.31	100.0%	↑	\$172,317.31
BS-41	PJD and Capital Budget Process Improvements	\$150,000.00	\$172,317.31	\$172,317.31	80.0%	↑(Partial)	\$137,853.85
CS-01	Delivery of Strategic Customer Experience & Billing Projects	\$500,000.00	\$574,391.03	\$574,391.03	75.0%	↑(Partial)	\$430,793.28
CS-02	J.D. Power – Residential	\$250,000.00	\$287,195.52	\$287,195.52	25.0%	↑(Partial)	\$71,798.88
CS-03	J.D. Power – Business	\$250,000.00	\$287,195.52	\$287,195.52	25.0%	↑(Partial)	\$71,798.88
CS-05	Customer Transactional Performance Measurement & Analysis	\$400,000.00	\$459,512.83	\$459,512.83	75.0%	↑(Partial)	\$344,634.62
CS-10	Billing – Cancelled Rebill	\$200,000.00	\$229,756.41	\$229,756.41	100.0%	↑	\$229,756.41
CS-11	Contact Center Service Level with Live Agent Calls	\$300,000.00	\$344,634.62	\$344,634.62	0.0%	↓	\$0.00
CS-14	Net Dollars Written Off	\$300,000.00	\$344,634.62	\$344,634.62	100.0%	↑	\$344,634.62
CS-15	Arrears Aging Percent > 90 Days Past Due (Arrears %>90)	\$300,000.00	\$344,634.62	\$344,634.62	0.0%	↓	\$0.00
CS-17	Low to Moderate Income (LMI) Program Participation	\$200,000.00	\$229,756.41	\$229,756.41	0.0%	↓	\$0.00
CS-19	DPS Customer Complaint Rate	\$50,000.00	\$57,439.10	\$57,439.10	100.0%	↑	\$57,439.10
CS-21	Outage Information Satisfaction	\$200,000.00	\$229,756.41	\$229,756.41	75.0%	↑(Partial)	\$172,317.31
CS-25	Interactive Voice Response (IVR) Containment Rate	\$150,000.00	\$172,317.31	\$172,317.31	0.0%	↓	\$0.00
CS-28	Move Process Improvement	\$350,000.00	\$402,073.72	\$402,073.72	60.0%	↑(Partial)	\$241,244.23

Metric Number	Metric Name	Initial Base Incentive (excluding CPI)	Initial Base Incentive (including CPI)	Reallocated Base Incentive (including CPI)	Achieved Incentive Allocation	Claimed Status	Claimed Incentive
CS-30	Optimize Contact Center Resource Utilization	\$250,000.00	\$287,195.52	\$287,195.52	75.0%	↑(Partial)	\$215,396.64
CS-31	Call Average Handle Time (AHT)	\$300,000.00	\$344,634.62	\$344,634.62	25.0%	↑(Partial)	\$86,158.66
IT-01	IT Organizational Maturity	\$350,000.00	\$402,073.72	\$482,488.47	100.0%	↑	\$482,488.47
IT-03	System Resiliency - Business Continuity Plans and Functional Drills	\$250,000.00	\$287,195.52	\$0.00	Reallocated	Reallocated	\$0.00
IT-04	System and Software Lifecycle Management	\$100,000.00	\$114,878.21	\$137,853.85	100.0%	↑	\$137,853.85
IT-05	Project Performance - In-flight Projects	\$300,000.00	\$344,634.62	\$413,561.54	50.0%	↑(Partial)	\$206,780.77
IT-06	Project Performance – New 2024 Projects	\$400,000.00	\$459,512.83	\$551,415.39	75.0%	↑(Partial)	\$413,561.54
IT-07	System Segregation	\$900,000.00	\$1,033,903.86	\$1,240,684.63	0.0%	↓	\$0.00
IT-08	Cyber Security Organization - Implementation	\$250,000.00	\$287,195.52	\$344,634.62	100.0%	↑	\$344,634.62
IT-09	IT Planning - Ransomware Readiness and Response	\$200,000.00	\$229,756.41	\$275,707.70	100.0%	↑	\$275,707.70
IT-10	System Resiliency - Disaster Recovery Plans and Testing	\$250,000.00	\$287,195.52	\$0.00	Reallocated	Reallocated	\$0.00
PS&CE-01	Complete Integrated Resource Plan (IRP) Follow-on Activities	\$100,000.00	\$114,878.21	\$114,878.21	100.0%	↑	\$114,878.21
PS&CE-03	Energy Efficiency Plan Savings	\$350,000.00	\$402,073.72	\$402,073.72	100.0%	↑	\$402,073.72
PS&CE-05	Beneficial Electrification – Building Electrification	\$350,000.00	\$402,073.72	\$402,073.72	100.0%	↑	\$402,073.72
PS&CE-08	Transition to New "Standard" Time of Day Residential Rates on an Opt-Out Basis	\$400,000.00	\$459,512.83	\$459,512.83	90.0%	↑(Partial)	\$413,561.54
PS&CE-13	Heat Pump Strategy to Address Barriers to Customer Adoption	\$400,000.00	\$459,512.83	\$459,512.83	100.0%	↑	\$459,512.83
PS&CE-14	Transportation Electrification Strategic Initiatives	\$400,000.00	\$459,512.83	\$459,512.83	100.0%	↑	\$459,512.83
T&D-01	Asset Management Program Implementation – Asset Inventory	\$500,000.00	\$574,391.03	\$574,391.03	0.0%	↓	\$0.00
T&D-06	Primary Transmission Control Center (PTCC) Replacement	\$300,000.00	\$344,634.62	\$344,634.62	100.0%	↑	\$344,634.62
T&D-07	System Average Interruption Duration Index (SAIDI) Reliability	\$375,000.00	\$430,793.28	\$430,793.28	0.0%	↓	\$0.00
T&D-08	System Average Interruption Frequency Index (SAIFI) Reliability	\$350,000.00	\$402,073.72	\$402,073.72	0.0%	↓	\$0.00
T&D-09	Momentary Average Interruption Frequency Index (MAIFI) Reliability	\$275,000.00	\$315,915.07	\$315,915.07	100.0%	↑	\$315,915.07
T&D-10	Reduce Sustained Multiple Customer Outages (S-MCOs)	\$275,000.00	\$315,915.07	\$315,915.07	75.0%	↑(Partial)	\$236,936.30
T&D-12	Reduce Momentary Multiple Customer Outages (M-MCOs)	\$275,000.00	\$315,915.07	\$315,915.07	100.0%	↑	\$315,915.07
T&D-13	Safety – Serious Injury Incident Rate (SIIR)	\$450,000.00	\$516,951.93	\$516,951.93	0.0%	↓	\$0.00

Metric Number	Metric Name	Initial Base Incentive (excluding CPI)	Initial Base Incentive (including CPI)	Reallocated Base Incentive (including CPI)	Achieved Incentive Allocation	Claimed Status	Claimed Incentive
T&D-18	Workforce Management Plans	\$400,000.00	\$459,512.83	\$459,512.83	100.0%	↑	\$459,512.83
T&D-24	Cycle Trim and Trim-to-Sky	\$350,000.00	\$402,073.72	\$402,073.72	100.0%	↑	\$402,073.72
T&D-26	Hazard Tree Removal	\$450,000.00	\$516,951.93	\$516,951.93	100.0%	↑	\$516,951.93
T&D-30	ACRV Commissioning Program	\$450,000.00	\$516,951.93	\$516,951.93	100.0%	↑	\$516,951.93
T&D-31	LT5H (ASUV) Program	\$350,000.00	\$402,073.72	\$402,073.72	100.0%	↑	\$402,073.72
T&D-36	Construction - Cost Estimating Accuracy	\$300,000.00	\$344,634.62	\$344,634.62	100.0%	↑	\$344,634.62
T&D-37	Completion of Program Planned Units and	\$600,000.00	\$689,269.24	\$689,269.24	100.0%	↑	\$689,269.24
T&D-40	Reduce Double Wood Poles	\$200,000.00	\$229,756.41	\$229,756.41	50.0%	↑(Partial)	\$114,878.21
T&D-41	Program Effectiveness - Vegetation Management	\$300,000.00	\$344,634.62	\$344,634.62	0.0%	↓	\$0.00
T&D-44	Regulatory Compliance	\$250,000.00	\$287,195.52	\$287,195.52	100.0%	↑	\$287,195.52
T&D-46	Root Cause Analysis (RCA) Execution and Compliance	\$400,000.00	\$459,512.83	\$459,512.83	100.0%	↑	\$459,512.83
T&D-49	Work Management Effectiveness	\$500,000.00	\$574,391.03	\$574,391.03	100.0%	↑	\$574,391.03
T&D-50	Storm Outage Response Performance	\$300,000.00	\$344,634.62	\$344,634.62	100.0%	↑	\$344,634.62
T&D-52	Triennial Safety Assessment	\$350,000.00	\$402,073.72	\$402,073.72	100.0%	↑	\$402,073.72

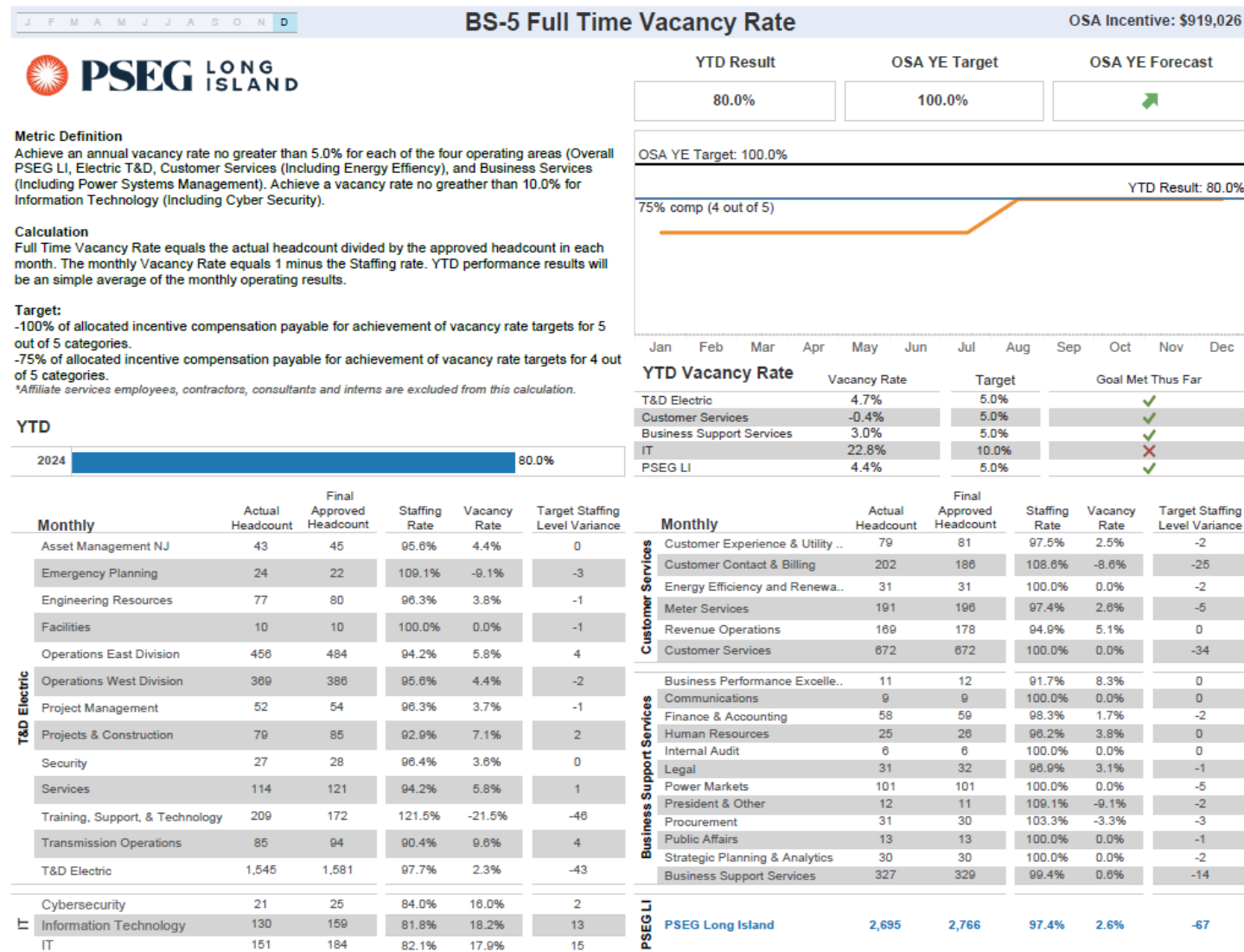
Summary

Scope Function	Potential Incentive	Claimed Incentive Compensation	% of Incentive Compensation Claimed
Business Services	\$3,446,346.19	\$2,638,752.41	76.6%
Customer Services	\$4,595,128.26	\$2,265,972.63	49.3%
Information Technology	\$3,446,346.21	\$1,861,026.95	54.0%
Power Supply & Clean Energy	\$2,297,564.14	\$2,251,612.85	98.0%
Electric T&D	\$9,190,256.53	\$6,727,554.99	73.2%
Grand Total	\$22,975,641.33	\$15,744,919.83	68.5%

Business Services

BS-05 – Full Time Vacancy Rate

Metric Type	Quantitative	Metric Performance	↑(Partial – 75% of compensation)
Incentive Compensation Claim	\$689,269.24	Comments	4 out of 5 areas achieved



Summary

- PSEG Long Island achieved 4 out of the 5 vacancy rate targets for the following groups resulting in 75% of the compensation at risk:

Area/Function	Target	YE Performance	PSEG LI Performance
Electric T&D	5.0%	4.7%	Achieved
Customer Services	5.0%	-0.4%	Achieved
Business Support Services	5.0%	3.0%	Achieved
Information Technology	10.0%	22.8%	Did Not Achieve
PSEG Long Island	5.0%	4.4%	Achieved

- PSEG Long Island met key all other deliverable dates for providing additional information identified in the LIPA KPI Smartsheet on a quarterly basis.

BS-07 - Implement Affiliate Service Remediation Plans and Transition Plans Information

Metric Type	Qualitative	Metric Performance	↑ (Partial – 69% of compensation)
Incentive Compensation Claim	\$634,127.70	Comments	N/A

BS-07	Implement Affiliate Service Remediation Plans and Transition Plans Information			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-07.01	Procurement - Obtain LIPA approval of the Remediation / Transition Plans and Budget estimates in accordance with the OSA and 2023 Metric BS-07. Deliverables from the approved Remediation / Transition Plans will be added to Smartsheet and incorporated into 2024 Metric BS-07 deliverables.	01/31/24	Achieved	Approved
BS-07.02	Procurement - Submit monthly Remediation / Transition Plan Implementation Status Report.	02/29/24	Achieved	Approved
BS-07.03	Procurement - Submit monthly Remediation / Transition Plan Implementation Status Report.	03/31/24	Achieved	Approved
BS-07.04	Procurement - Submit monthly Remediation / Transition Plan Implementation Status Report.	04/30/24	Achieved	Approved
BS-07.05	Procurement - Submit monthly Remediation / Transition Plan Implementation Status Report.	05/30/24	Achieved	Approved
BS-07.06	Procurement - Submit monthly Remediation / Transition Plan Implementation Status Report.	06/30/24	Achieved	Approved
BS-07.07	Procurement - Submit monthly Remediation / Transition Plan Implementation Status Report.	07/31/24	Achieved	Approved
BS-07.10	Procurement - Submit monthly Remediation / Transition Plan Implementation Status Report.	10/31/24	Achieved	Approved
BS-07.11	Procurement - Submit monthly Remediation / Transition Plan Implementation Status Report.	11/30/24	Achieved	Approved
BS-07.12	Procurement - Submit monthly Remediation / Transition Plan Implementation Status Report.	12/31/24	Achieved	Approved
BS-07.13	IT - Obtain LIPA approval of the Remediation / Transition Plans and Budget estimates in accordance with the OSA and 2023 Metric BS-07. Deliverables from the approved Remediation / Transition Plans will be added to Smartsheet and incorporated into 2024 Metric BS-07 deliverables.	01/31/24	Did Not Achieve	Declined
BS-07.14	HR - Obtain LIPA approval of the Remediation / Transition Plans and Budget estimates in accordance with the OSA and 2023 Metric BS-07. Deliverables from the approved Remediation / Transition Plans will be added to Smartsheet and incorporated into 2024 Metric BS-07 deliverables.	01/31/24	Did Not Achieve	Declined
BS-07.15	All Other - Obtain LIPA approval of the Remediation / Transition Plans and Budget estimates in accordance with the OSA and 2023 Metric BS-07. Deliverables from the approved Remediation / Transition Plans will be added to Smartsheet and incorporated into 2024 Metric BS-07 deliverables.	01/31/24	Did Not Achieve	Declined
BS-07.16	IT - Submit monthly Remediation / Transition Plan Implementation Status Report.	02/29/24	Did Not Achieve	Declined
BS-07.17	HR - Submit monthly Remediation / Transition Plan Implementation Status Report.	02/29/24	Did Not Achieve	Declined
BS-07.18	All Other - Submit monthly Remediation / Transition Plan Implementation Status Report.	02/29/24	Did Not Achieve	Declined
BS-07.19	IT - Submit monthly Remediation / Transition Plan Implementation Status Report.	03/31/24	Did Not Achieve	Declined
BS-07.20	HR - Submit monthly Remediation / Transition Plan Implementation Status Report.	03/31/24	Did Not Achieve	Declined
BS-07.21	All Other - Submit monthly Remediation / Transition Plan Implementation Status Report.	03/31/24	Did Not Achieve	Declined
BS-07.22	IT - Submit monthly Remediation / Transition Plan Implementation Status Report.	04/30/24	Did Not Achieve	Declined
BS-07.23	HR - Submit monthly Remediation / Transition Plan Implementation Status Report.	04/30/24	Did Not Achieve	Declined
BS-07.24	All Other - Submit monthly Remediation / Transition Plan Implementation Status Report.	04/30/24	Did Not Achieve	Declined
BS-07.25	IT - Submit monthly Remediation / Transition Plan Implementation Status Report.	05/30/24	Did Not Achieve	Declined
BS-07.26	HR - Submit monthly Remediation / Transition Plan Implementation Status Report.	05/30/24	Did Not Achieve	Declined
BS-07.27	All Other - Submit monthly Remediation / Transition Plan Implementation Status Report.	05/30/24	Did Not Achieve	Declined

BS-07 Implement Affiliate Service Remediation Plans and Transition Plans Information				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-07.28	IT - Submit monthly Remediation / Transition Plan Implementation Status Report.	06/30/24	Did Not Achieve	Declined
BS-07.29	HR - Submit monthly Remediation / Transition Plan Implementation Status Report.	06/30/24	Did Not Achieve	Declined
BS-07.30	All Other - Submit monthly Remediation / Transition Plan Implementation Status Report.	06/30/24	Did Not Achieve	Declined
BS-07.31	IT - Submit monthly Remediation / Transition Plan Implementation Status Report.	07/31/24	Did Not Achieve	Declined
BS-07.31a	HR - Submit monthly Remediation / Transition Plan Implementation Status Report.	07/31/24	Did Not Achieve	Declined
BS-07.32	All Other - Submit monthly Remediation / Transition Plan Implementation Status Report.	07/31/24	Did Not Achieve	Declined
BS-07.33	Procurement - Submit monthly Remediation / Transition Plan Implementation Status Report.	08/31/24	Achieved	Approved
BS-07.34	IT - Submit monthly Remediation / Transition Plan Implementation Status Report.	08/31/24	Did Not Achieve	Declined
BS-07.35	HR - Submit monthly Remediation / Transition Plan Implementation Status Report.	08/31/24	Did Not Achieve	Declined
BS-07.36	All Other - Submit monthly Remediation / Transition Plan Implementation Status Report.	08/31/24	Achieved	Approved
BS-07.37	Procurement - Submit monthly Remediation / Transition Plan Implementation Status Report.	09/30/24	Achieved	Approved
BS-07.38	IT - Submit monthly Remediation / Transition Plan Implementation Status Report.	09/30/24	Did Not Achieve	Declined
BS-07.39	HR - Submit monthly Remediation / Transition Plan Implementation Status Report.	09/30/24	Achieved	Approved
BS-07.40	All Other - Submit monthly Remediation / Transition Plan Implementation Status Report.	09/30/24	Did Not Achieve	Declined
BS-07.41	IT - Submit monthly Remediation / Transition Plan Implementation Status Report.	10/31/24	Did Not Achieve	Declined
BS-07.42	HR - Submit monthly Remediation / Transition Plan Implementation Status Report.	10/31/24	Achieved	Approved
BS-07.43	All Other - Submit monthly Remediation / Transition Plan Implementation Status Report.	10/31/24	Achieved	Approved
BS-07.44	IT - Submit monthly Remediation / Transition Plan Implementation Status Report.	11/30/24	Achieved	Approved
BS-07.45	HR - Submit monthly Remediation / Transition Plan Implementation Status Report.	11/30/24	Achieved	Approved
BS-07.46	All Other - Submit monthly Remediation / Transition Plan Implementation Status Report.	11/30/24	Achieved	Approved
BS-07.47	IT - Submit monthly Remediation / Transition Plan Implementation Status Report.	12/31/24	Achieved	Approved
BS-07.48	HR - Submit monthly Remediation / Transition Plan Implementation Status Report.	12/31/24	Achieved	Approved
BS-07.49	All Other - Submit monthly Remediation / Transition Plan Implementation Status Report.	12/31/24	Achieved	Approved

Summary

- PSEG Long Island partially achieved the scope of BS-07 as a result of partial transition and/or affiliate charge reduction across all areas.
- **Based upon overall performance and final discussions between PSEG LI and LIPA, the parties have agreed to a final payment allocation percentage of 69% of the incentive compensation at risk.**

BS-13 - Information Request (IR) Responses

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$344,634.62	Comments	N/A

BS-13 Information Request (IR) Responses OSA Incentive: \$344,635



YTD Result	OSA YE Target	OSA YE Forecast
100.0%	94.0%	↑

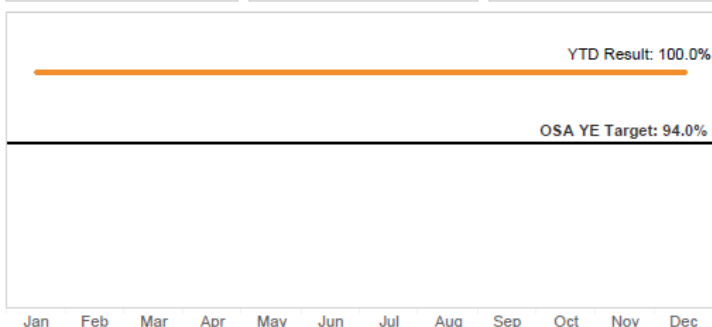
Metric Definition

Measuring the timely submission of complete information requests (IRs) responses in 10/11 days, or the period as extended.

Calculation

(On time submissions / The total number of submissions) For IRs issued by 2:00PM, a response is expected within 10 days, and for IRs issued after 2:00PM, a response is expected within 11 days (excluding weekends and holidays).

YTD



YTD Timeliness By IR Responses

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
On time	3	14	17	15	1	0	1	3	2	1	0	1
Late	0	0	0	0	0	0	0	0	0	0	0	0
Total Completed	3	14	17	15	1	0	1	3	2	1	0	1
In Progress	0	0	0	0	0	0	0	0	0	0	0	0
% On Time	100.0%	100.0%	100.0%	100.0%	100.0%	N/A	100.0%	100.0%	100.0%	100.0%	N/A	100.0%

Information Request Responses

✓ On Time Completion

Date Received	Request Number	Responsible Organization	Initial LIPA Due Date	Extension	Due Date for Calculation	Date Submitted	
12/02/24	10065	ASSET MANAGEMENT	12/12/24	N	12/12/24	12/11/24	✓

Summary

- PSEG Long Island achieved information request responses.
- There were 58 information requests and PSEG Long Island completed the responses timely in alignment with the metric definitions and provisions.

BS-22 - Timely, Accurate, and Supported Storm Event Invoicing

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$172,317.31	Comments	N/A

BS-22	Timely, Accurate, and Supported Storm Event Invoicing			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-22.01	Provide a Monthly Status Report demonstrating metric performance for the prior month.	2/14/2024	Achieved	Approved
BS-22.02	Provide a Monthly Status Report demonstrating metric performance for the prior month.	3/13/2024	Achieved	Approved
BS-22.03	Provide a Monthly Status Report demonstrating metric performance for the prior month.	4/17/2024	Achieved	Approved
BS-22.04	Provide a Monthly Status Report demonstrating metric performance for the prior month.	5/15/2024	Achieved	Approved
BS-22.05	Provide a Monthly Status Report demonstrating metric performance for the prior month.	6/12/2024	Achieved	Approved
BS-22.06	Provide a Monthly Status Report demonstrating metric performance for the prior month.	7/17/2024	Achieved	Approved
BS-22.07	Provide a Monthly Status Report demonstrating metric performance for the prior month.	8/14/2024	Achieved	Approved
BS-22.08	Provide a Monthly Status Report demonstrating metric performance for the prior month.	9/18/2024	Achieved	Approved
BS-22.09	Provide a Monthly Status Report demonstrating metric performance for the prior month.	10/16/2024	Achieved	Approved
BS-22.10	Provide a Monthly Status Report demonstrating metric performance for the prior month.	11/20/2024	Achieved	Approved
BS-22.11	Provide a Monthly Status Report demonstrating metric performance for the prior month.	12/18/2024	Achieved	Approved
BS-22.12	Provide a Monthly Status Report demonstrating metric performance for the prior month.	1/22/2025	Achieved	Approved

Summary

- The objective of this goal was to ensure PSEG Long Island provided timely, accurate, and appropriately-supported storm event costs to LIPA.
- During 2024, PSEG Long Island had 20 storms that met the criteria under the metric.
- PSEG Long Island must meet both the Accuracy and Timeliness standard on $\geq 90\%$ of storm events

BS-34 - Improve Budgeting, Billing, and Collection Efforts for Reimbursable Projects

Metric Type	Qualitative	Metric Performance	↑ (Partial – 20% of compensation)
Incentive Compensation Claim	\$34,463.46	Comments	N/A

BS-34	Improve Budgeting, Billing, and Collection Efforts for Reimbursable Projects			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
BS-34.01	Submission of a standard costing methodology or revised billing format.	6/30/2024	Submitted and Not Implemented	Declined
BS-34.02	Submit process document for improved process including collections analysis process.	6/30/2024	Achieved	Approved
BS-34.03	Provide monthly reporting package to LIPA within 30 days of each month's accounting close, that includes budget vs. actual analysis reports and receivable aging analysis related to third-party reimbursable projects.	7/31/2024	Submitted	Declined
BS-34.04	Provide monthly reporting package to LIPA within 30 days of each month's accounting close, that includes budget vs. actual analysis reports and receivable aging analysis related to third-party reimbursable projects.	8/30/2024	Submitted	Declined
BS-34.05	Provide monthly reporting package to LIPA within 30 days of each month's accounting close, that includes budget vs. actual analysis reports and receivable aging analysis related to third-party reimbursable projects.	9/30/2024	Submitted	Declined
BS-34.06	Provide monthly reporting package to LIPA within 30 days of each month's accounting close, that includes budget vs. actual analysis reports and receivable aging analysis related to third-party reimbursable projects.	10/31/2024	Submitted	Declined
BS-34.07	Provide monthly reporting package to LIPA within 30 days of each month's accounting close, that includes budget vs. actual analysis reports and receivable aging analysis related to third-party reimbursable projects.	11/30/2024	Submitted	Declined
BS-34.08	Provide monthly reporting package to LIPA within 30 days of each month's accounting close, that includes budget vs. actual analysis reports and receivable aging analysis related to third-party reimbursable projects.	12/31/2024	Submitted	Declined

Summary

- PSEG Long Island submitted a new standard costing methodology for reimbursable projects to streamline the overall billing. The standard costing methodology was designed but was unable to be implemented in operating year 2024.
- PSEG Long Island submitted process documentation for improved process including collections analysis process.
- PSEG Long Island submitted monthly reporting packages to LIPA within 30 days of each month's accounting close, that included receivable aging analysis related to third-party reimbursable projects.
- **Based upon overall performance and final discussions between PSEG LI and LIPA, the parties have agreed to a final payment allocation percentage of 20% of the incentive compensation at risk.**

BS-35 - Implement Budget Process Improvements

Metric Type	Qualitative	Metric Performance	↑ (Partial – 70% of compensation)
Incentive Compensation Claim	\$281,451.61	Comments	N/A

BS-35	Implement Budget Process Improvements			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
BS-35.01	Submit the 2024 Work Management and Call Center Models provided in 2023 to develop the Approved 2024 O&M And Capital Budget reconciled to the direct inputs to each category of the Approved Budget, as presented.	1/15/2024	Achieved	Approved
BS-35.02	Align on format for enhanced variance analysis in 1B. And provide monthly variance analysis using new format.	4/30/2024	Achieved	Approved
BS-35.03	Starting from March 2024 accounting month-end close, hold monthly variance analysis review meeting with PSEG Long Island Finance to provide LIPA documented explanations on significant drivers of unit and cost variances compared to historical trend (Meetings held monthly through year end.)	5/17/2024	Submitted	Declined
BS-35.04	Starting from March 2024 accounting month-end close, hold monthly variance analysis review meeting with PSEG Long Island Finance to provide LIPA documented explanations on significant drivers of unit and cost variances compared to historical trend (Meetings held monthly through year end.)	5/30/2024	Submitted	Declined
BS-35.05	Starting from March 2024 accounting month-end close, hold monthly variance analysis review meeting with PSEG Long Island Finance to provide LIPA documented explanations on significant drivers of unit and cost variances compared to historical trend (Meetings held monthly through year end.)	6/29/2024	Submitted	Declined
BS-35.06	Starting from March 2024 accounting month-end close, hold monthly variance analysis review meeting with PSEG Long Island Finance to provide LIPA documented explanations on significant drivers of unit and cost variances compared to historical trend (Meetings held monthly through year end.)	7/30/2024	Submitted	Declined
BS-35.07	Provide detailed support for the 2025 Budget submission related to the areas identified in Step 2.	8/15/2024	Submitted	Declined
BS-35.08	Starting from March 2024 accounting month-end close, hold monthly variance analysis review meeting with PSEG Long Island Finance to provide LIPA documented explanations on significant drivers of unit and cost variances compared to historical trend (Meetings held monthly through year end.)	8/31/2024	Submitted	Declined
BS-35.09	Starting from March 2024 accounting month-end close, hold monthly variance analysis review meeting with PSEG Long Island Finance to provide LIPA documented explanations on significant drivers of unit and cost variances compared to historical trend (Meetings held monthly through year end.)	9/30/2024	Submitted	Declined
BS-35.10	Starting from March 2024 accounting month-end close, hold monthly variance analysis review meeting with PSEG Long Island Finance to provide LIPA documented explanations on significant drivers of unit and cost variances compared to historical trend (Meetings held monthly through year end.)	10/30/2024	Submitted	Declined
BS-35.11	Starting from March 2024 accounting month-end close, hold monthly variance analysis review meeting with PSEG Long Island Finance to provide LIPA documented explanations on significant drivers of unit and cost variances compared to historical trend (Meetings held monthly through year end.)	11/29/2024	Submitted	Declined
BS-35.12	Starting from March 2024 accounting month-end close, hold monthly variance analysis review meeting with PSEG Long Island Finance to provide LIPA documented explanations on significant drivers of unit and cost variances compared to historical trend (Meetings held monthly through year end.)	12/30/2024	Submitted	Declined
BS-35.13	Present year-end results to validate actual costs are within 10% budget variance threshold as defined in Step 3.	1/30/2025	Achieved	Approved

Summary

- PSEG Long Island submitted 2024 Work Management and Call Center Models provided in 2023 to develop the Approved 2024 O&M And Capital Budget reconciled to the direct inputs to each category of the Approved Budget, as presented.
- PSEG Long Island and LIPA aligned on format for enhanced variance analysis and PSEG Long Island provided monthly variance analysis using new format.
- Beginning March 2024, PSEG Long Island provided monthly variance analysis and held meetings with LIPA documenting explanations on significant drivers of unit and cost variances compared to historical trend.
- PSEG Long Island Provide detailed support for the 2025 Budget submission related to the areas identified.
- PSEG Long Island presented year-end results and validated that the actual costs for areas being measured were within 10% budget variance threshold.
- **Based upon overall performance and final discussions between PSEG LI and LIPA, the parties have agreed to a final payment allocation percentage of 70% of the incentive compensation at risk.**

BS-38 - Improve the Rate and Tariff Change Implementation Process

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$172,317.31	Comments	N/A

BS-38	Improve the Rate and Tariff Change Implementation Process			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
BS-38.01	Submission of PIP defined in Targets and Calculations.	4/30/2024	Achieved	Approved
BS-38.02	Submit Quarterly Progress Report	5/12/2024	Achieved	Approved
BS-38.03	Obtain LIPA approval of PIP. Deliverables from the approved PIP will be added to Smartsheet as metric deliverables.	6/4/2024	Achieved	Approved
BS-38.04	Submit Quarterly Progress Report	7/12/2024	Achieved	Approved
BS-38.04a	Provide final SOP to LIPA	7/29/2024	Achieved	Approved
BS-38.04b	Obtain LIPA approval of SOP	8/12/2024	Achieved	Approved
BS-38.04c	Provide examples of protections implemented	9/30/2024	Achieved	Approved
BS-38.05	Submit Quarterly Progress Report	10/11/2024	Achieved	Approved
BS-38.05a	Obtain LIPA approval of protections implemented	10/15/2024	Achieved	Approved
BS-38.06	Submit Quarterly Progress Report	1/10/2025	Achieved	Approved

Summary

- PSEG Long Island submitted a PIP for Rate and Tariff Change Implementation to address the findings and recommendations of LIPA's third-party consultant report.
- PSEG Long Island obtained LIPA's approval of the PIP and the deliverables from the PIP were added and tracked via the metric tracking system.
- PSEG Long Island provided and received LIPA's approval on final Standard Operating Procedures (SOP)
- PSEG Long Island provided and received LIPA's approval for examples of protections implemented in the rate and tariff change process.
- All quarterly progress reports were provided.

BS-40 - Implement Improvements to Budget Process Using New Budget System

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$172,317.31	Comments	N/A

BS-40	Implement Improvements to Budget Process Using New Budget System			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
BS-40.01	Submit to LIPA for approval a minimum of three proposed value-added budget process improvements utilizing the new EPBCS Budget system.	4/30/2024	Achieved	Approved
BS-40.02	Submit a PIP to implement the three or more budget process improvements.	5/31/2024	Achieved	Approved
BS-40.03	Obtain LIPA approval of the PIP for the budget process improvements, reflecting LIPA comments. The PIP deliverables will be added as metric deliverables in Smartsheet.	7/31/2024	Achieved	Approved

Summary

- PSEG Long Island submitted to LIPA for approval three proposed value-added budget process improvements utilizing the new EPBCS Budget system.
- PSEG Long Island submitted a PIP for implementation of the identified process improvements and obtained LIPA's approval.

BS-41 - PJD and Capital Budget Process Improvements

Metric Type	Qualitative	Metric Performance	↑ (Partial – 80% of compensation)
Incentive Compensation Claim	\$137,853.85	Comments	N/A

BS-41	PJD and Capital Budget Process Improvements			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
BS-41.01	Develop internal policies and procedures to ensure PJDs are reviewed for quality, accuracy, and completeness before submitting to LIPA.	3/15/2024	Achieved	Approved
BS-41.02	Submit the training guidance document to LIPA for review and approval.	4/30/2024	Achieved	Approved
BS-41.03	Submit the training guidance document to LIPA for review and approval.	5/31/2024	Achieved	Approved
BS-41.04	Provide the standard format for the PJD Quality Checklist for approval by LIPA.	5/31/2024	Submitted	Declined
BS-41.05	Provide R&C monitoring and LIPA Capital expenditure approvals vs. URB approvals information either in a new report or an existing report (and report continuously monthly after July 31, 2024).	7/31/2024	Achieved	Approved
BS-41.06	Provide assessment of process and proposed improvements for implementation.	9/30/2024	Submitted	Declined

Summary

- PSEG Long Island developed internal policies and procedures to ensure PJDs are reviewed for quality, accuracy, and completeness before submitting to LIPA.
- PSEG Long Island developed a PJD development instruction manual with examples and detailed training guidance to be used to train employees on the quality development of a PJD which was reviewed and approved by LIPA.
- PSEG Long Island provided training and educational sessions to employees who are involved in the development of PJDs.
- PSEG Long Island provided the standard format for the PJD Quality Checklist
- PSEG Long Island provided Risk & Contingency monitoring and LIPA Capital expenditure approvals vs. URB approvals information either in a new report or an existing report
- PSEG Long Island provided an assessment of process and proposed improvements for implementation.
- **Based upon overall performance and final discussions between PSEG LI and LIPA, the parties have agreed to a final payment allocation percentage of 80% of the incentive compensation at risk.**

Customer Services

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

Metric Type	Qualitative	Metric Performance	↑(Partial – 75% of compensation)
Incentive Compensation Claim	\$430,793.28	Comments	4 of 5 projects delivered

Project #1: CCaaS IVR Enhancements

Project Status: **Achieved**

CS-01.01	CCaaS IVR Enhancements			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-01.01.01	<u>CCaaS IVR Enhancements</u> - Provide final Project Implementation Plan, which shall be high quality and sufficiently complete. Update Smartsheet to include the LIPA-approved PIP metric deliverables and due dates.	4/15/2024	Achieved	Approved
CS-01.01.02	<u>CCaaS IVR Enhancements</u> - Provide business and system requirements informed by VOC feedback and industry best practices	8/30/2024	Achieved	Approved
CS-01.01.03	<u>CCaaS IVR Enhancements</u> - Provide final Project Implementation Plan for approval, incorporating all LIPA feedback. Update Smartsheet to include the LIPA-approved PIP metric deliverables and due dates.	3/15/2024	Exempted	Exempted
CS-01.01.04	<u>CCaaS IVR Enhancements</u> - Provide test management plan	9/27/2024	Achieved	Approved
CS-01.01.05	<u>CCaaS IVR Enhancements</u> - Provide functional and technical design document	9/20/2024	Achieved	Approved
CS-01.01.06	<u>CCaaS IVR Enhancements</u> - Provide Requirements Traceability Matrix	9/27/2024	Achieved	Approved
CS-01.01.07	<u>CCaaS IVR Enhancements</u> - Provide security review	10/11/2024	Achieved	Approved
CS-01.01.08	<u>CCaaS IVR Enhancements</u> - Provide test results with evidence	11/8/2024	Achieved	Approved
CS-01.01.09	<u>CCaaS IVR Enhancements</u> - Provide customer communication & marketing plan	As approved in CS-01.01.17	Exempted	Exempted
CS-01.01.10	<u>CCaaS IVR Enhancements</u> - Provide updated business processes/procedures	11/1/2024	Achieved	Approved
CS-01.01.11	<u>CCaaS IVR Enhancements</u> - Provide customer satisfaction hypothesis	9/6/2024	Achieved	Approved
CS-01.01.12	<u>CCaaS IVR Enhancements</u> - Inform LIPA of go-live decision and submit completed go-live checklist that supports decision	11/15/2024	Achieved	Approved
CS-01.01.13	<u>CCaaS IVR Enhancements</u> - Go-live	11/22/2024	Achieved	Approved
CS-01.01.14	<u>CCaaS IVR Enhancements</u> - Collect customer satisfaction feedback beyond go-live. Assess results of a representative sample against customer satisfaction hypothesis. Provide results and if hypothesis is not achieved, provide analysis and plan for resolving.	2/28/2025	Achieved	Approved
CS-01.01.15	<u>CCaaS IVR Enhancements</u> - Provide NICE enhancements recommendations draft report to LIPA for review	5/29/2024	Achieved	Approved
CS-01.01.16	<u>CCaaS IVR Enhancements</u> - Provide prioritized list of enhancements approved by business, including IVR enhancements opportunities provided by NICE.	8/2/2024	Achieved	Approved
CS-01.01.17	<u>CCaaS IVR Enhancements</u> - Provide LIPA approved finalized list of enhancements and due dates for completion of deliverables and go live in 2024 and customer satisfaction feedback in 2025.	8/9/2024	Achieved	Approved
CS-01.01.18	<u>CCaaS IVR Enhancements</u> - Provide NICE enhancements recommendations final report to LIPA for review	7/26/2024	Achieved	Approved

Project #2: Mobile App MIMO Enhancement

Project Status: **Achieved**

CS-01.02	Mobile App MIMO Enhancement			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-01.02.01	<u>Mobile App MIMO Enhancement</u> - Provide draft Project Implementation Plan, which shall be high quality and sufficiently complete	6/15/2024	Exempted	Exempted
CS-01.02.02	<u>Mobile App MIMO Enhancement</u> - Provide business and system requirements informed by VOC feedback and industry best practices	6/15/2024	Achieved	Approved
CS-01.02.03	<u>Mobile App MIMO Enhancement</u> - Provide final project schedule for approval. Update Smartsheet to include the deliverables and due dates as approved by LIPA in the schedule.	7/15/2024	Achieved	Approved
CS-01.02.04	<u>Mobile App MIMO Enhancement</u> - Provide test management plan	9/9/2024	Achieved	Approved
CS-01.02.05	<u>Mobile App MIMO Enhancement</u> - Provide functional and technical design document	8/23/2024	Achieved	Approved
CS-01.02.06	<u>Mobile App MIMO Enhancement</u> - Provide Requirements Traceability Matrix	8/30/2024	Achieved	Approved
CS-01.02.07	<u>Mobile App MIMO Enhancement</u> - Provide security review	9/2/2024	Achieved	Approved
CS-01.02.08	<u>Mobile App MIMO Enhancement</u> - Provide test results with evidence	10/4/2024	Achieved	Approved
CS-01.02.09	<u>Mobile App MIMO Enhancement</u> - Provide customer communication & marketing plan	8/30/2024	Achieved	Approved
CS-01.02.10	<u>Mobile App MIMO Enhancement</u> - Provide updated business processes/procedures	9/6/2024	Achieved	Approved
CS-01.02.11	<u>Mobile App MIMO Enhancement</u> - Provide customer satisfaction hypothesis	8/30/2024	Achieved	Approved
CS-01.02.12	<u>Mobile App MIMO Enhancement</u> - Inform LIPA of go-live decision and submit completed go-live checklist that supports decision	10/9/2024	Achieved	Approved
CS-01.02.13	<u>Mobile App MIMO Enhancement</u> - Go-live	10/15/2024	Achieved	Approved
CS-01.02.14	<u>Mobile App MIMO Enhancement</u> - Collect customer satisfaction feedback beyond go-live. Assess results of a representative sample against customer satisfaction hypothesis. Provide results and if hypothesis is not achieved, provide analysis and plan for resolving.	1/31/2025	Achieved	Approved

Project #3: Bidgely MyAccount / Mobile App Integration

Project Status: **Achieved**

CS-01.03	Bidgely MyAccount / Mobile App Integration			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-01.03.01	<u>Bidgely MyAcct/Mobile App Integration</u> - Provide draft Project Implementation Plan, which shall be high quality and sufficiently complete	4/15/2024	Exempted	Exempted
CS-01.03.02	<u>Bidgely MyAcct/Mobile App Integration</u> - Provide business and system requirements	8/2/2024	Achieved	Approved
CS-01.03.03	<u>Bidgely MyAcct/Mobile App Integration</u> - Provide final project schedule for approval. Update Smartsheet to include the deliverables and due dates as approved by LIPA in the schedule.	5/15/2024	Achieved	Approved
CS-01.03.04	<u>Bidgely MyAcct/Mobile App Integration</u> - Provide test management plan	8/23/2024	Achieved	Approved
CS-01.03.05	<u>Bidgely MyAcct/Mobile App Integration</u> - Provide functional and technical design document	8/30/2024	Achieved	Approved
CS-01.03.06	<u>Bidgely MyAcct/Mobile App Integration</u> - Provide Requirements Traceability Matrix	9/13/2024	Achieved	Approved
CS-01.03.07	<u>Bidgely MyAcct/Mobile App Integration</u> - Provide security review	9/20/2024	Achieved	Approved
CS-01.03.08	<u>Bidgely MyAcct/Mobile App Integration</u> - Provide test results with evidence	9/27/2024	Achieved	Approved
CS-01.03.09	<u>Bidgely MyAcct/Mobile App Integration</u> - Provide customer communication & marketing plan	8/30/2024	Achieved	Approved
CS-01.03.10	<u>Bidgely MyAcct/Mobile App Integration</u> - Provide updated business processes/procedures	9/6/2024	Achieved	Approved

CS-01.03 Bidgely MyAccount / Mobile App Integration				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-01.03.11	<u>Bidgely MyAcct/Mobile App Integration</u> - Provide customer satisfaction hypothesis	9/6/2024	Exempted	Exempted
CS-01.03.12	<u>Bidgely MyAcct/Mobile App Integration</u> - Inform LIPA of go-live decision and submit completed go-live checklist that supports decision	10/4/2024	Achieved	Approved
CS-01.03.13	<u>Bidgely MyAcct/Mobile App Integration</u> - Go-live	10/15/2024	Achieved	Approved
CS-01.03.14	<u>Bidgely MyAcct/Mobile App Integration</u> - Collect customer satisfaction feedback beyond go-live. Assess results of a representative sample against customer satisfaction hypothesis. Provide results and if hypothesis is not achieved, provide analysis and plan for resolving.	1/31/2025	Exempted	Exempted

Project #4: Credit Card Improvement

Project Status: **Did Not Achieve**

CS-01.04 Credit Card Improvement				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-01.04.01	<u>Credit Card Improvement</u> - Update Smartsheet with 2023 deliverables from LIPA-approved PIPs for Credit Card Improvement project that were not delivered in 2023	4/8/2024	Achieved	Approved
CS-01.04.02	<u>Credit Card Improvement</u> - Credit Card Post implementation CSAT measurement and assessment	5/1/2024	Achieved	Approved
CS-01.04.03	<u>Credit Card Improvement</u> - Finalized Credit Card Business Requirements	4/17/2024	Achieved	Approved
CS-01.04.04	<u>Credit Card Improvement</u> - Credit Card Customer Communication and Marketing Strategy / Plan	4/17/2024	Achieved	Approved
CS-01.04.05	<u>Credit Card Improvement</u> - Credit Card Functional & Technical Design Documents	4/30/2024	Achieved	Approved
CS-01.04.06	<u>Credit Card Improvement</u> - Credit Card Testing Strategy	5/31/2024	Achieved	Approved
CS-01.04.07	<u>Credit Card Improvement</u> - Credit Card Requirement Traceability Matrix (RTM)	7/17/2024	Achieved	Approved
CS-01.04.08	<u>Credit Card Improvement</u> - Credit Card Updated Business and Technical Process Documents	10/9/2024	Achieved	Approved
CS-01.04.09	<u>Credit Card Improvement</u> - Credit Card UAT/SIT Test Results	11/18/2024	Achieved	Approved
CS-01.04.10	<u>Credit Card Improvement</u> - Credit Card Go/No-Go Decision Checklist	12/19/2024	Did Not Achieve	Declined
CS-01.04.11	<u>Credit Card Improvement</u> - Credit Card (Carry Over to 2025) Post Implementation Survey (4/1/2025)	4/1/2025	Not Due Yet	Not Due Yet
CS-01.04.12	<u>Credit Card Improvement</u> - Credit Card Go Live	12/31/2024	Did Not Achieve	Declined

Project #5: Kiosk Project (Payment Arrangement)

Project Status: **Achieved**

CS-01.05 Kiosk Project (Payment Arrangement)				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-01.05.01	<u>Kiosk Project (Payment Arrangement)</u> - Update Smartsheet with 2023 deliverables from LIPA-approved PIPs for Kiosk project that were not delivered in 2023	As identified at 2023 yearend	Achieved	Approved
CS-01.05.02	<u>Kiosk Project (Payment Arrangement)</u> - Update deliverable dates in PIP for Payment Arrangement functionality	As approved in updated PIP	Exempted	Exempted
CS-01.05.03	<u>Kiosk Project (Payment Arrangement)</u> - Provide functional and technical design document	As approved in updated PIP	Exempted	Exempted
CS-01.05.04	<u>Kiosk Project (Payment Arrangement)</u> - Provide test management plan	1/15/2024	Achieved	Approved

CS-01.05 Kiosk Project (Payment Arrangement)				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-01.05.05	<u>Kiosk Project (Payment Arrangement)</u> - Provide Requirements Traceability Matrix	2/5/2024	Achieved	Approved
CS-01.05.06	<u>Kiosk Project (Payment Arrangement)</u> - Provide test results with evidence	6/5/2024	Achieved	Approved
CS-01.05.07	<u>Kiosk Project (Payment Arrangement)</u> - Inform LIPA of go-live decision and submit completed go-live checklist that supports decision	6/5/2024	Achieved	Approved
CS-01.05.08	<u>Kiosk Project (Payment Arrangement)</u> - Collect customer feedback on kiosk and create a roadmap outlining the future decisions required to determine the future of kiosks	8/13/2024	Achieved	Approved
CS-01.05.09	<u>Kiosk Project (Payment Arrangement)</u> - Go-live	6/20/2024	Achieved	Approved
CS-01.05.10	<u>Kiosk Project (Payment Arrangement)</u> - Marketing and Communication Execution Plan	2/28/2024	Achieved	Approved
CS-01.05.11	<u>Kiosk Project (Payment Arrangement)</u> - Payment Agreement Marketing and Communication Execution	6/20/2024	Achieved	Approved
CS-01.05.12	<u>Kiosk Project (Payment Arrangement)</u> - Provide customer communication and marketing plan (For PA's only and including phone and QR code lookup) Update due dates in Smartsheet related to the marketing plan (collateral and execution)	2/28/2024	Exempted	Exempted

Overall Summary

- PSEG Long Island implemented 4 of the 5 Strategic Customer Experience & Billing Projects in 2024.
- The Credit Card improvement project was technically complete and ready to go live by the specified date but due to some penetration testing deficiencies that were identified during final review, PSEG Long Island deferred the go-live of the system to mitigate any potential cyber security concerns.

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

Metric Type	Quantitative	Metric Performance	↑ (Partial – 25% of compensation)
Incentive Compensation Claim	\$71,798.88	Comments	N/A

CS-2 JD Power Residential Survey OSA Incentive: \$287,196



Metric Definition

This metric comprises the overall JD Power and Associates Annual Electric Utility Customer Satisfaction Study for Residential Customers for the "East Region, Large Segment". Receive 25% of the allocated compensation for achieving the tactical plan.

Calculation

The score will be reported as the JD Power Customer Satisfaction Survey (Residential) score. The metric result for 2024 represents Wave 1, Wave 2, Wave 3, & Wave 4 results fielded in 2024.

YTD

2024	700
2023	702

Quarter 4

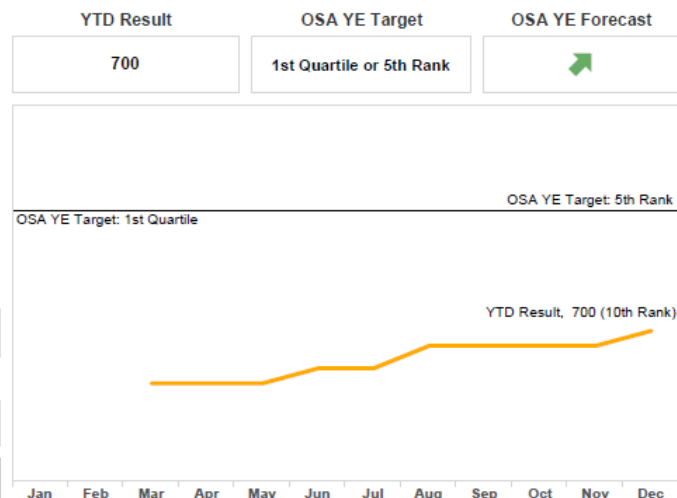
2024	705
2023	708

2024 Quarter 4 YTD vs. 1st Quartile	2024	1st Q	2024	2024	2024
	YTD	YTD	YTD	YTD	YTD
Overall Customer Satisfaction Index	100%	716	700	-16	10
Power Quality & Reliability Index	25%	765	746	-19	9
Price Index	20%	647	617	-30	10
Billing & Payment Index	17%	773	755	-18	10
Corporate Citizenship Index	17%	674	650	-24	10
Communications Index	12%	699	692	-7	8
Customer Care/Service Index	9%	770	773	3	4

Scores by Quarter & Year

PSEG LI

2020	2021	2022	2023	2024
Overall: 717	Overall: 677	Overall: 690	Overall: 702	Overall: 700
744 748 713 664	652 693 697 668	702 668 703 687	700 717 682 708	693 697 704 705
Q1 Q2 Q3 Q4	Q1 Q2 Q3 Q4	Q1 Q2 Q3 Q4	Q1 Q2 Q3 Q4	Q1 Q2 Q3 Q4



2024 Quarter 4 Scores

PSE&G	708: 1st Quartile	734
Pepco		725
PECO		719
PPL ELECTRIC UTILITIES		709
Duquesne Light		708
BGE		706
PSEG LI		705
JCP&L		700
CON EDISON	698: 2nd Quartile	698
West Penn Power		697
NATIONAL GRID		682
Met-Ed		676
Penelec		649
EVERSOURCE ENERGY		642
NYSEG		611
APPALACHIAN POWER		609
Central Maine Power	557 649: 3rd Quartile	

*Atlantic City Electric has been excluded, as it was not part of the baseline measure for this metric

CS-02	JD Power Customer Satisfaction Survey (Residential)			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-02.01	Submit tactical plan for performance year to improve satisfaction result, prioritizing items that will influence customers' perception.	1/31/2024	Achieved	Approved
CS-02.02	PSEG Long Island submits their calculation of the 2024 target based on 2023 results.	1/31/2024	Achieved	Approved
CS-02.03	Submit Q1 progress report for initiatives and tasks from tactical plan, identify prior events that could negatively impact results, and propose corrective actions.	4/10/2024	Achieved	Approved
CS-02.04	Submit Q2 progress report for initiatives and tasks from tactical plan, identify prior events that could negatively impact results, and propose corrective actions.	7/10/2024	Achieved	Approved
CS-02.05	Submit Q3 progress report for initiatives and tasks from tactical plan, identify prior events that could negatively impact results, and propose corrective actions.	10/10/2024	Achieved	Approved

CS-02 JD Power Customer Satisfaction Survey (Residential)				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-02.06	Submit Q4 progress report for initiatives and tasks from tactical plan, identify prior events that could negatively impact results, and propose corrective actions.	12/31/2024	Achieved	Approved
CS-02.07	Upload to the LIPA designated folder on the LIPA SharePoint Site the Scorecard Reporting Requirement for J.D. Power - Residential (aligned to quarterly J.D. Power reporting).	Quarterly	Achieved	Approved

Summary

- PSEG Long Island finished 2024 ranked 10th out of 18 companies in the Large East segment in the 2024 J.D. Power – Residential survey.
- PSEG Long Island achieved the deliverable of the tactical plan
- No other target levels were achieved

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

Metric Type	Quantitative	Metric Performance	↑ (Partial – 25% of compensation)
Incentive Compensation Claim	\$71,798.88	Comments	N/A



CS-03	JD Power Customer Satisfaction Survey (Business)			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-03.01	Submit tactical plan for performance year to improve satisfaction score, prioritizing items that will influence customers' perception.	1/31/2024	Achieved	Approved
CS-03.02	PSEG Long Island submits their calculation of the 2024 target based on 2023 results.	1/31/2024	Achieved	Approved
CS-03.03	Submit Q1 progress report for initiatives and tasks from tactical plan, identify prior events that could negatively impact results, and propose corrective actions.	4/10/2024	Achieved	Approved
CS-03.04	Submit Q2 progress report for initiatives and tasks from tactical plan, identify prior events that could negatively impact results, and propose corrective actions.	7/31/2024	Achieved	Approved
CS-03.05	Submit Q3 progress report for initiatives and tasks from tactical plan, identify prior events that could negatively impact results, and propose corrective actions.	10/10/2024	Achieved	Approved

CS-03 JD Power Customer Satisfaction Survey (Business)				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-03.06	Submit Q4 progress report for initiatives and tasks from tactical plan, identify prior events that could negatively impact results, and propose corrective actions.	12/31/2024	Achieved	Approved
CS-03.07	Upload to the LIPA designated folder on the LIPA SharePoint Site the Scorecard Reporting Requirement for J.D. Power - Business (aligned to bi-annual J.D. Power reporting).	Bi-annual	Achieved	Approved

Summary

- PSEG Long Island finished 2024 ranked 11th out of 12 companies in the Large East segment in the 2024 J.D. Power – Business survey.
- PSEG Long Island achieved the deliverable of the tactical plan
- No other target levels were achieved

CS-05 - Customer Transactional Performance

Metric Type	Qualitative	Metric Performance	↑ (Partial –75% of compensation)
Incentive Compensation Claim	\$344,634.62	Comments	N/A

CS-05	Customer Transactional Performance			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-05.01	BASE COLLECTION & ANALYSIS	N/A	N/A	N/A
CS-05.01.01	Provide list of transaction types surveyed in CCaaS and mapping to transaction category	1/20/2024	Achieved	Approved
CS-05.01.02	January survey result reports and supporting detail	2/20/2024	Achieved	Approved
CS-05.01.03	February survey result reports and supporting detail	3/20/2024	Achieved	Approved
CS-05.01.04	March survey result reports and supporting detail	4/20/2024	Achieved	Approved
CS-05.01.05	Provide 2023 cost per transaction analysis	4/30/2024	Achieved	Approved
CS-05.01.06	April survey result reports and supporting, detail including evidence of surveying of a) all other collections & payment assistance-related transactions beyond payment arrangements; b) billing transactions in MyAccount and mobile app; and c) additional payment-related transactions in MyAccount and mobile app.	5/20/2024	Achieved	Approved
CS-05.01.07	Provide observations and recommendations from survey results, operational data, and cost per transaction analysis to drive continuous improvement	7/15/2024	Achieved	Approved
CS-05.01.08	May survey result reports and supporting detail	6/20/2024	Achieved	Approved
CS-05.01.09	June survey result reports and supporting detail	7/20/2024	Achieved	Approved
CS-05.01.10	July survey result reports and supporting detail	8/21/2024	Achieved	Approved
CS-05.01.11	August survey result reports and supporting detail	9/20/2024	Achieved	Approved
CS-05.01.12	September survey result reports and supporting detail	10/20/2024	Achieved	Approved
CS-05.01.13	October survey result reports and supporting detail	11/20/2024	Achieved	Approved
CS-05.01.14	November survey result reports and supporting detail	12/20/2024	Achieved	Approved
CS-05.01.15	December survey result reports and supporting detail	1/20/2025	Achieved	Approved
CS-05.01.16	Submit findings from failed/incomplete transaction research study	3/31/2024	Achieved	Approved
CS-05.01.17	Submit potential opportunities to enhance transaction type categorization beyond caller intent. If categorization can be enhanced, indicate when will be included in monthly reporting.	4/15/2024	Achieved	Approved
CS-05.02	PROJECT PLANNING	N/A	N/A	N/A
CS-05.02.01	Provide update during check-in meeting with LIPA on progress and selection criteria for choosing the on-site survey solution	3/5/2024	Approved	Approved
CS-05.02.02	Expanding Survey Channels - Provide final Project Implementation Plan for approval, incorporating all LIPA feedback. Update Smartsheet to include the LIPA-approved PIP metric deliverables and due dates.	3/31/2024	Approved	Approved
CS-05.02.03	Data Appending & Automation: Provide final Project Implementation Plan for approval, incorporating all LIPA feedback. Update Smartsheet to include the LIPA-approved PIP metric deliverables and due dates.	3/31/2024	Funding not provided by LIPA	Declined
CS-05.03.01	Expanding Survey Channels - Provide business & system requirements	9/6/2024	Approved	Approved
CS-05.03.02	Expanding Survey Channels - Provide functional & technical design document	9/13/2024	Approved	Approved

CS-05 Customer Transactional Performance				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-05.03.03	Expanding Survey Channels - Provide Requirements Traceability Matrix	9/27/2024	Approved	Approved
CS-05.03.04	Expanding Survey Channels - Provide updated business processes/procedures	10/25/2024	Approved	Approved
CS-05.03.05	Expanding Survey Channels - Inform LIPA of go-live decision and submit completed go-live checklist that supports decision	11/15/2024	Approved	Approved
CS-05.03.06	Expanding Survey Channels - Go-live	11/26/2024	Approved	Approved
CS-05.04.01	Data Appending & Automation - Provide business & system requirements	As approved in final PIP	Funding not provided by LIPA	Declined
CS-05.04.02	Data Appending & Automation - Provide functional & technical design document	As approved in final PIP	Funding not provided by LIPA	Declined
CS-05.04.03	Data Appending & Automation - Provide Requirements Traceability Matrix	As approved in final PIP	Funding not provided by LIPA	Declined
CS-05.04.04	Data Appending & Automation - Provide updated business processes/procedures	As approved in final PIP	Funding not provided by LIPA	Declined
CS-05.04.05	Data Appending & Automation - Inform LIPA of go-live decision and submit completed go-live checklist that supports decision	As approved in final PIP	Funding not provided by LIPA	Declined
CS-05.04.06	Data Appending & Automation - Go-live	As approved in final PIP	Funding not provided by LIPA	Declined

Summary

- PSEG Long Island achieved the Base Collection & Analysis which included:
 - Collection, analyzing, and reporting on customer feedback across payment, billing, move in/move out (MIMO), outage, and collection transactions.
 - Compilation of 2023 cost per transaction analysis in LIPA-approved format from 2021 cost per transaction analysis
 - Document mapping of transaction types surveyed in the new CCaaS system to the appropriate transaction category for the following channels: IVR, live agent call, email, live agent chat, and chatbot. Document methodology for frequency of survey offering by channel.
 - Analyzing the survey results with associated operational data including behavioral, segmentation, usage and cost per transaction. From the analyzed results and data, provide observations and deep insights (patterns, trends, correlations). Draw and document informed conclusions. Provide recommendations to drive continuous improvement initiatives in customer satisfaction and ease. Categorize recommendations/issues into categories of people, process, or technology and complexity of low, medium, high. Communicate the findings and insights with relevant stakeholders.
- PSEG Long Island achieved Project Planning portion with the Expanding Survey Channels portion which included:
 - Provide update during check-in meeting with LIPA on progress and selection criteria for choosing the on-site survey solution
 - Providing final Project Implementation Plan
 - Providing business & system requirements
 - Providing functional & technical design document
 - Providing Requirements Traceability Matrix
 - Providing updated business processes/procedures
 - Informing LIPA of go-live decision and submit completed go-live checklist that supports decision and go-live with solution
- PSEG Long Island was unable to deliver Project Planning portion with the Data Appending & Automation because of lack of funding provided to complete the effort.

- Data Appending and Automation – work was not been funded by LIPA which is a fundamental requirement of Scope Specific Performance metrics. While there was no initial budget as the requirements and scope were not fully defined prior to completion of the 2024 budget, it was agreed that this would be treated as emergent work.
- PSEG Long Island provided a detailed cost estimate from IT to complete the appending/data automation by the end of 2024. LIPA advised that they would not be moving forward with this project based on the estimated capital costs.
- LIPA followed up asking what data points were currently being stored and available in the data lake to better assess how they would like to proceed. PSEG Long Island provided this and scheduled a follow up call to walk through this.
- PSEG Long Island provided additional mapping of what was currently available in the data lake upon LIPA clarifying their ask during a meeting. During that meeting, LIPA requested that IT break out the costs for each data system to see if it would reduce overall cost if a more phased approach was undertaken.
- PSEG Long Island IT provided new cost estimates and timeline. At this point (3 months after our initial proposal), the IT work was no longer achievable in 2024 due to the decision delays.
- PSEG Long Island met with LIPA to walk through the cost estimate and adjusted timeline.
- LIPA sent an email “CS-05 Data Lake Discussion Follow-up”, indicating the cost is still higher than what they expected and since the timeline would now go into 2025, LIPA would no longer be proceeding. However, would consider an exception to split compensation differently between the data project and the pop-up survey project.
- LIPA reiterated that PSEG Long Island would not be compensated for this component of CS-05 as it would not be delivered in this fiscal year. PSEG Long Island had shared initial proposal in early March and outlined what would be required to complete this in 2024, and LIPA had delayed the decision.
- Overall – PSEG LI’s position is that the Data Appending & Automation would have been completed within the desired timeline if adequate funding was timely released. The project is now being addressed via the SDAP program per LIPA rescoping and redirection.
- **Based upon overall performance and final discussions between PSEG LI and LIPA, the parties have agreed to a final payment allocation percentage of 75% of the incentive compensation at risk.**

CS-10 - Billing Cancelled Rebill

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$229,756.41	Comments	N/A

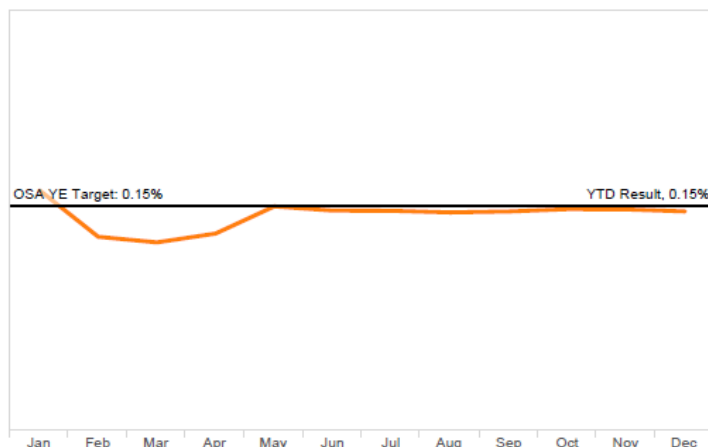
J F M A M J J A S O N D CS-10 Billing Cancelled Rebill OSA Incentive: \$229,756



YTD Result OSA YE Target OSA YE Forecast

0.15%

0.15%



Metric Definition

Accuracy of a customer bill is measured by issuance of a subsequent bill for a previously billed period. Cancel/re-bill transactions are measured monthly based on issuance of a bill where the customer is being sent a correction for a previously issued bill. This includes all cancellations performed by the PSEG-LI staff, as well as, the cancel/re-bills performed automatically by the billing system.

Calculation

The sum of the number of the monthly bills cancel rebill for the account noted in the definition above divided by the sum of the number of unique bills for the contract year Issued for the year.

Exclusions

Exclusions will be granted if situations or business conditions arise that LIPA determines or agrees are truly out of PSEG Long Island's control, as long as, they are presented to LIPA within 5 business days.

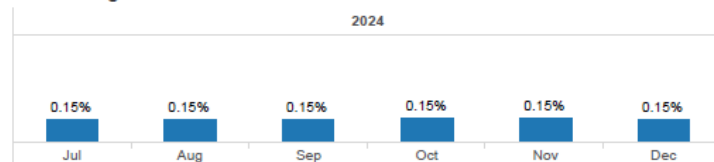
YTD

2024	0.15%
2023	0.17%

Month

2024	0.13%
2023	0.13%

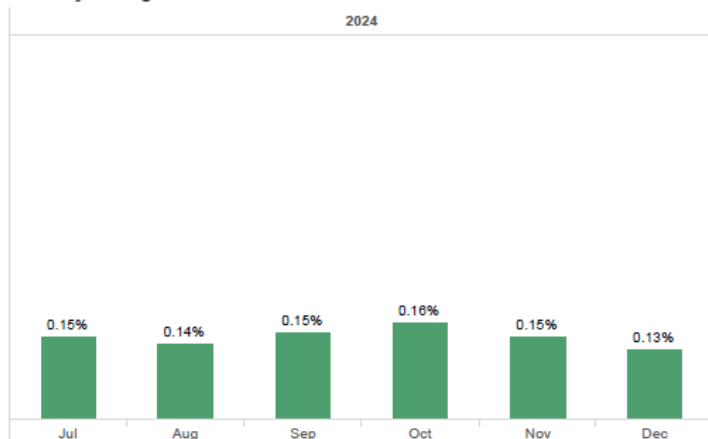
YTD Billing Cancell Rebill



Monthly Statistics:

	2024					
	Jul	Aug	Sep	Oct	Nov	Dec
Cancelled Rebills	1,651	1,542	1,724	1,821	1,649	1,482
Number of Unique Bills	1,132,441	1,120,299	1,139,910	1,129,255	1,129,922	1,128,058
Billing Cancelled Rebill	0.15%	0.14%	0.15%	0.16%	0.15%	0.13%

Monthly Billing Cancell Rebill



Summary

- PSEG Long Island achieved a cancelled rebill percentage of 0.15% of all unique bills.
- PSEG Long Island 19,737 rebills out of 13,508,826 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	Comments	N/A

CS-11 Contact Center Service Level with Live Agent Calls OSA Incentive: \$344,635



Metric Definition

The Contact Center Service Level for this metric is all calls handled by a representative (live agent) from Automatic Call Distribution (ACD) and High Volume Call Application (HVCA). The performance expectation will be: During blue sky days and any storms defined as "non-major", 77% of calls will be answered within 30 seconds. During "major storms", 77% of calls will be answered within 90 seconds.

Calculation

Calc= (major storm day ACD calls answered by the representative in 90 seconds + HVCA major storm calls answered by a representative in 90 seconds + ACD non-storm answered by a representative in 30 seconds + HVCA non-storm answered by an HVCA provider in 30 seconds) divided by (ACD representative offered calls + HVCA representative offered calls)

Exclusions

All contacts that are answered solely by IVR or any other self-service technology are excluded. Incoming rep offered calls to the Time-of-Day (TOD) skill queue are excluded.

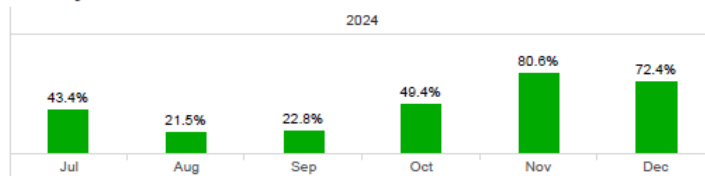
YTD

2024	41.3%
2023	41.8%

Month

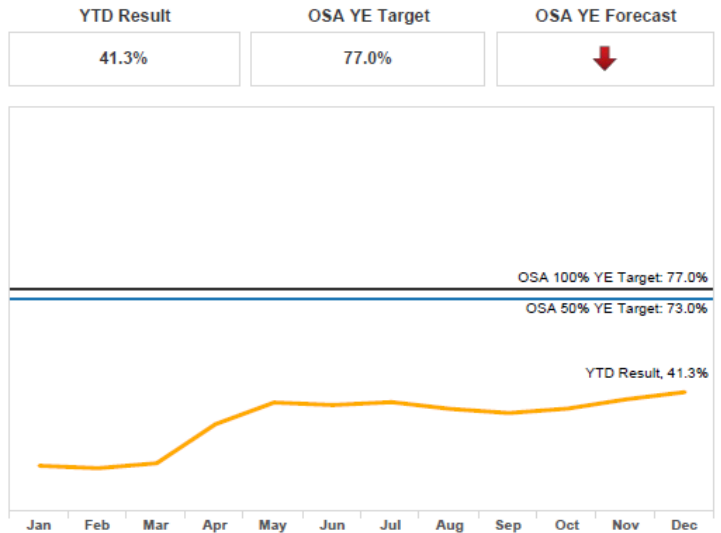
2024	72.4%
2023	31.1%

Monthly

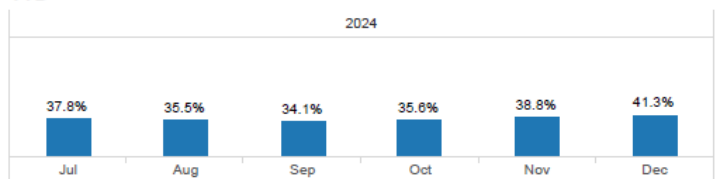


Call Volumes

		2024					
		Jul	Aug	Sep	Oct	Nov	Dec
Monthly	# Answered Within 30 sec (Rep)	50,805	27,316	25,554	54,136	68,463	69,444
	Storm # Answered Within 90 sec (Rep)	0	0	0	0	0	0
	Rep Calls Offered	116,595	126,723	111,709	109,425	84,928	95,836
	TOD # Answered Within 30 Sec	80	111	104	134	139	220
YTD	TOD Rep Calls Offered	127	130	132	160	150	236
	# Answered Within 30 sec (Rep)	286,465	313,781	339,335	393,471	461,934	531,378
	Storm # Answered Within 90 sec (Rep)	0	0	0	0	0	0
	Rep Calls Offered	756,393	883,116	994,825	1,104,250	1,189,178	1,285,014
	TOD # Answered Within 30 Sec	631	742	846	980	1,119	1,339
	TOD Rep Calls Offered	961	1,091	1,223	1,383	1,533	1,769



YTD

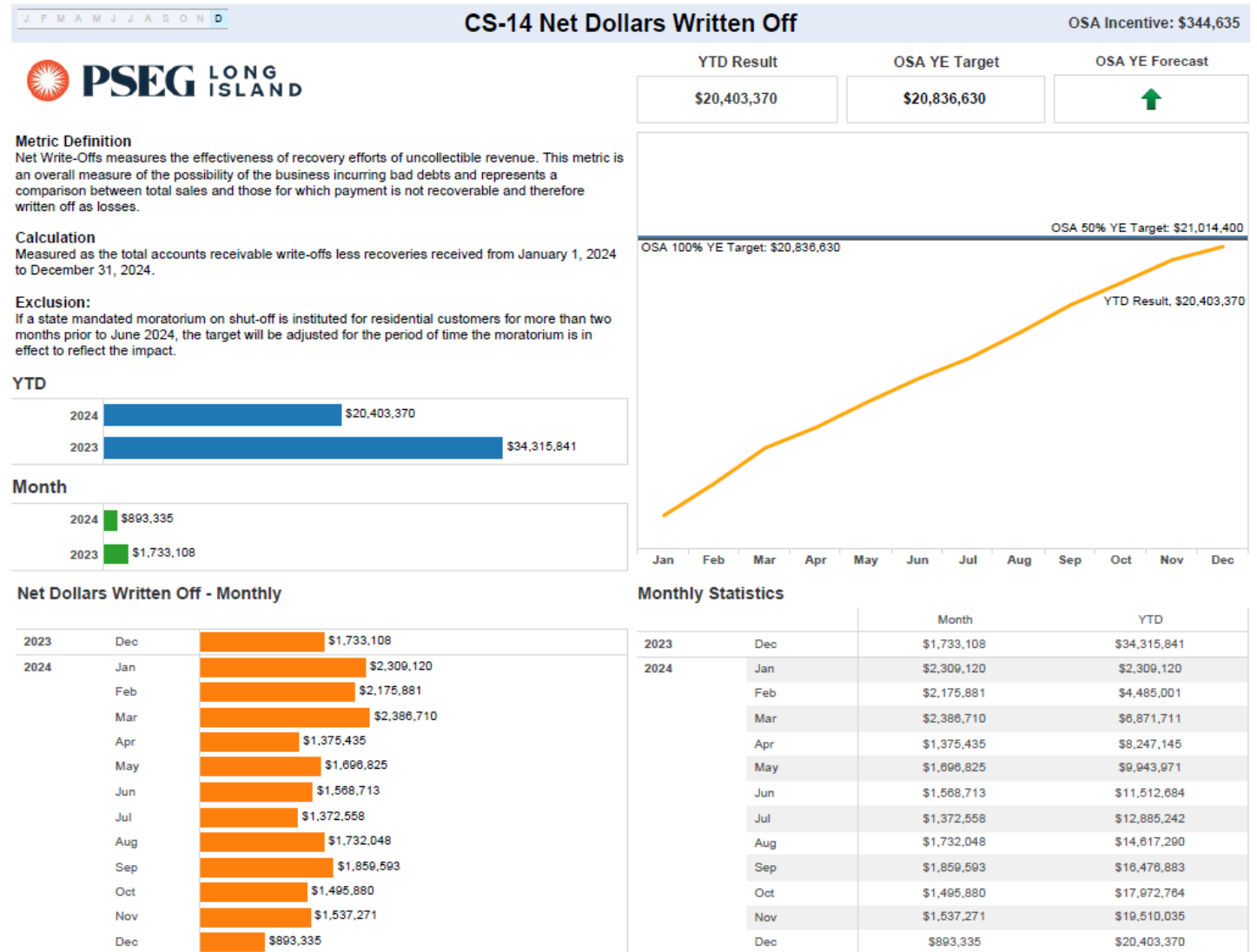


Summary

- PSEG Long Island did not achieve Contact Center Service Level with Live Agent Calls of 77.0% of calls answered within 30 seconds during blue sky and non-major storm periods and 90 seconds during major storms
- PSEG Long Island answered 531,378 within 30 second with a live rep out of the 1,285,014 rep answered calls in 2024. PSEG Long Island answered 41.3% calls within the defined period not achieving the 77.0% targeted performance level.
- PSEG Long Island's average speed of answer was 230 seconds in 2024 or 3.84 minutes.

CS-14 - Net Dollars Written Off

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$344,634.62	Comments	N/A



Summary

- PSEG Long Island's 2024 Net Dollars Written Off performance was \$20,403,370 thus achieving the Net Dollars Written Off Target value of \$20,836,630.

CS-15 - AR > 90 (No Exclusions)

Metric Type	Quantitative	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00	Comments	N/A

CS-15 Arrears Aging Percent > 90 Days Past Due OSA Incentive: \$344,635



Metric Definition

Measures percent of arrears that have aged more than 90 days (i.e. excluding current AR).

Calculation

Month=Dollars outstanding more than 90 days / Total dollars outstanding 30 and more days past due. YTD = Rolling 12-month total dollars outstanding more than 90 days / Rolling 12-month total dollars outstanding 30 and more days past due.

Exclusions:

If a state-mandated moratorium on shut-off is instituted for residential customers for more than 2 months during 2024, the target will be adjusted for the period the moratorium exists based on field disconnection portion of funds anticipated during that period.

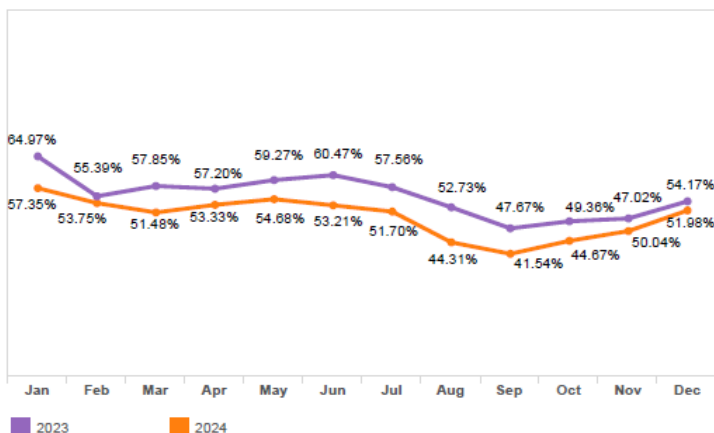
YTD

2024	50.18%
2023	55.82%

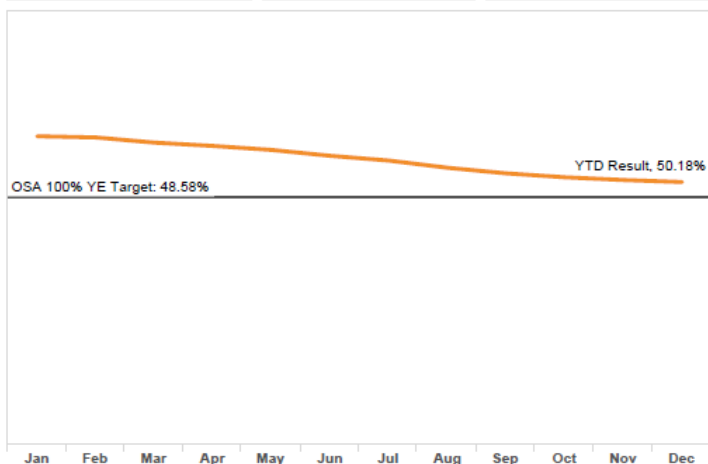
Month

2024	51.98%
2023	54.17%

Monthly AR > 90 Past Due (Year Over Year)



YTD Result	OSA YE Target	OSA YE Forecast
50.18%	48.58%	↓



Monthly Arrears

	2024					
	Jul	Aug	Sep	Oct	Nov	Dec
Current Dollars	\$336,244,841	\$353,050,158	\$353,611,860	\$236,521,668	\$238,390,538	\$235,534,285
30-59 Days	\$42,717,121	\$58,442,837	\$62,084,789	\$51,432,961	\$48,950,095	\$41,509,216
60-89 Days	\$16,190,694	\$18,265,372	\$22,838,926	\$24,024,618	\$24,472,223	\$20,977,783
> 90 Days	\$63,059,014	\$81,037,749	\$80,355,259	\$80,915,697	\$85,171,348	\$87,637,015
Total Arrears	\$121,966,829	\$137,745,957	\$145,278,974	\$136,373,275	\$138,593,666	\$130,123,994
Total Dollars Outstanding	\$458,211,671	\$490,796,115	\$498,890,833	\$372,894,943	\$376,984,204	\$365,658,279

Summary

- PSEG Long Island did not achieve Arrears Aging Percent > 90 Days Past Due targets of:
 - 100% Target: 48.58%
- PSEG Long Island's 2023 Arrears Aging Percent > 90 Days Past Due was 50.18% thus exceeding the Arrears Aging Percent > 90 Days Past Due Target value.
- PSEG Long Island has not achieved Accounts Receivable OSA metric target once in 2022, 2023 and 2024 while getting back to pre-pandemic levels and far exceeding the performance of peers Utilities within the state of New York. PSEG Long Island has called into question the reasonableness and achievability of the established targets previously. PSEG Long Island's forecasts for 2024 were between 49.77% for the 100% as a stretch and 50.77% for 75% as a more likely expected outcome. These forecasts were disregarded during the 2024 target setting process. PSEG LI landed FY2024 in between forecast levels at 50.18% vs. final target of 48.58% which was a level we didn't believe we could achieve and far outpaced any comparable performance to any NYS Utility.

CS-17 - LMI Program Participation

Metric Type	Quantitative	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00	Comments	N/A

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

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

OSA Incentive: \$229,756



YTD Result

38,716

OSA YE Target

50,000

OSA YE Forecast



Metric Definition

The number of unique valid LMI program enrollees in any month during the calendar year 2024.

Calculation

Meet 50,000 LMI program enrollees in any month during the calendar year 2024 and demonstrates that automated file matching was executed, and the customer rate has been updated for the Rockaways and Nassau County data matching file.

Exclusions

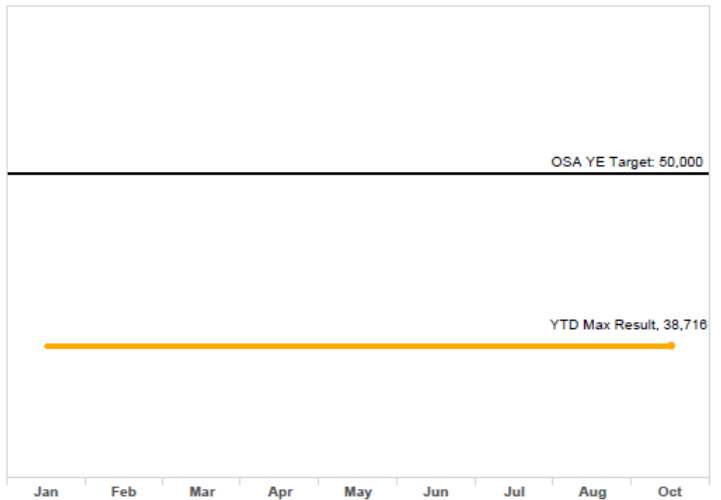
Customers who have not met the 18-month renewal process. The automation requirement would be exempted if PSEG Long Island demonstrates that the agency refused to participate or if PSEG Long Island pursued automation beginning in January and the agency was unable to complete the execution of an automated matching process in 2024.

YTD

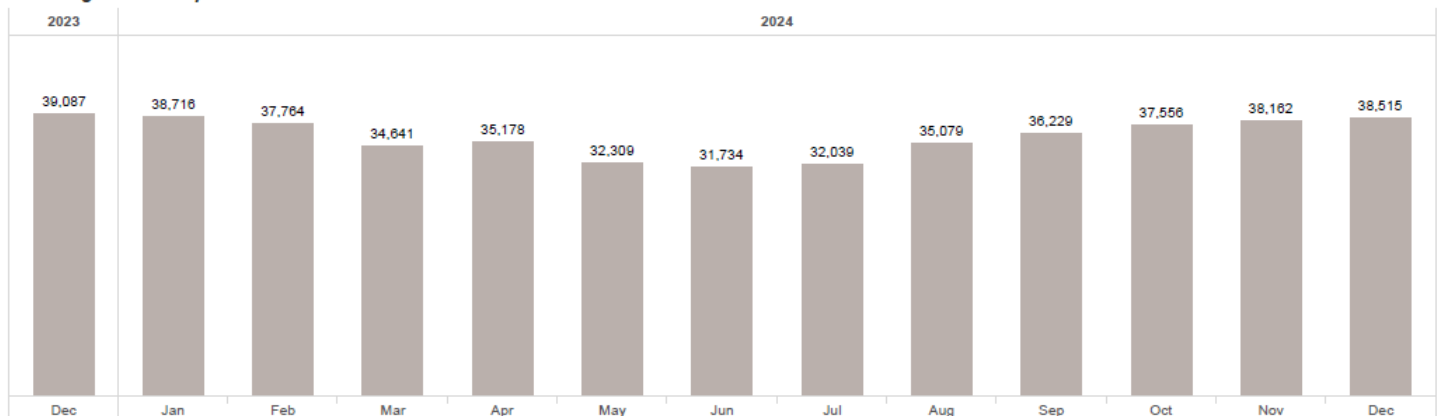
2024	38,716
2023	41,933

Month

2024	38,515
2023	39,087



LMI Program Participation - Number of Enrollees

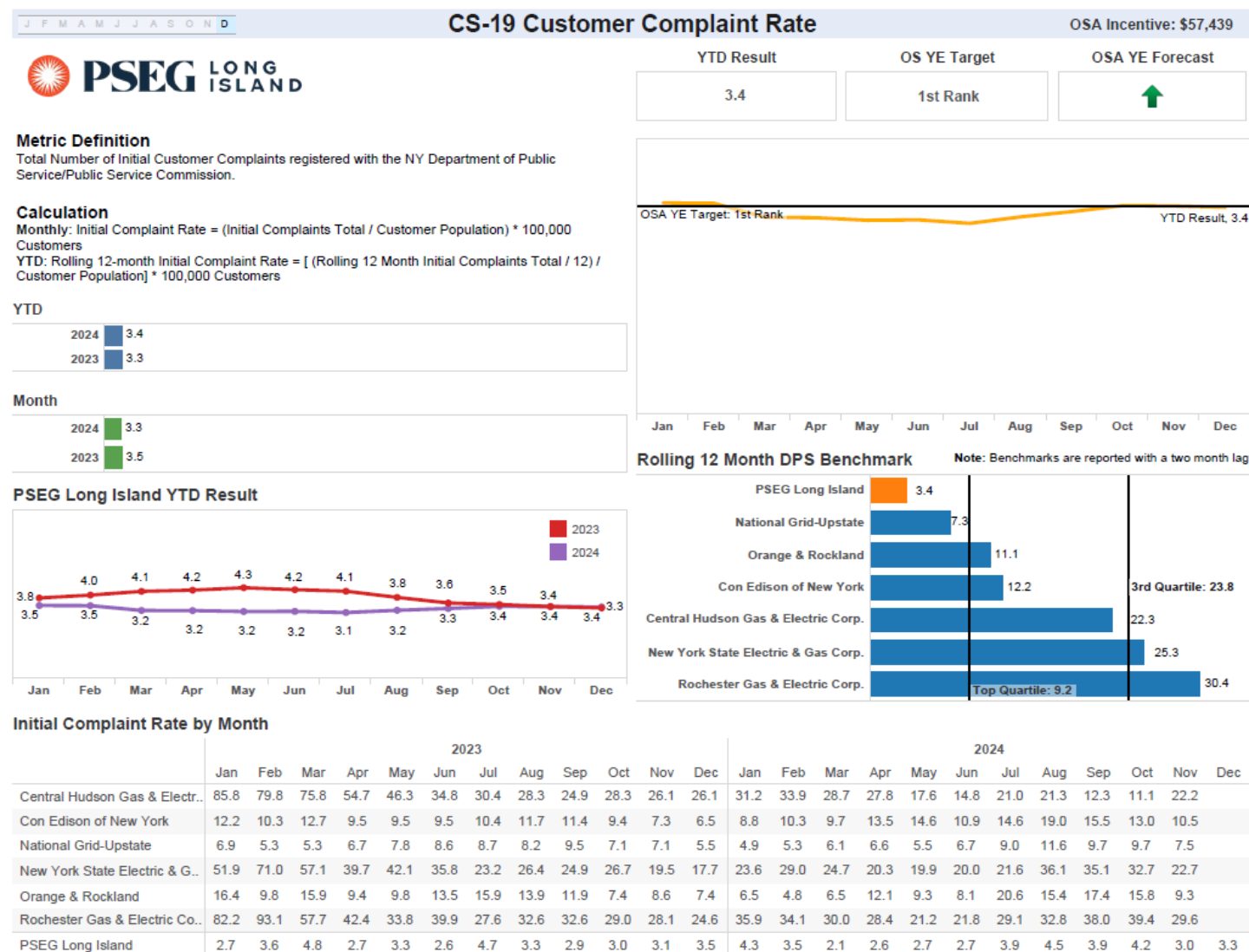


Summary

- PSEG Long Island did not achieve the number of Low to Moderate Income Program participant enrollees target of 50,000 during any calendar month in 2024.
- January 2024 was the highest number of enrollees which was 38,716 customers enrolled

CS-19 - Customer Complaint Rate

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$57,439.10	Comments	N/A



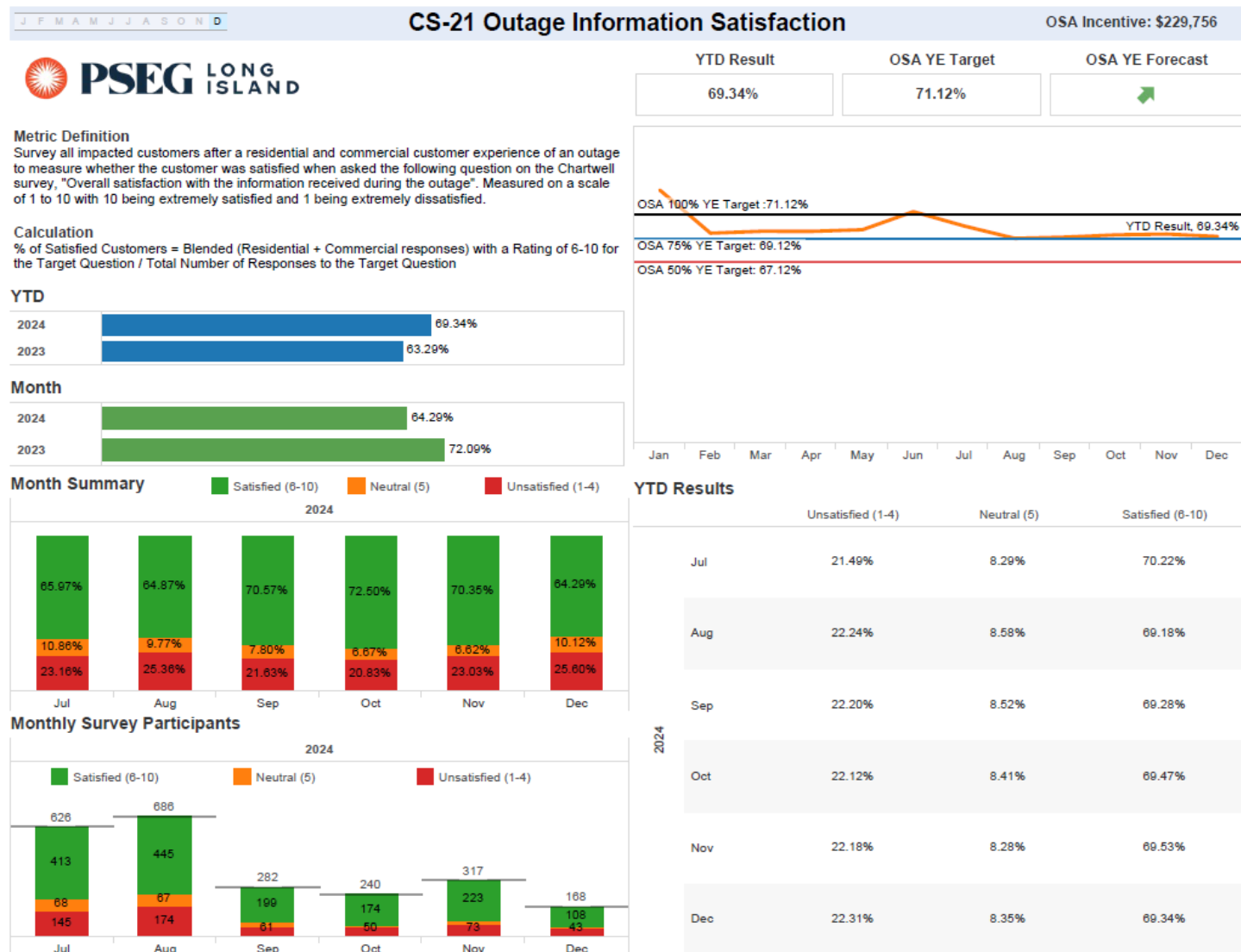
Summary

- PSEG Long Island achieved the Customer Complaint Rate targeted performance level of being first ranked electric and/or combined utility company complaints per 100,000 customers. PSEG Long Island's 2024 year-end reported complaint rate was 3.4 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 [(475 initial complaints divided by 12 months) divided by 1,166,764 customers] times 100,000 customers equals 3.4 complaints per 100K customers.
- PSEG Long Island finished 2024 with the best complaint rate/100k customers among other NYS electric and/or combined utilities.
 1. **PSEG Long Island – 3.4**
 2. National Grid Upstate – 7.3
 3. Orange and Rockland – 11.1
 4. Con Edison – 12.2

5. Central Hudson Gas & Electric Corp. – 22.3
6. New York State Electric & Gas Corp – 25.3
7. Rochester Gas & Electric Corp – 30.4

CS-21 - Outage Information Satisfaction

Metric Type	Quantitative	Metric Performance	↑ (Partial – 75% of compensation)
Incentive Compensation Claim	\$172,317.31	Comments	N/A



Summary

- PSEG Long Island achieved the 75% target of the Outage Information Satisfaction targeted performance level of 69.12%. PSEG Long Island's 2024 year-end Outage Information Satisfaction was 69.34%.
- 2024 YE results were a 9.6% increase when compared to 2023 YE results.

CS-25 - Interactive Voice Response (IVR) Containment Rate

Metric Type	Quantitative	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00	Comments	N/A

J F M A M J J A S O N D CS-25 Interactive Voice Response (IVR) Containment Rate OSA Incentive: \$172,317



Metric Definition

The containment rate is the percentage of callers who interact with the IVR residential customer general inquiry line, business solution center line, and the emergency line and leave normally without transferring to the ACD.

Calculation

% of Calls Contained = (Normal Hang Up + Payment Vendor Transfers) / Total Number of Calls Answered in IVR)

Exclude from numerator the following:

- 1) Callback requests
- 2) Hang ups resulting from system issues

Exclude from the numerator and denominator the following:

- 1) Transfers from ACD back to IVR
- 2) HVCA calls
- 3) Calls resulting from any scenario that prevents the customer while conducting regular business in the IVR from transferring to the ACD during normal business hours.

YTD Result

55.65%

OSA YE Target

62.08%

OSA YE Forecast

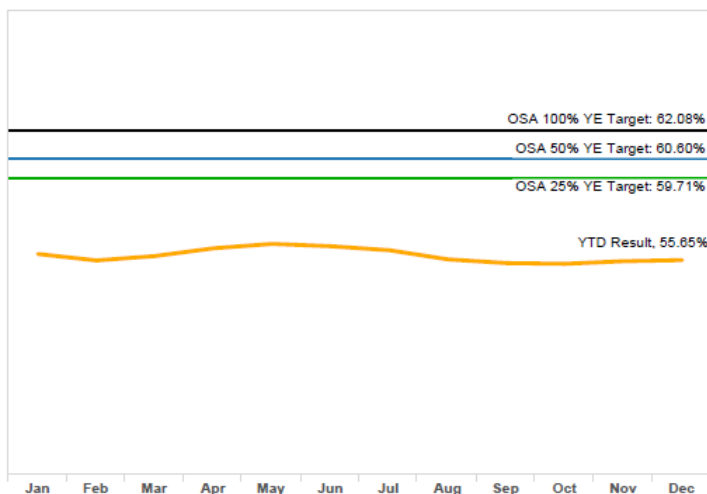


OSA 100% YE Target: 62.08%

OSA 50% YE Target: 60.60%

OSA 25% YE Target: 59.71%

YTD Result, 55.65%



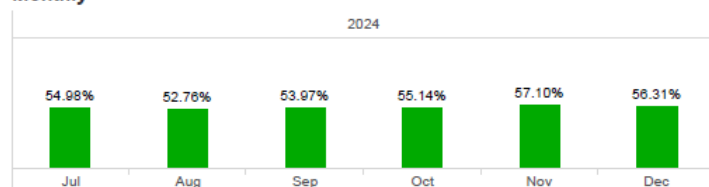
YTD

2024	55.65%
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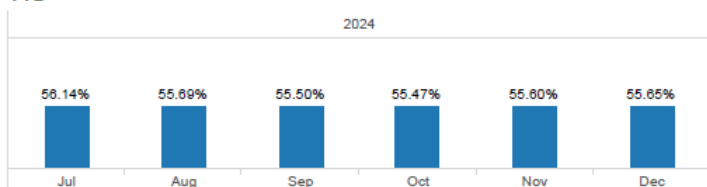
Month

2024	56.31%
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Monthly



YTD



Call Volumes

		2024					
		Jul	Aug	Sep	Oct	Nov	Dec
Monthly	IVR Calls Answered	288,393	302,227	272,779	270,983	240,094	250,868
	IVR Calls Satisfied	157,473	159,467	147,213	149,432	137,087	141,261
YTD	IVR Calls Answered	1,956,190	2,258,417	2,531,196	2,802,179	3,042,273	3,293,141
	IVR Calls Satisfied	1,098,180	1,257,647	1,404,860	1,554,292	1,691,379	1,832,640

Summary

- PSEG Long Island's YE performance for IVR Containment Rate was 55.65% vs targeted levels of 59.71% to 62.08% thus not achieving any of the target level thresholds for compensation.

CS-28 - Move Process Improvement

Metric Type	Qualitative	Metric Performance	↑ (Partial – 60% of compensation)
Incentive Compensation Claim	\$241,244.23	Comments	N/A

CS-28	Move Process Improvement			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-28.01	Move Automation Project - Provide Project Implementation Plan if not delivered in 2023	1/15/2024	Achieved	Declined
CS-28.02	2024 Ph1: MyAcct Start/Move RPA - Provide business and system requirements informed by VOC feedback and industry best practices	2/12/2024	Achieved	Approved
CS-28.03	2024 Ph1: MyAcct Start/Move RPA - Provide test management plan	3/15/2024	Achieved	Approved
CS-28.04	2024 Ph1: MyAcct Start/Move RPA - Provide functional & technical design document	2/29/2024	Achieved	Approved
CS-28.05	2024 Ph2: Website RPAs & Address Enhancement - Provide business and system requirements informed by VOC feedback and industry best practices	7/26/2024	Achieved	Approved
CS-28.06	2024 Ph2: Website RPAs & Address Enhancement - Provide functional & technical design document	8/23/2024	Achieved	Approved
CS-28.07	2024 Ph1: MyAcct Start/Move RPA - Provide test results with evidence	4/12/2024	Achieved	Approved
CS-28.08	2024 Ph1: MyAcct Start/Move RPA - Update business process documentation	4/17/2024	Achieved	Approved
CS-28.09	2024 Ph2: Website RPAs & Address Enhancement - Provide test results with evidence	11/8/2024	Achieved	Approved
CS-28.10	2024 Ph2: Website RPAs & Address Enhancement - Go-live	11/22/2024	Achieved	Approved
CS-28.11	2024 Ph1: MyAcct Start/Move RPA - Go-live	4/18/2024	Achieved	Approved
CS-28.12	2024 Ph3: IVR, Live Agent, & Chatbot - Provide business and system requirements informed by VOC feedback and industry best practices	12/31/2024	Unable to Deliver Phase 3	Declined
CS-28.13	2024 Ph3: IVR, Live Agent, & Chatbot - Provide functional & technical design document	12/31/2024	Unable to Deliver Phase 3	Declined
CS-28.14	2024 Ph3: IVR, Live Agent, & Chatbot - Provide the test management plan	12/31/2024	Unable to Deliver Phase 3	Declined
CS-28.15	2024 Ph3: IVR, Live Agent, & Chatbot - Provide Requirements Traceability Matrix	12/31/2024	Unable to Deliver Phase 3	Declined
CS-28.16	2024 Ph3: IVR, Live Agent, & Chatbot - Provide test results with evidence	12/31/2024	Unable to Deliver Phase 3	Declined
CS-28.17	2024 Ph3: IVR, Live Agent, & Chatbot - Provide customer communication & marketing plan	12/31/2024	Unable to Deliver Phase 3	Declined
CS-28.18	2024 Ph3: IVR, Live Agent, & Chatbot - Inform LIPA of go-live decision and submit complete go-live checklist that supports decision	12/31/2024	Unable to Deliver Phase 3	Declined
CS-28.19	2024 Ph3: IVR, Live Agent, & Chatbot - Go-live	12/31/2024	Unable to Deliver Phase 3	Declined
CS-28.20	Move Automation Project - Achieve the expected outcomes in the PIP	12/31/2024	Unable to Deliver Phase 3	Declined
CS-28.21	Develop an approach to encourage customers to utilize self-service for MIMO	1/25/2025	Achieved	Approved

Summary

- Given the lack of adequate mainframe resources and competing project priorities which prohibited the execution of Option 1, PSEG Long Island presented a second option (Visual IVR Option 2) to LIPA for consideration. While not as comprehensive as Option 1, this Option was to provide additional self-service functionality and improve the customer experience. Due to the untimeliness of a final determination and ultimate lack of LIPA support for this Option, the ability to complete it in 2024 was compromised. Nonetheless, PSEG LI chose to move ahead to begin implementation of Option 2 given the improved customer experience it will provide and continued lack of IT resource availability to address the preferred Option 1 during 2025.

Functionality Delivered in 2024

- MIMO Robot Process Automation bot delivered in 2024.
- Smartforms delivered in 2024
- Address validation – A major enhancement that has been deployed
- Visual IVR will be delivered in 2025 due to delays on decision to proceed with this option.

Functionality Not delivered in 2024:

- Agent experience – System limitations/resource constraints made this work unachievable in 2024. This was identified during metric negotiations in late 2023.
- Chatbot – After working through Cybersecurity concerns, PSEG LI presented an alternative option that balanced security and customer experience, however both parties (PSEG LI and LIPA) universally agreed not to pursue this channel in 2024.

LIPA also requested additional deliverables in December 2024 to be added to the metric. PSEG Long Island informed LIPA that it would not be reasonable to add additional deliverables this late in the year as we would not be able to complete in the operating year, but we do see the value in pursuing their implementation. PSEG LI will be willing to add these deliverables to the metric scope for:

- List MIMO as a quick link from search engine results.
- Consider repositioning the commercial MIMO link on the residential MIMO site. On smaller screens, appears this is the commercial screen if don't scroll down.
- In advance of visual IVR for MIMO, consider adding messaging on the IVR to plug the online MIMO process when relevant intents/intent categories are used.
- Ensure agents are suggesting use of SSN first before suggesting two forms of ID to optimize use of RPAs over manual DFO process

PSEG Long Island also completed additional deliverables requested of LIPA.

- **Based upon overall performance and final discussions between PSEG LI and LIPA, the parties have agreed to a final payment allocation percentage of 60% of the incentive compensation at risk.**

CS-30 - Optimize Contact Center Resource Utilization

Metric Type	Qualitative	Metric Performance	↑ (Partial – 75% of compensation)
Incentive Compensation Claim	\$215,396.64	Comments	N/A

CS-30	Optimize Contact Center Resource Utilization			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-30.01	1) RESOURCE UTILIZATION REPORT & PROCEDURES	N/A	N/A	N/A
CS-30.01.01	Resource Utilization Report & Procedures - Provide draft PIP, which shall be high quality and sufficiently complete	1/15/2024	Achieved	Declined
CS-30.01.02	Resource Utilization Report & Procedures - Provide business & system requirements, which shall also include concepts in metric definition	1/15/2024	Achieved	Declined
CS-30.01.03	Resource Utilization Report & Procedures - Provide final PIP for approval, incorporating all LIPA feedback. Update Smartsheet to include the LIPA-approved PIP metric deliverables and due dates.	2/15/2024	Achieved	Declined
CS-30.01.04	Resource Utilization Report & Procedures - Provide functional and technical design	2/15/2024	Achieved	Declined
CS-30.01.05	Resource Utilization Report & Procedures - Go-live: Provide final version of production report. If technically possible, provide monthly data retro to CCaaS go-live in 2023.	2/29/2024	Achieved	Declined
CS-30.01.06	Resource Utilization Report & Procedures - Submit monthly Resource Utilization report - March	4/5/2024	Achieved	Declined
CS-30.01.07	Resource Utilization Report & Procedures - Establish procedures and processes to perform intraday call volume reforecasting and agent schedule adjustments	4/15/2024	Achieved	Declined
CS-30.01.08	Resource Utilization Report & Procedures - Submit monthly Resource Utilization report - April	5/5/2024	Achieved	Declined
CS-30.01.09	Resource Utilization Report & Procedures - Submit monthly Resource Utilization report - May	6/5/2024	Achieved	Declined
CS-30.01.10	Resource Utilization Report & Procedures - Submit monthly Resource Utilization report - June	7/5/2024	Achieved	Declined
CS-30.01.11	Resource Utilization Report & Procedures - Submit monthly Resource Utilization report - July	8/5/2024	Achieved	Declined
CS-30.01.12	Resource Utilization Report & Procedures - Submit monthly Resource Utilization report - August	9/5/2024	Achieved	Declined
CS-30.01.13	Resource Utilization Report & Procedures - Submit monthly Resource Utilization report - September	10/5/2024	Achieved	Declined
CS-30.01.14	Resource Utilization Report & Procedures - Submit monthly Resource Utilization report - October	11/5/2024	Achieved	Declined
CS-30.01.15	Resource Utilization Report & Procedures - Submit monthly Resource Utilization report - November	12/5/2024	Achieved	Declined
CS-30.01.16	Resource Utilization Report & Procedures - Submit monthly Resource Utilization report - December	1/5/2025	Achieved	Declined
CS-30.02	2) RESOURCE UTILIZATION IMPROVEMENT	N/A	N/A	N/A
CS-30.02.01	Resource Utilization Improvement - Provide draft PIP, which shall be high quality and sufficiently complete	5/31/2024	Achieved	Declined
CS-30.02.02	Resource Utilization Improvement - Provide final PIP for approval, incorporating all LIPA feedback. Update Smartsheet to include the LIPA-approved PIP metric deliverables and due dates.	6/30/2024	Achieved	Declined
CS-30.02.03	Resource Utilization Improvement - Provide business & system requirements	As approved in final PIP	Achieved	Declined
CS-30.02.04	Resource Utilization Improvement - Provide functional and technical design	As approved in final PIP	Achieved	Declined
CS-30.02.05	Resource Utilization Improvement - Go-live	11/30/2024	Achieved	Declined

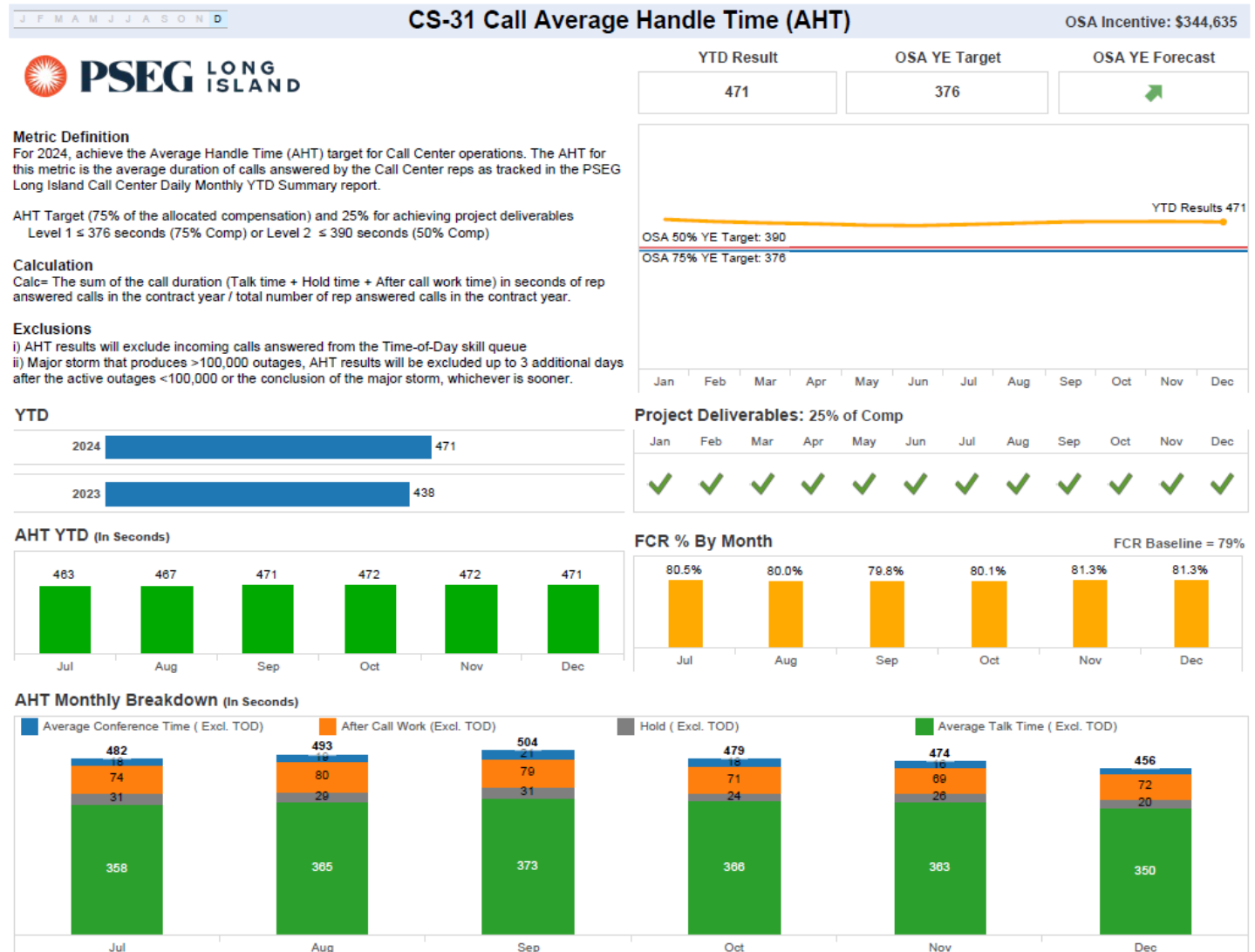
Summary

- This project had 2 sub projects on Resource Utilization Report & Procedures and Resource Utilization Improvement. One PIP to deliver a resource utilization report and procedures to make operational changes, and one PIP to execute improvement activities to optimize and improve intraday Contact Center resource utilization for performance benefits.
- Adherence and Intraday reports were provided to LIPA on a monthly basis. These reports included:

- Provides forecasted vs. actual call volume throughout the day, staffing overages and short falls by interval. This is real time data used to make scheduling decisions. Based on intraday data, WFM adjusted overtime and training classes (i.e., utilized trainees on phones during understaffed periods) to best address call volumes. In addition, WFM realigned shifts during the shift bid process including aligning supervisor shifts to agent shifts.
- The Workforce Management team also utilizes several NICE reports to manage the call center:
 - Adherence: Provides agent data regarding following their assigned schedule accurately. Adherence is an agent monthly goal and included on the agent's scorecard and is part of the telecommuting criteria. As a result of failing to consistently meet Adherence agents are performance managed, including return to office.
 - WFM Agent Scorecard Data & WFM Agent Historical Data: Provides the metrics for agents including inbound handled calls, ACW, Hold, AHT, etc.
 - WFM Precision Queue Multi Day: Provides overall call center metrics that are included in department daily report.
 - WFM Skill Disposition Report: Provides total number of dispositions selected by skill type.
 - WFM Agent Disposition Historical Report: Provides the agent's performance in regard to selecting dispositions on each call.
- PSEG Long Island and LIPA engaged with our call center vendor requesting a customized schedule efficiency report. After months of meeting with WFM experts at our call center vendor, it was made clear the reports that our vendor provides are industry standard call center reports and the unique report being asking for by LIPA could not be created. The reports that were leveraged delivered the functionality that allowed us to effectively manage our contact center agents within the confines of our collective bargaining agreement with IBEW Local 1049 and current business operations. LIPA has declined all deliverables because this report has not been delivered and stated "No solution has been identified to meet the report requirements of the metric." Our Call Center vendor has provided notification that "We've expended every resource to try and create the scheduling formula report that PSEG LI has requested. It is not a standard report, and after consulting with our top workforce management, performance management, and custom reporting subject matter experts, we do not have the ability to create it."
- The request for this reporting by LIPA was not based in any best practice and is not something this is reasonably available and/or technically leveraged based on feedback from our call center vendor which is a leader in the industry per Gartner's Magic Quadrant.
- PSEG Long Island implemented Standard Operating Procedure - Workforce Management to ensure consistently among team and action to be taken based on call volume.
- Call Center management monitored Adherence daily and performance managed agents failing to consistently meet the goal. Based on benchmarking and standard adherence goals within call centers, PSEG is within the expected range. Department YTD Adherence: 91.5%
- Although the report LIPA has requested was incapable of being delivered, the overall metric scope still provided benefits to the call center by providing WFM to make decisions for staffing peak periods as well as realignment of shifts for shift bid based on intraday volume.
- **Based upon overall performance and final discussions between PSEG LI and LIPA, the parties have agreed to a final payment allocation percentage of 75% of the incentive compensation at risk.**

CS-31 - Call Average Handle Time (AHT)

Metric Type	Hybrid	Metric Performance	↑ (Partial – 25% of compensation)
Incentive Compensation Claim	\$86,158.66	Comments	N/A



CS-31	Call Average Handle Time (AHT)			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-31.02	AHT IMPROVEMENT PROJECT	N/A	N/A	N/A
CS-31.02.01	AHT Improvement Project - Provide statistical analysis of AHT with underlying raw data	02/29/24	Achieved	Approved
CS-31.02.02	AHT Improvement Project - Provide draft PIP (people, process and technology), which shall be high quality and sufficiently complete, to resolve AHT root cause. PIP to also include methods utilized to determine root cause	02/29/24	Achieved	Approved
CS-31.02.03	AHT Improvement Project - Provide final PIP for approval, incorporating all LIPA feedback. Update Smartsheet to include the LIPA-approved PIP metric deliverables and due dates	03/31/24	Achieved	Approved
CS-31.02.04	AHT Improvement Project - Provide business & system requirements	03/30/24	Exempted via Approved PIP	Exempted via Approved PIP
CS-31.02.05	AHT Improvement Project - Provide test management plan	As approved in final PIP	Exempted via Approved PIP	Exempted via Approved PIP

CS-31	Call Average Handle Time (AHT)			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-31.02.06	AHT Improvement Project - Provide functional and technical design	As approved per the final PIP	Exempted via Approved PIP	Exempted via Approved PIP
CS-31.02.07	AHT Improvement Project - Provide Requirements Traceability Matrix	As approved in final PIP	Exempted via Approved PIP	Exempted via Approved PIP
CS-31.02.08	AHT Improvement Project - Provide test results with evidence	As approved in final PIP	Exempted via Approved PIP	Exempted via Approved PIP
CS-31.02.09	AHT Improvement Project - Provide business process document for continuous identification of AHT root cause	03/30/24	Achieved	Approved
CS-31.02.10	AHT Improvement Project - Inform LIPA of go-live decision and submit completed go-live checklist that supports decision.	As approved in final PIP	Exempted via Approved PIP	Exempted via Approved PIP
CS-31.02.11	AHT Improvement Project - Go-live	07/31/24	Exempted via Approved PIP	Exempted via Approved PIP
CS-31.02.12	AHT Improvement Project - Provide evidence of utilization of new technology, performance/resource management, and processes and quantify impact on AHT	08/31/24	Exempted via Approved PIP	Exempted via Approved PIP
CS-31.02.13	AHT Improvement Project - Provide - Q2 Root cause findings, improvements and execution plan to implement the improvement	06/30/24	Achieved	Approved
CS-31.02.14	AHT Improvement Project - Provide - Q3 Root cause findings, improvements and execution plan to implement the improvement	09/30/24	Achieved	Approved
CS-31.02.15	AHT Improvement Project - Provide - Q4 Root cause findings, improvements and execution plan to implement the improvement	12/31/24	Achieved	Approved

Summary

- PSEG Long Island did not achieve the quantitative component of the metric with a YE performance of 471 second versus target threshold range of 376-390 seconds.
- PSEG Long Island did achieve the project qualitative portion of the metric with the delivery of the AHT Improvement Project and applicable deliverables. This portion of the metric was worth 25% of the allocated compensation.

Information Technology

IT-01 - IT Organizational Maturity

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$482,488.47	Comments	N/A

IT-01	IT Organizational Maturity			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-01.01	PSEG Long Island IT organization determined to be at Maturity Level 3 in the CMMI Development Model via a CMMI Benchmark Appraisal to be conducted by a LIPA consultant in 2024 Q2, in accordance with all requirements and specifications in this metric.	02/28/25	Achieved	Approved
IT-01.02	PSEG Long Island has fully supported and cooperated with the planning, conduct, and reporting of the appraisal, including making all requested personnel available and providing all requested artifacts, information and data, in a timely manner.	02/28/25	Achieved	Approved

Summary

- The objective of the goal is that PSEG Long Island IT achieves an Organizational Maturity Level at CMMI Level 3 in the CMMI Development Model.
- LIPA's consultant completed the third party appraisal and concluded that PSEG Long Island has achieved an Organizational Maturity Level at CMMI Level 3 in the CMMI Development Model.

IT-03 - System Resiliency - Business Continuity Plans and Functional Drills

Metric Type	Quantitative	Metric Performance	Reallocated
Incentive Compensation Claim	Reallocated	Comments	Reasons for reallocation below

Summary

- PSEG Long Island recommends to LIPA that we cancel IT-03 and IT-10 and reallocate the compensation associated with aforementioned metrics evenly to the remainder of the Information Technology Scope Function Metrics. While the third party assessment was completed, additional time was needed to develop a comprehensive plan to resolve/mitigate any findings and recommendations coming from the third party assessment.

IT-04 - System and Software Lifecycle Management

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$137,853.85	Comments	N/A

IT-04	System and Software Lifecycle Management			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-04.01	Submit updated 2024 IT and OT asset inventory, as specified in this metric.	02/28/24	Achieved	Approved
IT-04.02	Submit 2-year Refresh Plan, as specified in this metric, updated to account for any relevant changes to the approved 2023 inventory or other conditions, and extended to 2025.	03/31/24	Achieved	Approved
IT-04.03	Quarterly Project Status Report for 2024 Q1	04/10/24	Achieved	Approved
IT-04.04	Quarterly Project Status Report for 2024 Q2	07/10/24	Achieved	Approved
IT-04.05	Quarterly Project Status Report for 2024 Q3	10/10/24	Achieved	Approved
IT-04.06	All planned work for 2024 in the LIPA-approved Refresh Plan is completed in accordance with the plan.	12/31/24	Achieved	Approved
IT-04.07	All planned work for 2024 for any Life Cycle Planning (LCP) projects that are not in the 2024 Refresh Plan, but have approved budget for 2024, is completed.	12/31/24	Achieved	Approved
IT-04.08	Year-end Closeout Report, as specified in this metric.	01/15/25	Achieved	Approved

Summary

- PSEG Long Island provided 2024 IT and OT asset inventory
- PSEG Long Island submitted 2-year Refresh Plan, updated to account for any relevant changes to the approved 2023 inventory, and extended to 2025.
- PSEG Long Island completed all planned work for 2024 in the LIPA-approved Refresh Plan is completed in accordance with the plan.
- PSEG Long Island provided quarterly project status reports and a YE closeout report.
- PSEG Long Island completed all planned work for 2024 in the LIPA-approved Refresh Plan in accordance with the plan.
- PSEG Long Island completed all planned work for 2024 for any Life Cycle Planning (LCP) projects that are not in the 2024 Refresh Plan, but have approved budget for 2024.

IT-05 - Project Performance - In-flight Projects

Metric Type	Quantitative	Metric Performance	↑ (Partial – 50% of compensation)
Incentive Compensation Claim	\$206,780.77	Comments	N/A

- This is a project-based metric aimed at improving organizational IT project management performance. PSEG Long Island met requirements for 7 of 11 (64%) of the included projects.
- The seven projects that met the Metric requirements are: Salesforce Applications Replacement (CRM alternative), CG Concentrator Replacement, DIA-01, CDG Billing Automation- 2023 Scope, Cybersecurity Continuous Improvement for CNI - 2023 Scope, CyberArk for CNI- 2023 Scope, and Cybersecurity Cont. Improvement - 2023 Scope.
- The four projects that did not meet the Metric requirements are Industrial Defender- 2023 Scope, SailPoint Access Control - 2023 Scope, Cybersecurity Program- 2023 Scope, Dragos for CNI- 2023 Scope

IT-05 Project Performance - In-flight Projects Project Summary

Project #	Project Name	Performance
IT-05.2023-06.T2.04	Salesforce Applications Replacement (CRM alternative)	Achieved
IT-05.2023.T3.01	CG Concentrator Replacement	Achieved
IT-05.2023.T1.5	DIA-01	Achieved
IT-05.2023.T1.09	CDG Billing Automation- 2023 Scope	Achieved
IT-05.2023-06.T1.05	Cybersecurity Continuous Improvement for CNI - 2023 Scope	Achieved
IT-05.2023.T2.02	CyberArk for CNI- 2023 Scope	Achieved
IT-05.2023-06.T2.03	Cybersecurity Cont. Improvement - 2023 Scope	Achieved
IT-05.2023.T2.05	Industrial Defender- 2023 Scope	Did Not Achieve
IT-05.2023.T1.03	SailPoint Access Control - 2023 Scope	Did Not Achieve
IT-05.2023-05.T2.03	Cybersecurity Program- 2023 Scope	Did Not Achieve
IT-05.2023-05.T2.04	Dragos for CNI- 2023 Scope	Did Not Achieve

IT-06 - Project Performance – New 2024 Projects

Metric Type	Quantitative	Metric Performance	↑ (Partial – 75% of compensation)
Incentive Compensation Claim	\$413,561.54	Comments	N/A

- This is a project-based metric aimed at improving organizational IT project management performance. PSEG Long Island met requirements for 9 of 11 (82%) included projects.
- The nine projects that met the metric requirements are GRC Tool Deployment, JMUX Replacement, Standard Data Platform Phase 2, Energy Management System (EMS) Upgrade, Replace Sonic ESB with MuleSoft, DER to DSCADA Communications Upgrade, OMS CAD System Enhancements 2024, Customer Insights and Home Energy Management, Business Intelligence & Analytics, ETR, Storm, Transformer, etc.
- The one project that did not meet the metric requirement was Cybersecurity Continuous Improvement 2024
- The IT Portfolio Planning System was not started as initially planned/budgeted
- The Physical Security and Team Center Replacement projects were exempted via approved exception requests.

IT-06 Project Performance - In-flight Projects Project Summary

Project #	Project Name	Performance
IT-06.T1.02	GRC Tool Deployment	Achieved
IT-06.T1.03	JMUX Replacement	Achieved
IT-06.T1.05	Standard Data Platform Phase 2	Achieved
IT-06.T2.01	Energy Management System (EMS) Upgrade	Achieved
IT-06.T2.02	Replace Sonic ESB with MuleSoft	Achieved
IT-06.T2.04	DER to DSCADA Communications Upgrade	Achieved
IT-06.T2.05	OMS CAD System Enhancements 2024	Achieved
IT-06.T2.06	Customer Insights and Home Energy Management	Achieved
IT-06.T2.08	Business Intelligence & Analytics ETR, Storm, Transformer, etc.	Achieved
IT-06.T1.01	Cybersecurity Continuous Improvement 2024	Did Not Achieve
IT-06.T2.07	IT Portfolio Planning System	Did Not Start Project
IT-06.T1.04	Physical Security	Exempted
IT-06.T2.03	Team Center Replacement	Exempted

IT-07 – System Segregation

Metric Type	Qualitative	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00	Comments	N/A

IT-07	System Segregation			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-07.04	Status report for April 2024	05/15/24	Achieved	Approved
IT-07.05	Status report for May 2024	06/15/24	Achieved	Approved
IT-07.06	Status report for June 2024	07/15/24	Achieved	Approved
IT-07.07	Status report for July 2024	08/15/24	Achieved	Approved
IT-07.08	Status report for August 2024	09/15/24	Achieved	Approved
IT-07-IB1.01	All Bundle 1 Implementations/Go-lives Completed	11/16/24	No Approved PIP	No Status
IT-07-IB1.02	Bundle 1 Close-out Report	02/16/25	No Approved PIP	Declined
IT-07-IB1.03	All 2024 Deliverables in the LIPA-approved Implementation Bundle 1 PIP	02/16/25	No Approved PIP	Declined
IT-07-IB2.01	All Bundle 2 Implementations/Go-lives Completed	12/31/24	No Approved PIP	Declined
IT-07-IB2.02	All 2024 Deliverables in the LIPA-approved Implementation Bundle 2 PIP	12/31/25	No Approved PIP	Declined
IT-07-IB3.01	All Bundle 3 Implementations Completed	12/31/24	No Approved PIP	Declined
IT-07-IB3.02	All 2024 Deliverables in the LIPA-approved Implementation Bundle 3 PIP	12/31/25	No Approved PIP	Declined
IT-07-IB4.01	Submit Implementation Bundle 4 PIP	03/31/24	Submitted	Declined
IT-07-IB4.01	All Bundle 4 Implementations Completed	Per LIPA-approved PIP	No Approved PIP	No Status
IT-07-IB4.02	All 2024 Deliverables in the LIPA-approved Implementation Bundle 4 PIP	Per LIPA-approved PIP	No Approved PIP	No Status

Summary

- PSEG Long Island did not go live with any bundles in 2024. The only bundle that was initially planned and scheduled for 2024 was Bundle 1 which was delayed.
- The other deliverables for Bundle 2, 3 and 4 were never anticipated, planned or scheduled to go-live in 2024 which was discussed during development of the 2024 metrics but the deliverables were input regardless.

IT-08 - Cyber Security Organization - Implementation

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$344,634.62	Comments	N/A

IT-08	Cyber Security Organization - Implementation			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-08.00.01	Project Kick-off Presentation and Meeting notes	03/19/24	Achieved	Approved
IT-08.00.02	All 2024 Deliverables from LIPA-approved Cyber Security Organization PIP	04/11/25	Achieved	Approved
IT-08.00.03	Detailed Project Plan	03/26/24	Achieved	Approved
IT-08.00.04	Proposed Organizational Structure	03/26/24	Achieved	Approved
IT-08.00.05	Position descriptions of roles to be hired	01/21/24	Achieved	Approved
IT-08.00.06	Provide an affiliate reduction plan that takes into consideration onboard dates for Cyber personnel, managed services and System separation activities	04/23/24	Achieved	Approved
IT-08.00.07	Positions have been posted by HR and are available to the public.	05/14/24	Achieved	Approved
IT-08.00.08	Mid-term assessment and action plan if needed.	06/14/24	Achieved	Approved
IT-08.00.09	Artifacts that all FY24 roles were hired per plan.	04/11/25	Achieved	Approved
IT-08.00.10	Updated organizational chart with roles and responsibilities of the new and existing positions and named employees, contractors and Managed Services vendors	12/30/24	Achieved	Approved
IT-08.00.11	Project Close-out Report	04/11/25	Achieved	Approved
IT-08.8.2023	Hiring completed for critical positions that were approved to be filled in 2023.	06/14/24	Achieved	Approved

Summary

- PSEG Long Island submitted a detail project plan for Cyber Security Organization - Implementation
- PSEG Long Island submitted a Proposed Organizational Structure and corresponding position descriptions for roles to be hired
- All Positions were posted by HR and made available to the public
- PSEG Long Island completed a Mid-term assessment
- PSEG Long Island updated the Cyber Security organizational chart with roles and responsibilities of the new and existing positions and named employees, contractors and Managed Services vendors
- PSEG Long Island completed hiring of all roles in alignment with the plan
- PSEG Long Island submitted an affiliate reduction plan that took into consideration onboard dates for Cyber personnel, managed services and System separation activities
- PSEG Long Island submitted a project close-out report.

IT-09 - IT Planning - Ransomware Readiness and Response

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$275,707.70	Comments	N/A

IT-09	IT Planning - Ransomware Readiness and Response			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-09.01.01	Monthly progress reports and status briefing	01/30/24	Exempt	Exempt
IT-09.01.02	Monthly progress reports and status briefing	02/28/24	Exempt	Exempt
IT-09.01.03	Monthly progress reports and status briefing	03/31/24	Achieved	Approved
IT-09.01.04	Monthly progress reports and status briefing	04/30/24	Achieved	Approved
IT-09.01.05	Monthly progress reports and status briefing	05/31/24	Achieved	Approved
IT-09.01.06	Monthly progress reports and status briefing	06/30/24	Achieved	Approved
IT-09.01.07	Monthly progress reports and status briefing	07/30/24	Achieved	Approved
IT-09.01.08	Monthly progress reports and status briefing	08/30/24	Achieved	Approved
IT-09.01.09	Monthly progress reports and status briefing	09/29/24	Achieved	Approved
IT-09.01.10	Monthly progress reports and status briefing	10/30/24	Achieved	Approved
IT-09.01.11	Monthly progress reports and status briefing	11/29/24	Achieved	Approved
IT-09.01.12	Monthly progress reports and status briefing	12/30/24	Achieved	Approved
IT-09.02	PSEG Long Island has fully supported the assessment, including making all relevant PSEG Long Island personnel available as needed for interviews, meetings, etc. and providing all requested information and data in a timely manner.	04/15/24	Achieved	Approved
IT-09.03	PIP to implement the Ransomware Readiness and Response Roadmap	08/02/24	Achieved	Approved
IT-09.04	All 2024 Deliverables in the LIPA-approved PIP	12/30/24	Achieved	Approved

Summary

- PSEG Long Island fully supported the Ransomware Readiness and Response assessment, including making all relevant PSEG Long Island personnel available as needed for interviews, meetings, etc. and providing all requested information and data in a timely manner.
- PSEG Long Island submitted a PIP to implement the Ransomware Readiness and Response Roadmap
- PSEG Long Island provided monthly progress reports and status briefing

IT-10 - System Resiliency - Disaster Recovery Plans and Testing

Metric Type	Quantitative	Metric Performance	Reallocated
Incentive Compensation Claim	Reallocated	Comments	Reasons for reallocation below

Summary

- PSEG Long Island recommends to LIPA that we cancel IT-03 and IT-10 and reallocate the compensation associated with aforementioned metrics evenly to the remainder of the Information Technology Scope Function Metrics. While the third party assessment was completed, additional time was needed to develop a comprehensive plan to resolve/mitigate any findings and recommendations coming from the third party assessment.

Power Supply and Clean Energy

PS&CE-01 - Complete Integrated Resource Plan (IRP) Follow-on Activities

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$114,878.21	Comments	N/A

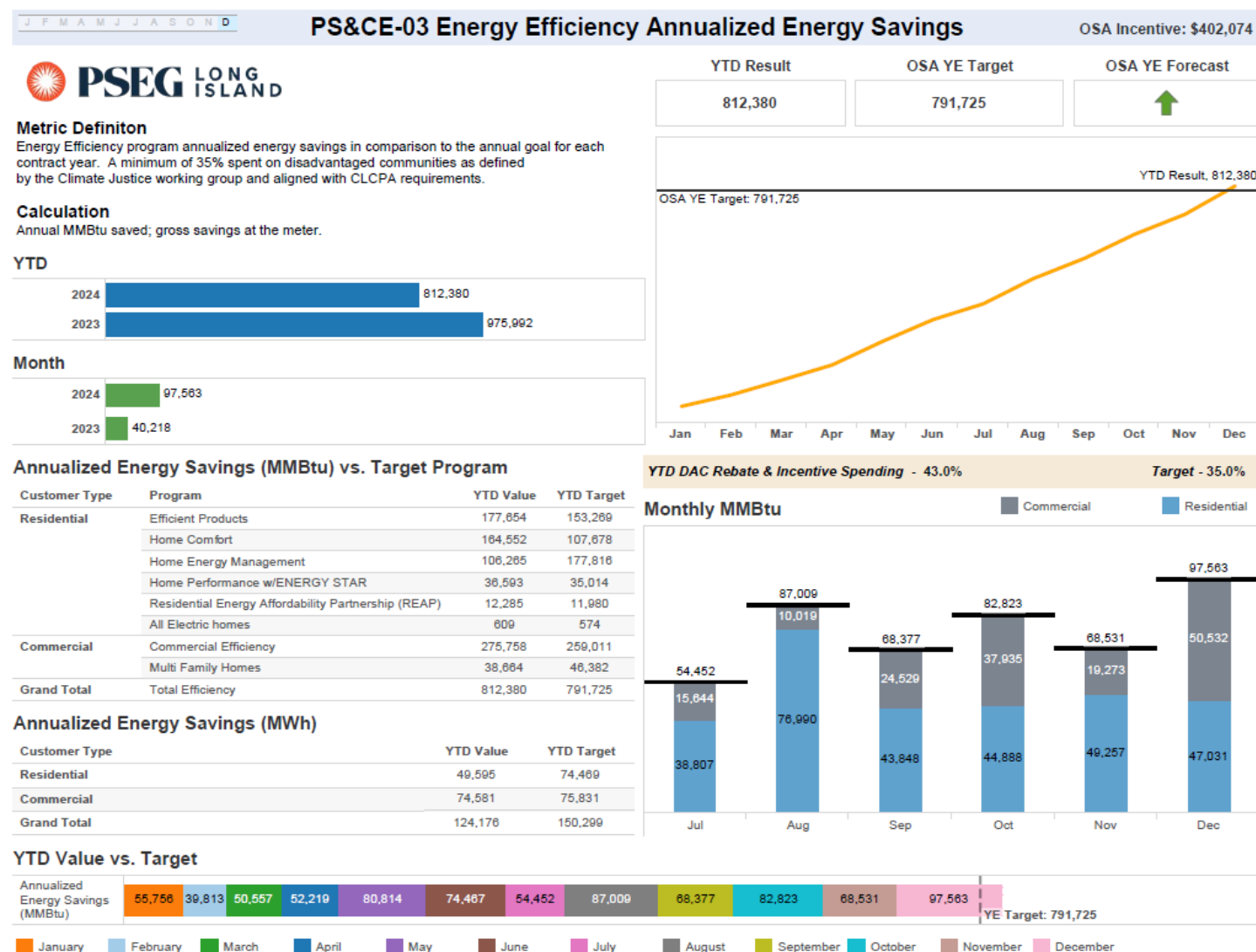
PS&CE-01	Complete Integrated Resource Plan (IRP) Follow-on Activities			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
PS&CE-01.01	Submit Draft Steam Deactivation Study for LIPA comments.	3/29/2024	Achieved	Approved
PS&CE-01.02	Steam Deactivation Study: Development of Solutions and Final Report	4/29/2024	Achieved	Approved
PS&CE-01.03	Optimal Locations for Energy Storage: Review Steam Deactivation Study and update optimal storage locations as needed.	6/28/2024	Achieved	Approved

Summary

- PSEG Long Island Submit Draft Steam Deactivation Study and Finalize the Study with a Development of Solutions and Final Report
- PSEG Long Island submitted an Optimal Locations for Energy Storage: Review Steam Deactivation Study and update optimal storage locations as needed.

PS&CE-03 - Energy Efficiency Annualized Energy Savings

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$402,073.72	Comments	N/A



Summary

- PSEG Long Island achieved 2024 Energy Efficiency Annualized Energy Savings (MMBtu) target of 791,725 MMBtus with year-end performance of 812,380 MMBtus of savings.
- PSEG Long Island also exceeded the target of a minimum of 35.0% spend on disadvantaged communities as defined by the Climate Justice working group and aligned with CLCPA requirements with a YE spend of 43.0%

PS&CE-05 - Beneficial Electrification

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$402,073.72	Comments	N/A

J F M A M J J A S O N D	PS&CE-05 Beneficial Electrification	OSA Incentive: \$402,074
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Metric Definition

Achieve the following implementation targets by December 31, 2024:

1. Pay rebates for 3,600 single-family and multi-family housing units served by whole house heat pumps systems in incentive programs.
2. Meet the minimum of 35% of the heat pump rebate and incentive budget on disadvantaged/low income customers, or those located in DAC communities.

Calculation

Each target above is worth 50% of the total incentive and is measured on a pass/fail basis. A pass is earned by full completion of that target.

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

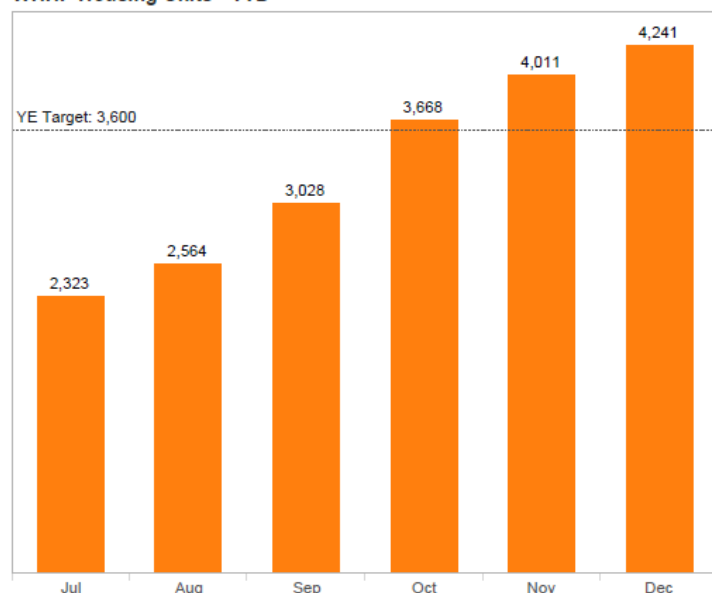
Beneficial Electrification - YTD vs Target

	YTD Value	YTD Target	YTD %	Pass / Fail
WHHP Housing Units	4,241	3,600	117.8%	Pass
DAC/Low Income HP Rebate & Incentive	59.6%	35.0%	170.4%	Pass

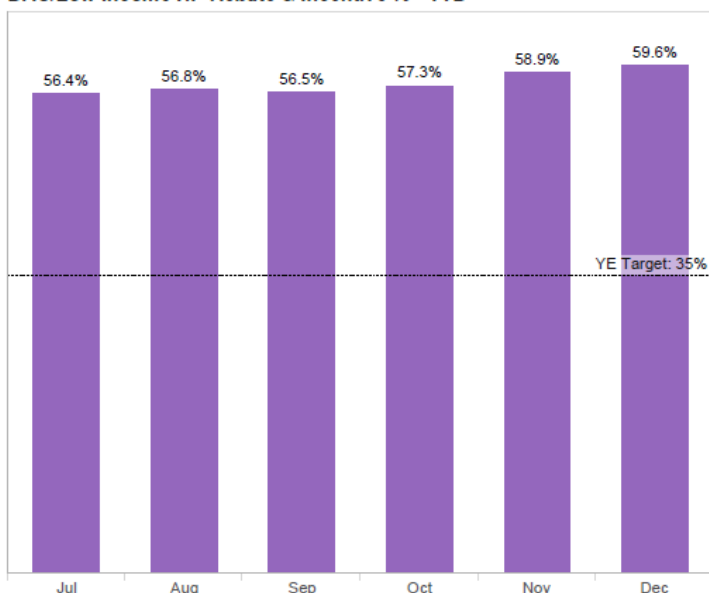
YTD



WHHP Housing Units - YTD



DAC/Low Income HP Rebate & Incentive % - YTD



- PSEG Long Island achieved both of the Beneficial Electrification targets. Each target above is worth 50% of the total incentive and is measured on a pass/fail basis. A pass is earned by full completion of that target.

Sub-Metric A: Whole House Heat Pumps (WHHP) Housing Units

- PSEG Long Island paid rebates for 4,241 Whole House Heat Pumps (WHHP) Housing Units versus target 3,600 WHHPs – target achieved.

Sub-Metric B: Disadvantaged Communities (DAC)/Low Income Heat Pump Rebate & Incentive %

- PSEG Long Island exceeded the target of 35.0% for Disadvantaged Communities (DAC)/Low Income Heat Pump Rebate & Incentive with a YE performance of 59.6% of spend on DAC/Low Income Customers.

PS&CE-08 - Transition to New "Standard" Time of Day Residential and Small Business Rates on an Opt-Out Basis

Metric Type	Qualitative	Metric Performance	↑ (Partial – 90% of compensation)
Incentive Compensation Claim	\$413,561.54	Comments	N/A

PS&CE-08	Transition to New "Standard" Time of Day Residential and Small Business Rates on an Opt-Out Basis			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
PS&CE-08.01	Provide revised 2024 migration plan details and metric deliverable schedule (to also include deliverables related to rate comparison modelling for future rate) as approved by LIPA in 2023. Update the metric deliverables and due dates in Smartsheet to reflect the LIPA-approved revised schedule.	01/02/24	Achieved	Declined
PS&CE-08.02	New or moved residential customers defaulting to standard TOD rates	As approved in revised schedule	Exempted	Exempted
PS&CE-08.03	Release 3: Provide business processes and procedures	05/29/24	Achieved	Approved
PS&CE-08.04	Provide plan to capture customer feedback post conversion	05/15/24	Achieved	Approved
PS&CE-08.05	Release 3: Provide UAT test results with evidence for Kubra	05/13/24	Achieved	Approved
PS&CE-08.06	Release 3: Provide go-live checklist	As approved in revised schedule	Exempted	Exempted
PS&CE-08.07	Release 3: Provide cutover plan	05/27/24	Achieved	Approved
PS&CE-08.08	Release 3: Inform LIPA of go-live decision and submit completed go-live checklist that supports the decision	05/27/24	Achieved	Approved
PS&CE-08.09	Release 3: Go-live	06/04/24	Achieved	Approved
PS&CE-08.10	CI&HEM 1: Submit evidence of baseline Home Energy Reports (HER) available for customers	05/15/24	Achieved	Approved
PS&CE-08.11	Begin converting eligible Group 1 customers to TOD rate	06/05/24	Achieved	Approved
PS&CE-08.12	Release 3: Provide post go-live validation report containing business validation evidence capture and documentation	07/12/24	Achieved	Approved
PS&CE-08.13	Provide implementation progress report, program progress report & bill guarantee revenue impact report - January	02/15/24	Achieved	Approved
PS&CE-08.14	Provide implementation progress report, program progress report & bill guarantee revenue impact report - February	03/15/24	Achieved	Approved
PS&CE-08.15	Begin customer education campaign	10/15/24	Achieved	Approved
PS&CE-08.16	Provide implementation progress report, program progress report & bill guarantee revenue impact report - March	04/15/24	Achieved	Approved
PS&CE-08.17	Provide migration/post-migration customer research summary and detail - March	As approved in revised schedule	Exempted	Exempted
PS&CE-08.18	Begin converting eligible Group 2 customers to TOD rate	As approved in revised schedule	Exempted	Exempted
PS&CE-08.19	Provide implementation progress report, program progress report & bill guarantee revenue impact report - April	05/15/24	Achieved	Approved
PS&CE-08.20	Provide migration/post-migration customer research summary and detail - April	As approved in revised schedule	Exempted	Exempted
PS&CE-08.21	CI&HEM 2: Submit evidence of including Time-of-Day content in HERs and related alerts for TOD customers	As approved in revised schedule	Exempted	Exempted
PS&CE-08.22	Submit post production needs assessment	05/31/24	Achieved	Approved
PS&CE-08.23	Update the TOD workplan to include scope of Release 4 implementation based on post production needs assessment. Update Smartsheet for metric deliverables and due dates for Release 4 implementation	As approved in revised schedule	Achieved	Approved
PS&CE-08.24	Provide implementation progress report, program progress report & bill guarantee revenue impact report - May	06/15/24	Achieved	Approved

PS&CE-08	Transition to New "Standard" Time of Day Residential and Small Business Rates on an Opt-Out Basis			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
PS&CE-08.25	Provide migration/post-migration customer research summary and detail - May	As approved in revised schedule	Exempted	Exempted
PS&CE-08.26	Provide implementation progress report, program progress report & bill guarantee revenue impact report - June	07/15/24	Achieved	Approved
PS&CE-08.27	Release TBD: Rate comparison modelling future inclusion updates - Go Live	As approved in revised schedule	Exempted	Exempted
PS&CE-08.28	Provide migration/post-migration customer research summary and detail - June	As approved in revised schedule	Exempted	Exempted
PS&CE-08.29	Provide implementation progress report, program progress report & bill guarantee revenue impact report - July	08/15/24	Achieved	Approved
PS&CE-08.30	Provide Group 1 migration/post-migration customer research summary and detail - July	08/20/24	Achieved	Approved
PS&CE-08.31	Provide implementation progress report, program progress report & bill guarantee revenue impact report - August	09/15/24	Achieved	Approved
PS&CE-08.32	Release 4: Provide final business and system requirements	07/02/24	Achieved	Declined
PS&CE-08.33	Release 4 A/B: Provide technical requirements	10/07/24	Achieved	Approved
PS&CE-08.34	Release 4 A/B: Provide test management plan	10/08/24	Achieved	Approved
PS&CE-08.35	Release 4 A/B: Provide solution design document	10/16/24	Achieved	Approved
PS&CE-08.36	Release 4A: Provide Requirements Traceability Matrix	10/10/24	Achieved	Approved
PS&CE-08.37	Release 4A: Provide UAT test case scenarios and detailed scripts	10/10/24	Achieved	Approved
PS&CE-08.38	Release 4A: Provide UAT test results with evidence	10/25/24	Achieved	Approved
PS&CE-08.39	Release 4A: Provide updated business processes/procedures	11/01/24	Achieved	Approved
PS&CE-08.40	Release 4A: Provide go-live checklist template	10/28/24	Achieved	Approved
PS&CE-08.41	Release 4A: Submit cutover plan	10/28/24	Achieved	Approved
PS&CE-08.42	Release 4A: Inform LIPA of go-live decision and submit completed go-live checklist that supports decision.	10/28/24	Achieved	Approved
PS&CE-08.43	Release 4A: Go Live	10/31/24	Achieved	Approved
PS&CE-08.44	Release 4A: Submit post go-live validation report	12/03/24	Achieved	Approved
PS&CE-08.45	Provide migration/post-migration customer research summary and detail - August	As approved in revised schedule	Exempted	Exempted
PS&CE-08.46	Begin converting eligible Group 3 customers to TOD rate	As approved in revised schedule	Exempted	Exempted
PS&CE-08.47	Provide implementation progress report, program progress report & bill guarantee revenue impact report - September	10/15/24	Achieved	Approved
PS&CE-08.48	Provide Group 1 migration/post-migration customer research summary and detail - September	10/20/24	Achieved	Approved
PS&CE-08.49	Begin converting eligible Group 4 customers to TOD rate	As approved in revised schedule	Exempted	Exempted
PS&CE-08.50	Provide implementation progress report, program progress report & bill guarantee revenue impact report - October	11/15/24	Achieved	Approved
PS&CE-08.51	Provide migration/post-migration customer research summary and detail - October	As approved in revised schedule	Achieved	Approved
PS&CE-08.52	Begin converting eligible Group 5 customers to TOD rate	As approved in revised schedule	Exempted	Exempted
PS&CE-08.53	Provide implementation progress report, program progress report & bill guarantee revenue impact report - November	12/15/24	Achieved	Approved
PS&CE-08.54	Provide migration/post-migration customer research summary and detail - November	As approved in revised schedule	Achieved	Approved
PS&CE-08.55	Provide implementation progress report, program progress report & bill guarantee revenue impact report - December	01/15/25	Achieved	Approved

PS&CE-08 Transition to New "Standard" Time of Day Residential and Small Business Rates on an Opt-Out Basis				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
PS&CE-08.56	Provide migration/post-migration customer research summary and detail - December	As approved in revised schedule	Achieved	Approved
PS&CE-08.57	Release 3: Submit solution design documents for CAS	02/12/24	Achieved	Approved
PS&CE-08.58	Release 3: Provide requirements traceability matrix (RTM)	02/21/24	Achieved	Approved
PS&CE-08.59	Release 3: Provide SIT and system test cases for CAS	02/21/24	Achieved	Approved
PS&CE-08.60	Release 3: Provide UAT test cases for CAS	03/08/24	Achieved	Approved
PS&CE-08.61	Release 3: Provide SIT and system test results with evidence for CAS	03/11/24	Achieved	Approved
PS&CE-08.62	Release 3: Submit solution design documents for Kubra	03/11/24	Achieved	Approved
PS&CE-08.63	Release 3: Provide SIT and system test cases for Kubra	04/05/24	Achieved	Approved
PS&CE-08.64	Release 3: Provide UAT test cases for Kubra	04/10/24	Achieved	Approved
PS&CE-08.65	Release 3: Provide regression test cases	04/12/24	Achieved	Approved
PS&CE-08.66	Release 3: Provide performance test scripting	04/17/24	Achieved	Approved
PS&CE-08.67	Release 3: Provide SIT and system test results with evidence for Kubra	05/06/24	Achieved	Approved
PS&CE-08.68	Release 3: Provide UAT test results with evidence for CAS	05/06/24	Achieved	Approved
PS&CE-08.69	Release 3: Provide penetration test results with evidence	05/17/24	Achieved	Approved
PS&CE-08.70	Release 3: Provide performance test results with evidence (excludes performance test for Kubra)	05/22/24	Achieved	Approved
PS&CE-08.71	Release 3: Regression test results with evidence (excludes storm testing)	05/24/24	Achieved	Approved
PS&CE-08.72	Release 3: Regression test results with evidence for storm only	07/31/24	Achieved	Approved
PS&CE-08.73	Release 4: Provide draft business and system requirements	06/21/24	Achieved	Declined
PS&CE-08.74	Release 4B: Provide Requirements Traceability Matrix	11/12/24	Achieved	Approved
PS&CE-08.75	Release 4B: Provide SIT/system test case scenarios and detailed scripts	11/06/24	Achieved	Approved
PS&CE-08.76	Release 4B: Provide UAT test case scenarios and detailed scripts	11/12/24	Achieved	Approved
PS&CE-08.77	Release 4B: Provide SIT/system test results with evidence	11/07/24	Achieved	Approved
PS&CE-08.78	Release 4B: Provide UAT test results with evidence	11/26/24	Achieved	Approved
PS&CE-08.79	Release 4B: Cyber security code review	12/17/24	Achieved	Approved
PS&CE-08.80	Release 4B: Provide updated business processes/procedures	12/19/24	Achieved	Approved
PS&CE-08.81	Release 4B: Provide go-live checklist template	11/30/24	Achieved	Approved
PS&CE-08.82	Release 4B: Submit cutover plan	12/16/24	Achieved	Approved
PS&CE-08.83	Release 4B: Inform LIPA of go-live decision and submit completed go-live checklist that supports decision.	12/17/24	Achieved	Approved
PS&CE-08.84	Release 4B: Go Live	12/31/24	Achieved	Approved
PS&CE-08.85	Release 4B: Submit post go-live validation report	01/15/25	Achieved	Declined

Summary

- This metric had multiple deliverables including: Transition of group 2 migration, completion of enhancement releases, customer research and needs assessments, billing metrics associated with migration groups and providing implementation progress reports.
- **Based upon overall performance and final discussions between PSEG LI and LIPA, the parties have agreed to a final payment allocation percentage of 90% of the incentive compensation at risk.**

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

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$459,512.83	Comments	N/A

PS&CE-13	Heat Pump Strategy to Address Barriers to Customer Adoption			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
PS&CE-13.01	OUTREACH AND ENGAGEMENT PLAN	N/A	N/A	N/A
PS&CE-13.01.01	Update Smartsheet with the 2024 Engagement and implementation expansion action plan and LMI engagement plan as defined per the LIPA approved deliverable in the Supply Chain Development PIP (a)	1/19/2024	Achieved	Approved
PS&CE-13.01.02	Demonstrate promulgation of revised tools incentive for contractors and list of qualified air-to-water heat pumps and addition of this equipment to heat pump incentive (g)	1/19/2024	Achieved	Approved
PS&CE-13.01.03	All incomplete 2023 COMP plan deliverables to be added to 2024 deliverables (f)	1/19/2024	Achieved	Approved
PS&CE-13.01.04	Provide low income heat pump sizing risk mitigation plan, including the focus on integration with weatherization (i)	1/31/2024	Achieved	Approved
PS&CE-13.01.05	Customer Outreach and Marketing Plan for segment-specific targeted outreach and marketing. Scope of plan to build on the 2023 COMP plan with incorporation of lesson learned and new opportunities identified. Update Smartsheet to include the LIPA-approved COMP metric deliverables and due dates.(f)	2/10/2024	Achieved	Approved
PS&CE-13.01.06	Demonstrate implementation of the LMI engagement plan items, excluding financing opportunity (b)	3/15/2024	Achieved	Approved
PS&CE-13.01.07	PSEG Long Island to provide inputs to LIPA-Proposed financing plan (c)	14 days after receipt of the draft financing plan	Exempted	Exempted
PS&CE-13.01.08	PSEG Long Island to develop draft work plan to operationalize the final financing plan and associated budget (c)	45 days after receipt of the final financing plan	Exempted	Exempted
PS&CE-13.01.09	Promulgate and promote 2 additional heat pump case studies (h)	4/30/2024	Achieved	Approved
PS&CE-13.01.10	PSEG Long Island to develop final work plan to operationalize the final financing plan and associated budget (d)	15 Business days after receipt of the draft plan	Exempted	Exempted
PS&CE-13.01.11	Provide supporting information demonstrating the individual customer target results improvement. If less than 33% improvement, include the modified approach to clearly test individual targeting. (e)	6/15/2024	Achieved	Approved
PS&CE-13.01.12	Promulgate and promote 2 additional heat pump case studies (h)	7/31/2024	Achieved	Approved
PS&CE-13.01.13	Promulgate and promote 2 additional heat pump case studies (h)	10/31/2024	Achieved	Approved
PS&CE-13.01.14	Deliverable(s) for execution of the COMP (f)	As approved in final COMP	Achieved	Approved
PS&CE-13.01.15	Performance success will be measured at 12-15.24 for demonstrating the minimum percentage difference (e)	12/15/2024	Achieved	Approved
PS&CE-13.02	EXECUTE PROGRAM REVIEW AND DESIGN - SUPPLY CHAIN	N/A	N/A	N/A
PS&CE-13.02.01	Update Smartsheet to add deliverables and due dates for any 2023 program stream lining and design schedule for completion in 2023 that were not completed in the Supply Chain Development PIP (a)	1/10/2024	Achieved	Approved
PS&CE-13.02.02	Update Smartsheet to add deliverables and due dates for LIPA approved proposed plan for coordination with NYSERDA about training program design and resources, per the 11/17/23 deliverable (b)	1/10/2024	Achieved	Approved
PS&CE-13.02.03	Straw dog deliverable of a midstream program distributor and contractor discussions and Con Ed meetings referenced in 2023 Supply Chain Management PIP or LIPA-approved alternative (c)	3/1/2024	Achieved	Approved

PS&CE-13 Heat Pump Strategy to Address Barriers to Customer Adoption				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
PS&CE-13.02.04	Implement LIPA approved long term electronic payment solution for high volume contractors (d)	3/31/2024	Achieved	Approved
PS&CE-13.02.05	Implement propose program revisions recommendations that will reduce contractor and customer process (e)	4/1/2024	Achieved	Approved
PS&CE-13.02.06	Provide installer training program results (b)	12/31/2024	Achieved	Approved
PS&CE-13.03	AIR-TO-WATER HEAT PUMP	N/A	N/A	N/A
PS&CE-13.03.01	Contractor PIP 2023 deliverables not completed in 2023 to be added.	1/15/2024	Achieved	Approved
PS&CE-13.03.02	Demonstrate implementation of Air to Water Heat Pump Incentives Launch as stated in 2023 Contractor PIP deliverables	4/1/2024	Achieved	Approved
PS&CE-13.03.03	Provide quarterly training to existing and new contractor for low temperature heating and cooling system (b)	4/15/2024	Achieved	Approved
PS&CE-13.03.04	Provide quarterly training to existing and new contractor for low temperature heating and cooling system (b)	7/15/2024	Achieved	Approved
PS&CE-13.03.05	Provide quarterly training to existing and new contractor for low temperature heating and cooling system (b)	12/31/2024	Achieved	Approved
PS&CE-13.03.06	Execute a low-temperature water contractor recruitment initiative for air-to-water heat pumps installations (a)	12/1/2024	Achieved	Approved
PS&CE-13.03.07	Promulgate at least one AWHP case study for low temperature heating and cooling systems based off of contractor submissions as set forth in existing Contractor PIP (c)	8/15/2024	Achieved	Approved
PS&CE-13.04	NYSERDA BEEM	N/A	N/A	N/A
PS&CE-13.04.01	Develop a detailed 2024-2025 plan to achieve the LI portion of NYSERDA BEEM model projections + gap support (BEEM+) for supporting New York Beneficial Electrification Heat pump goals for 2024-2030. The plan will be broken down into a defined segment: Single-family existing (Market & LMI), Multifamily existing (Market & LMI), Single-family new construction (Market & LMI), and Multifamily new construction (Market & LMI). Update the metric deliverables in Smartsheet to include the LIPA-approved deliverables and due dates identified in the plan.	7/1/2024	Achieved	Approved
PS&CE-13.04.02	New initiatives deployment (Single family existing Market)	7/1/2024	Achieved	Approved
PS&CE-13.04.03	New initiatives deployment (Single family existing LMI)	7/1/2024	Achieved	Approved
PS&CE-13.04.04	New initiatives deployment (Multifamily existing Market)	7/1/2024	Achieved	Approved
PS&CE-13.04.05	New initiatives deployment (Multifamily existing LMI)	7/1/2024	Achieved	Approved
PS&CE-13.04.06	New initiatives deployment (Single family new construction Market)	7/1/2024	Achieved	Approved
PS&CE-13.04.07	New initiatives deployment (Single family new construction LMI)	7/1/2024	Achieved	Approved
PS&CE-13.04.08	New initiatives deployment (Multifamily new construction Market)	7/1/2024	Achieved	Approved
PS&CE-13.04.09	New initiatives deployment (Multifamily new construction LMI)	7/1/2024	Achieved	Approved
PS&CE-13.05	STATUS REPORTING	N/A	N/A	N/A
PS&CE-13.05.01	Provide monthly project status report versus the work plan, including KPI as defined in the 2023 Supply Chain Development plan - January	2/12/2024	Achieved	Approved
PS&CE-13.05.02	Provide monthly project status report versus the work plan, including KPI as defined in the 2023 Supply Chain Development plan - February	3/12/2024	Achieved	Approved
PS&CE-13.05.03	Provide monthly project status report versus the work plan, including KPI as defined in the 2023 Supply Chain Development plan - March	4/10/2024	Achieved	Approved
PS&CE-13.05.04	Provide monthly project status report versus the work plan, including KPI as defined in the 2023 Supply Chain Development plan - April	5/10/2024	Achieved	Approved
PS&CE-13.05.05	Provide monthly project status report versus the work plan, including KPI as defined in the 2023 Supply Chain Development plan - May	6/12/2024	Achieved	Approved
PS&CE-13.05.06	Provide monthly project status report versus the work plan, including KPI as defined in the 2023 Supply Chain Development plan - June	7/11/2024	Achieved	Approved
PS&CE-13.05.07	Provide monthly project status report versus the work plan, including KPI as defined in the 2023 Supply Chain Development plan - July	8/12/2024	Achieved	Approved

PS&CE-13 Heat Pump Strategy to Address Barriers to Customer Adoption				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
PS&CE-13.05.08	Provide monthly project status report versus the work plan, including KPI as defined in the 2023 Supply Chain Development plan - August	9/12/2024	Achieved	Approved
PS&CE-13.05.09	Provide monthly project status report versus the work plan, including KPI as defined in the 2023 Supply Chain Development plan - September	10/10/2024	Achieved	Approved
PS&CE-13.05.10	Provide monthly project status report versus the work plan, including KPI as defined in the 2023 Supply Chain Development plan - October	11/13/2024	Achieved	Approved
PS&CE-13.05.11	Provide monthly project status report versus the work plan, including KPI as defined in the 2023 Supply Chain Development plan - November	12/11/2024	Achieved	Approved
PS&CE-13.05.12	Provide monthly project status report versus the work plan, including KPI as defined in the 2023 Supply Chain Development plan - December	1/13/2025	Achieved	Approved

Summary

- PSEG Long Island completed and achieved the deliverables for the following projects:
 1. Outreach and Engagement Plan
 2. Execute Program Review And Design - Supply Chain
 3. Air-To-Water Heat Pump
 4. NYSERDA BEEM
- PSEG Long Island submitted a project status report to on a monthly basis to LIPA to review metric performance.
- Overall PSEG Long Island achieved 4 out of 4 projects and 100% of the allocated compensation for PS&CE-13 metric in 2024.

PS&CE-14 - Transportation Electrification Strategic Initiatives

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$459,512.83	Comments	N/A

PS&CE-14	Transportation Electrification Strategic Initiatives			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
PS&CE-14.01	TRANSPORTATION ELECTRIFICATION PROJECT IMPLEMENTATION PLAN	N/A	N/A	N/A
PS&CE-14.01.01	Project Definition and initial outline for Project Deliverables, and Project Structure. Hold review session with LIPA and DPS to discuss progress-to-date on Transportation Electrification PIP	2/15/2024	Achieved	Approved
PS&CE-14.01.02	Project Definition, Project Deliverables and Project Structure with LIPA and DPS feedback incorporated, along with initial outline for Project Plan, and Timeline, excluding Budget. Hold review session with LIPA to discuss progress-to-date on Transportation Electrification PIP	3/22/2024	Achieved	Approved
PS&CE-14.01.03	Provide a first draft of the Project Implementation Plan (PIP) for Transportation Electrification	4/11/2024	Achieved	Approved
PS&CE-14.01.04	Provide a second draft PIP updated with LIPA feedback incorporated. Hold review session with LIPA and DPS to discuss progress-to-date on Transportation Electrification PIP	5/10/2024	Achieved	Approved
PS&CE-14.01.05	Submit Project Implementation Plan (PIP) for Transportation Electrification for final review by LIPA	6/6/2024	Achieved	Approved
PS&CE-14.01.06	Receive final LIPA feedback on Transportation Electrification PIP	6/14/2024	Achieved	Approved
PS&CE-14.01.07	Final Project Implementation Plan (PIP) for Transportation Electrification	7/1/2024	Achieved	Approved
PS&CE-14.01.08	Provide monthly program implementation report and transportations statistics - July	7/8/2024	Achieved	Approved
PS&CE-14.01.09	Provide monthly program implementation report and transportations statistics - Aug	8/8/2024	Achieved	Approved
PS&CE-14.01.10	Provide monthly program implementation report and transportations statistics - Sept	9/9/2024	Achieved	Approved
PS&CE-14.01.11	Provide monthly program implementation report and transportations statistics - Oct	10/8/2024	Achieved	Approved
PS&CE-14.01.12	Provide monthly program implementation report and transportations statistics - Nov	11/8/2024	Achieved	Approved
PS&CE-14.01.13	Provide monthly program implementation report and transportations statistics - Dec	12/9/2024	Achieved	Approved
PS&CE-14.02	FLEET ROUND TABLE	N/A	N/A	N/A
PS&CE-14.02.01	Host 1st round table with at least a total of 10 fleet operators and developers and provide round table summary and results report	2/28/2024	Achieved	Approved
PS&CE-14.02.02	Host 2nd round table in which the original participants will be invited and at least 5 developers and at least 5 commercial customers that are different than the first round table attend and provide round table summary and results report.	11/15/2024	Achieved	Approved
PS&CE-14.03	EV MAKE READY PROGRAM ROUND TABLE	N/A	N/A	N/A
PS&CE-14.03.01	Host 1st round table with at least 10 Developers and at least 10 Commercial Customers and provide round table summary and results report	3/31/2024	Achieved	Approved
PS&CE-14.03.02	Host 2nd round table with in which the original participants will be invited at least 5 Developers and at least 5 Commercial Customers that are different than the first round table and provide round table summary and results report.	11/30/2024	Achieved	Approved

Summary

- PSEG Long Island completed and achieved the deliverables for the following projects:
 - Transportation Electrification Project Implementation Plan (60%)
 - Fleet Round Table (20%)
 - EV Make Ready Program Round Table (20%)
- Overall PSEG Long Island achieved 3 subprojects and 100% of the allocated compensation for PS&CE-14 metric.

Electric T&D

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

Metric Type	Hybrid	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00	Comments	N/A

T&D-01	Asset Management Program Implementation - Asset Inventory			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-01.01	Submit 1st Quarter status report of Asset Inventory collected and uploaded to EGIS by April 15, 2024.	4/15/2024	Achieved	Approved
T&D-01.02	Submit 2nd Quarter status report of Asset Inventory collected and uploaded to EGIS by July 15, 2024.	7/15/2024	Achieved	Approved
T&D-01.03	Submit 3rd Quarter status report of Asset Inventory collected and uploaded to EGIS by October 15, 2024.	10/15/2024	Achieved	Approved
T&D-01.04	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.	12/31/2024	Did Not Achieve	Declined
T&D-01.05	Submit 4th Quarter status report of Asset Inventory collected and uploaded to EGIS by January 15, 2025.	1/15/2025	Achieved	Approved

Summary

- PSEG Long Island submitted all quarterly status report of Asset Inventory collected and updated to EGIS by the specified dates.
- The current LIPA / Verizon Pole count utilized for the metric calculation is: 545,255. The 2024 T&D-1 Metric specified a rolling Program total of 65.0% of poles to be field verified and updated in GIS by 12/31/24, which translated to 354,416 total pole field verifications/GIS updates required by the end of 2024.
- PSEG Long Island worked throughout the year on the required field verifications and completed a cumulative total of 334,754 field verifications YE 2024, which did not meet the required number of 354,416. GIS record updates as of the end of 2024 was 242,000 record updates.

T&D-06 - Primary Transmission Control Center (PTCC) Replacement

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$344,634.62	Comments	N/A

T&D-06	Primary Transmission Control Center (PTCC) Replacement			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-06.01	Reached agreement on 2024 deliverables between LIPA and PSEGLI	2/16/2024	Achieved	Approved
T&D-06.01a	PTCC: Issue A&E Firm RFP	5/28/2024	Achieved	Approved
T&D-06.01b	PTCC: IT/OT Program Requirement for AE Schematic Design	8/30/2024	Achieved	Approved
T&D-06.01c	PTCC: Contract Award for A&E Firm Executed	9/24/2024	Achieved	Approved
T&D-06.01d	PTCC: Operational Technology (OT) Transition Plan and Information Technology (IT) Implementation Plan	11/15/2024	Achieved	Approved
T&D-06.01e	PTCC: Issue RFP for Construction Services	11/15/2024	Achieved	Approved
T&D-06.01f	PTCC: Preliminary Draft Schematic Operations Center Design and Site Development Design (Phase 1)	12/10/2024	Achieved	Approved
T&D-06.01g	PTCC: Preliminary Draft Schematic Operations Center Design and Site Development Design (Phase 2)	12/18/2024	Achieved	Approved
T&D-06.01h	PTCC: End of Year (Schematic Design Cost Estimate)	12/24/2024	Achieved	Approved
T&D-06.02a	Hicksville Video Wall: Contract Award for Video Wall Solution and Integrator Executed	7/18/2024	Achieved	Approved
T&D-06.02b	Hicksville Video Wall: Final Video Wall and Solution Architecture Design	8/20/2024	Achieved	Approved
T&D-06.02c	Hicksville Video Wall: Video Wall Substantial Completion	12/20/2024	Achieved	Approved

Summary

- PSEG Long Island completed the following deliverables and were approved by LIPA:
 - PTCC: Issue A&E Firm RFP
 - PTCC: IT/OT Program Requirement for AE Schematic Design
 - PTCC: Contract Award for A&E Firm Executed
 - PTCC: Operational Technology (OT) Transition Plan and Information Technology (IT) Implementation Plan
 - PTCC: Issue RFP for Construction Services
 - PTCC: Preliminary Draft Schematic Operations Center Design and Site Development Design (Phase 1)
 - PTCC: Preliminary Draft Schematic Operations Center Design and Site Development Design (Phase 2)
 - PTCC: End of Year (Schematic Design Cost Estimate)
 - Hicksville Video Wall: Contract Award for Video Wall Solution and Integrator Executed
 - Hicksville Video Wall: Final Video Wall and Solution Architecture Design
 - Hicksville Video Wall: Video Wall Substantial Completion

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

Metric Type	Quantitative	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00	Comments	N/A

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

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

OSA Incentive: \$430,793



Metric Definition

Total duration of sustained interruption (≥ 5 minutes) 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.

Calculation

SAIDI (System Average Interruption Duration Index) = $\sum(r_i * N_i) / NT$

Where,

Σ = Summation function.

r_i = Restoration time, minutes.

N_i = Total number of customers interrupted 5 minutes or more.

NT = Total number of customers served.

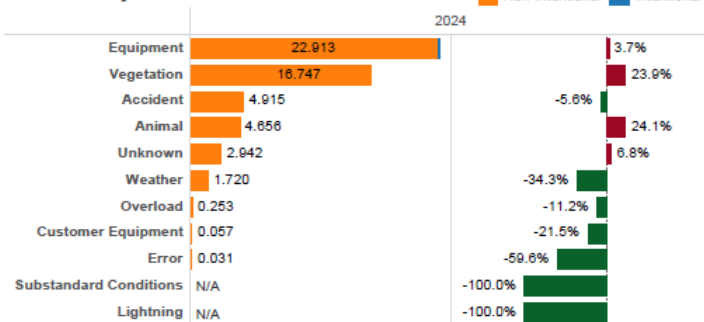
YTD



Month



YTD SAIDI by Cause



Transmission and Distribution SAIDI

Transmission/Substation & TBD	0.92
Distribution	58.38

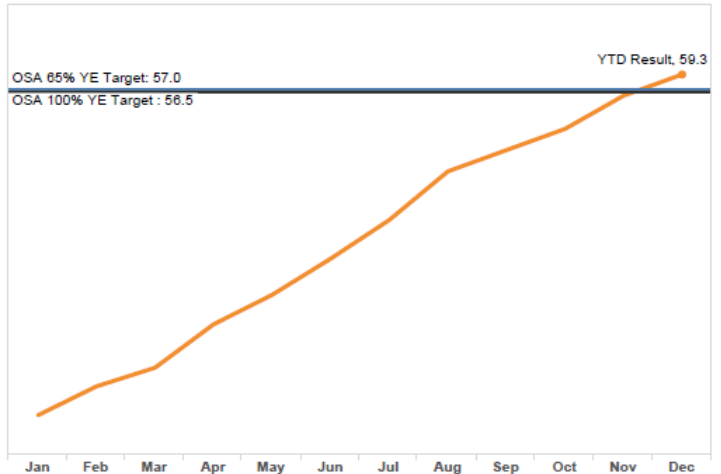
YTD Result

59.3

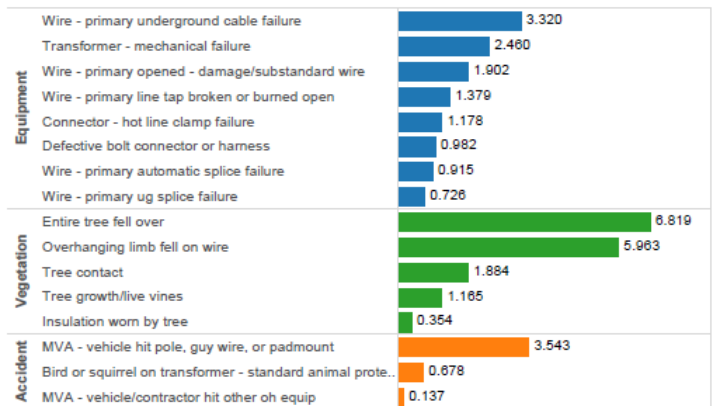
OSA YE Target

56.5

OSA YE Forecast



YTD SAIDI: Cause Codes



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's YE performance for System Average Interruption Duration Index (SAIDI) of 59.3 minutes did not achieve the targeted performance levels of 56.5 or 57.0 minutes.

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

Metric Type	Quantitative	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00	Comments	N/A

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

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

OSA Incentive: \$402,074



Metric Definition

Frequency of sustained interruption (≥ 5 minutes) within a Contract Year, computed in accordance with IEEE Standard 1366, Section 4.2.1. Exclusions for Major Storms will be applied as per NY Department of Public Service and NYCRR 97.1.

Calculation

SAIFI (System Average Interruption Frequency Index) = $\sum(N_i) / NT$

Where,

\sum = Summation function.

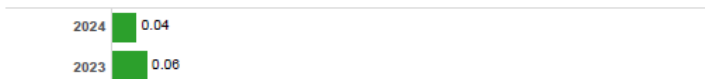
N_i = Total number of customers interrupted 5 minutes or more.

NT = Total number of customers served.

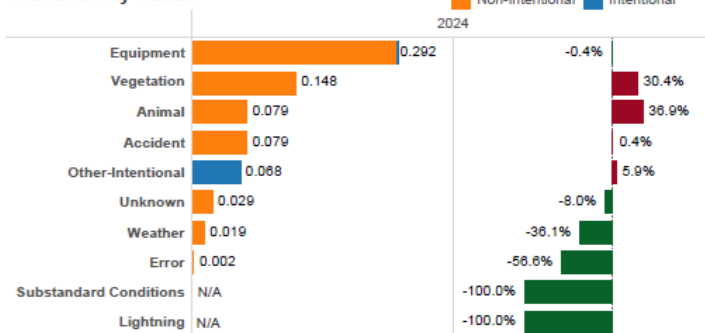
YTD



Month

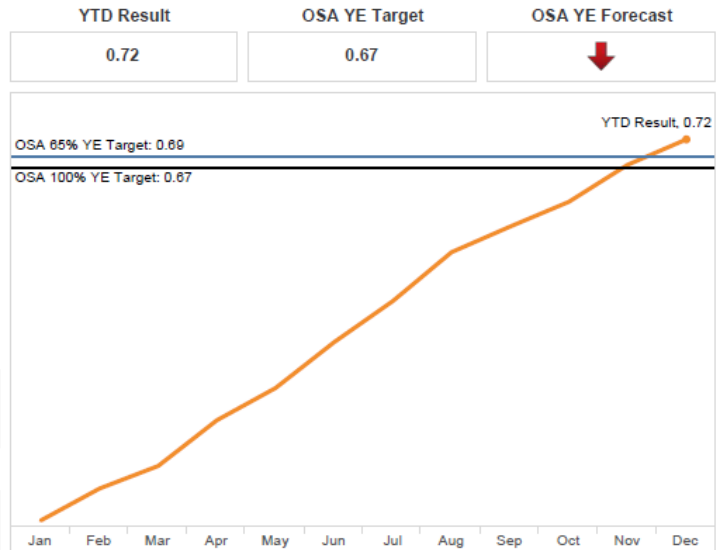


YTD SAIFI by Cause

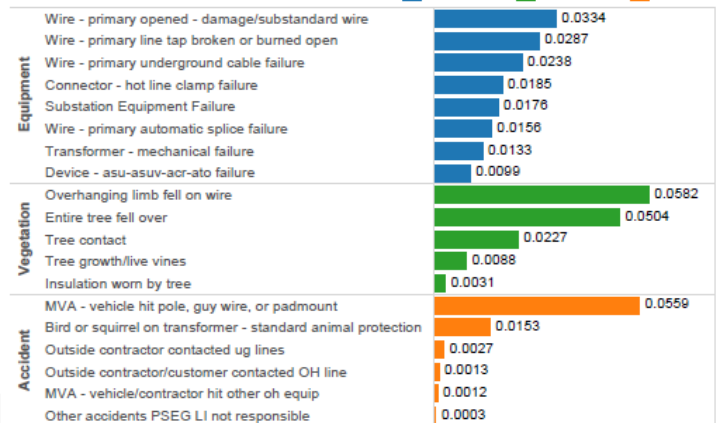


Transmission and Distribution SAIFI

Transmission/Substation & TBD	0.025
Distribution	0.696



YTD SAIFI: Cause Codes



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's YE performance for System Average Interruption Frequency Index (SAIFI) of 0.72 did not achieve the targeted performance levels of 0.67 or 0.69.

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

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$315,915.07	Comments	N/A

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

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

OSA Incentive: \$315,915



Metric Definition

Frequency of momentary interruption (<5 minutes) within a Contract Year, computed in accordance with IEEE Standard 1366, Section 4.2.1.

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

2024	1.46
2023	1.45

Month

2024	0.09
2023	0.14

Monthly Statistics

	2023		2024	
	Interruptions	MAIFI	Interruptions	MAIFI
January	109,732	0.10	149,778	0.13
February	74,578	0.07	127,146	0.11
March	93,088	0.08	87,579	0.08
April	121,839	0.11	150,898	0.13
May	158,817	0.14	157,199	0.14
June	189,973	0.17	255,972	0.22
July	192,370	0.17	121,818	0.11
August	186,098	0.16	221,753	0.19
September	140,543	0.12	83,188	0.07
October	113,430	0.10	107,158	0.09
November	130,729	0.11	120,233	0.10
December	158,839	0.14	100,318	0.09
Total	1,887,632	1.45	1,882,638	1.46
Customers Served	1,146,481		1,151,740	

YTD Result

1.46

OSA YE Target

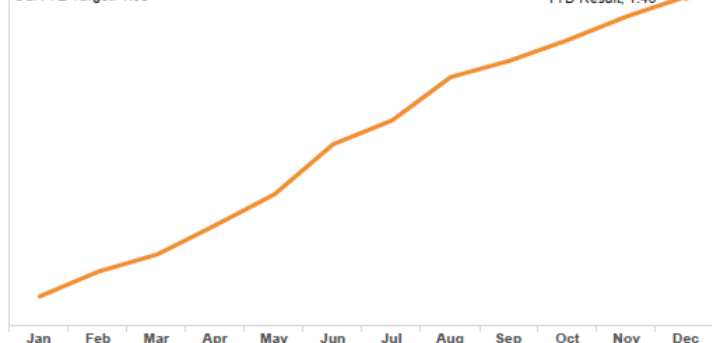
1.50

OSA YE Forecast

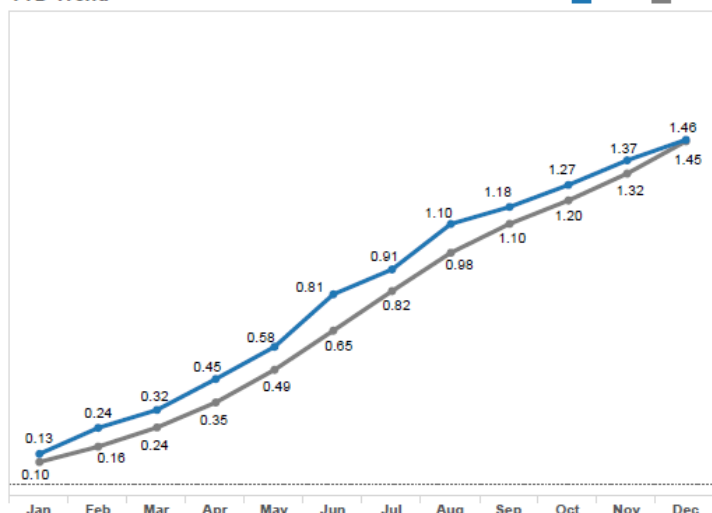


OSA YE Target: 1.50

YTD Result: 1.46



YTD Trend



Summary

- PSEG Long Island's YE performance for Momentary Average Interruption Frequency Index (MAIFI) of 1.46 achieved the targeted performance level of 1.50.

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

Metric Type	Quantitative	Metric Performance	↑(Partial – 75% of compensation)
Incentive Compensation Claim	\$236,936.30	Comments	N/A

J F M A M J J A S O N D T&D-10 Reduce Sustained Multiple Customer Outages (S-MCOs) OSA Incentive: \$315,915



Metric Definition

The objective of this metric is to provide a level of reliability for each customer that is within a reasonable variance from the system average conditions.

Calculation

Count of customers experiencing X or more sustained interruptions in the last 12 months, excluding major events consistent with the Department of Public Service guidelines.

Target

A) A level of ≥ 6 S-MCOs; Equal to $\leq 2,275$ customers - 25%

B) A level of ≥ 8 S-MCOs; Equal to ≤ 375 customers - 25%

C) A level of ≥ 10 S-MCOs; Equal to ≤ 50 customers - 25%

D) A level of ≥ 12 S-MCOs; Equal to 0 customers - 25%

Alternative: A level of ≥ 6 S-MCOs; Equal to $\leq 2,000$ customers and a level of ≥ 10 S-MCOs; Equal to ≤ 0 customers - 100%

Exclusion

Major Storms as defined by NY Department of Public Service and NYCRR 97.1. For planned intentional interruptions taken to affect improvements to system associated with these customers to improve reliability.

YTD Result

75%

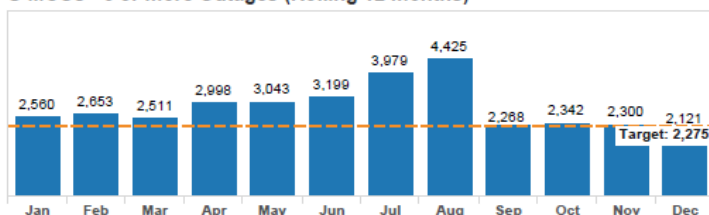
OSA YE Target

100%

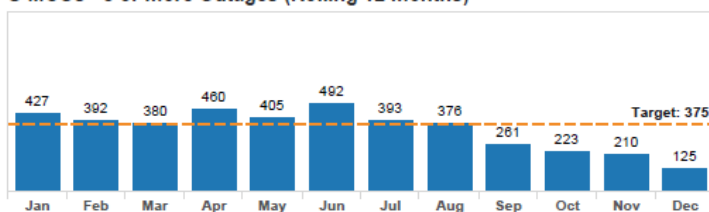
OSA YE Forecast



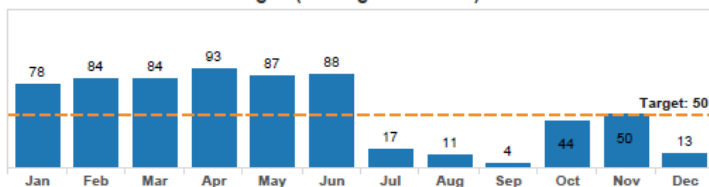
S-MCOs - 6 or more Outages (Rolling 12 months)



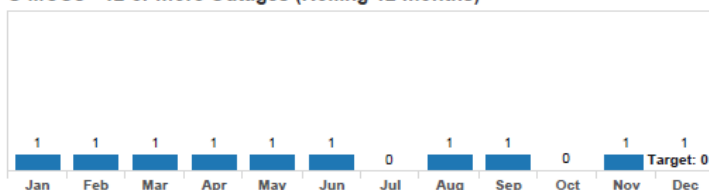
S-MCOs - 8 or more Outages (Rolling 12 months)



S-MCOs - 10 or more Outages (Rolling 12 months)



S-MCOs - 12 or more Outages (Rolling 12 months)



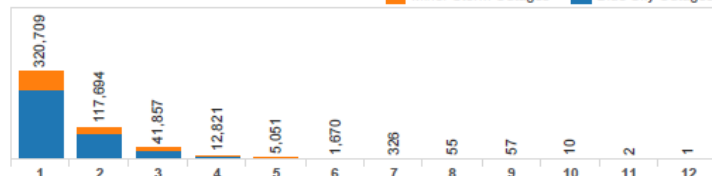
YTD



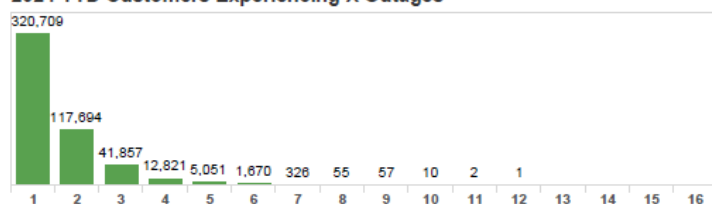
Customers Experiencing X Outages

Rolling 12 Months as of December

Minor Storm Outages Blue Sky Outages



2024 YTD Customers Experiencing X Outages



Summary

- Sustained Multiple Customer Outages (S-MCO) is the count of customers experiencing X or more sustained interruptions in the last 12 months, excluding major events consistent with NYCRR 97.1 and planned intentional interruptions taken to affect improvements to systems associated with these customers to improve reliability.
- PSEG Long Island's 2024 S-MCO metric had 4 different reporting levels each worth 25% of compensation. The reporting levels included:
 - 6 S-MCOs with a target of $\leq 2,275$ customers
 - Achieved** – PSEG Long Island finished year with 2,121 customers
 - 8 S-MCOs with a target of ≤ 375 customers
 - Achieved** – PSEG Long Island finished year with 125 customers
 - 10 S-MCOs with a target of ≤ 50 customers
 - Achieved** – PSEG Long Island finished year with 13 customers
 - 12 S-MCOs with a target of ≤ 0 customers
 - Did Not Achieve** – PSEG Long Island finished year with 1 customer

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

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$315,915.07	Comments	N/A

T&D-12 Momentary MCO (6 or More) OSA Incentive: \$315,915



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).

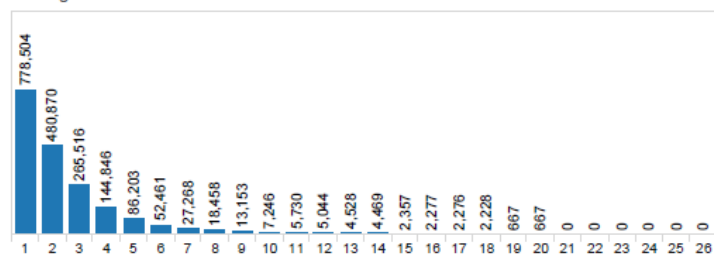
Exclusions

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

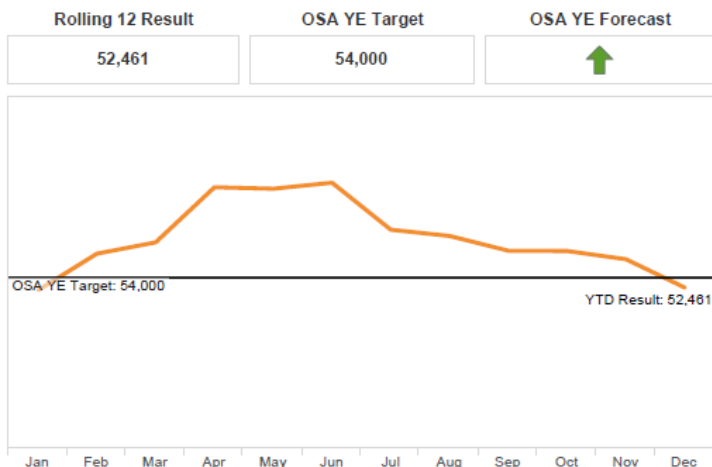
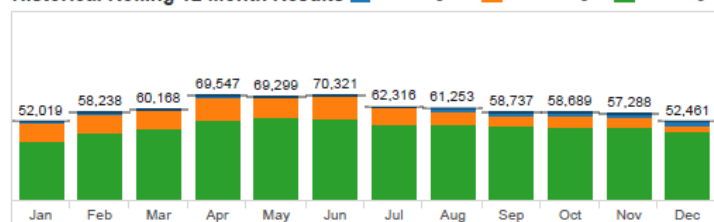
Rolling 12-Months



Customers Experiencing X Outages Rolling 12 Months as of December



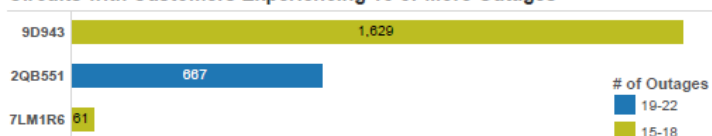
Historical Rolling 12 Month Results



Customers Experiencing X Outages by Month

		16+	17+	18+	19+	20+	21+	22+	23+	24+	No Outages
2023	Dec	47	0	0	0	0	0	0	0	0	365,420
	Jan	708	708	708	703	703	178	31	0	0	362,328
	Feb	1,042	1,042	1,042	1,037	723	178	31	0	0	352,686
	Mar	1,038	1,038	1,037	1,032	1,032	516	369	338	338	356,029
2024	Apr	1,036	1,036	1,035	1,030	1,030	516	369	338	338	349,293
	May	1,029	1,029	1,028	1,023	1,023	514	367	336	336	351,818
	Jun	1,074	1,026	1,026	1,025	1,025	1,020	1,018	513	366	336,355
	Jul	1,068	1,020	1,020	1,019	1,019	1,014	1,013	511	365	356,492
	Aug	1,059	1,012	1,012	1,012	1,011	1,006	1,006	510	364	349,046
	Sep	1,056	1,010	1,010	1,010	1,009	1,004	1,004	510	364	375,258
	Oct	1,052	1,006	1,006	1,006	1,005	1,000	1,000	507	362	378,214
	Nov	2,353	2,243	673	673	673	0	0	0	0	371,518
	Dec	2,277	2,276	2,228	667	667	0	0	0	0	373,236

Circuits with Customers Experiencing 15 or More Outages



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 2024 M-MCO performance was 52,461 customers, which was better than the YE target of 54,000 customers.

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

Metric Type	Quantitative	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00	Comments	N/A

T&D-13 Serious Injury Incident Rate (SIIR) OSA Incentive: \$516,952



YTD Result	OSA YE Target	OSA YE Forecast
0.14	0.00	↓

Metric Definition

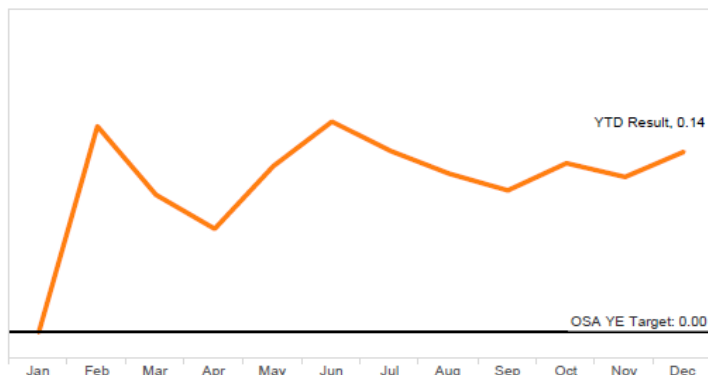
Total Fatalities and serious life altering injuries. The total OSHA recordable injury and illness cases based on the exposure of 100 full-time workers, using 200,000 hours as the equivalent.

Calculation

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

Exclusions

LIPA will review qualifying incidents on a case-by-case basis and at their discretion, grant exclusions for up to two nonlife-altering injuries that occur during the Contract Year.



YTD

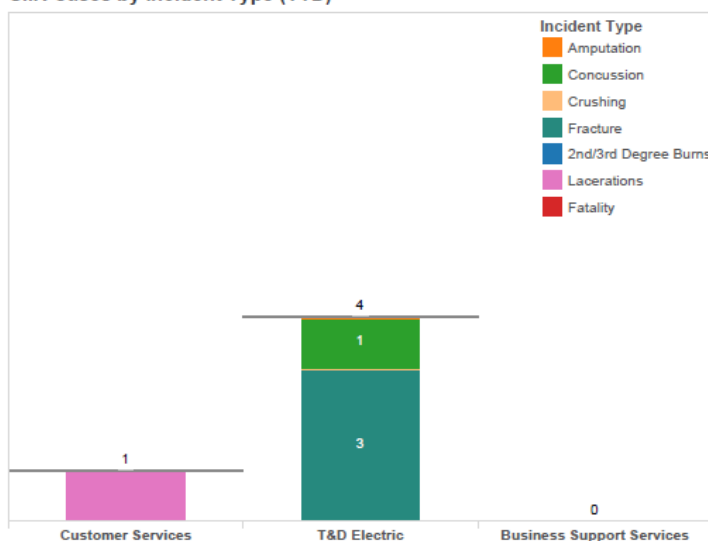
2024	0.14
------	------

Month

2024	0.39
------	------

YTD Summary		Exposure Hours	Serious Injury Incidents	Serious Injury Incident Rate (SIIR)
Customer Services	Employees	1,230,590	1	0.16
	Contractors	9,585	0	0.00
T&D Electric	Employees	2,616,965	3	0.23
	Contractors	1,612,463	1	0.12
Business Support Services	Employees	1,377,927	0	0.00
	Contractors	310,688	0	0.00
PSEG LI	CS	1,240,175	1	0.16
	T&D	4,229,428	4	0.19
	BSS	1,688,613	0	0.00
	PSEG LI	7,158,216	5	0.14

SIIR Cases by Incident Type (YTD)



MTD Summary		Exposure Hours	Serious Injury Incidents	Serious Injury Incident Rate (SIIR)
Customer Services	Employees	90,404	0	0.00
	Contractors	871	0	0.00
T&D Electric	Employees	162,744	1	1.04
	Contractors	108,831	0	0.00
Business Support Services	Employees	96,231	0	0.00
	Contractors	17,384	0	0.00
PSEG LI	CS	91,275	0	0.00
	T&D	301,575	1	0.66
	BSS	113,615	0	0.00
	PSEG LI	506,464	1	0.39

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 five serious injury in 2024 that met the criteria above.
 - In February, an employee injured his left thumb while placing steel angle iron into the bed of a pickup truck. The employee underwent surgery for a fractured thumb.

- In May, an employee was exiting their work vehicle and rolled their ankle. The employee felt sharp pain and was taken to the hospital via ambulance and admitted for treatment. The employee underwent surgery and had a displaced fracture that was corrected with hardware.
- In June, an contractor employee was loading branches into a wood chipper when the tail end of the lowering line got caught in the wood chipper. The employee was pulled towards the feed chute causing the employee to hit his head against the wood chipper. EMS and Police responded to the scene and the employee was transported to the hospital. PSEG LI Supervision and safety responded. The employee was admitted to the hospital and was sedated to aid the healing process.
- In October, an employee performing work at a customer property identified an animal (deer) in distress. While attempting to assist, the animal became aggressive and the employee was poked by one of the antlers.
- In December, an employee was installing a new ground rod with a ground rod driver and injured his ring finger. As the employee raised the ground rod driver it came off the ground rod, which led to the employee's finger getting caught between the ground rod driver and the ground rod when he attempted to strike the ground rod.

T&D-18 – Workforce Management Plans

Metric Type	Hybrid	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$459,512.83	Comments	N/A

T&D-18	Workforce Management Plans			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-18.01	Initial submission of 2025 Workforce Management Plan for LIPA approval by August 1, 2024 (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.	08/01/24	Achieved	Approved
T&D-18.02	PSEG Long Island hold Q1 quarterly review meeting with LIPA to review progress of the Workforce Management Plan. - Plan Vs. Actual Units Complete YTD - Planned Vs. Forecast Units Complete PYE	04/22/24	Achieved	Approved
T&D-18.03	PSEG Long Island hold Q2 quarterly review meeting with LIPA to review progress of the Workforce Management Plan. - Plan Vs. Actual Units Complete YTD - Planned Vs. Forecast Units Complete PYE	07/22/24	Achieved	Approved
T&D-18.04	PSEG Long Island hold Q3 quarterly review meeting with LIPA to review progress of the Workforce Management Plan. - Plan Vs. Actual Units Complete YTD - Planned Vs. Forecast Units Complete PYE	10/21/24	Achieved	Approved
T&D-18.05	Successfully deliver all elements of the LIPA-approved 2024 Workforce Management Plan by December 31, 2024.	01/15/25	Achieved	Approved
T&D-18.06	PSEG Long Island hold Q4 quarterly review meeting with LIPA to review progress of the Workforce Management Plan. - Plan Vs. Actual Units Complete YTD - Planned Vs. Forecast Units Complete PYE	01/22/25	Achieved	Achieved
T&D-18.07	Final submission of 2025 Workforce Management Plan for LIPA approval by November 15, 2024 (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.	11/15/24	Achieved	Approved

Summary

- PSEG Long Island submitted a 2024 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 2024 Workforce Management Plan by December 31, 2024. The elements of the 2024 Workforce Management Plan include:
 1. Histogram by labor source (in-house / Contractor) and functional area (Divisions, P&C)
 2. Histogram by settlement (Capital, O&M)
 3. Hours by High Level Settlement
 4. Hours by Low Level Settlement
 5. 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 2025 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 2024 Workforce Management Plan by providing:
 1. Histogram by labor source (in-house / Contractor) and functional area (Divisions, P&C)
 2. Histogram by settlement (Capital, O&M)
 3. Hours by High Level Settlement
 4. Hours by Low Level Settlement
 5. 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-24 – Improve Reliability Through Vegetation Management Work Plan - Cycle Trim and Trim-to-Sky

Metric Type	Hybrid	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$402,073.72	Comments	N/A

T&D-24	Improve Reliability Through Vegetation Management Work Plan - Cycle Trim and Trim-to-Sky			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-24.01	Submit January report of work completed vs. schedule and budget at the monthly meeting.	02/16/24	Achieved	Approved
T&D-24.02	Submit February report of work completed vs. schedule and budget at the monthly meeting.	03/15/24	Achieved	Approved
T&D-24.03	Submit March report of work completed vs. schedule and budget at the monthly meeting.	04/19/24	Achieved	Approved
T&D-24.04	Submit April report of work completed vs. schedule and budget at the monthly meeting.	05/17/24	Achieved	Approved
T&D-24.05	Submit May report of work completed vs. schedule and budget at the monthly meeting.	06/21/24	Achieved	Approved
T&D-24.06	Submit June report of work completed vs. schedule and budget at the monthly meeting.	07/19/24	Achieved	Achieved
T&D-24.07	Submit July report of work completed vs. schedule and budget at the monthly meeting.	08/16/24	Achieved	Approved
T&D-24.08	The 2025 Vegetation Work Plan shall identify the minimum of 1/4 of the overhead distribution system (which equates to approximately 2,200 miles) and budgets and be provided to LIPA for approval, which shall not be unreasonably withheld, by August 30, 2024.	08/30/24	Achieved	Approved
T&D-24.09	Submit August report of work completed vs. schedule and budget at the monthly meeting.	09/20/24	Achieved	Approved
T&D-24.10	Submit September report of work completed vs. schedule and budget at the monthly meeting.	10/18/24	Achieved	Approved
T&D-24.11	Submit October report of work completed vs. schedule and budget at the monthly meeting.	11/15/24	Achieved	Approved
T&D-24.12	Submit November report of work completed vs. schedule and budget at the monthly meeting.	12/20/24	Achieved	Approved
T&D-24.13	Submit 2024 YE closeout report of work completed vs. schedule and budget at the monthly meeting.	01/31/25	Achieved	Approved

Units Completed

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
T&D-24	Cycle Trim (Circuit Miles)	Plan		181	185	216	198	214	206	181	181	177	173	185	161	2,258	2,258	100.0%	2,258	2,258	2,258
		Forecast		146	233	173	220	252	175	218	201	143	167	165	165						
		Actual		146	233	173	220	252	175	218	201	143	167	165	165						
	Cycle Trim (Circuits)	Forecast		8	17	14	14	18	11	11	19	11	14	18	20	175	175	100.0%	175	175	175
		Actual		8	17	14	14	18	11	11	19	11	14	18	20						
		Plan		11	11	16	15	14	15	12	14	14	16	17	20						
	Trim to Sky (Circuits)	Forecast		8	12	16	22	13	11	12	9	22	9	11	30	175	175	100.0%	175	175	175
		Actual		8	12	16	22	13	11	12	9	22	9	11	30						
		Plan		11	11	16	15	14	15	12	14	14	16	17	20						

Summary:

- **Cycle Trim** - PSEG Long Island completed 2,258 miles and 175 cycle trim circuits for 100% of the vegetation management plan for the Cycle Trim Portion of the metric.
- **Trim-to-Sky** - PSEG Long Island completed 207 trim to sky circuits and achieved the year-end target of 207 circuits.

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	Top side Adj.	Revised YE Plan	YE Forecast	YE Target
T&D-24	Cycle Trim	Plan		\$2,106,418	\$1,950,664	\$2,356,565	\$2,004,803	\$2,160,031	\$2,078,431	\$1,585,000	\$1,899,178	\$1,718,828	\$1,497,500	\$1,648,780	\$1,541,943								
		Forecast		\$1,330,525	\$2,219,876	\$1,793,075	\$2,173,826	\$2,211,723	\$1,719,574	\$2,212,425	\$2,021,472	\$1,595,803	\$1,855,967	\$1,635,991	\$1,682,789								
		Actual		\$1,330,525	\$2,219,876	\$1,793,075	\$2,173,826	\$2,211,723	\$1,719,574	\$2,212,425	\$2,021,472	\$1,595,803	\$1,855,967	\$1,635,991	\$1,682,789	\$22,453,046	\$22,318,138	100.6%	\$24,318,138	-\$2,000,000	\$22,318,138	\$22,453,046	\$23,434,045
	Trim to Sky	Plan		\$134,192	\$134,192	\$134,192	\$134,192	\$134,192	\$134,192	\$134,192	\$134,192	\$134,192	\$134,192	\$134,192	\$134,192								
		Forecast		\$13,946	\$103,888	\$70,479	\$113,158	\$78,579	\$95,833	\$100,739	\$54,990	\$271,735	\$79,113	\$82,156	\$273,770								
		Actual		\$13,946	\$103,888	\$70,479	\$113,158	\$78,579	\$95,833	\$100,739	\$54,990	\$271,735	\$79,113	\$82,156	\$273,770	\$1,307,754	\$1,610,300	81.2%	\$1,610,300		\$1,610,300	\$1,307,754	\$1,690,815

Summary:

- **Cycle Trim** - PSEG Long Island YE spend for Cycle Tree Trim was \$22.453M compared to an updated final budget of \$23.434M or 100.6% of final planned spend which is within the +105% target threshold requirement.
- **Trim-to-Sky** - PSEG Long Island YE spend for Trim-to-Sky was \$1.308M compared to the final budget of \$1.610M or 81.2% of final planned spend which is within the +105% target threshold requirement.

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

Metric Type	Hybrid	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$516,951.93	Comments	N/A

T&D-26	Improve Reliability Through Vegetation Management Work Plan – Hazard Tree Removal			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-26.01	Submit January report of work completed vs. schedule and budget at the monthly meeting.	02/16/24	Achieved	Approved
T&D-26.02	Submit February report of work completed vs. schedule and budget at the monthly meeting.	03/15/24	Achieved	Approved
T&D-26.03	Submit March report of work completed vs. schedule and budget at the monthly meeting.	04/19/24	Achieved	Approved
T&D-26.04	Submit April report of work completed vs. schedule and budget at the monthly meeting.	05/17/24	Achieved	Approved
T&D-26.05	Submit May report of work completed vs. schedule and budget at the monthly meeting.	06/21/24	Achieved	Approved
T&D-26.06	Submit June report of work completed vs. schedule and budget at the monthly meeting.	07/19/24	Achieved	Approved
T&D-26.07	Submit July report of work completed vs. schedule and budget at the monthly meeting.	08/16/24	Achieved	Approved
T&D-26.08	The 2025 Vegetation Work Plans shall identify at least 14,000 hazard trees and limbs (9,000 trees + 5,000 limbs) to be removed (including locations, schedules, and cost estimates) and be provided to LIPA for approval, which shall not be unreasonably withheld, by August 30, 2024.	08/30/24	Achieved	Approved
T&D-26.09	Submit August report of work completed vs. schedule and budget at the monthly meeting.	09/20/24	Achieved	Approved
T&D-26.10	Submit September report of work completed vs. schedule and budget at the monthly meeting.	10/18/24	Achieved	Approved
T&D-26.11	Submit October report of work completed vs. schedule and budget at the monthly meeting.	11/15/24	Achieved	Approved
T&D-26.12	Submit November report of work completed vs. schedule and budget at the monthly meeting.	12/20/24	Achieved	Approved
T&D-26.13	Submit 2024 YE closeout report of work completed vs. schedule and budget at the monthly meeting.	01/31/25	Achieved	Declined

Units Completed

T&D-26	Hazard Tree Program (Base Limbs)	Plan	69	82	56	92	95	95	105	100	92	78	79	39	1,443	980	147.2%	980	1,443	980
		Forecast	0	239	307	251	381	265	0	0	0	0	0	0						
		Actual	0	239	307	251	381	265	0	0	0	0	0	0						
	Hazard Tree Program (Base Trees)	Plan	129	151	103	171	176	177	195	185	171	145	146	71	1,521	1,820	83.6%	1,820	1,521	1,820
		Forecast	13	378	262	339	340	189	0	0	0	0	0	0						
		Actual	13	378	262	339	340	189	0	0	0	0	0	0						
	Hazard Tree Program (Incremental Limbs)	Plan	270	363	325	357	341	355	365	352	371	345	339	237	3,557	4,019	88.5%	4,019	3,557	4,019
		Forecast	1	20	133	19	66	108	333	171	422	641	890	753						
		Actual	1	20	133	19	66	108	333	171	422	641	890	753						
	Hazard Tree Program (Incremental Trees)	Plan	502	673	603	662	632	659	677	655	690	547	536	344	7,479	7,181	104.2%	7,181	7,479	7,181
		Forecast	141	372	417	349	569	345	630	613	1,082	1,222	1,739	0						
		Actual	141	372	417	349	569	345	630	613	1,082	1,222	1,739	0						
	Hazard Tree Program (Total Limbs)	Plan	340	444	380	449	435	430	470	432	463	423	418	275	5,000	5,000	100.0%	5,000	5,000	5,000
		Forecast	1	259	440	270	447	373	333	171	422	641	890	753						
		Actual	1	259	440	270	447	373	333	171	422	641	890	753						
	Hazard Tree Program (Total Trees)	Plan	631	825	707	833	808	836	872	840	861	692	682	415	9,000	9,000	100.0%	9,000	9,000	9,000
		Forecast	154	750	679	688	909	534	630	613	1,082	1,222	1,739	0						
		Actual	154	750	679	688	909	534	630	613	1,082	1,222	1,739	0						
	Hazard Tree Program (Total)	Plan	970	1,269	1,087	1,282	1,243	1,286	1,342	1,292	1,324	1,115	1,100	690	14,000	14,000	100.0%	14,000	14,000	14,000
		Forecast	155	1,009	1,119	958	1,356	907	963	784	1,594	1,863	2,629	753						
		Actual	155	1,009	1,119	958	1,356	907	963	784	1,594	1,863	2,629	753						

Summary:

- PSEG Long Island completed 14,000 units (5,000 limbs and 9,000 trees) and met the year-end target of 14,000 units (5,000 limbs and 9,000 trees).

Budget Performance

T&D-26	Hazard Tree Program (Base Limbs)	Plan	\$77,049	\$77,049	\$77,049	\$77,049	\$77,049	\$77,049	\$77,049	\$77,049	\$77,049	\$77,049	\$77,049	\$1,005,788	\$931,701	107.0%	\$769,245	\$138,548	\$931,701	\$1,005,788	\$978,381	
		Forecast	\$0	\$216,753	\$200,058	\$153,122	\$254,890	\$180,967	\$0	\$0	\$0	\$0	\$0	\$0								
		Actual	\$0	\$216,753	\$200,058	\$153,122	\$254,890	\$180,967	\$0	\$0	\$0	\$0	\$0	\$0								
	Hazard Tree Program (Base Trees)	Plan	\$144,206	\$144,206	\$144,206	\$144,206	\$144,206	\$144,206	\$144,206	\$144,206	\$144,206	\$144,206	\$144,206	\$144,206	\$1,082,133	\$1,730,470	62.5%	\$1,473,170	\$257,300	\$1,730,470	\$1,082,133	\$1,816,984
		Forecast	\$5,270	\$342,815	\$170,733	\$208,806	\$227,442	\$129,087	\$0	\$0	\$0	\$0	\$0	\$0								
		Actual	\$5,270	\$342,815	\$170,733	\$208,806	\$227,442	\$129,087	\$0	\$0	\$0	\$0	\$0	\$0								
	Hazard Tree Program (Incremental Limbs)	Plan	\$314,872	\$314,872	\$314,872	\$314,872	\$314,872	\$314,872	\$314,872	\$314,872	\$314,872	\$314,872	\$314,872	\$314,872	\$2,818,712	\$3,776,059	74.6%	\$3,214,055	\$501,454	\$3,776,059	\$2,818,712	\$3,964,861
		Forecast	\$1,569	\$27,687	\$153,521	\$32,734	\$66,725	\$168,891	\$303,869	\$183,276	\$484,850	\$625,877	\$625,151	\$114,562								
		Actual	\$1,569	\$27,687	\$153,521	\$32,734	\$66,725	\$168,891	\$303,869	\$183,276	\$484,850	\$625,877	\$625,151	\$114,562								
	Hazard Tree Program (Incremental Trees)	Plan	\$584,390	\$584,390	\$584,390	\$584,390	\$584,390	\$584,390	\$584,390	\$584,390	\$584,390	\$584,390	\$584,390	\$584,390	\$8,081,879	\$7,012,680	115.2%	\$9,956,980	\$1,042,700	\$7,012,680	\$8,081,879	\$7,383,314
		Forecast	\$221,171	\$1,514,984	\$481,340	\$901,273	\$833,884	\$539,511	\$574,888	\$957,007	\$1,243,147	\$1,193,170	\$1,221,502	\$0								
		Actual	\$221,171	\$1,514,984	\$481,340	\$901,273	\$833,884	\$539,511	\$574,888	\$957,007	\$1,243,147	\$1,193,170	\$1,221,502	\$0								
	Hazard Tree Program (Total Limbs)	Plan	\$392,321	\$392,321	\$392,321	\$392,321	\$392,321	\$392,321	\$392,321	\$392,321	\$392,321	\$392,321	\$392,321	\$392,321	\$3,824,480	\$4,707,850	81.2%	\$4,007,850	\$700,000	\$4,707,850	\$3,824,480	\$4,943,243
		Forecast	\$1,569	\$244,441	\$353,578	\$185,856	\$351,594	\$349,857	\$303,869	\$183,276	\$484,850	\$625,877	\$625,151	\$114,562								
Actual		\$1,569	\$244,441	\$353,578	\$185,856	\$351,594	\$349,857	\$303,869	\$183,276	\$484,850	\$625,877	\$625,151	\$114,562									
Hazard Tree Program (Total Trees)	Plan	\$728,596	\$728,596	\$728,596	\$728,596	\$728,596	\$728,596	\$728,596	\$728,596	\$728,596	\$728,596	\$728,596	\$728,596	\$9,164,011	\$8,743,150	104.8%	\$7,443,150	\$1,300,000	\$8,743,150	\$9,164,011	\$9,180,308	
	Forecast	\$226,441	\$857,799	\$652,073	\$808,079	\$1,061,326	\$668,578	\$574,888	\$957,007	\$1,243,147	\$1,193,170	\$1,221,502	\$0									
	Actual	\$226,441	\$857,799	\$652,073	\$808,079	\$1,061,326	\$668,578	\$574,888	\$957,007	\$1,243,147	\$1,193,170	\$1,221,502	\$0									
Hazard Tree Program (Total)	Plan	\$1,120,917	\$1,120,917	\$1,120,917	\$1,120,917	\$1,120,917	\$1,120,917	\$1,120,917	\$1,120,917	\$1,120,917	\$1,120,917	\$1,120,917	\$1,120,917	\$12,988,492	\$13,451,000	96.6%	\$11,451,000	\$2,000,000	\$13,451,000	\$12,988,492	\$14,123,550	
	Forecast	\$228,010	\$1,102,240	\$1,005,652	\$993,934	\$1,412,919	\$1,018,435	\$876,757	\$840,283	\$1,727,998	\$1,819,948	\$1,846,653	\$114,562									
	Actual	\$228,010	\$1,102,240	\$1,005,652	\$993,934	\$1,412,919	\$1,018,435	\$876,757	\$840,283	\$1,727,998	\$1,819,948	\$1,846,653	\$114,562									

Summary:

- PSEG Long Island YE spend for Hazard Tree was \$12.988M compared to the updated target budget range of \$13.451-\$14.124M². PSEG Long Island achieved the budget targeted threshold range of +5% within the budget or 96.6% of plan.

Overall Vegetation Summary

Overall PSEG Long Island was able to deliver on full scope of the vegetation management program by delivering all units and at 98.3% of the budgeted expense. PSEG Long Island was transparent and submitted an exception to LIPA early in the year to discuss imbalance at the programmatic level since planning occurred in July 2023 prior to finalized pricing from the procurement bid event. PSEG LI's claim is based on the full scope of the vegetation management being completed under the overall planned budgeted amount. The ratepayers of Long Island and the Rockaways received the full scope of the vegetation management work at 98.3% of the overall budget. PSEG Long Island is also contractually allowed to reallocate within a director level and required no additional budgetary requests rather than just rebalancing among programs.

Vegetation Management Metric Supplemental Support

Issue #1 - Budget Reallocation Rejection

Metric Number	T&D-24	T&D-24	T&D-26	Combined
Program	Cycle Trim	Trim-to-Sky	Hazard Tree	
Targets				
Units - Target was to complete 100% of units	2,225 Circuit Miles	175 Circuits	14,000 Units (9,000 trees/5,000 limbs)	16,400
Units (Supplemental)	175 Circuits	N/A	N/A	
Budget (Base Plan)	\$24,318,138.00	\$1,610,300.00	\$11,451,000.00	\$37,379,438.00
105% of Plan	\$25,534,044.90	\$1,690,815.00	\$12,023,550.00	\$39,248,409.90
Performance				
Units - Target was to complete 100% of units	2,225	175	14,000 Units (9,000 trees/5,000 limbs)	
Units (Supplemental)	175	N/A	N/A	
Spend	\$22,453,046.00	\$1,307,754.00	\$12,988,492.00	\$36,749,292.00
% of Budget (Base Plan)	92.3%	81.2%	113.4%	98.3%
PSEG LI Offered Plan Reallocation	-\$2,000,000.00	\$0.00	\$2,000,000.00	\$0.00
New Base Budget	\$22,318,138.00	\$1,610,300.00	\$13,451,000.00	\$37,379,438.00
Budget Adherence %	100.6%	81.2%	96.6%	98.3%

² Target ranges align with topside adjustment made at the programmatic level which was requested in February of 2024 and discussed at the alignment meeting between PSEG LI and LIPA. LIPA subsequently declined the exception not providing a reasonable opportunity for PSEG LI to achieve the metric outcome and not in alignment with the Operating Budget reallocation thresholds identified in Section 5.2(B)(iii)(3) of the 2nd Amended and Restated OSA

T&D-30 - Improve Resiliency Through Storm Hardening Work Plan - ACRV Commissioning Program

Metric Type	Hybrid	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$516,951.93	Comments	N/A

T&D-30	Improve Resiliency Through Storm Hardening Work Plan - ACRV Commissioning Program			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-30.01	Submit by April 1, 2024 a total circuit operational coordination study on all circuits that contain an ASUV.	11/27/24	Achieved	Approved
T&D-30.01a	Submit 1st Quarter status report.	04/18/24	Achieved	Approved
T&D-30.02	Submit 2nd Quarter status report.	07/19/24	Achieved	Approved
T&D-30.03	The initial metric called for a minimum of 300 ASUVs. LIPA and PSEG Long Island mutually agreed to reduce the scope from 300 ASUVs to 133 ASUVS to complete an engineering coordination study. The metric will also be modified to complete a ACRV Coordination Study for 50 of the circuits on the system. The expected outcome of the study is to identify the Cost Benefit Analysis (CBA) and strategy/recommendation for ACRV implementation. Upon completion of the study and the identified units, LIPA and PSEG LI will meet to put together a multi-year plan for implementation of recommended ACRV locations. Locations that are identified in the plan would be identified for ones that could be reasonably installed in 2024 and the remainder will be allocated as part of the 2025 workplan. The 2025 Workplan and finalized budget will be submitted by November 15, 2024 in alignment with the study completion date.	11/27/24	Achieved	Approved
T&D-30.04	Submit 3rd Quarter status report.	10/18/24	Achieved	Approved
T&D-30.05	Submit 2024 YE Verification Report.	01/31/25	Achieved	Approved

Summary

- PSEG Long Island completed a circuit operational coordination study
- PSEG Long Island completed the all of the ACRV units identified in the metric
- PSEG Long Island completed all quarterly reports and provided a YE verification report in support of the metric achievement.

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

Metric Type	Hybrid	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$402,073.72	Comments	N/A

T&D-31	Improve Resiliency Through Storm Hardening Work Plan - LT5H (ASUV) Program			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-31.01	Submit 1st Quarter status report.	04/19/24	Achieved	Approved
T&D-31.02	Submit 2nd Quarter status report.	07/19/24	Achieved	Approved
T&D-31.03	PSEG Long Island shall submit a 2025 Storm Hardening Work Plan - LT5H (ASUV) Program and budget that identifies 75 ASUV locations, schedules, cost estimates, and updated PJD for the LT5H (ASUV) Program for 2025, including that the installed ASUVs are “operationalized” such that the ASUV operates as an ACRV.	08/30/24	Achieved	Approved
T&D-31.04	Submit 3rd Quarter status report.	10/18/24	Achieved	Approved
T&D-31.05	Submit 2024 YE Verification Report.	01/31/25	Achieved	Approved

Summary

- PSEG Long Island completed all of the ASUV units identified in the metric
- PSEG Long Island completed all quarterly reports and provided a YE verification report in support of the metric achievement.

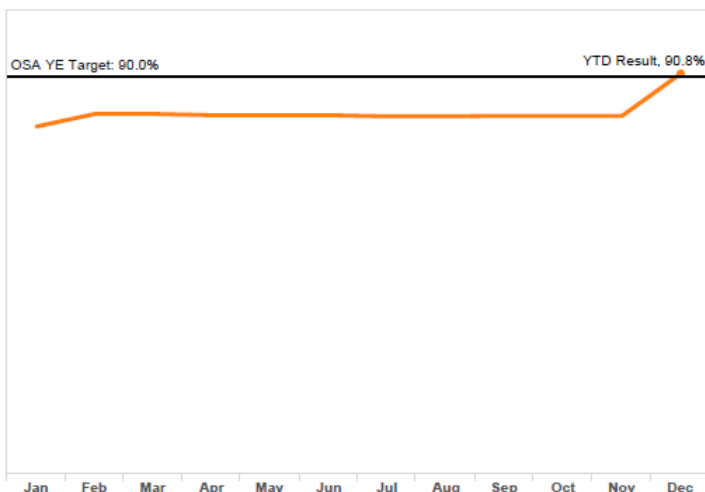
T&D-36 - Construction - Cost Estimating Accuracy

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$344,634.62	Comments	N/A

T&D-36 Construction - Cost Estimating Accuracy OSA Incentive: \$344,635



YTD Result	OSA YE Target	OSA YE Forecast
90.8%	90.0%	↑



Metric Definition

Execution of 2024 Specific Capital Project within cost estimates.

Calculation

Cost estimating accuracy per existing methodology for Budget PJDs.

- Estimating accuracy reported based on the month when project is closed-out.

- % Estimating Accuracy = % absolute variance of each project closed-out cost versus initial

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.

Exclusions

Schedule relief may be granted for delays i) directed or requested by LIPA or ii) situations or business conditions that arise that LIPA determines or agrees are beyond the reasonable control of PSEG Long Island.

YTD

2024	90.8%
2023	90.3%

Month

2024	90.8%
2023	91.2%

YTD Cost Estimating Projects Closed Out

Closeout Month	Project Title/Description	Definitive Estimate Cost (Base)	Closeout Costs
January	Bridgehampton 2 Feeders C&R Project	\$16,059,544.00	\$12,649,558.00
February	Flowerfield-Terryville New 69kV UG Cable	\$37,387,309.00	\$30,977,384.00
	Hewlett Reconfiguration	\$7,802,470.00	\$5,748,306.00
April	Navy Rd Substation Two New 33kV Capacitor Banks	\$2,150,612.00	\$2,031,027.00
July	Bridgehampton New 13 kV Feeder and C&R	\$12,118,207.00	\$9,648,848.00
September	Eatons Neck Reconfiguration	\$2,883,148.00	\$2,281,212.00
	Arverne-Rockaway Beach Install New 33KV Circuit	\$28,052,484.00	\$22,685,869.32
	Brooklyn Avenue Install New Substation	\$33,725,012.00	\$34,203,554.00
	E. HAMPTON Bk 2 REPLACEMENT 69/33KV-40MVA	\$6,720,405.00	\$6,443,552.00
December	Feeder Extension (Superblock)	\$5,194,936.00	\$5,217,994.00
	NAVY RD NEW 23-33 KV SUB AND ASSOCIATED CR	\$30,242,341.00	\$30,915,686.38
	Rockaway Beach Install New 33/13KV Bank & Switchgear	\$18,786,073.00	\$19,380,931.00

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 12 projects in 2024 and had an estimating accuracy of 90.8% vs. YE target of 90.0%.
- There was a combined final definitive estimate cost of \$122,721,251 across the 12 projects in scope for 2024. PSEG Long Island closed out the with closeout costs of \$118,847,587 for the 12 projects.

T&D-37 - Improve Reliability and Resiliency Through Completion of Program Planned Units and Management of Unit Costs Per Workplan

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$689,269.24	Comments	N/A

Units

PJD	Program	Initial Metric Units	Latest LIPA Approved PJD Units	2024 Completed Units	2024 Target Units	% Complete vs. Target Units	Performance
1293-C	Distribution Circuit Improvement Program (Miles)	330	330	327	300	99.0%	✓ Achieved
1452	Transmission Breaker Replacement	15	15	15	14	100.0%	✓ Achieved
1283	Underground Distribution Cable Upgrades	92,100	111,505	114,375	105,225	102.6%	✓ Achieved
1183	Upgrade Supervisory Controller for Capacitor Banks	130	130	130	120	100.0%	✓ Achieved
1291	Residential Underground Cables	82,145	102,200	102,821	94,595	100.6%	✓ Achieved
2124	Replacement of Non-restorable Distribution Pole Rejects	1,050	1,050	1,068	983	101.7%	✓ Achieved
2438	Single Phase Recloser Devices	1,500	1,500	1,464	1,347	97.6%	✓ Achieved
1250	Transformer Monitoring (Purchases and Installation)	50	50	50	46	100.0%	✓ Achieved

Cost/Unit

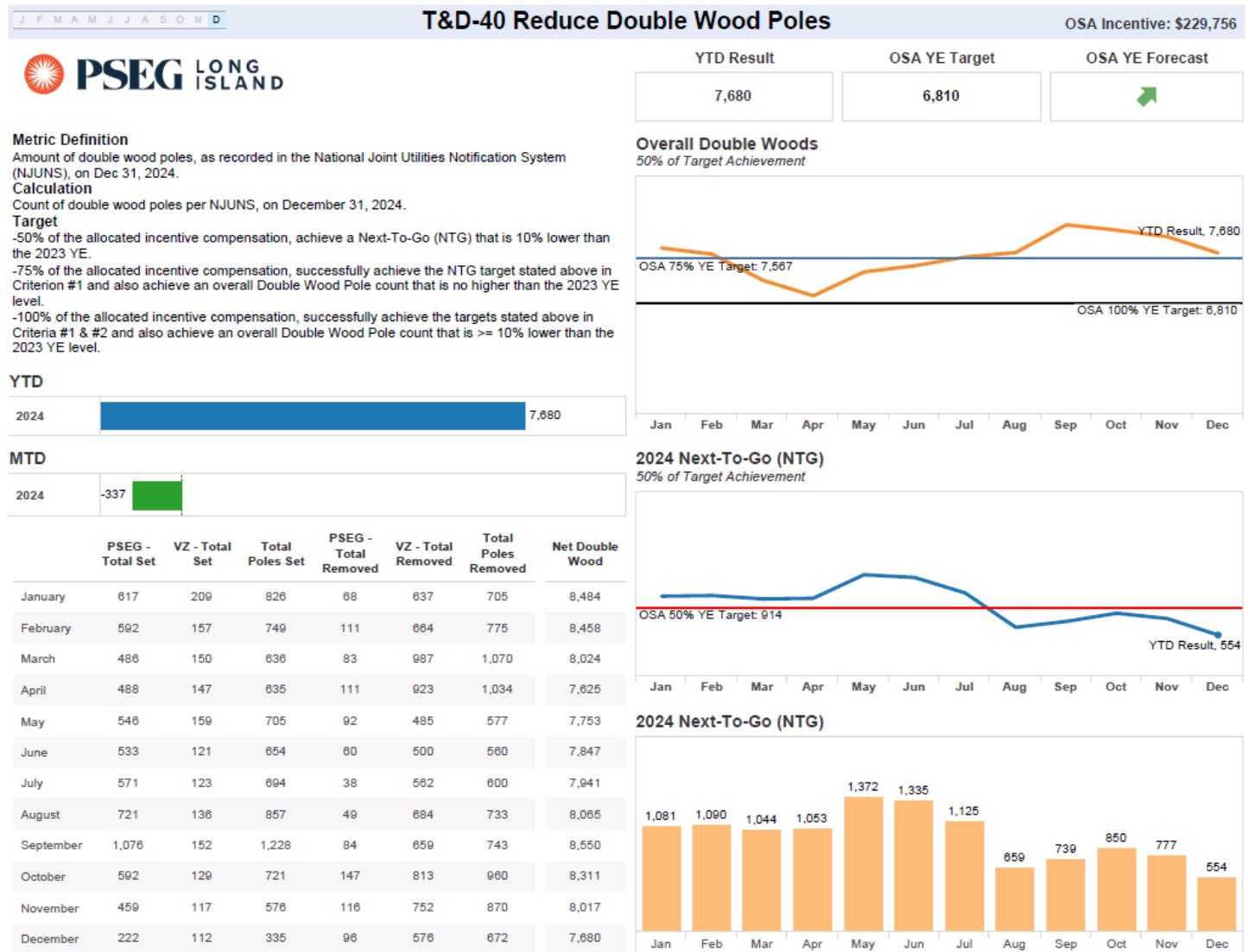
PJD	Program	Initial Metric Cost/Unit	Latest LIPA Approved PJD Cost/Unit	Actual Cost/Unit	2024 Target Cost/Unit (Low)	2024 Target Cost/Unit (High)	Performance
1293-C	Distribution Circuit Improvement Program (Miles)	\$20,954/mile	\$16,300/mile	\$15,599.85	\$ 15,485.00	\$ 17,115.00	✓ Achieved
1452	Transmission Breaker Replacement	\$255,000 /breaker	\$293,000/ breaker	\$ 306,261.73	\$ 278,350.00	\$ 307,650.00	✓ Achieved
1283	Underground Distribution Cable Upgrades	\$200/foot	\$198.91/foot	\$ 200.56	\$ 188.96	\$ 208.86	✓ Achieved
1183	Upgrade Supervisory Controller for Capacitor Banks	\$27,500/unit	\$27,500/unit	\$ 27,382.89	\$ 26,125.00	\$ 28,875.00	✓ Achieved
1291	Residential Underground Cables	\$190/foot	\$152.72/foot	\$ 158.66	\$ 145.08	\$ 160.36	✓ Achieved
2124	Replacement of Non-restorable Distribution Pole Rejects	\$11,943/pole	\$11,943/pole	\$ 12,412.60	\$ 11,345.85	\$ 12,540.15	✓ Achieved
2438	Single Phase Recloser Devices	\$10,515/unit	\$10,000/unit	\$ 9,934.57	\$ 9,500.00	\$ 10,500.00	✓ Achieved
1250	Transformer Monitoring (Purchases and Installation)	\$98,000/unit	\$96,000/unit	\$ 93,211.00	\$ 91,200.00	\$ 100,800.00	✓ Achieved

Summary

- PSEG Long Island completed 8 of 8 programs achieving unit threshold of $\geq 92.0\%$ of the planned units/miles within the established target and based on the latest LIPA-approved PJD documentation. Also achieving the cost elements, achieve $\pm 5\%$ of the planned per unit and per-mile costs within the established target and based on the latest LIPA-approved PJD documentation.

T&D-40 - Double Woods

Metric Type	Quantitative	Metric Performance	↑ (Partial – 50% of compensation)
Incentive Compensation Claim	\$114,878.21	Comments	N/A



Summary

- PSEG Long Island YE Double Wood poles as reported in National Joint Utilities Notification System (NJUNS) was 7,680 vs targets of 6,810 and 7,680. PSEG Long Island did not achieve targeted performance levels for overall double woods.
- PSEG Long Island did achieve 2024 Next-to-Go (NTG) target of 914 with a yearend result – these are the NTG pole units for which PSEG Long Island is directly responsible/accountable for and PSEG LI significantly exceeded the reduction target of 10%.

T&D-41 - Program Effectiveness - Vegetation Management

Metric Type	Quantitative	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00	Comments	N/A

T&D-41 Program Effectiveness - Vegetation Management

OSA Incentive: \$344,635



Metric Definition

Year-Over-Year (YOY) Outage incident reduction of 50.0% for the circuits actually addressed in the 2023 Plan due to effective Vegetation Management. This applies only to Primary, sustained outages directly related to vegetation. Baseline for each circuit will be set using 12 months immediately prior to 2023 work/upgrades being completed.

Incentive compensation will be allocated as follows:

-100% for achieving a $\geq 50.0\%$ YOY outage incident reduction

-50% for achieving a $\geq 35.0\%$ YOY outage incident reduction

Calculation

(Year After - Year Before)/Year Before

Exclusion

Exclusions only for NYS DPS 72-hour storm events

*Only those outages deemed to be directly Vegetation related, and with vegetation-related cause codes (e.g., Entire tree fell over or Large Overhanging Limb) will be included in the calculation.

YTD

2024	2.9%
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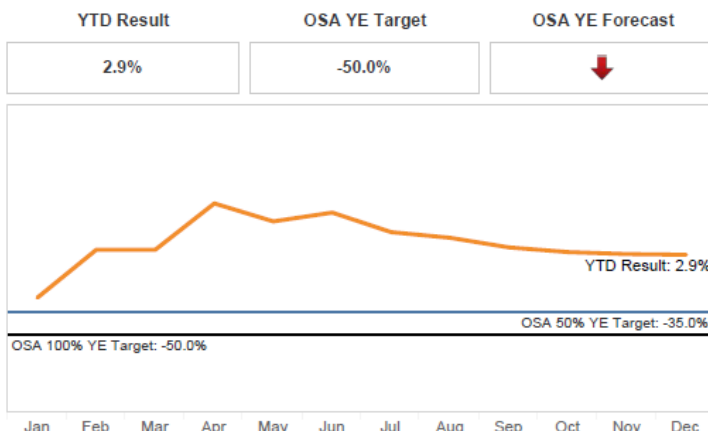
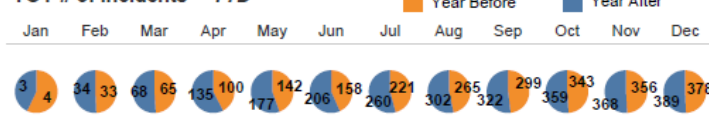
Month

2024	-4.5%
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Monthly Summary - Number of Incidents

	Before Incidents	After Incidents
January	4	3
February	29	31
March	32	34
April	35	67
May	42	42
June	16	29
July	63	54
August	44	42
September	34	20
October	44	37
November	13	9
December	22	21

YOY # of Incidents - YTD



Monthly Sample of Incidents by Circuit - December

Circuit	Year Of Trim	Last Trim	Before Incidents	After Incidents
2BB561	2023	12/20/2023	0	0
3BG067	2023	12/27/2023	0	2
3H080	2023	12/27/2023	5	9
3J5P3	2023	12/31/2023	2	1
3R189	2023	12/05/2023	2	1
4S307	2023	12/21/2023	0	0
5R391	2023	12/29/2023	0	0
5U8K6	2023	12/14/2023	0	1
6HL812	2023	12/19/2023	4	3
6HL816	2023	12/04/2023	3	0
8A714	2023	12/14/2023	2	2
8E825	2023	12/11/2023	1	1
9AU4H4	2023	12/27/2023	2	0
9J932	2023	12/14/2023	1	1

Summary

- PSEG Long Island YE Program Effectiveness – Vegetation Management result was 2.9% increase vs. a target of -50.0% for 100% of allocated compensation and -35.0% for 50% of allocated compensation. There were 378 incidents before and 389 incidents after. PSEG Long Island did not achieve either of the targeted performance levels.
- 211 circuits from the 2023 trim list have had a full year after cycle trim through the end of December.
- 93 circuits (43.9%) have had no tree-related incidents within the year after being trimmed.
- For the circuits with a full-year from trim since 2023, there has been a 2.9% increase in vegetation-related incidents, mostly from the branch-line tree contacts during storm periods.

T&D-44 - Regulatory Compliance

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$287,195.52	Comments	N/A

J F M A M J J A S O N D T&D-44 Regulatory Compliance OSA Incentive: \$287,196



Metric Definition

Operate within all applicable rules and regulations by meeting all local, state, and federal compliance reporting regulations. Appropriately Self-Report all instances of Non-Compliance.

Calculation

- 1) Achieve ≤ 3 violations of Environmental Rules and Regulations to include both Self-Reports and Notice of Violations for the year ending December 31, 2024.
- 2) 100% of regulatory required Operator Training for the year ending December 31, 2024.
- 3) For Bulk Electric System (BES) System Studies managed by Transmission Planning, 100% of regulatory required BES System Studies for the year ending December 31, 2024.
- 4) Achieve ≤ 3 violations of all required permitting to include both Self-Reports and Notice of Violations for the year ending December 31, 2024.
- 5) Comply with all established NYS DPS requirements regarding Event Notifications.

Target

Compensation to be allocated based on achievement of specific metrics above:

- 5 out of 5 is required for 100% of the allocated compensation
- 4 out of 5 is required for 65% of the allocated compensation
- ≤ 3 out of 5 will result in 0% of the allocated compensation

Item #1 and #4 - Violations (Environmental and Permitting)

		J	F	M	A	M	J	J	A	S	O	N	D
Environmental	Notice of Violations	0	0	0	0	0	0	0	0	0	0	0	0
	Self-Report	0	0	0	0	0	0	0	0	0	0	0	0
Permitting	Notice of Violations	0	0	0	0	0	0	0	0	0	0	0	0
	Self-Report	0	0	0	0	0	0	0	0	0	0	0	0
Total		0	0	0	0	0	0	0	0	0	0	0	0

Item #3 - BES System Studies

Sent to NYISO		✓ Completed	In Progress	Not Started
2/16/2024	FAC 014 Winter 2023-2024 Operating Horizon	✓		
3/8/2024	FERC 715 Report Submissions to NYISO	✓		
5/6/2024	G3 Loss of Gas Supply Study	✓		
6/21/2024	LIPA NERC TPL Planning Assessment	✓		
6/24/2024	LIPA 2024 Summer Operating Study	✓		
9/16/2024	FAC 014 Summer 2024 Operating Horizon	✓		
12/27/2024	LIPA 2024-2025 Winter Operating Study Main report	✓		
	LIPA 2024-2025 Winter Operating Study: Extreme Cold Weather Event report	✓		

YTD Result	OSA YE Target	OSA YE Forecast
Pass	Pass	↑
Components	# of Failures	Pass/Fail
Item #1 and #4 Violations	0	Pass
Item #2 Operator Training	0	Pass
Item #3 BES Studies	0	Pass
Item #5 DPS Notifications	0	Pass

Item #2 - Required Operator Training

All NERC Transmission operator certified System Operators and Senior System Operators have completed their regulatory required training for the year.	100.0%
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Item #5 - NYS DPS requirements regarding Event Notifications

Type1	Division1	Pass	Not Applicable	Fail
Dist Ops.	1 - QUEENS/NASSAU	18	2	0
	2 - CENTRAL NASSAU	5	3	0
	3 - WESTERN SUFFOLK	7		0
	4 - EASTERN SUFFOLK	4	3	0
Trans Ops.	ESO Incident	49	55	0
Grand Total		83	63	0

*N/A (Not Applicable) = DPS notification made but does not require notification as per DPS Event Notification Requirements

Summary

- The Objective of this metric is for PSEG Long Island to operate within all applicable rules and regulations by meeting all local, state and federal compliance reporting regulations and appropriately Self-Report for all instances of Non-Compliance.
- The metric had multiple components that included:
 - Environmental Rules and Regulations to Include both Self-Reports and Notice of Violations
 - PSEG Long Island had 0 Self-Reports or NOV's in 2024 exceeding the target of ≤ 3
 - Completion of 100% of regulatory required Operating Training
 - PSEG Long Island completed 100% of System Operators and Senior System Operators completed their required regulatory training for 2024.
 - Bulk Electric System (BES) studies managed by transmission planning to be completed
 - PSEG Long Island completed 100% of regulatory required BES System Studies in 2024
 - Permitting Compliance to include both Self-Reports and Notice of Violations

- PSEG Long Island had 0 Self-Reports or NOV's in 2024 exceeding the target of ≤ 3
- Comply with all established NYS DPS requirements around event notifications
 - PSEG Long Island complied with all requirements and made notifications to DPS in alignment with requirements.

T&D-46 - Root Cause Analysis (RCA) Execution and Compliance

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$459,512.83	Comments	N/A

T&D-46	Root Cause Analysis (RCA) Execution and Compliance			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-46.01	Develop and submit a PIP by March 1, 2024, for the development and implementation of a formal Corrective Action Program (CAP), including the review and selection of necessary software, as appropriate. Execution of all approved PIP deliverables by December 31, 2024. Metric deliverables will be modified with 2024 deliverables upon completion and approval of PIP.	3/1/2024	Achieved	Approved
T&D-46.02	Q1 report delivered to LIPA and DPS to be reviewed at quarterly meeting between the three Parties	4/19/2024	Achieved	Approved
T&D-46.03	Q2 report delivered to LIPA and DPS to be reviewed at quarterly meeting between the three Parties	7/19/2024	Achieved	Approved
T&D-46.04	Q3 report delivered to LIPA and DPS to be reviewed at quarterly meeting between the three Parties	10/18/2024	Achieved	Approved
T&D-46.05	Q4 report delivered to LIPA and DPS to be reviewed at quarterly meeting between the three Parties	1/17/2025	Achieved	Approved

Summary

- PSEG LI submitted a PIP for the development and implementation of a formal Corrective Action Program (CAP), including the review and selection of necessary software, as appropriate.
- PSEG LI provided quarter updates via Smartsheet for efforts associated with completion of the deliverables within the PIP.
- The overall project scope was to Improve root cause analysis (“RCA”) was to expand for the inclusion of the following incident types:
 1. T&D - Safety Incidents
 2. T&D - Inadvertent Operations, including NRA incidents
 3. T&D - Mis-Operations
 4. T&D - Locate and Mark (Dig-Ins)
 5. IT - Outages or incidences affecting IT/OT Systems
- PSEG LI completed identified project scope and provided updates via quarterly reports.

T&D-49: Work Management Effectiveness

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$574,391.03	Comments	N/A

J F M A M J J A S O N D T&D-49 Work Management Effectiveness OSA Incentive: \$574,391



Metric Definition

Measure the effectiveness of the Work Management initiatives implemented from 2021-2024.

Demonstrate the work management effectiveness by measuring the following factors:

1) Productivity for Specific Work Types (1 Target)

i. Specific Work Types to be Measured (ASUV, ACRV, New Business, Replacement of Non-Restorable Distribution Wood Pole Rejects, Distribution Transformer Replacement, and Trip Saver II Program)

2) Create Scorecard (1 Target)

i. Utilization

a. Target: Create a LIPA OSA scorecard to demonstrate the review of the utilization metric for Overhead and Underground lines, Relay and Substation Maintenance.

ii. Work Plan Variance

a. Target: Create a LIPA OSA scorecard to demonstrate the review of the work plan variance to review past performance and future forecast for Overhead and Underground lines.

3) Overtime Rates (3 Targets)

i. Overhead/Underground

ii. Distribution Ops

iii. Substation/Relay Maintenance

4) Schedule Attainment (3 Targets)

i. Overhead/Underground

ii. Substation

iii. Relay Maintenance

Calculation

-Productivity for Specific Work Types: (Estimated Hours)/(Actual Hours)

-Utilization: (Output) / (Available Hours)

-Work Plan Variance: (Total Actual Hours)/(Total Forecasted Hours)

-Overtime Rates: (Non-Storm OT Hours)/(Non-Storm productive Hours)

-Schedule Attainment: [Scheduled Jobs that were completed or in progress] / [Scheduled Jobs that were completed or in progress + Non-Scheduled Jobs that were completed or in progress]

Incentive Compensation:

- Successfully meet 8 or more targets = 100% of incentive compensation

- Successfully meet 7 or more targets = 75% of incentive compensation

- Successfully meet 5 or more targets = 50% of incentive compensation

- Successfully meet 4 or less targets = 0% of incentive compensations

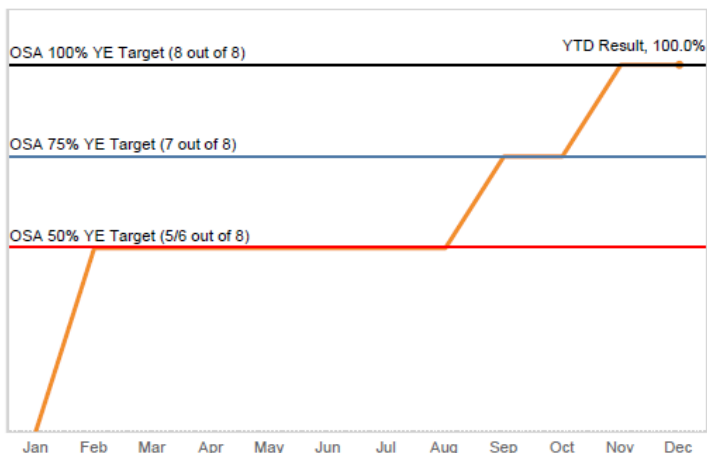
YTD Result

100.0%

OSA YE Target

100.0%

OSA YE Forecast



Components

*See following pages for more details

YTD	Achieved	Target	Pass/Fail
Productivity for Specific Work Types	1	1	Pass
Utilization/Work Plan Variance	1	1	Pass
Overtime Rates	3	3	Pass
Schedule Attainment	3	3	Pass
Total	8	8	

Summary

- T&D-49 – Work Management Effectiveness had four components and 8 sub metrics within the components. PSEG Long Island achieved all 8 sub metric targets. Details are below on a component and metric basis.

T&D-49.1 – Productivity for Specific Work Types

Achieved

T&D-49 Work Management Effectiveness - Productivity for Specific Work Types



Metric Definition

Productivity for Specific Work Types (1 Target)

Key Inclusions:

- Measured at SAP order level
- In House Crew Work only
- Must go Work (excluded)
- Specific Work Types to Be Measured:
 - ASUV
 - ACRV
 - New Business
 - Replacement of Non-Restorable Distribution Wood Pole Rejects
 - Distribution Transformer Replacement
 - Trip Saver II Program

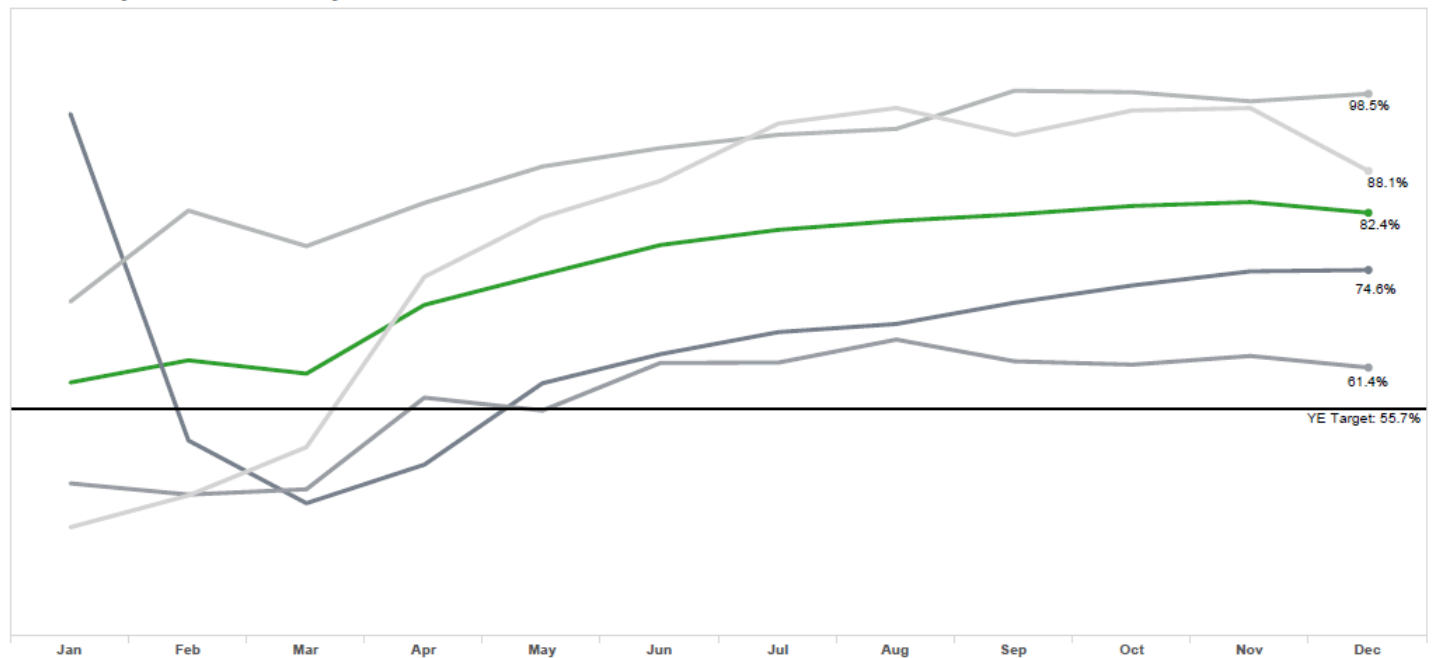
Calculation

$(\text{Estimated Hours})/(\text{Actual Hours})$

Target: Overhead/Underground Lines - 55.7%

Queens/Nassau Central Nassau W Suffolk E Suffolk OH UG Lines

Productivity - YTD Breakdown by Division



T&D-49.2a – Utilization

Achieved

T&D-49 Work Management Effectiveness - Utilization



Metric Definition

Create Scorecard (1 Target)

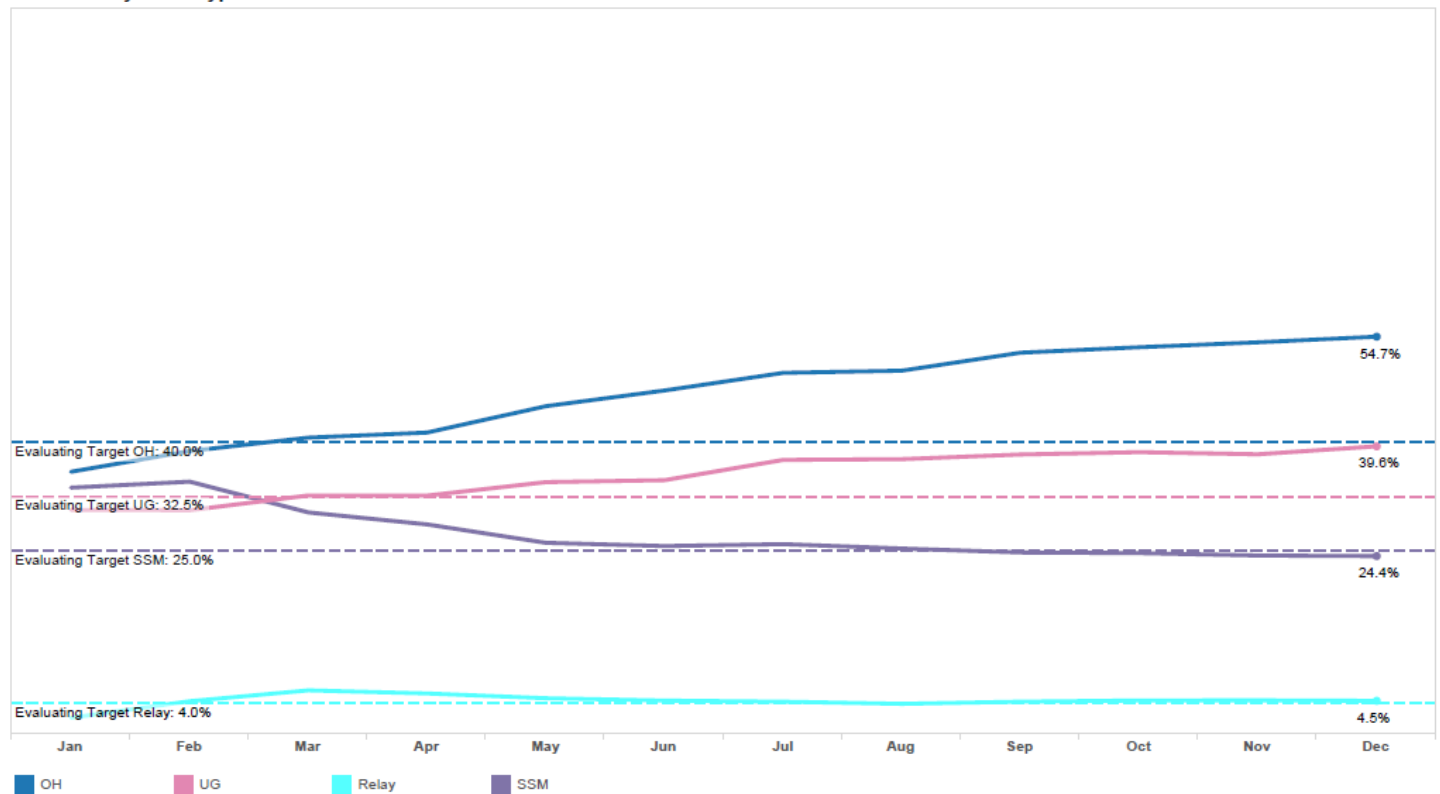
Calculation

(Output) / (Available Hours)

Target:

Create a LIPA OSA scorecard to demonstrate the review of the utilization metric for Overhead and Underground lines, Relay, and Substation Maintenance.


Utilization by Work Type - YTD



Targets for Utilization are provided to assist with baselining performance in 2024. Performance against the target does not have any bearing on achieving metric T&D-49, in part or in whole.

T&D-49.2b – Workplan Variance

Achieved

T&D-49 Work Management Effectiveness - Work Plan Variance													 PSEG LONG ISLAND	
Overhead/Underground		Actuals / Forecast												
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Capital	Forecast Hours	81,143	88,386	83,819	88,578	97,621	77,261	83,739	84,663	97,001	105,424	73,224	82,089	1,042,948
	Actual Hours YTD	60,969	66,678	77,727	71,589	85,755	82,057	75,424	79,765	70,308	79,003	67,458	51,859	868,592
	Work Plan Variance (%)	75.1%	75.4%	92.7%	80.8%	87.8%	106.2%	90.1%	94.2%	72.5%	74.9%	92.1%	63.2%	83.3%
O&M	Forecast Hours	11,502	13,691	15,884	17,257	17,881	16,640	20,540	22,247	25,416	34,270	10,756	18,548	224,632
	Actual Hours YTD	23,596	16,256	19,259	15,430	17,901	18,406	18,538	15,305	22,580	8,119	14,849	14,004	204,244
	Work Plan Variance (%)	205.1%	118.7%	121.2%	89.4%	100.1%	110.6%	90.3%	68.8%	88.8%	23.7%	138.1%	75.5%	90.9%
Storm	Forecast Hours	4,911	4,338	5,185	4,166	4,225	3,163	4,314	4,899	5,279	5,546	2,566	5,619	54,211
	Actual Hours YTD	13,645	7,312	2,595	13,694	0	3,799	113	11,217	0	0	0	3,981	56,354
	Work Plan Variance (%)	277.8%	168.5%	50.0%	328.7%	0.0%	120.1%	2.6%	229.0%	0.0%	0.0%	0.0%	70.8%	104.0%
Non-Productive	Forecast Hours	8,410	8,145	9,867	10,119	10,839	9,619	11,070	11,385	12,299	16,315	8,692	16,929	133,689
	Actual Hours YTD	8,289	8,306	7,555	8,974	8,642	8,293	11,523	11,519	8,146	8,975	9,284	12,015	111,519
	Work Plan Variance (%)	98.6%	102.0%	76.6%	88.7%	79.7%	86.2%	104.1%	101.2%	66.2%	55.0%	106.8%	71.0%	83.4%
Grand Total	Forecast Hours	105,966	114,560	114,755	120,120	130,566	106,683	119,663	123,194	139,995	161,555	95,238	123,185	1,455,480
	Actual Hours YTD	106,499	98,551	107,136	109,686	112,298	112,555	105,598	117,806	101,034	96,097	91,591	81,858	1,240,709
	Work Plan Variance (%)	100.5%	86.0%	93.4%	91.3%	86.0%	105.5%	88.2%	95.6%	72.2%	59.5%	96.2%	66.5%	85.2%

*Evaluating Target for Work Plan Variance (%) Based on Grand Total = +/-20% (80% - 120%)

**Target for Work Plan Variance is provided to assist with baselining performance in 2024. Performance against the target does not have any bearing on achieving metric T&D-49, in part or in whole.

T&D-49.3 – Overtime Rates

Achieved 3 of 3 sub targets

T&D-49 Work Management Effectiveness - Employee Overtime



Metric Definition

Overtime targets will be established at the Work Group Level for the following work groups and the associated targets will be established:

- Overhead/Underground Lines: 31.0%
- Distribution Ops: 36.0%
- Substation/Relay Maintenance: 32.0%

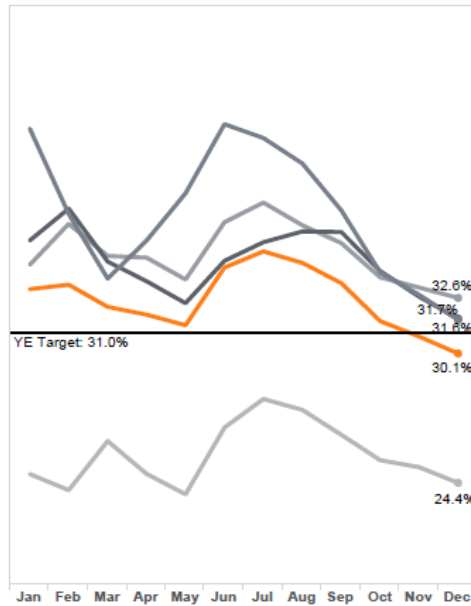
Calculation

(Non-Storm OT Hours) / (Non-Storm Productive Hours)

Exclusions:

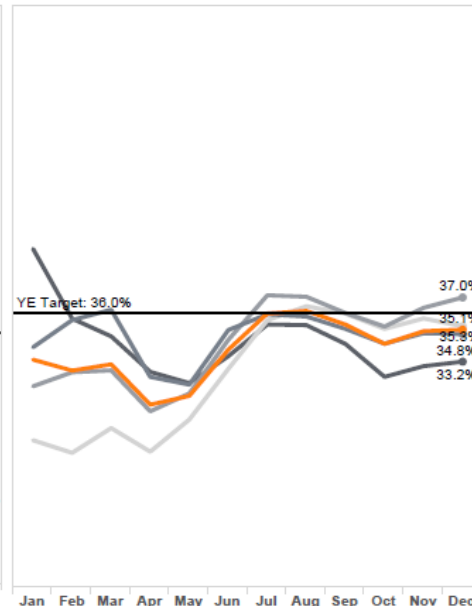
Non-Storm Emergencies pursuant to the second A&R OSA.

Overhead/ Underground Lines - YTD



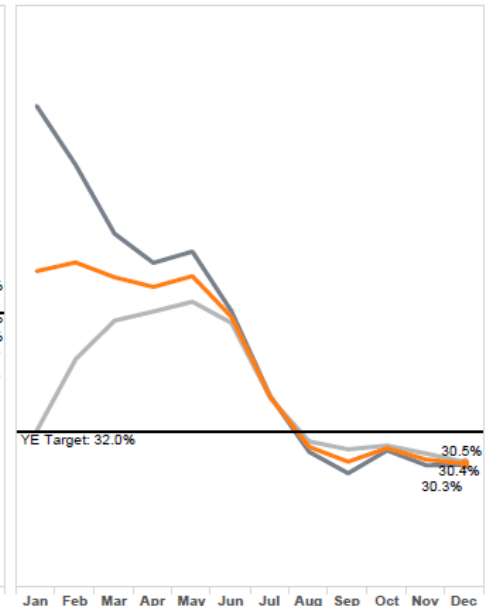
OH UG Lines
Queens/Nassau
Central Nassau
W Suffolk
E Suffolk

Distribution Operations - YTD



Distribution Ops.
Queens/Nassau
Central Nassau
W Suffolk
E Suffolk

Substation/ Relay Maintenance - YTD



SSM Relay
Substation - West
Substation - East

T&D-49.4 – Schedule Attainment

Achieved 3 of 3 sub targets

T&D-49 Work Management Effectiveness - Schedule Attainment



Metric Definition

Schedule Attainment (3 Targets)

Key Inclusions:

- Must Go Job is a separate category and not counted in the dominator.

- Specific Work Types to Be Measured:

- Overhead/Underground Lines

- Substation

- Relay Maintenance

Calculation

$$\frac{[\text{Scheduled Jobs that were completed or in progress}]}{[\text{Scheduled Jobs that were completed or in progress} + \text{Non-Scheduled Jobs that were completed or in progress}]}$$

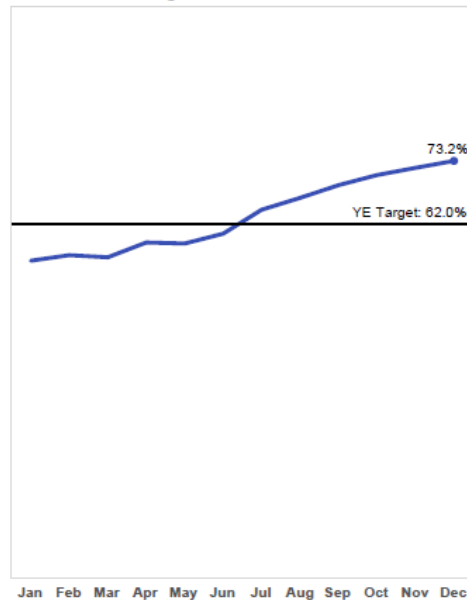
Target:

- Overhead/Underground Lines: 62.0%

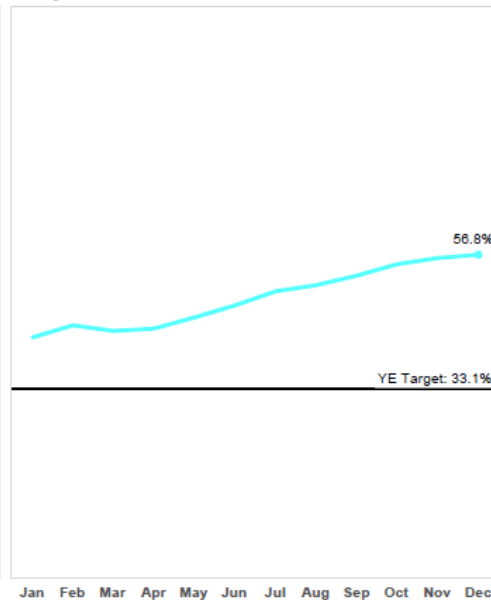
- Substation: 31.8%

- Relay Maintenance: 33.1%

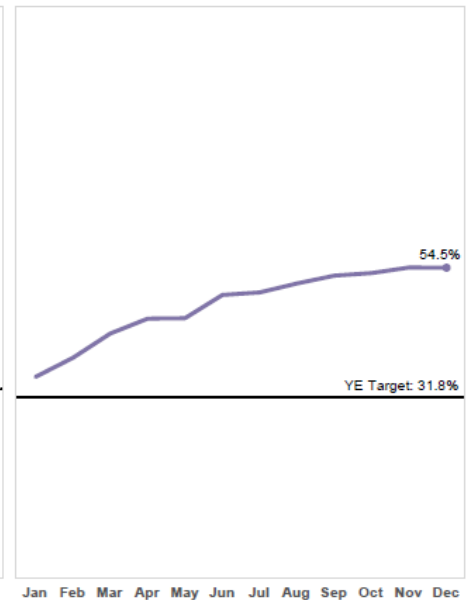
Overhead/Underground Lines - YTD



Relay Maintenance - YTD



Substation - YTD



T&D-50: Storm Outage Response Performance

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$344,634.62	Comments	N/A

T&D-50 Storm Outage Response Performance OSA Incentive: \$344,635



Metric Definition

Measure and improve the overall outage management and response effectiveness during storms with customer outage durations ≥ 24 hours and < 48 hours.

Calculation

Demonstrate excellent performance as reflected in the Small Storm Scorecard ("Scorecard") for applicable OSA storms ≥ 24 and < 48 hours in length. The Scorecard is based on a total maximum score of 1,000 points. Note: certain elements of the Scorecard will not be applicable for all storms. In those cases, a maximum eligible score of less than 1,000 points will result and be applicable to that specific storm. The % achievement calculations for that specific storm will then be calculated in the normal fashion on the lower point basis.

- 1) Pre-Storm (200 Points)
- 2) Storm Accuracy (500 Points)
- 3) Post Storm (300 Points)

Target

Incentive compensation will be awarded, based on the average point score for all qualifying storms over the course of the rating period, as follows:
 -100% of the allocated incentive compensation awarded for an average score of $\geq 80.0\%$ attainment of all eligible points for the rating period.
 -50% of the allocated incentive compensation awarded for an average score of $\geq 70.0\%$ attainment of all eligible points for the rating period.
 -0% incentive compensation awarded for an average score of $< 70.0\%$ attainment of all eligible points for the rating period.

YTD Result

OSA YE Target

OSA YE Forecast

100.0%

100.0%



OSA YE Target: 100%

YTD Incentive Compensation: 100.0%

OSA YE Target: 50%

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

		Weight	Applicable Points	Achieved Result	Storm Score
Storm #8 06/26/2024	Preparation and Close-Out	15.0%	105	105	
	Operations and Performance	55.0%	450	425	
	Communications	30.0%	300	225	
	Total	100.0%	855	755	88.3%
Storm #9 08/3/2024	Preparation and Close-Out	15.0%	105	105	
	Operations and Performance	55.0%	450	410	
	Communications	30.0%	300	275	
	Total	100.0%	855	790	92.4%

Summary

- PSEG Long Island has 2 events that for measurement of overall outage management and response effectiveness during storms with customer outage durations ≥ 24 hours and < 48 hours.
- PSEG Long Island scored $\geq 80\%$ of the applicable points on each of the storms thus achieving 100% of the allocated incentive.

T&D-52: Triennial Safety Assessment

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$402,073.72	Comments	N/A

T&D-52	Triennial Safety Assessment			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-52.01	Develop and Submit a Final 2024 Year-End Report of Activities Completed and 2025 Mitigation Plan. The Parties will meet, as deemed necessary, to discuss final 2024 status and expectations for 2025 progress.	1/17/2025	Achieved	Approved
T&D-52.02	Q1 Update of metric deliverables in Smartsheet. The Parties will meet, as deemed necessary, to discuss progress and issues.	Exempted	Exempted	Exempted
T&D-52.03	Q1/Q2 Update of metric deliverables in Smartsheet. The Parties will meet, as deemed necessary, to discuss progress and issues.	Exempted	Exempted	Exempted
T&D-52.04	Q3 Update of metric deliverables in Smartsheet. The Parties will meet, as deemed necessary, to discuss progress and issues.	Exempted	Exempted	Exempted
T&D-52.05	Develop and Submit a Preliminary 2024 Year-End Report and 2025 Mitigation Plan. The Parties will meet, as deemed necessary, to discuss progress and issues.	1/17/2025	Achieved	Approved

Summary

- LIPA's third party triennial safety assessment was issued with findings, recommendations and onsite assessment findings.
- PSEG Long Island issued a comprehensive report addressing the findings, recommendations and onsite assessment findings and reviewed the final report with LIPA.



PSEG LONG ISLAND

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