FOR CONSIDERATION
November 18, 2026

TO:	The Board of Trustees
FROM:	Carrie Meek Gallagher
SUBJECT:	Customer Credit and Collections Review and Adoption of Customer Bill of Rights and Service Standards, and Customer Experience Policy

Requested Action

The Board of Trustees (the "Board") of the Long Island Power Authority ("LIPA") is requested to adopt a resolution: (i) accepting the actions taken by LIPA Staff in response to the Board's May 20, 2026 direction and the results and staff report of the expanded Customer Credit and Collections Review to date; (ii) adopting the Customer Bill of Rights and Service Standards attached as Exhibit "B"; and directing LIPA management, consistent with applicable law, tariff, and the Authority's contractual rights and obligations, to oversee implementation and ongoing adherence to those standards through LIPA's existing governance and contract-oversight mechanisms; and (iii) directing LIPA Staff to ensure that each final Internal Audit finding and recommendation arising from the Customer Credit and Collections audit is addressed through a documented corrective action plan and LIPA's established audit follow-up process, with the Finance and Audit Committee overseeing implementation, remediation progress, and the status, progress, and accountability around closure of outstanding items on behalf of the Board; and (iv) approving the amended Board Policy on Customer Experience.

Background

In April 2026, public reporting concerning utility collection practices, including comments made by a PSEG Long Island employee at an industry collections conference, raised concerns regarding the treatment of customers experiencing financial hardship. In response, Governor Kathy Hochul called for a statewide review of utility collection practices and customer protections.

On May 7, 2026, the Department of Public Service ("DPS") formally commenced Matter 26-00971, *In the Matter of Department of Public Service Investigation into Utility Collections Practices*. As part of that investigation, DPS directed PSEG Long Island and other utilities to provide information concerning collection policies and procedures, third-party collection arrangements, protections for vulnerable customers, service terminations for arrears, deferred payment agreements, employee training, and compliance with applicable Public Service Commission requirements. PSEG Long Island subsequently suspended residential terminations for non-payment while its review was underway.

At its May 20, 2026, meeting, the Board reaffirmed its expectation that LIPA customers be treated lawfully, fairly, respectfully, and compassionately throughout customer service and collections interactions. Consistent with the Governor's call for heightened scrutiny and the DPS investigation, the Board directed LIPA Staff to broaden work already underway and conduct an independent review of PSEG Long Island's credit and collections practices. The Board directed that the review extend beyond the underlying incident to examine the policies, controls, training, oversight, organizational culture, and customer protections that shape the collections process.

Actions Taken in Response to the Board's Direction

- **Expanded Internal Audit Review.** LIPA Internal Audit expanded its Customer Credit and Collections Audit to examine customer communications; deferred payment arrangements; suspension and termination practices; vendor oversight; employee and contractor training; protections for seniors, medically vulnerable customers, low- and moderate-income customers, and other protected populations; and governance of the collections function. Testing included a review of terminations and related customer interactions before and after termination; compliance with HEFPA requirements and internal policies and procedures, including protections afforded to vulnerable and otherwise protected customers; and whether appropriate alternatives to termination were offered.

- **Community Advisory Board Participation.** LIPA engaged members of its Community Advisory Board ("CAB"), including members with experience serving vulnerable and financially stressed households. In addition to direct listening sessions and the June 18 CAB meeting, LIPA distributed a written survey addressing customer communications, hardship assistance, payment arrangements, escalation practices, accessibility, and principles for a Customer Bill of Rights.

- **Consumer and Vulnerable-Population Advocates.** LIPA engaged the Public Utility Law Project of New York ("PULP"), AARP, and the Long Island Progressive Coalition ("LIPC") through introductory and follow-up sessions focused on deferred payment arrangements, termination practices, assistance programs, communications, complaint escalation, and opportunities to strengthen customer protections.

- **Labor and Frontline Employee Participation.** LIPA engaged IBEW Local 1049 leadership and frontline workforce in multiple sessions concerning operational pain points, communications, training needs, procedures, quality assurance, and customer interaction protocols. The proposed recommendations emphasize the importance of continued engagement with labor representatives when operational changes may impact represented employees.

- **Peer Public Power Benchmarking.** LIPA engaged peer public power utilities through the Large Public Power Council and surveyed their practices related to collections, hardship protections, customer communications, employee training, quality assurance, and accountability to benchmark the proposed standards against leading public-power practices.

- **Complaint and Regulatory Review.** LIPA Internal Audit coordinated with the DPS to obtain complaint data and conducted an analysis of a full two-year period, including an assessment of complaint trends, initiation, handling, and escalation to evaluate compliance with regulatory requirements and internal policies and procedures.

Stakeholder Engagement

The review included a broad stakeholder engagement process intended to incorporate the perspectives of customer advocates, community representatives, and frontline employees. LIPA held two meetings with members of the CAB, six sessions with PULP, AARP, and LIPC, and three sessions with IBEW Local 1049. PULP also provided written feedback on the proposed

recommendations and Customer Bill of Rights and Service Standards, which are being incorporated into the final review.

Stakeholder feedback focused on strengthening protections for customers experiencing financial hardship, improving the clarity and consistency of customer communications, ensuring meaningful access to payment arrangements and assistance programs, strengthening escalation and complaint processes, and providing employees with appropriate training, guidance, and discretion to respond to individual customer circumstances. Stakeholders also emphasized the importance of identifying vulnerable customers early, improving referrals to available assistance, and using quality assurance and oversight to promote consistent and compassionate treatment.

Outcome of the Review

The review identified opportunities to strengthen governance, organizational accountability, quality assurance, training, complaint monitoring, customer communications, collection strategies, vendor oversight, and controls supporting compliance with customer-protection requirements.

Based on this work, LIPA conducted a comprehensive review resulting in a report outlining the process LIPA Staff undertook, along with key findings and recommendations, attached as Exhibit "B"; and the Customer Bill of Rights and Service Standards, attached as Exhibit "C." The standards establish clear customer-treatment expectations that can be implemented through procedures, training, quality assurance, performance management, vendor oversight, customer communications, and LIPA monitoring. They supplement, and do not replace, rights and protections provided by applicable law, regulation, or LIPA's Tariff for Electric Service. Additionally, LIPA Staff recommends changes to the Board Policy on Customer Experience, attached as Exhibit "D," to ensure consistency with these recommendations.

Recommendation

Based upon the foregoing, I recommend approval of the above-requested action by adoption of the resolution in the form attached hereto as Exhibit "A."

Attachments

Exhibit "A" Resolution

Exhibit "B" LIPA Report on the Review of PSEG Long Island's Customer Credit & Collections Practices

Exhibit "C" Customer Bill of Rights and Service Standards

Exhibit "D" Amended Board Policy on Customer Experience

Exhibit "A"

RESOLUTION REGARDING
CUSTOMER BILL OF RIGHTS AND SERVICE STANDARDS

WHEREAS, the Long Island Power Authority ("Authority" or "LIPA") is committed to providing safe, reliable, and affordable electric service while ensuring that customers are treated fairly, respectfully, and empathetically; and

WHEREAS, the Authority's Board of Trustees has emphasized the importance of customer experience, transparency, accountability, and continuous improvement in all aspects of utility operations; and

WHEREAS, in May 2026, the Board expanded the scope of an ongoing internal audit review to include customer collections practices, customer communications, service termination processes, and related customer protections; and

WHEREAS, the audit review included an examination of policies, procedures, training materials, customer assistance programs, collection activities, service termination practices, and applicable customer protections; and

WHEREAS, the findings of the review identified opportunities to further strengthen customer communications, employee training, customer navigation, and service standards, while also confirming the existence of substantive customer assistance programs, payment options, and customer protections currently available to customers; and

WHEREAS, the Board also directed LIPA Staff to engage with members of the Authority's Community Advisory Board and other stakeholder organizations, including AARP, PULP, and LIPC, to gather input and recommendations regarding customer treatment, customer communications, access to assistance programs, and opportunities for improvement; and

WHEREAS, those discussions confirmed that existing customer assistance programs provide important protections and resources for customers experiencing financial hardship and that continued efforts should be made to ensure customers can effectively access and navigate those programs; and

WHEREAS, stakeholders identified several common themes, including the importance of empathy and compassion in customer interactions, the need for clear and accurate communications regarding available assistance, the value of multilingual customer support, and the importance of ensuring that service termination remains a measure of last resort after reasonable opportunities for customer engagement and resolution have been provided; and

WHEREAS, stakeholders further emphasized the importance of establishing clear expectations regarding customer treatment and fostering a culture that reflects the Authority's commitment to dignity, respect, empathy, and accountability; and

WHEREAS, the Authority recognizes that customer-facing employees often work in challenging circumstances and that clear expectations, training, and support are necessary to ensure consistent customer experiences across all customer interactions; and

WHEREAS, the Board believes that establishing a Customer Bill of Rights and Service Standards will reinforce shared expectations regarding customer treatment, provide additional transparency and accountability, and further strengthen customer confidence in the electric service provided on Long Island and in the Rockaways; and

WHEREAS, the Customer Bill of Rights and Service Standards attached hereto as Exhibit C reflects the Authority's commitment to customer-focused service, continuous improvement, and a culture that prioritizes empathy, professionalism, and respect while maintaining the financial integrity necessary to provide safe and reliable electric service;

NOW, THEREFORE, BE IT RESOLVED, that the Board of Trustees hereby adopts the Customer Bill of Rights and Service Standards attached as Exhibit C; and

BE IT FURTHER RESOLVED, that the Board directs LIPA Staff to work collaboratively with PSEG Long Island to implement the principles and service standards contained therein and to incorporate such principles, as appropriate, into customer-facing policies, procedures, training programs, communications, and operational practices; and

BE IT FURTHER RESOLVED, that LIPA Staff shall work with PSEG Long Island to evaluate opportunities to enhance customer communications, strengthen customer navigation and referral resources, improve language accessibility, and reinforce customer service expectations through training and operational practices; and

BE IT FURTHER RESOLVED, that LIPA Staff shall evaluate whether performance measures or incentives associated with collections appropriately balance financial stewardship with customer protection, affordability, compliance, and customer-service outcomes, and shall incorporate the results of that evaluation into the applicable performance measures metrics process; and

BE IT FURTHER RESOLVED, that LIPA Staff shall continue engagement with the Community Advisory Board, customer advocates, and stakeholder organizations regarding implementation of these standards and opportunities for ongoing improvement; and

BE IT FURTHER RESOLVED, that, with respect to the final findings and recommendations arising from LIPA Internal Audit's Customer Credit and Collections Review, LIPA Staff shall use the Authority's existing oversight and contractual mechanisms to obtain a documented management response and corrective action plan addressing each finding and recommendation applicable to PSEG Long Island; and

BE IT FURTHER RESOLVED, that the Finance and Audit Committee shall oversee implementation of the Customer Bill of Rights and Service Standard and the status of corrective actions arising from the Customer Credit and Collections Review; and

BE IT FURTHER RESOLVED, that LIPA Staff shall periodically report to the Finance and Audit Committee regarding implementation efforts, customer service trends, customer assistance program participation, service termination activities, and other information necessary to assess compliance with and effectiveness of the Customer Bill of Rights and Service Standards; and

BE IT FURTHER RESOLVED, that the Board reaffirms its commitment to ensuring that all customers are treated with dignity, respect, fairness, compassion, and empathy and recognizes the shared commitment of the Authority, PSEG Long Island, employees, community partners, and stakeholders to advancing those principles.

Exhibit "B"

LIPA Report on the Review of Customer Credit & Collections: November 2026

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LIPA



Customer Credit & Collections Review

November 2026

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Background and Purpose

LIPA is responsible for providing reliable electric service while ensuring that customers are treated fairly, respectfully, consistently, and with empathy in every interaction with our service provider. For customers facing financial hardship, illness, or other vulnerable circumstances, LIPA is committed to ensuring that our customers' needs are fully understood and that all available options are explored to provide relief and find solutions to bring their accounts out of arrears and avoid service termination.

Credit and collections policies and practices must balance the need to recover amounts owed from accounts in arrears, which affect all customers, with the serious consequences that loss of electric service can have for a household, ensuring these consequences are applied only as a last resort. This review evaluates whether PSEG Long Island's policies, customer assistance programs, employee guidance, and oversight functions are working together to fulfill this responsibility, both in principle and in practice. It also establishes clear expectations and provides actionable recommendations to align the customer experience with LIPA's mission and values. Residential terminations will not resume until the review is completed, and a resumption strategy is developed and approved by LIPA.

How the review developed:

In April 2026, public reporting about utility collection practices, including comments made by a PSEG Long Island employee at an industry collections conference, raised concerns about the treatment of customers experiencing financial hardship. Governor Kathy Hochul called for a statewide examination of utility collection practices, and the New York State Department of Public Service (DPS) opened Matter 26-00971 on May 7, 2026. PSEG Long Island subsequently suspended residential service terminations for nonpayment while its review was underway.

At its May 20, 2026, meeting, LIPA's Board of Trustees reaffirmed its expectation that customers be treated lawfully, fairly, respectfully, and compassionately, especially when facing financial hardship. The Board directed LIPA staff to broaden a review that was already underway, and a comprehensive, independent review of PSEG Long Island's credit and collections practices was initiated. The Board's direction was intentionally broader than the initial public concern: it called for thorough examination of the policies, controls, training, organizational culture, customer protections and management oversight that shape customers' experiences. The goal was not simply to respond to a single incident, but to understand any systemic issues and identify improvements that will strengthen the organization as a whole.

- **April 27, 2026** | Public reporting prompted questions about utility collection practices and a statewide call for greater scrutiny of customer protections.
- **May 7, 2026** | DPS commenced its collections-practices investigation, and the LIPA Board directed a broader review on May 20.
- **June–September 2026** | LIPA examined procedures, customer communications, payment arrangements, protected-account safeguards, employee training and oversight, while consulting customer advocates, community representatives, labor and peer public-power utilities.
- **June 18, 2026** - Community Advisory Board presentation and discussion.
- **September–October 2026** | LIPA continued to refine proposed corrective actions, develop a Customer Bill of Rights and Service Standards, and an updated Board Policy on Customer Experience.
- **November 2026 (anticipated)** | The proposed package is expected to be presented for Board consideration. Residential terminations remain suspended while review and transition planning continue.

Methodology and approach

LIPA's review investigated PSEG Long Island's existing procedures and operations involving customers with accounts in arrears. LIPA staff held discussions with management and frontline personnel; solicited input from LIPA's Community Advisory Board; engaged with the Public Utility Law Project of New York (PULP), AARP, and the Long Island Progressive Coalition (LIPC); and held sessions to discuss the review with IBEW Local 1049 representatives. LIPA also identified best practices from peer public-power utilities that PSEG Long Island could

adopt. Stakeholders brought different perspectives and helped LIPA staff understand the customer experience, and their contributions helped focus the work on practical questions: *Were customers adequately informed and educated regarding their arrears and the status of their account? Are they on an appropriate rate? Do they know how to reach out to seek help? Do they know what assistance programs are available? Do they understand how to establish a sustainable payment arrangement, obtain medical protection, or resolve a dispute? Do they understand the role of the customer service representative they are talking to? Are all other options explored before termination becomes a possibility?*

The review also addresses the important role of frontline employees, who are often required to navigate difficult circumstances and complex rules. Strong customer protections depend not only on clear standards, but on employees having the information, training, tools, discretion, escalation paths, and management support needed to carry them out.

1. Summary of Review and Actions

LIPA has identified several matters that warrant action before residential service terminations resume. Residential terminations remain suspended as LIPA completes its review and transition planning is approved and implemented. The readiness requirements described below are management expectations intended to inform and guide resumption efforts.

First, PSEG Long Island will develop a coordinated implementation plan to resume terminations. The plan will address customer communications, employee readiness, assistance and payment-arrangement options, notice validity, protected-account safeguards, operational controls, escalation procedures, monitoring, and enhanced oversight during the initial resumption period. The purpose is not simply to restart a prior process but to implement a more effective customer-centric framework that is informed by the review.

- **Readiness verification before restarting terminations.** LIPA will require a written transition plan and supporting evidence covering the final customer-notice approach; procedures for handling current protection flags, pending certifications and disputes; sustainable DPA guidance; employee scripts and training; exception escalation; outreach activities; and enhanced quality-assurance review. LIPA will review the transition plan to identify any items that must be effective before an account may advance to termination and any options for a monitored, longer-term implementation track.
- **Readiness decision and accountability.** Before operational resumption, LIPA will assess whether the required near-term safeguards are functioning and whether outstanding issues can be addressed by appropriate interim controls. Legal, Customer Experience, and operating personnel will validate their respective areas. Any unresolved protection-related exception that could affect an individual account must be handled before that account can advance to termination.
- **Account-level safeguards and exception review.** Accounts considered eligible for termination will pass applicable documented system checks and required existing reviews. LIPA will require closer screening of accounts with medical, life support, or other protection indicators, pending assistance or certification requests, material billing disputes, and data inconsistencies. These controls will be supplemented by targeted human review of exceptions. Where a legally required protection, account status, or unresolved exception cannot be verified, the account will not be terminated until the issue is addressed. This risk-based approach does not displace any individual review required by law or tariff.

Second, PSEG Long Island will revisit the structure and administration of deferred payment arrangements, or DPAs. The review identified opportunities to provide greater flexibility so that payment arrangements are realistic and sustainable for customers experiencing financial hardship. This includes evaluating whether a customer's recent payments can be applied to a DPA when determining the amount required to establish an arrangement, rather than requiring a customer who has recently made a substantial payment to submit an additional down payment when seeking a DPA.

This change addresses stakeholder recommendations that payment arrangements better reflect a customer's ability to pay and ensures that unnecessary administrative barriers do not prevent customers from avoiding termination. Any revised DPA practices will be reflected in procedures, training, and employee guidance documents, ensuring customers receive consistent treatment regardless of which customer service representative handles their account.

Third, LIPA has given particular attention to the time provided to customers seeking protection due to a medical emergency or the presence of life-support equipment.

Current procedures generally provide five business days for customers to submit supporting medical documentation. The review recommends extending that period to 20 business days. LIPA believes customers facing a serious medical circumstance should have a reasonable opportunity to obtain documentation from a physician or other appropriate medical professional and should not lose protection merely because that process cannot be completed within a very short administrative window.

PSEG Long Island has agreed, as an interim measure, to accept the required medical documentation within 20 business days while LIPA and PSEG Long Island evaluate any procedural, system, and tariff changes necessary to formally establish the longer timeframe.

This action directly addresses concerns raised by PULP, AARP, and LIPC regarding the accessibility of medical and life support protections. The review also examined how customers are informed of eligibility requirements, what documentation is required, how long protections remain in effect, how renewals are handled, and how customers are informed when documentation has been received or additional information is needed. LIPA's customers seeking medical protection should understand the process and should not lose protection simply because the paperwork is still being completed within the permitted timeframe.

- **Documentation and status confirmation.** The 20-business-day interim medical-documentation accommodation should be reflected in frontline guidance and customer communications. PSEG Long Island should provide confirmation of receipt and identify any missing documentation or applicable renewal requirements. LIPA will review whether formal procedure, system, or tariff changes are needed before this interim measure can become a permanent standard.

2. Stronger Protections Before Service Termination

The review identified several opportunities to strengthen the steps between a customer falling into arrears and the eventual termination of service.

PSEG Long Island will evaluate the timing, clarity, and effectiveness of termination notices and required pre-termination contact, including any applicable 72-hour outreach steps. Final termination notices and additional customer-contact requirements serve different purposes and must be evaluated against the applicable HEFPA and LIPA tariff provisions. One concern identified during the review is the potential for an earlier notice to remain actionable even when circumstances on the account may have changed. For example, a customer may make a payment after receiving a notice and reasonably believe that the immediate risk of termination has been resolved.

The corrective-action process will consider changes to notice timing, language, and supplemental customer contact so customers can understand the current amount owed, the status of any payment arrangement or dispute, the available protections, and what action, if any, remains necessary to avoid termination. Any renewal or replacement of prior notices must comply with applicable law and tariff requirements; the transition plan will document which notices remain valid and when new notices are required.

PSEG Long Island will also add an evening contact attempt to its pre-termination outreach. This recognizes that relying exclusively on daytime outreach may make it more difficult to reach working customers or others who cannot respond during regular business hours.

- **Moratorium transition communications.** PSEG Long Island has prepared separate draft communications for customers with past-due balances and customers potentially subject to termination after the moratorium ends. The drafts describe assistance options and the transition back to service terminations, but they are not individualized statements of a customer's account status. LIPA has requested that final communications address how to seek an account review or dispute a bill, clearly explain the treatment of earlier termination notices, and direct customers to their current account balance and appropriate assistance channels.
- **New notice and timeline clarity.** LIPA favors issuing new, legally sufficient notices where required before actual termination, rather than relying ambiguously on notices issued before or during the suspension. Legal and Customer Experience staff should verify the applicable HEFPA and tariff timing, as well as how account-specific deadlines are communicated. Customers will receive communications regarding the transition out of the moratorium; however, these communications will not replace the requirement to issue new termination notices. Before resuming service terminations, LIPA will require new 72-hour termination notices, with delivery timed as close as possible to the scheduled termination date.

Additional approaches remain to be implemented. These include whether field personnel can play a broader customer-assistance role before termination, including helping customers understand available assistance, directing them to consumer advocacy or other resources, and providing an additional opportunity to resolve an account before service is disconnected.

LIPA is also working to ensure that PSEG Long Island strengthens proactive screening for available assistance. Customer-facing representatives should be equipped to recognize circumstances suggesting that a customer may qualify for HEAP, utility affordability programs, Department of Social Services assistance, or other available resources and should be able to make an effective referral.

These actions reflect stakeholder recommendations that customers receive meaningful and easy-to-understand information about protections, assistance, and alternatives before termination, and that the collections process does not assume that a customer knows which programs exist or the appropriate questions to ask.

- **After-disconnection communication and remedy.** Customers whose service is disconnected will receive clear information about the reason for the disconnection, the balance, dispute rights, available assistance, reconnection steps, the applicable restoration process, and how to obtain help. If a termination without the required notice or protection is identified, PSEG Long Island will evaluate and apply the remedy appropriate to the circumstances, including restoration when warranted. LIPA will require PSEG Long Island to seek timely escalation and root-cause review, with particular attention to medical or other high-risk cases. The outreach and remedy process should be proportionate to customer circumstances and applicable requirements.

- **Restoration and assistance information.** Customer-facing instructions will reflect the restoration standards applicable under HEFPA, the LIPA tariff, and PSEG Long Island's customer rights guidance, including the process for prompt reconnection when qualifying conditions are met. Legal and Customer Experience staff should verify the applicable timing and any exceptions before those standards are reproduced in notices or scripts.

3. Medical, Life-Support and Vulnerable-Customer Protections

Protections for medical and vulnerable customers are a central component of the corrective action program.

In addition to extending the period available to provide medical documentation, LIPA is requiring strengthened training and escalation procedures for employees who interact with customers protected under medical emergency, life-support, elderly, blind, disabled, or other applicable customer-protection provisions.

PSEG Long Island will provide recurring training for customer-facing representatives and supervisors addressing protected-account indicators, applicable cold-weather, extreme-heat, holiday, and termination restrictions, proper escalation procedures, and customer care. Training will place greater emphasis on recognizing circumstances that require specialized handling rather than relying solely on a customer to request a specific protection.

The review also identified the need for clearly defined escalation procedures so that a representative who encounters an urgent medical or vulnerable customer circumstance can promptly reach a trained supervisor with the authority to address the situation.

LIPA will also work to ensure PSEG Long Island addresses the communication elements raised by PULP, AARP, and LIPC. Customers seeking medical or life-support protection should receive clear information concerning eligibility, documentation requirements, the duration of protection, and applicable renewal requirements. The process should provide meaningful confirmation that the documentation has been received, and a clear explanation when additional information is required or when protections cannot be approved.

Where a customer has initiated the medical-certification process in a timely manner, procedures should be structured to prevent an inappropriate termination while the customer completes the required documentation within the permitted timeframe. The approach also must define how pending applications are identified and escalated, what interim protections apply, and how expiration and renewal information is conveyed.

- **Different protections require different handling. Medical emergency certificates, life-support equipment status, protections for the elderly, the blind, or the disabled**, and applicable weather-related restrictions may have different eligibility, duration, contact, and renewal rules. The transition plan should distinguish these categories in staff guidance, system flags, and customer instructions, with the Legal department confirming the governing requirements. The 20-business-day interim accommodation should not be described as a change to statutory requirements until any necessary approvals or tariff actions are complete. In addition, a manual review of a sample of service terminations will help to ensure that protected customer accounts are protected in accordance with existing statutory and tariff protections. Over the longer term, LIPA will also ensure that customer-protection requirements are incorporated into the design of PSEG Long Island's new customer information system so that the technology provides stronger preventive controls against the inappropriate termination of protected customers.
- **Protection records and exception handling.** The assessment materials indicate that medical, life-support, and related status indicators are maintained on customer accounts and that some protection of renewal notices already exist. LIPA will seek verification that those flags remain effective during transition to the new system, are visible to relevant employees, and are updated promptly when protections are granted or renewed. Any apparent conflict, missing flag, or unresolved request should trigger appropriate supervisory review before termination.
- **Proportionate review.** Accounts involving medical necessity, life-support equipment, protections for the elderly, the blind, or the disabled, disputed eligibility, or unresolved requests warrant closer attention than routine accounts. In the new system, termination of customers protected under HEPFA will be enhanced through the use of system controls during relevant periods.

4. Affordable and Sustainable Payment Options

A significant theme emerging from both the operational review and stakeholder engagement is that collection practices are more effective when customers are placed on arrangements they can realistically maintain.

Accordingly, PSEG Long Island will review DPA guidelines, decision tools, and training to ensure that representatives appropriately consider customers' recent payment activity and financial circumstances. The objective is to reduce unnecessary barriers to establishing arrangements while improving the likelihood that customers successfully complete them.

The review also identified opportunities for representatives to look at customer accounts more holistically, including enrollment in other assistance programs. That includes consideration of payment history, account credits, usage, rate, Balanced Billing and Auto Pay participation, available assistance, and other account circumstances that may help resolve arrears or prevent a customer from falling further behind.

- **Balanced Billing and emerging arrears.** LIPA will also seek a process that requires customer-facing representatives to review available balanced billing credits and apply eligible credits toward outstanding arrears for customers experiencing financial hardship.

In response to concerns raised by PULP, AARP, and LIPC regarding customers whose incomes exceed traditional low-income eligibility thresholds yet still struggle with utility affordability, LIPA will further evaluate enhanced energy affordability program options for moderate-income customers. That review will examine potential eligibility, projected participation, program costs, rate impacts, system requirements, and potential customer benefits before any program recommendation is made.

This work is intended to complement, not replace, existing programs such as Home Energy Assistance Program, household assistance discount rate, and other available public and utility assistance.

- **DPA explanation and reconsideration.** A consistent customer-facing explanation of the proposed down payment, installment amount and duration, treatment of recent payments, consequences of default, available assistance, and the circumstances in which an agreement may be modified should be clearly communicated to our customers. Current PSEG Long Island **process** permits renegotiation when a customer's financial circumstances change significantly for reasons beyond the customer's control. The opportunity should be explained, not merely referenced in a letter.
- **Affordability and separate program decisions.** Assistance participation can affect a customer's capacity to sustain a payment agreement. Potential changes to income eligibility, benefit levels, or other assistance programs will be evaluated separately, including cost, eligibility, rate-impact, and tariff considerations.

5. Clearer and More Proactive Customer Communications

The review found that effective customer protection depends substantially on the quality and timing of communications.

LIPA is therefore seeking a more coordinated governance structure for credit and collections communications. PSEG Long Island will establish a centralized inventory of customer-facing notices, letters, email communications, scripts, and other collection materials, with clearly assigned ownership and a defined process for periodic review.

Communications should be evaluated for legal and regulatory compliance, accuracy, readability, and customer experience. Changes to important customer-protection or collection procedures should be communicated consistently to employees before they are expected to implement those changes with customers.

PSEG Long Island will consider incorporating the communication principles emphasized by PULP, AARP, and LIPC. Important customer notices should use plain language, clearly identify the action a customer must take, and describe available payment, assistance, and protection options. Where appropriate, information should be available through multiple channels and in languages and formats accessible to the customers who need it.

Special attention will be paid to communications surrounding moratoriums, changes in collection status, and the resumption of termination activity. Customers should not receive communications that unnecessarily create confusion about whether termination can occur, or what steps must be taken to maintain service.

- **Targeted resumption outreach.** PSEG Long Island's assessment materials describe draft letters to delinquent customers and an updated outbound calling approach that includes an evening contact attempt. A coordinated schedule, final notices, clear contact instructions, and a method for tracking outreach activity and customer response are expected. Routine billing statements and mass communications do not, by themselves, establish that a specific customer's protections or disputed balance have been resolved.
- **Community engagement.** LIPA suggests a broader outreach plan that emphasizes community-based partners, accessible information, high-need areas, and referrals to assistance to support customer communication. Outreach should begin sufficiently early to provide customers with meaningful opportunities to act, continue after resumption, and be assessed by participation, reach, and assistance outcomes. Scheduling and geographic coverage should be based on demonstrated customer needs rather than event counts alone.
- **Individual account questions.** Final communications should explain in easy-to-understand language how a customer can question the bill or meter reading, request an account review, submit a dispute, verify assistance or protection status, and understand the payments or documentation expected while a dispute is pending. Disputes affecting the basis for termination require careful review and any applicable safeguards; a dispute should not automatically suspend every collection activity without regard to applicable rules.
- **Complaint and escalation pathways.** Customer communications will clearly identify how a customer can request supervisory review and, where applicable, seek assistance or submit a complaint through an appropriate customer service channel, including New York State Department of Public Service o. These instructions should be consistent with the companion Customer Bill of Rights.

6. Employee Training, Discretion and Customer Care

Policies are effective only if employees interacting with customers are well informed, understand how to implement them and have the tools and authority to act appropriately.

PSEG Long Island will strengthen customer-facing training. Training will place a greater emphasis on applicable customer protections, assistance programs, empathy, de-escalation, difficult customer situations, and appropriate referrals to consumer advocacy.

Training will increasingly use realistic customer scenarios and role-playing so representatives can practice balancing collection responsibilities with customer-protection requirements and the circumstances of customers experiencing hardship.

LIPA has requested stronger alignment among the Call Center, Back Office Collections, Customer Experience, Consumer Advocacy, and Field Operations. Regular operational coordination should help reduce circumstances in which customers receive different information depending upon which part of the organization they contact.

Frontline employees also need effective mechanisms to raise issues. As procedures change, management communications should explain what has changed, what has not changed, and what employees should do when a situation does not fit neatly within standard procedures. Questions identified by customer-facing employees should be elevated and resolved in a manner that can then be communicated consistently across the organizations.

- **Training materials and scripts.** The transition plan should cover enhanced employee training and updated call scripts or decision trees for consumer advocates, call-center employees, collections personnel, and relevant field representatives. These materials will address assistance screening, medical protections, DPA terms and default options, account-review requests, escalation, and communication of a customer's specific next step. Training completion, receipt of materials, and supervisory follow-up should be documented.

- **Third-party assistance coordination.** Customer representatives should explain program requirements, provide practical guidance, and, where authorized and legally permissible, facilitate referrals to public agencies and community partners. Any exchange of personal information must follow applicable privacy and consent requirements. Eligibility and application determinations made by outside agencies remain with those agencies.

7. Complaints, Quality Assurance and Third-Party Oversight

The review identifies opportunities to strengthen the use of complaints and quality-assurance information as management tools.

PSEG Long Island will establish or enhance a complaint-governance framework that includes monitoring, analysis, escalation, and reporting. Complaint trends, repeat complaints and unresolved complaints should be evaluated to identify recurring operational problems, training opportunities and potential customer-protection concerns.

Corrective actions addressing systemic issues should have clear owners and expected completion dates, with follow-up to determine whether the underlying issue has been resolved.

LIPA has also recommended stronger quality assurance for customer interactions. Quality review should evaluate not simply whether a representative completed a transaction, but whether required protections were considered, information was accurate, the customer was treated appropriately, and available assistance or advocacy resources were discussed when warranted.

PSEG Long Island will also strengthen oversight of third-party collection agencies. That oversight will include periodic compliance monitoring, complaint and dispute review, testing of collection activities, and evaluation against both legal requirements and PSEG Long Island's customer-service expectations.

Customer treatment and compliance measures should be included alongside traditional collection-effectiveness measures when evaluating third-party performance.

- **Termination-specific quality assurance.** PSEG Long Island will develop a quality-assurance protocol for termination activity, using a defined sample of completed terminations, targeted review of protected-account exceptions and immediate assessment of substantiated improper-disconnection complaints. Oversight should identify root causes, customer remedies, responsible business owners, and evidence that corrective action was completed. Quality-assurance sampling supplements, rather than replaces, mandatory pre-termination controls.
- **Initial-period monitoring.** As termination activity resumes, management should review performance at defined early intervals, with attention to protected and vulnerable customers.

8. Stronger Operational Controls and Account Accuracy

The review identified several opportunities to improve controls over account processing and to ensure that customers are billed and treated consistently.

PSEG Long Island will strengthen monitoring and timeliness of account-balance transfers, including secondary review and exception reporting, to ensure balances are handled under the appropriate account and tariff and to identify and correct any improper fees or notices.

Controls over collection-related fees will also be reviewed. In particular, PSEG Long Island will perform an analysis of the reconnection charge applicable when service can be restored remotely through advanced metering infrastructure. That analysis will consider the actual cost of providing the service, customer impacts, regulatory considerations, and utility practices. LIPA will use that analysis to determine whether a tariff or fee change should be pursued.

PSEG Long Island will also strengthen the reconciliation of Department of Social Services payments and improve coordination for customers receiving one-time assistance, ensuring that assistance payments are properly applied and that customers are placed on appropriate arrangements for remaining balances.

Additional system and technology improvements will address outbound dialing, change controls, collection-system issues, and future capabilities for the customer information system.

9. Performance Measures and Management Accountability

LIPA believes that any actions taken to improve the customer experience must be actionable and measurable.

LIPA will work with PSEG Long Island to strengthen the governance of credit and collections performance measures, including clearer definitions, ownership, reporting requirements, and escalation when performance does not meet expectations.

The review also supports a more balanced view of collections performance. Traditional measures such as arrears and collections remain important, but they should be considered alongside indicators of customer protection and sustainable outcomes.

This approach aligns with concerns raised by PULP, AARP, and LIPC regarding potential incentives to prioritize collections without sufficient regard for customer-protection outcomes. LIPA will assess applicable measures and safeguards through its established performance-metrics and governance processes. This management summary does not create, eliminate or condition incentive compensation, which requires separate consideration under the governing performance framework.

- **Operational indicators.** LIPA will require PSEG Long Island to develop a documented credit-and-collections KPI framework that identifies definitions, owners, review frequency, remediation triggers, and appropriate validation. Relevant indicators may include the timeliness of customer assistance applications; established, maintained, and defaulted DPAs; complaint monitoring; billing management enrollment, and third-party collection vendor quality. The combination is intended to measure whether customer outcomes improve, not simply whether required tasks are recorded.
- **Compensation and regulatory processes.** LIPA will consider how customer-protection outcomes and safeguards are reflected in its established performance metrics and service-provider oversight processes. Questions about compensation conditions or reporting in other regulatory proceedings will be considered through the applicable governance and legal channels. This management summary does not itself amend incentive compensation or establish separate regulatory filing requirements.

10. Affordability, Assistance and Customer Navigation

The review confirmed that the collections process cannot be evaluated separately from affordability and customer assistance.

LIPA will work to ensure that PSEG Long Island strengthens the process for connecting customers to available assistance and ensure that employees understand when and how to refer customers to internal consumer advocates, Low Income Home Energy Assistance Program, Department of Social Services programs, and utility assistance organizations.

The process should be designed so that customers do not have to navigate multiple programs without assistance or repeatedly explain the same hardship to different parts of the organization.

LIPA will continue evaluating broader affordability recommendations raised through stakeholder engagement, including enhanced assistance for customers who may not qualify under existing low-income thresholds, improved coordination between affordability programs and payment arrangements, and ways to better measure whether assistance produces sustainable reductions in arrears.

These longer-term affordability policy questions require analysis of eligibility, program costs and impacts on the broader customer base. They will therefore proceed on a separate policy track while the immediate collections and customer-protection reforms move forward.

- **Assistance and pending applications.** Before a high-risk account advances to termination, relevant employees should have clear procedures for considering known pending assistance applications, DSS payments and requests for protective status, and for directing customers to consumer advocacy or community-based assistance. Third-party application decisions and timing are not within PSEG Long Island's exclusive control; the company can, however, improve guidance, referrals and account follow-through.

11. Implementation, Accountability and Continuing Stakeholder Engagement

LIPA will maintain a formal corrective-action process with PSEG Long Island to track implementation of the material actions resulting from this review.

Actions will be assigned to responsible business areas, with accountable owners, deadlines, evidence of implementation, and a process for validation. A recommendation, draft letter or training concept is not equivalent to an implemented and tested control. Where an action requires legal review, tariff amendments, technology changes or further policy analysis, those dependencies will be recorded explicitly and interim controls considered rather than treating a provisional operational response as a final resolution.

LIPA will also maintain enhanced oversight as termination activity resumes. Early results will be reviewed to identify unintended effects, emerging customer concerns or areas where additional procedural changes are warranted.

Management reporting to LIPA and the Board will increasingly focus on outcomes, including arrears trends, payment arrangements and defaults, assistance utilization, notices and outreach, terminations and reconnections, medical and vulnerable-customer protections, complaints and quality-assurance findings.

Stakeholder engagement will continue as implementation proceeds. PULP, AARP, LIPC, and LIPA's Community Advisory Board, IBEW Local 1049 and other interested stakeholders have provided significant input into the review, and several of the resulting corrective actions directly reflect or reinforce those recommendations.

Conclusion

The events that triggered LIPA's review provided an opportunity to evaluate whether the policies, procedures, and business practices regarding customers facing financial hardship align with its values and mission. During a time when customer affordability is of concern across many essential services, we recognize how difficult it is for our customers. LIPA is taking action to make sure our most vulnerable customers are treated fairly, respectfully, and with compassion as they try to resolve accounts in arrears and navigate a path forward. To support this, the objective is not simply to modify individual collection procedures. The broader goal is to establish a more consistent customer-protection framework in which customers receive clear information, have meaningful access to assistance and sustainable payment options, receive appropriate medical and vulnerable-customer protections, and are given reasonable opportunities to resolve arrears before service termination occurs.

The corrective-action effort includes near-term transition safeguards, such as notice clarity, account-protection checks, enhanced outreach, payment-arrangement guidance and the interim medical-documentation accommodation. Other measures, including system redesign, some affordability initiatives and possible tariff changes, require longer-term work. Before residential terminations resume, LIPA will need to verify which near-term controls are operational, identify any outstanding dependencies and document the appropriate transition safeguards.

LIPA will continue to oversee implementation, evaluate results, and engage stakeholders as this work progresses. The measure of success will not simply be whether new procedures have been written. It will be whether customers experience a collections process that is clear, consistent, fair, appropriately protective of vulnerable households and effective in connecting customers with reasonable paths to maintain essential electric service.

DATED: November 18, 2026

Exhibit "C"

CUSTOMER BILL OF RIGHTS AND RELATED SERVICE STANDARDS

Introduction

Electric service is essential to the health, safety, and economic well-being of Long Island and the Rockaway communities.

The Long Island Power Authority Board of Trustees believes that every customer deserves to be treated with empathy, dignity, respect, fairness, and compassion. The purpose of this Customer Bill of Rights and Service Standards is to establish clear expectations regarding customer treatment, communications, collections practices, service terminations, and access to assistance programs.

These rights supplement existing protections provided by law and tariff and establish service standards expected by the Long Island Power Authority and implemented by PSEG Long Island.

Every customer has the right:

1. **TO BE TREATED WITH DIGNITY, RESPECT, AND EMPATHY**

   Customers shall be treated professionally, courteously, respectfully, and compassionately in all interactions.

   Employees, contractors, and representatives shall communicate with customers in a manner that is respectful, empathetic, and free from intimidation, coercion, or unnecessary confrontation.

   Customers shall not be judged based on assumptions regarding their financial circumstances and shall receive consistent treatment regardless of their account status.

2. **TO CLEAR, ACCURATE, AND ACCESSIBLE INFORMATION**

   Customers shall receive timely, accurate, and understandable information regarding:

   - Bills and charges
   - Payment options
   - Assistance programs
   - Service termination procedures
   - Customer rights and protections
   - Complaint and appeal processes

   Communications shall be written in plain language whenever possible.

Customers shall be provided clear guidance regarding eligibility requirements for assistance programs and payment arrangements to help ensure they are directed to the most appropriate resources and avoid unnecessary referrals.

3. TO MEANINGFUL ACCESS TO ASSISTANCE PROGRAMS

Customers have the right to receive information regarding available assistance programs and support services that may be available to them.

The Authority and PSEG Long Island shall strive to provide clear pathways to assistance and work with community organizations to improve customer understanding of available options and eligibility requirements.

Customers should not be unnecessarily referred between programs, agencies, or organizations without clear information regarding potential eligibility and available alternatives.

4. TO LANGUAGE ACCESS AND EFFECTIVE COMMUNICATION

Customers have the right to access critical customer information in languages and formats that support meaningful understanding of available rights, protections, and assistance options.

PSEG Long Island shall maintain multilingual customer support resources and continue efforts to improve accessibility for customers with limited English proficiency and customers with disabilities, including customers with visual, hearing, speech, or other communication-related needs. Appropriate accommodations and accessible communication options shall be made available consistent with applicable law.

5. TO NOTICE BEFORE TERMINATION

Customers shall receive advance notice before service termination consistent with applicable laws and tariffs.

Notices shall clearly identify:

- Amount owed
- Available payment arrangements
- Available assistance programs
- Steps required to avoid termination
- Contact information for assistance

Notices should be designed to clearly communicate available options and encourage customer engagement before termination becomes necessary.

6. TO AN OPPORTUNITY TO SEEK ASSISTANCE

Before service is terminated for non-payment, customers shall be provided opportunities to:

- Establish payment arrangements
- Apply for available assistance programs
- Discuss hardship circumstances
- Seek available protections for elderly, disabled, or medically vulnerable household members

7. TO HAVE SERVICE TERMINATION USED ONLY AS A LAST RESORT

Service termination is a serious action that should occur only after reasonable efforts have been made to contact the customer, communicate available options, and explore alternatives.

The Authority expects collection practices to prioritize customer engagement, problem-solving, and resolution whenever possible.

Before residential service is terminated for non-payment, PSEG Long Island shall conduct an appropriate account review to confirm compliance with applicable notice and customer-protection requirements and to determine whether available payment arrangements, assistance programs, hardship protections, or other reasonable alternatives should be considered.

Service termination activities shall be conducted in a professional manner consistent with the principles of dignity, respect, and empathy established in this Bill of Rights.

8. TO FAIR PAYMENT ARRANGEMENTS

Customers experiencing financial hardship shall have access to reasonable deferred payment options consistent with applicable laws, tariffs, and customer circumstances.

9. TO ADDITIONAL PROTECTIONS FOR VULNERABLE CUSTOMERS

Enhanced protections shall be provided for:

- Elderly customers
- Customers with documented medical conditions
- Customers with disabilities
- Customers experiencing extraordinary hardship
- Customers facing emergency circumstances

Processes for obtaining and maintaining available medical and vulnerability-based protections should be clear, accessible, and designed to minimize unnecessary administrative barriers. Customers should receive timely information on the status, expiration, or denial of requested protections, along with available next steps. If the company denies any requested protections, customers shall receive clear explanation why the protections were denied and specific action necessary for approval.

10. TO FILE A COMPLAINT AND RECEIVE A RESPONSE

Customers shall have access to a clear process for raising concerns regarding billing, collections, customer service, or service terminations.

Complaints shall be tracked, reviewed, and responded to within established service standards.

Customers shall be informed of available escalation and appeal options when concerns cannot be resolved through normal customer service channels.

11. TO TRANSPARENCY AND ACCOUNTABILITY

PSEG Long Island shall publicly report information regarding:

- Customer complaints
- Deferred payment agreements
- Service terminations
- Customer assistance program participation
- Collection activities

Such reporting shall be provided regularly to the Board of Trustees and posted on the Authority's website.

12. TO CONTINUOUS IMPROVEMENT

The Authority and PSEG Long Island shall regularly review customer policies, procedures, training programs, communications, and performance standards to ensure customer treatment remains consistent with the principles established in this Bill of Rights.

Customer feedback, stakeholder input, and lessons learned shall be considered as part of ongoing improvement efforts.

SERVICE STANDARDS

To support these rights, PSEG Long Island shall:

- Maintain annual customer empathy, de-escalation, and customer assistance training for customer-facing employees. Incorporate empathy training as part of all employee onboarding.

- Provide employees engaged in collections activities with training regarding available assistance programs, referral pathways, hardship considerations, and customer treatment expectations.

- Review customer-facing job titles to ensure they reflect the Authority's commitment to dignity, respect, empathy, and customer service.

- Develop and maintain customer guidance materials that clearly explain assistance programs, eligibility requirements, and available payment options, and post such materials on PSEG Long Island's website.

- Conduct enhanced supervisory review of service termination activities, including review of compliance with applicable notice requirements, customer-protection requirements, payment-arrangement practices, assistance referrals, and documented customer outreach.

- Use proactive, multi-channel outreach for customers at risk of service termination, with enhanced outreach for customers reasonably identified as financially vulnerable, medically vulnerable, elderly, disabled, or otherwise eligible for additional protections.

- Maintain customer-service practices for customers seeking domestic-violence-related protections that safeguard confidentiality, minimize unnecessary repeated disclosure of sensitive circumstances, and provide clear pathways to appropriate assistance and escalation.

- Regularly review customer communications for clarity, accessibility, and plain-language effectiveness.

- Maintain and promote customer assistance and payment arrangement programs.

- Continue to improve multilingual communications and customer support resources.

- Provide periodic reporting to the LIPA Board regarding compliance with these standards.

- Cooperate fully with LIPA's customer service, credit, and collections audit and reviews, and timely implement corrective actions in accordance with LIPA's established audit follow-up and closure processes to address identified findings.

Commitment

The Long Island Power Authority Board of Trustees believes that reliable electric service and strong customer protections go hand in hand. This Customer Bill of Rights and Service Standards reflects the Authority's commitment to ensuring customers are treated fairly, compassionately, and with respect while maintaining the financial integrity necessary to provide safe and reliable electric service.

DATED: November 18, 2026

Exhibit "D"

Board Policy:	**Customer Experience**
Policy Type:	**Strategic Direction**
Monitored by:	**Oversight and Clean Energy**
Board Resolution:	**#1370, approved July 26, 2017**
	#1430, amended September 27, 2018
	#1480, amended May 22, 2019
	#1576, amended December 16, 2020
	#1683, amended November 17, 2021

Board Policy on Customer Experience

LIPA's vision is to provide a customer experience that is fair, accessible, responsive, and continuously improving. Customers should be treated with dignity, empathy, respect, and compassion, and LIPA's policies and oversight should promote customer trust and confidence. LIPA's objective is to provide customer service that meets high industry standards and reflects the needs of the communities we serve.

To achieve this objective, LIPA will:

- Establish and periodically review a Customer Bill of Rights and applicable Service Standards that clearly define expectations for customer treatment, service, and accountability.
- Put customers at the center of our decisions, recognizing that customers have different circumstances, preferences, abilities, and needs.
- Provide reasonable flexibility and customer assistance to resolve payment and service challenges. Consistent with applicable laws and tariffs, service termination should be used only after appropriate assistance and payment options have been exhausted.
- Measure customer experience, including customer satisfaction, accessibility, responsiveness, issue resolution, and adherence to established service standards, using recognized industry benchmarks while delivering top quartile performance in J.D. Power's utility residential and business customer satisfaction studies.
- Demonstrate continual improvement in customer satisfaction, ease of interaction, and value as measured by internal, end-to-end customer post-transaction assessments.
- Invest in technologies that enhance the service, flexibility, convenience, and cost-effectiveness of billing, payment, appointments, emergency restoration, and other customer interactions.
- Provide clear, accurate, and proactive customer communications related to billing, energy usage, outages, restoration, and other significant customer matters.
- Use customer and performance insights to continually improve customer-facing policies, programs, and services, and evaluate their effectiveness based on customer experience, participation, and value.

The Chief Executive Officer, or his or her designee, will report annually to the Board on compliance with the key provisions of the Customer Experience Policy as well as compliance with the Customer Bill of Rights and related service standards.

Board Policy: **Customer Experience**

Policy Type: **Strategic Direction**
Monitored by: **Oversight and Clean Energy**
Board Resolution: **#1370, approved July 26, 2017**
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Board Policy on Customer Experience

LIPA's vision is to provide a ~~for our~~ a customer experience that is fair, accessible, responsive, and continuously improving. Customers should be treated with dignity, empathy, respect, and compassion, and LIPA's policies and oversight should promote customer trust and confidence. LIPA's objective is to provide customer service that meets high industry standards and reflects the needs of the communities we serve. ~~is to be a recognized innovator in our industry in serving customers by investing in technologies that enhance and simplify the customer experience and by rigorously measuring and improving the quality of our customer interactions.~~

To achieve this objective, ~~our vision,~~ LIPA will:

- Establish and periodically review a Customer Bill of Rights and applicable Service Standards that clearly define expectations for customer treatment, service, and accountability.
- Put customers at the center of our decisions, recognizing that customers have different circumstances, preferences, abilities, and needs.
- Provide reasonable flexibility and customer assistance to resolve payment and service challenges. Consistent with applicable laws and tariffs, service termination should be used only after appropriate assistance, and payment options have been exhausted.
- Measure customer experience, including customer satisfaction, accessibility, responsiveness, issue resolution, and adherence to established service standards, using recognized industry benchmarks while delivering top ~~Deliver~~ top quartile performance in J.D. Power's utility residential and business customer satisfaction studies. ~~and on industry-standard customer service metrics;~~
  • Demonstrate continual improvement in customer satisfaction, ease of interaction, and value as measured by internal, end-to-end customer post-transaction assessments;
  • Invest in technologies ~~to~~ that enhance the service, flexibility, convenience, and cost-effectiveness of billing, payment, appointments, emergency restoration, and other customer interactions;
  • Provide clear, ~~Ensure simple,~~ accurate, and proactive customer communications related to customer billing, energy usage, outages, restorations, and other significant customer matters. ~~emergency response, and estimated times of restoration;~~

- Use customer and performance insights to continually improve customer-facing policies, programs, and services, and evaluate their effectiveness based on customer experience, participation, and value.

~~• Effectively target communications across customer segments and socioeconomic groups,~~
~~with particular attention to low income and disadvantaged communities; and~~
~~• Evaluate the success of our rate options, clean energy programs, and other offerings by customer adoption and satisfaction and use the information to regularly review and improve~~
~~our offerings.~~

The Chief Executive Officer, or his or her designee, will report annually to the Board on compliance with the key provisions of the Customer Experience Policy as well as compliance with the Customer Bill of Rights and related service standards