



PSEG LONG ISLAND

PSEG Long Island

2023 Incentive Compensation Claim

March 29, 2024



Table of Contents

Executive Summary	6
2023 Incentive Compensation Claim Calculation	7
Business Services	11
BS-01 Enterprise Risk Management - Implementation of the Mitigation Effectiveness Process.....	11
BS-05 – Full Time Vacancy Rate	12
BS-07 - Complete Affiliate Cost and Quality Justifications.....	13
BS-08 - Capital Project Impact Analysis.....	15
BS-10 - Improve Annual Substation Property Tax Reports	16
BS-18 - Utility Marketing Effectiveness.....	17
BS-19 - Reputation Management – Positive Media Sentiment	19
BS-20 - Reputation Management – Share of Voice	20
BS-21 - Social Media Engagement and Following	21
<i>Sub-Metric A: Blue Sky – Personal Health and Safety</i>	21
<i>Sub-Metric B: Blue Sky – Other</i>	21
<i>Sub-Metric C: Major Storm – Personal Health and Safety</i>	21
<i>Sub-Metric D: Major Storm – Other</i>	21
BS-22 - Timely, Accurate, and Supported Storm Event Invoicing	22
BS-23 - FEMA Tropical Storm Isaias Grant - Engineering to Support.....	23
BS-24 - Improve the Accuracy of Asset Records for Outside Plant.....	24
BS-32 - Update Low and Moderate Income (LMI) Tariff and Billing	25
BS-33 - Consolidate Real Estate Footprint	27
Customer Services	30
CS-01 - Delivery of Strategic Customer Experience & Billing Projects.....	30
<i>Project #1: Accelerated Payment Posting Feasibility Study</i>	30
<i>Project #2: Kiosk Implementation</i>	31
<i>Project #3: CCaaS Roadmap</i>	33
<i>Project #4: Credit Card Implementation</i>	34
CS-02 - JD Power Customer Satisfaction Survey (Residential).....	35
CS-03 - JD Power Customer Satisfaction Survey (Business).....	37
CS-04 - CIS Modernization – Phase 1	39
CS-05 - Customer Transactional Performance	41
CS-09 - Billing Exception Cycle Time	43
CS-10 - Billing Cancelled Rebill	44
CS-11 - Contact Center Service Level with Live Agent Calls.....	45

CS-13 - First Call Resolution (FCR)	46
CS-14 - Net Dollars Written Off	47
CS-15 - AR > 90 (No Exclusions)	48
CS-17 - LMI Program Participation	49
CS-19 - Customer Complaint Rate	50
CS-21 - Outage Information Satisfaction	52
CS-22 - AMI Roadmap and 2023 Improvements	55
CS-23 - Deferred Payment Agreement (DPA) Improvement	56
CS-24 - Payment Transaction Ease	58
CS-25 - Interactive Voice Response (IVR) Containment Rate	59
CS-26 - Life Sustaining Equipment (LSE) Customer Compliance	60
CS-27 – Estimated Billing %	61
CS-28 - Move Process Improvement	62
CS-29 - AMI Meter Validation, Estimation, Editing Enhancements & Data Reporting	63
Information Technology	64
IT-01 - Organizational Maturity Level	64
IT-03 - System Resiliency	65
IT-04 - System and Software Lifecycle Management	67
IT-05 - System Implementation – 2023 Budget Projects	68
Tier 1 Project Summary	68
IT-05-T1.01 – GIS – Long Term Plan, Architecture and Technology Stack Upgrade	68
IT-05-T1.02 – DER	69
IT-05-T1.02a – 4.01 - Strategic Technology Plan Outage Reporting and Communications	70
IT-05-T1.03 – ADMS Roadmap	71
IT-05-T1.04 – MEGA	72
IT-05-T1.05 – Regulatory Billing (Solar Communities Credit- FIT V, CCA)	73
IT-05-T1.06 – CCaaS	75
IT-05-T1.08 – Billing Capability for Standby Rates	77
IT-05-T1.09 – CDG Billing Automation	78
IT-05-T1.11 – Enterprise Mobile Strategy	79
Tier 2 Project Summary	80
IT-05-T2.02 – CyberArk for CNI	80
IT-05-T2.03 – Cybersecurity Program	82
IT-05-T2.04 – Dragos for CNI	85
IT-05-T2.05 – Industrial Defender for DSCADA	86

IT-05-T2.06 – AVLS Integration with Physical ID Badge System	87
IT-05-T2.07 – AMI System Enhancements	88
IT-05-T2.08 – Suffolk County Sewage Billing.....	90
IT-05-T2.09 – Rate Change Enhancements	91
IT-06 - Project Performance – New 2023 Projects.....	92
Tier 1 Project Summary.....	92
IT-06.T1.01 – Contact Center as a Service (CCaaS) Analytics.....	92
IT-06.T1.02 – Standard Data Platform Phase 2	93
IT-06.T1.03 – SailPoint Access Control.....	94
IT-06.T1.04 – IT Data Analytics 2023 / U2.0 Transition.....	95
IT-06.T1.05 – Cybersecurity Continuous Improvement for CNI.....	96
Tier 2 Project Summary.....	97
IT-06.T2.01 – Customer Communications Tool for Double Wood Poles	97
IT-06.T2.02 – ADMS Phase 1	98
IT-06.T2.03 – Cybersecurity Continuous Improvement.....	99
IT-06.T2.04 – Salesforce Applications Replacement.....	101
IT-06.T2.05 – SPLUNK Life Cycle Upgrade.....	102
IT-06.T2.06 – Application and Infrastructure Monitoring Consolidation - Planning	103
IT-06.T2.07 – Enterprise Time & Attendance Phase 2	104
Tier 3 Project Summary.....	105
IT-06.T3.01 – CG Concentrator Replacement	105
IT-06.T3.02 – Primavera Upgrade	106
IT-06.T3.03 – Outage and Incident Communications - Phase 2.....	107
IT-06.T3.04 – IT Portfolio Planning System	108
IT-07 - System Segregation	109
IT-08 - Cyber Security Organization - Structure, Staff & Capabilities Review	112
Power Supply and Clean Energy	113
PS&CE-01 - Complete Integrated Resource Plan (IRP) Follow-on Activities.....	113
PS&CE-02 - Complete Energy Storage Request for Proposal (RFP) Follow-on Activities.....	114
PS&CE-03 - Energy Efficiency Annualized Energy Savings	115
PS&CE-05 - Beneficial Electrification.....	116
<i>Sub-Metric A: Heat Pump Rebates.....</i>	<i>116</i>
<i>Sub-Metric B: Cold Climate Whole House Heat Pump (WHHP) Rebates</i>	<i>116</i>
<i>Sub-Metric C: MMBTU of Energy Savings from the low income REAP Program.....</i>	<i>116</i>
<i>Sub-Metric D: Multi-family (more than 4 dwelling units per building) Rebate Program.....</i>	<i>116</i>

PS&CE-06 - Electric Vehicle (EV) Make Ready.....	117
<i>Sub-Metric A: Enrollment of DCFC ports in make-ready infrastructure incentive.....</i>	<i>117</i>
<i>Sub-Metric B: Energizing of DCFC Ports.....</i>	<i>117</i>
<i>Sub-Metric C: Enrollment of Level 2 ports in make-ready infrastructure incentives.....</i>	<i>117</i>
<i>Sub-Metric D: Energizing of Level 2 Ports.....</i>	<i>117</i>
PS&CE-08 - Transition to New "Standard" Time of Day Residential and Small Business Rates on an Opt-Out Basis	118
PS&CE-11 - Implementation of Utility 2.0 Projects.....	119
<i>Project #1: Miller Place Battery Project.....</i>	<i>119</i>
<i>Project #2: Storage Hosting Capacity Map.....</i>	<i>119</i>
<i>Project #3: Electric Vehicle (EV) Hosting Capacity Map.....</i>	<i>120</i>
<i>Project #4: Residential Storage Incentive Program.....</i>	<i>120</i>
<i>Project #5: Suffolk County Bus Make-Ready Pilot.....</i>	<i>121</i>
<i>Project #6: Integrated Energy Data Resource (IEDR) Platform.....</i>	<i>121</i>
<i>Project #7: Connected Buildings Pilot.....</i>	<i>121</i>
PS&CE-13 - Heat Pump Strategy to Address Barriers to Customer Adoption	123
Electric T&D	126
T&D-01 - Asset Management Program Implementation - Asset Inventory.....	126
T&D-02 - Asset Management Program Implementation - AM Governance.....	127
T&D-03 - Enterprise Asset Management System Implementation Plan.....	129
T&D-04 - T&D System Relay Operations - Relay Mis-Operations	130
T&D-05 - T&D Inadvertent Operating Events	131
T&D-06 - Primary and Alternative Transmission Control Center Replacement	132
T&D-07 - System Average Interruption Duration Index (SAIDI).....	133
T&D-08 – System Average Interruption Frequency Index (SAIFI).....	134
T&D-09 - Momentary Average Interruption Frequency Index (MAIFI)	135
T&D-10 - Sustained Multiple Customer Outages (MCO) - 4 or more	136
T&D-11 - Reduce Repeat Customer Sustained Multiple Customer Outages.....	138
T&D-12 - Momentary Multiple Customer Outages- 6 or more	139
T&D-13 - Serious Injury Incident Rate (SIIR)	140
T&D-14 - OSHA Recordable Incidence Rate	142
T&D-15 - OSHA Days Away Rate (Severity).....	143
T&D-16 - Motor Vehicle Accident (MVA) Rate	144
T&D-17 - Work Management Enhancements - Short-Term Scheduling.....	145
T&D-18 – Work Management Enhancements - Workforce Management Plans.....	146
T&D-21 - Work Management Enhancements - KPIs & Dashboards	147

T&D-23 - Employee Overtime	148
T&D-24 – Vegetation Management - Cycle Tree Trim with Veg Intelligence	149
T&D-25 - Vegetation Management - Trim-To-Sky (TTS) Circuits	152
T&D-26 - Vegetation Management Work Plan - Hazard Tree Removal	154
T&D-27 - Storm Hardening Work Plan - Overhead Hardening	157
T&D-28 - Storm Hardening Work Plan - Underground Hardening	158
T&D-29 - T&D System Enhancements.....	158
T&D-30 - Storm Hardening Work Plan - ACRV Commissioning Program.....	159
T&D-31 - Storm Hardening Work Plan - LT5H (ASUV) Program.....	160
T&D-33 - Execute Real Estate Strategy	161
T&D-34 - Construction – Quality and Timely Completion of PJDs	162
T&D-35 - Construction - Project Milestones Achieved	163
T&D-36 - Construction - Cost Estimating Accuracy.....	164
T&D-37 - Completion of Program Planned Units per Workplan.....	165
T&D-38 - Program Unit Cost Variance	165
T&D-39 - Project Completion Consistent with Project Design.....	165
T&D-40 - Double Woods	166
T&D-41 - Program Effectiveness - Vegetation Management.....	167
T&D-42 – Estimated Time of Restoration (ETR) Process Enhancements.....	169
T&D-44 - Regulatory Compliance.....	170
T&D-45 – Physical Security	171
T&D-46 - Root Cause Analysis (RCA) Execution and Compliance	176
T&D-48 - Program Effectiveness - Storm Hardening	177

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 2023, the Annual Variable Compensation Component is \$22,285,334.03.

For 2023, PSEG Long Island and LIPA agreed to 93 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 29, 2024 its calculation of the incentive compensation due for 2023. 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 13, 2024 (45 days after receipt).
- The DPS is required to make recommendations to LIPA by June 12, 2024 (30 days later).
- LIPA must notify PSEG LI of its acceptance or disagreement with the calculation and to pay any undisputed portion by June 27, 2024 (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 93 Scope-Specific performance metrics. PSEG LI’s incentive compensation claim for 2023 is \$17,053,783.58 out of the potential \$22,285,334.03. 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.

2023 Incentive Compensation Claim Calculation

Metric Number	Metric Name	Initial Base Incentive (including CPI)	Reallocated Incentive	Achieved Incentive Allocation	Claimed Performance Level	Claimed Achieved Incentive
BS-01	Enterprise Risk Management - Implementation of the Mitigation Effectiveness Process	\$167,140.01	\$173,737.64	100%	↑	\$173,737.64
BS-05	Full Time Vacancy Rate	\$501,420.02	\$521,212.91	0%	↓	\$0.00
BS-07	Complete Affiliate Cost and Quality Justifications	\$278,566.68	\$289,562.73	100%	↑	\$289,562.73
BS-08	Improve the Capital Project Impact Analysis and Tracking Process	\$167,140.01	\$173,737.64	100%	↑	\$173,737.64
BS-10	Improve Annual Substation Property Tax Reports	\$167,140.01	\$173,737.64	100%	↑	\$173,737.64
BS-18	Utility Marketing Effectiveness	\$278,566.68	\$289,562.73	100%	↑	\$289,562.73
BS-19	Reputation Management – Positive Media Sentiment	\$167,140.01	\$173,737.64	100%	↑	\$173,737.64
BS-20	Reputation Management – Share of Voice	\$167,140.01	\$173,737.64	100%	↑	\$173,737.64
BS-21	Social Media Engagement and Following	\$278,566.68	\$289,562.73	100%	↑	\$289,562.73
BS-22	Timely, Accurate, and Supported Storm Event Invoicing	\$334,280.01	\$347,475.27	100%	↑	\$347,475.27
BS-23	FEMA Tropical Storm Isaias Grant - Engineering to Support	\$167,140.01	\$173,737.64	100%	↑	\$173,737.64
BS-24	Improve the Accuracy of Asset Records for Outside Plant	\$167,140.01	\$173,737.64	100%	↑	\$173,737.64
BS-32	Update Low and Moderate Income (LMI) Tariff and Billing	\$167,140.01	\$41,785.00	100%	↑ Partial Comp + Reallocation Project Cancelled	\$41,785.00
BS-33	Consolidate Real Estate Footprint	\$334,280.01	\$347,475.27	90%	↑	\$312,727.74
CS-01	Delivery of Strategic Customer Experience & Billing Projects	\$334,280.01	\$376,653.53	50%	↑(Partial)	\$188,326.77
CS-02	JD Power Customer Satisfaction Survey (Residential)	\$222,853.34	\$251,102.36	100%	↑	\$251,102.36
CS-03	JD Power Customer Satisfaction Survey (Business)	\$222,853.34	\$251,102.36	100%	↑	\$251,102.36
CS-04	CIS Modernization – Phase 1	\$445,706.68	\$188,326.77	100% of Business (37.5%) Reallocated Readiness (62.5%)	↑ Reallocation for Unfunded Work	\$188,326.77
CS-05	Customer Transactional Performance	\$334,280.01	\$376,653.53	100%	↑	\$376,653.53
CS-09	Billing Exception Cycle Time	\$55,713.34	\$62,775.59	100%	↑	\$62,775.59
CS-10	Billing Cancelled Rebill	\$111,426.67	\$125,551.18	100%	↑	\$125,551.18
CS-11	Contact Center Service Level with Live Agent Calls	\$389,993.35	\$439,429.12	0%	↓	\$0.00
CS-13	First Call Resolution (FCR)	\$111,426.67	\$125,551.18	0%	↓	\$0.00
CS-14	Net Dollars Written Off	\$222,853.34	\$251,102.36	0%	↓	\$0.00
CS-15	Arrears Aging Percent > 90 Days Past Due	\$334,280.01	\$376,653.53	0%	↓	\$0.00

Metric Number	Metric Name	Initial Base Incentive (including CPI)	Reallocated Incentive	Achieved Incentive Allocation	Claimed Performance Level	Claimed Achieved Incentive
CS-17	LMI Program Participation	\$111,426.67	\$125,551.18	0%	↓	\$0.00
CS-19	Customer Complaint Rate	\$111,426.67	\$125,551.18	100%	↑	\$125,551.18
CS-21	Outage Information Satisfaction	\$222,853.34	\$251,102.36	0%	↓	\$0.00
CS-22	AMI Roadmap and 2023 Improvements	\$111,426.67	\$125,551.18	100%	↑	\$125,551.18
CS-23	Deferred Payment Agreement (DPA) Improvement	\$167,140.01	\$188,326.77	50%	↑(Partial)	\$94,163.38
CS-24	Payment Transaction Ease	\$167,140.01	\$188,326.77	100%	↑	\$188,326.77
CS-25	Interactive Voice Response (IVR) Containment Rate	\$222,853.34	\$0.00	Reallocate Unable to Measure	Reallocate Unable to Measure	\$0.00
CS-26	Life Sustaining Equipment (LSE) Customer Compliance	\$111,426.67	\$125,551.18	100%	↑	\$125,551.18
CS-27	Estimated Bill %	\$111,426.67	\$125,551.18	100%	↑	\$125,551.18
CS-28	Move Process Improvement	\$167,140.01	\$188,326.77	50%	↑(Partial)	\$94,163.38
CS-29	AMI Meter Validation, Estimation, Editing Enhancements & Data Reporting	\$167,140.01	\$188,326.77	100%	↑	\$188,326.77
IT-01	Organizational Maturity Level	\$612,846.69	\$612,846.69	100%	↑	\$612,846.69
IT-03	System Resiliency	\$724,273.36	\$724,273.36	0%	↓	\$0.00
IT-04	System and Software Lifecycle Management	\$111,426.67	\$111,426.67	100%	↑	\$111,426.67
IT-05	Project Performance - In-flight Projects	\$445,706.68	\$445,706.68	50%	↑(Partial)	\$222,853.34
IT-06	Project Performance – New 2023 Projects	\$557,133.35	\$557,133.35	50%	↑(Partial)	\$278,566.68
IT-07	System Segregation	\$668,560.02	\$668,560.02	100%	↑	\$668,560.02
IT-08	Cyber Sec Org - Structure, Staff & Capabilities Review	\$222,853.34	\$222,853.34	100%	↑	\$222,853.34
PS&CE-01	Complete Integrated Resource Plan (IRP) Follow-on Activities	\$278,566.68	\$278,566.68	100%	↑	\$278,566.68
PS&CE-02	Complete Energy Storage Request for Proposal (RFP) Follow-on Activities	\$222,853.34	\$222,853.34	100%	↑	\$222,853.34
PS&CE-03	Energy Efficiency Annualized Energy Savings	\$278,566.68	\$278,566.68	100%	↑	\$278,566.68
PS&CE-05	Beneficial Electrification	\$111,426.67	\$111,426.67	100%	↑	\$111,426.67
PS&CE-06	Electric Vehicle (EV) Make Ready	\$111,426.67	\$111,426.67	50%	↑(Partial)	\$55,713.34
PS&CE-08	Transition to New "Standard" Time of Day Residential and Small Business Rates on an Opt-Out Basis	\$668,560.02	\$668,560.02	83%	↑(Partial)	\$554,904.82
PS&CE-11	Implementation of Utility 2.0 Projects	\$278,566.68	\$278,566.68	80%	↑(Partial)	\$208,925.01
PS&CE-13	Heat Pump Strategy to Address Barriers to Customer Adoption	\$278,566.68	\$278,566.68	100%	↑	\$278,566.68

Metric Number	Metric Name	Initial Base Incentive (including CPI)	Reallocated Incentive	Achieved Incentive Allocation	Claimed Performance Level	Claimed Achieved Incentive
T&D-01	Asset Management Program Implementation - Asset Inventory	\$167,140.01	\$180,691.90	0%	↓	\$0.00
T&D-02	Asset Management Program Implementation - AM Governance	\$167,140.01	\$180,691.90	100%	↑	\$180,691.90
T&D-03	Enterprise Asset Management System Implementation Plan	\$668,560.02	\$0.00	Project Cancelled Reallocate	Project Cancelled Reallocate	\$0.00
T&D-04	T&D System Relay Operations - Relay Mis-Operations	\$111,426.67	\$120,461.27	0%	↓	\$0.00
T&D-05	T&D Inadvertent Operating Events	\$111,426.67	\$120,461.27	100%	↑	\$120,461.27
T&D-06	Primary and Alternative Transmission Control Center Replacement	\$278,566.68	\$301,153.16	100%	↑	\$301,153.16
T&D-07	SAIDI	\$334,280.01	\$361,383.80	100%	↑	\$361,383.80
T&D-08	SAIFI	\$222,853.34	\$240,922.53	100%	↑	\$240,922.53
T&D-09	MAIFI	\$167,140.01	\$180,691.90	100%	↑	\$180,691.90
T&D-10	Sustained MCO (4 or more)	\$139,283.34	\$150,576.58	0%	↓	\$0.00
T&D-11	Reduce Repeat Customer Sustained MCOs	\$83,570.00	\$90,345.95	100%	↑	\$90,345.95
T&D-12	Momentary MCO (6 or more)	\$111,426.67	\$120,461.27	100%	↑	\$120,461.27
T&D-13	Serious Injury Incident Rate (SIIR)	\$222,853.34	\$240,922.53	0%	↓	\$0.00
T&D-14	OSHA Recordable Incidence Rate	\$222,853.34	\$240,922.53	100%	↑	\$240,922.53
T&D-15	OSHA Days Away Rate (Severity)	\$222,853.34	\$240,922.53	0%	↓	\$0.00
T&D-16	Motor Vehicle Accident Rate	\$167,140.01	\$180,691.90	100%	↑	\$180,691.90
T&D-17	Work Management Enhancements - Short-Term Scheduling	\$111,426.67	\$120,461.27	100%	↑	\$120,461.27
T&D-18	Work Management Enhancements - Workforce Management Plans	\$278,566.68	\$301,153.16	100%	↑	\$301,153.16
T&D-21	Work Management Enhancements - KPIs & Dashboards	\$111,426.67	\$120,461.27	100%	↑	\$120,461.27
T&D-23	Employee Overtime	\$167,140.01	\$180,691.90	100%	↑	\$180,691.90
T&D-24	Vegetation Management Work Plan - Cycle Tree Trim With Veg Intelligence	\$222,853.34	\$240,922.53	100%	↑	\$240,922.53
T&D-25	Vegetation Management Work Plan - Trim-To-Sky (TTS) Circuits	\$278,566.68	\$301,153.16	100%	↑	\$301,153.16
T&D-26	Vegetation Management Work Plan - Hazard Tree Removal	\$334,280.01	\$361,383.80	100%	↑	\$361,383.80
T&D-27	Storm Hardening Work Plan - Overhead Hardening	\$278,566.68	\$301,153.16	100%	↑	\$301,153.16
T&D-28	Storm Hardening Work Plan - Underground Hardening	\$167,140.01	\$180,691.90	100%	↑	\$180,691.90
T&D-29	T&D System Enhancements	\$167,140.01	\$180,691.90	100%	↑	\$180,691.90

Metric Number	Metric Name	Initial Base Incentive (including CPI)	Reallocated Incentive	Achieved Incentive Allocation	Claimed Performance Level	Claimed Achieved Incentive
T&D-30	Storm Hardening Work Plan - ACRV Commissioning Program	\$278,566.68	\$301,153.16	100%	↑	\$301,153.16
T&D-31	Storm Hardening Work Plan - LT5H (ASUV) Program	\$167,140.01	\$180,691.90	100%	↑	\$180,691.90
T&D-33	Execute Real Estate Strategy	\$139,283.34	\$150,576.58	100%	↑	\$150,576.58
T&D-34	Construction – Quality and Timely Completion of PJDs	\$222,853.34	\$240,922.53	100%	↑	\$240,922.53
T&D-35	Construction - Project Milestones Achieved	\$222,853.34	\$240,922.53	100%	↑	\$240,922.53
T&D-36	Construction - Cost Estimating Accuracy	\$222,853.34	\$240,922.53	100%	↑	\$240,922.53
T&D-37	Completion of Program Planned Units Per Workplan	\$445,706.68	\$481,845.06	100%	↑	\$481,845.06
T&D-38	Program Unit Cost Variance	\$222,853.34	\$240,922.53	75%	↑(Partial)	\$180,691.90
T&D-39	Project Completion Consistent with Project Design	\$111,426.67	\$120,461.27	100%	↑	\$120,461.27
T&D-40	Double Woods	\$55,713.34	\$60,230.63	0%	↓	\$0.00
T&D-41	Program Effectiveness - Vegetation Management	\$194,996.67	\$210,807.21	0%	↓	\$0.00
T&D-42	Estimated Time of Restoration (ETR) Process Enhancements	\$278,566.68	\$301,153.16	100%	↑	\$301,153.16
T&D-44	Regulatory Compliance	\$167,140.01	\$180,691.90	100%	↑	\$180,691.90
T&D-45	Physical Security	\$278,566.68	\$301,153.16	100%	↑	\$301,153.16
T&D-46	Root Cause Analysis (RCA) Execution and Compliance	\$194,996.67	\$210,807.21	100%	↑	\$210,807.21
T&D-48	Program Effectiveness - Storm Hardening	\$194,996.67	\$210,807.21	100%	↑	\$210,807.21

LEGEND:

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

Summary

Scope Function	Potential Incentive	Claimed Incentive Compensation	% of Incentive Compensation Claimed
Business Services	\$3,342,800.11	\$2,786,839.68	83.4%
Customer Services	\$4,457,066.81	\$2,511,023.58	56.3%
Electric T&D	\$8,914,133.61	\$7,649,290.36	85.8%
Information Technology	\$3,342,800.11	\$2,117,106.74	63.3%
Power Supply & Clean Energy	\$2,228,533.40	\$1,989,523.22	89.3%
Grand Total	\$22,285,334.03	\$17,053,783.58	76.5%

Business Services

BS-01 Enterprise Risk Management - Implementation of the Mitigation Effectiveness Process

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$173,737.64		

BS-01 Implementation of the Mitigation Effectiveness Process				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
BS-01.01	Propose 10 risks from the Tier 1 & Tier 2 risks to apply the risk mitigation effectiveness process that was developed in 2022 and outlined in the 2022 ERM Annual Report	2/2/2023	Achieved	Approved
BS-01.02	Include the results of applying the risk mitigation effectiveness process to the identified 10 risks in the ERM Annual Report due to LIPA by June 30, 2023	6/30/2023	Achieved	Approved
BS-01.03	Revise and update, if needed, PSEG LI's process for evaluating risk mitigation effectiveness based upon LIPA feedback on the ERM Annual Report due to LIPA by June 30, 2023	8/30/2023	Achieved	Approved
BS-01.04	Include updated results of applying the risk mitigation effectiveness process in the Update to the ERM Annual Report due December 15, 2023, including a discussion of any revisions made to the current process, recommendations for improvement, and identification of other Tier 1 & 2 risks for the risk mitigation effectiveness process to be applied to in 2024	12/15/2023	Achieved	Approved

Summary

- PSEG Long Island proposed 10 risks from the Tier 1 & Tier 2 risks to apply the risk mitigation effectiveness process that was developed in 2022 and outlined in the 2022 ERM Annual Report.
- PSEG Long Island included the results of applying the risk mitigation effectiveness process to the identified 10 risks in the ERM Annual Report due to LIPA by June 30, 2023.
- PSEG Long Island included updated results of applying the risk mitigation effectiveness process in the Update to the ERM Annual Report due December 15, 2023, and included a discussion of any revisions made to the current process, recommendations for improvement, and identification of other Tier 1 & 2 risks for the risk mitigation effectiveness process to be applied to in 2024.

BS-05 – Full Time Vacancy Rate

Metric Type	Qualitative	Metric Performance	↓ Did Not Achieve
Incentive Compensation Claim	\$0.00	Comments	3 out of 5 areas achieved

BS-05 Full Time Vacancy Rate				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
BS-05.2	PSEG Long Island will populate a LIPA-developed Smartsheet to track key performance indicators related to recruiting, hiring and retention practices. Key performance indicators will include - Time to Fill (exempt and non-exempt), Submittal to Interview Percentage, Voluntary/Involuntary Turnover Rates, and Job Offer Acceptance Rate.	4/25/2023	Achieved	Approved
BS-05.6	Complete and provide the information identified in the LIPA KPI Smartsheet.	4/25/2023	Achieved	Approved
BS-05.3	PSEG Long Island will populate a LIPA-developed Smartsheet to track key performance indicators related to recruiting, hiring and retention practices. Key performance indicators will include - Time to Fill (exempt and non-exempt), Submittal to Interview Percentage, Voluntary/Involuntary Turnover Rates, and Job Offer Acceptance Rate.	7/25/2023	Achieved	Approved
BS-05.7	Complete and provide the information identified in the LIPA KPI Smartsheet.	7/25/2023	Achieved	Approved
BS-05.4	PSEG Long Island will populate a LIPA-developed Smartsheet to track key performance indicators related to recruiting, hiring and retention practices. Key performance indicators will include - Time to Fill (exempt and non-exempt), Submittal to Interview Percentage, Voluntary/Involuntary Turnover Rates, and Job Offer Acceptance Rate.	10/25/2023	Achieved	Approved
BS-05.8	Complete and provide the information identified in the LIPA KPI Smartsheet.	10/25/2023	Achieved	Approved
BS-05.5	PSEG Long Island will populate a LIPA-developed Smartsheet to track key performance indicators related to recruiting, hiring and retention practices. Key performance indicators will include - Time to Fill (exempt and non-exempt), Submittal to Interview Percentage, Voluntary/Involuntary Turnover Rates, and Job Offer Acceptance Rate.	1/25/2024	Achieved	Approved
BS-05.9	Complete and provide the information identified in the LIPA KPI Smartsheet.	1/25/2024	Achieved	Approved

Summary

- PSEG Long Island achieved 3 out of the 5 vacancy rate targets for the following groups:

Area/Function	Target	YE Performance	PSEG LI Performance
Electric T&D	5.0%	-0.4%	Achieved
Customer Services	5.0%	4.1%	Achieved
Business Support Services	5.0%	5.5%	Did Not Achieve
Information Technology	7.0%	26.1%	Did Not Achieve
PSEG Long Island	5.0%	3.0%	Achieved

- There is not compensation for achieving only 3 out of the 5 area/functions.
- PSEG Long Island met key all other deliverable dates for providing reports to LIPA via LIPA-developed Smartsheet to track key performance indicators related to: recruiting, hiring, and retention practices. Key performance indicators will include - Time to Fill (exempt and non-exempt), Submittal to Interview Percentage, Voluntary/Involuntary Turnover Rates, and Job Offer Acceptance Rate.
- PSEG Long Island ended the year with 0.5% vacancy overall and 1.9% in Business Services for the month of December. However, since the YTD Vacancy Metric calculation is based on a simple monthly average. Business Services did not meet the 5.0% target after the year-end validation process revealed inadvertent inclusion of interns that was corrected for this incentive compensation claim when further analyzed.

BS-07 - Complete Affiliate Cost and Quality Justifications

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$289,562.73		

BS-07 Complete Affiliate Cost and Quality Justifications				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
BS-07.01	Update Metric deliverables to incorporate any Human Resources and Information Technology Remediation Plan deliverables to be completed in 2023 pursuant to the 2022 Metric BS-7 Affiliate Cost Benefit Justification.	01/15/23	Achieved	Declined
BS-07.02	Complete a "lessons learned" review process with key stakeholders, including LIPA, from the completion of 2022 Metric BS-7 Affiliate Cost Benefit Justification and submit a Project Implementation Plan (PIP) that results in specific, actionable recommendations to improve the process for 2023. Update the Metric deliverables in Smartsheet to include the PIP deliverables.	01/31/23	Achieved	Approved
BS-07.03	Update the comprehensive cost-benefit justification/alternative analysis (CBA/AA) template designed for the 2022 Metric BS-7 and any related procedures to implement recommendations from the "lessons learned."	02/28/23	Achieved	Approved
BS-07.05	In accordance with OSA Section 5.2(A)(7)(i), PSEG LI will prepare and submit to LIPA a cost and quality justification for the Service Provider's decision to perform Procurement through an Affiliate as a Shared Service.	03/31/23	Achieved	Approved
BS-07.06	In accordance with OSA Section 5.2(A)(7)(i), PSEG LI will prepare and submit to LIPA a cost and quality justification for the Service Provider's decision to perform Accounts Payable through an Affiliate as a Shared Service.	04/15/23	Achieved	Approved
BS-07.07	In accordance with OSA Section 5.2(A)(7)(i), PSEG LI will prepare and submit to LIPA a cost and quality justification for the Service Provider's decision to perform Treasury through an Affiliate as a Shared Service.	04/28/23	Achieved	Approved
BS-07.08	In accordance with OSA Section 5.2(A)(7)(i), PSEG LI will prepare and submit to LIPA a cost and quality justification for the Service Provider's decision to perform Enterprise Risk Management through an Affiliate as a Shared Service.	04/28/23	Achieved	Approved
BS-07.09	In accordance with OSA Section 5.2(A)(7)(i), PSEG LI will prepare and submit to LIPA a cost and quality justification for the Service Provider's decision to perform Payroll through an Affiliate as a Shared Service.	05/15/23	Achieved	Approved
BS-07.10	In accordance with OSA Section 5.2(A)(7)(i), PSEG LI will prepare and submit to LIPA a cost and quality justification for the Service Provider's decision to perform Legal through an Affiliate as a Shared Service.	05/31/23	Achieved	Approved
BS-07.11	In accordance with OSA Section 5.2(A)(7)(i), PSEG LI will prepare and submit to LIPA a cost and quality justification for the Service Provider's decision to perform Miscellaneous Accounting Services through an Affiliate as a Shared Service.	05/31/23	Achieved	Declined
BS-07.12	PSEG LI will submit revised cost and quality justifications based on LIPA's reasonable feedback.	06/23/23	No Status	Declined
BS-07.13	In accordance with OSA Section 5.2(A)(7)(ii), prepare a remediation plan in a LIPA-approved format within 60 days, if LIPA, in its reasonable judgment, determines that the cost and quality justification provided by the Service Provider for the performance or continued performance of the Scope Functions or Scope Sub-Functions by the Affiliate versus performance by qualified subcontractor or ServCo does not adequately justify moving forward (or continuing to move forward) with the performance of the Scope Functions or Scope Sub-Functions by the Affiliate; AND the Service Provider and LIPA meet to discuss LIPA's concerns and the Service Provider exercises its option to submit a remediation plan to reduce costs or otherwise address LIPA's concerns.	08/14/23	No Status	Declined
BS-07.14	In accordance with OSA Section 5.2(A)(7)(ii), submit a project plan including a detailed budget submission, to transition such services from the Affiliate to one or more subcontractors and/or to ServCo (as directed by LIPA) within a period not to exceed 120 days, unless a longer period is mutually agreed to by the Parties as necessary.	12/11/23	No Status	No Status

Summary

- PSEG Long Island completed cost-benefit justification/alternative analysis (CBA/AA) for the following areas that provide PSEG Long Island with affiliate services under the 2nd A&R OSA:
 1. Procurement

2. Accounts Payable
 3. Treasury
 4. Enterprise Risk Management
 5. Payroll
 6. Legal
 7. Miscellaneous Accounting
- The sub-metrics that LIPA are assessing as 'Declined' were either completed or not possible and/or not required in situations where LIPA did not identify deficiencies with the current affiliate services and/or provide PSEG LI with an opportunity to remediate any identified deficiencies.
 - PSEG Long Island has agreed to create a standalone procurement department for Long Island.
 - PSEG Long Island and LIPA continue to disagree on the on the outcome of the cost-benefit justification/alternative analysis (CBA/AA) provided by PSEG Long Island. PSEG Long Island completed analysis shows that breaking from the current affiliate model, which is allowed under the Second Amended & Restated OSA, would provide similar levels of service today but would be at an increased cost for the loss of economies of scale and efficiencies by moving from a shared services model to a standalone LI dedicated.

BS-08 - Capital Project Impact Analysis

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$173,737.64		

BS-08 Improve the Capital Project Impact Analysis and Tracking				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
BS-08.01	Conduct a "lessons learned" review process with key stakeholders, including LIPA, from the completion of 2022 Metric BS-8 Capital Project Impact Analysis and submit a Project Implementation Plan (PIP) that results in specific, actionable recommendations to improve the process for 2023. Update the Metric deliverables in Smartsheet to include the PIP deliverables.	5/31/2023	Exempted via Approved Exception Request	Exempted via Approved Exception Request
BS-08.02	Submit analysis for all major projects proposed, defined as a project having a total project cost of \$10.0M or are reasonably expected to have an annual operating budget impact (additional cost or savings) when fully implemented of \$1.0 million or greater on an annual basis. If this results in a listing of less than 5 projects, additional projects will be selected by LIPA, based on the advisement of the PSEG LI and LIPA Capital Working Group, to ensure the analysis is performed for a minimum of 5 projects.	8/31/2023	Achieved	Approved
BS-08.03	PSEG LI will submit revised analysis for each project based on LIPA's reasonable feedback.	9/15/2023	Achieved	Approved
BS-08.04	Submit a summary report detailing the analysis for each project (as defined above) to support the financial impact to the operating and capital budget based on the projected year the project enters service.	9/30/2023	Achieved	Achieved
BS-08.05	Submit an annual report of the realized benefits for the completed and in-service major projects tracked in 2022 Metric BS-8 Capital Project Impact Analysis.	10/30/2023	Achieved	Achieved

Summary

- PSEG Long Island submitted analysis for all major projects proposed, defined as a project having a total project cost of \$10.0M or are reasonably expected to have an annual operating budget impact (additional cost or savings) when fully implemented of \$1.0 million or greater on an annual basis.
- PSEG Long Island submitted a summary report detailing the analysis for each project to support the financial impact to the operating and capital budget based on the projected year the project enters service.
- PSEG Long Island submitted an annual report of the realized benefits for the completed and in-service major projects tracked in 2022 Metric BS-8 Capital Project Impact Analysis.

BS-10 - Improve Annual Substation Property Tax Reports

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$173,737.64		

BS-10 Improve Annual Substation Property Tax Reports				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
BS-10.01	Nassau County and New York City -- Incorporate the remaining 45 substations from 2022 Metric BS-10 (ACC-2) Substation Property Tax Module Plan located in Nassau County and/or New York City into the Substation Valuation Report.	2/3/2023	Achieved	Approved
BS-10.02	Nassau County and New York City -- Update Substation Valuation Report for the previous available tax year bills for Nassau County and New York City. Utilize November 2021/May 2022 School Tax bill and 2022 General bill for Nassau and January/July 2022 for New York City.	2/3/2023	Achieved	Approved
BS-10.04	Suffolk County -- Incorporate the remaining 45 substations from 2022 Metric BS-10 (ACC-2) Substation Property Tax Module Plan located in Suffolk County into the Substation Valuation Report.	4/1/2023	Achieved	Approved
BS-10.05	Suffolk County -- Update Substation Valuation Report for the previous available tax year bills for Suffolk County utilizing the Suffolk County 2022 bills.	4/1/2023	Achieved	Approved
BS-10.06	Submit a complete Substation Valuation Report reflecting the proper values from both above mentioned information on all tax bills and for reproduction cost of new assets less depreciation (RCNLD) for the 165 substations. Calculate substations with significant assessed value variances (and related necessary information) based on column #14 in table below.	4/14/2023	Achieved	Approved
BS-10.07	Submit a revised Substation Valuation Report based on LIPA's reasonable and timely feedback consistent with approved format from 2022 Metric BS-9.	5/19/2023	Achieved	Approved
BS-10.08	LIPA and PSEG LI review the Substation Valuation Report based on any additional reasonable and timely feedback which may differ from the 2022 report (i.e. "lessons learned"). PSEG LI to submit a revised report based on LIPA's review and recommendations.	6/30/2023	Achieved	Approved
BS-10.09	Submit a "draft" policy/procedure detailing the process, requirements, and deadlines to update the Annual Substation Valuation Report each year.	9/16/2023	Achieved	Approved
BS-10.10	Submit a revised policy/procedure for the Annual Substation Valuation Report based on LIPA's feedback.	11/16/2023	Achieved	Approved

Summary

- PSEG Long Island incorporated the remaining 45 substations from 2022 Metric BS-10 (ACC-2) Substation Property Tax Module Plan located in Nassau County, Suffolk and/or New York City into the Substation Valuation Report.
- PSEG Long Island updated Substation Valuation Report for the previous available tax year bills for Nassau County, Suffolk and New York City.
- PSEG Long Island submitted a complete Substation Valuation Report reflecting the proper values from identified information on all tax bills and for reproduction cost of new assets less depreciation (RCNLD) for the 165 substations and submitted a revised Substation Valuation Report based on LIPA's reasonable and timely feedback.
- LIPA and PSEG Long Island reviewed the Substation Valuation Report based on any additional reasonable and timely feedback which may differ from the 2022 report (i.e. "lessons learned").
- PSEG Long Island submitted a "draft" policy/procedure detailing the process, requirements, and deadlines to update the Annual Substation Valuation Report each year and subsequently submitted a final policy/procedure for the Annual Substation Valuation Report.

BS-18 - Utility Marketing Effectiveness

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$289,562.73		

BS-18	Utility Marketing Effectiveness ¹			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
BS-18.01	Choose one utility subject to test with customer intelligence firm with LIPA approval with rationale behind choice.	1/13/2023	Achieved	Approved
BS-18.02	Provide proposals with marketing campaigns, pilot program duration, and cost of preferred resource or customer intelligence firm for LIPA approval	1/27/2023	Achieved	Approved
BS-18.03	Customer intelligence firm data implementation period (6-8 weeks) to create the model/segmentation	7/31/2023	Achieved	Approved
BS-18.04	Submit monthly pilot program report	10/20/2023	Achieved	Approved
BS-18.05	Submit monthly pilot program report	11/20/2023	Achieved	Approved
BS-18.06	Submit monthly pilot program report	12/29/2023	Achieved	Approved
BS-18.07	Submit monthly pilot program report	7/31/2023	Achieved	Approved
BS-18.08	Submit monthly pilot program report	8/25/2023	Achieved	Approved
BS-18.10	Final report of pilot program with recommendations of whether to purchase data	10/6/2023	Achieved	Approved
BS-18.11	Submit Annual Marketing Plan to LIPA as defined in Targets and Calculations.	1/20/2023	Achieved	Approved
BS-18.12	Submit revised Annual Marketing Plan to LIPA reflecting LIPA's reasonable comments.	2/24/2023	Achieved	Approved
BS-18.13	Submit first quarter Marketing Report and Spending Report as defined in Targets and Calculations.	4/28/2023	Achieved	Approved
BS-18.14	Submit second quarter Marketing and Spending Report as defined in Targets and Calculations.	7/28/2023	Achieved	Approved
BS-18.15	Submit third quarter Marketing and Spending Report as defined in Targets and Calculations.	10/27/2023	Achieved	Approved
BS-18.16	Submit fourth quarter Marketing and Spending Report as defined in Targets and Calculations.	1/26/2024	Achieved	Approved

¹All dates above are sequential by metric number and are not broken out by sub-project

Summary

- The BS-18 metric consisted of 2 sub-projects which included:
 - Annual Marketing Plan and Reporting (75% of the compensation)
 - Customer Intelligence Pilot Program (25% of the compensation)

Annual Marketing Plan and Reporting

- PSEG Long Island submitted an Annual Marketing Plan to LIPA that identified the timing of planned communications, identified the market segments (profiles) of customers targeted, identified the marketing tactics and channels, identified party and department responsible for the campaigns, displayed the budgeting and proposed spending of each campaign along with the breakdown of department incurring the cost, clearly defined key performance indicators (KPIs) for each campaign and identified methods to further enhance customer communications
- PSEG Long Island submitted all quarterly marketing and spending reports

Customer Intelligence Pilot Program

- PSEG Long Island submitted an Annual Marketing Plan to LIPA that identified the timing of planned communications, identified the market segments (profiles) of customers targeted, identified the marketing tactics and channels, identified party and department responsible for the campaigns, displayed the budgeting and proposed spending of each campaign along with the breakdown of department incurring the cost, clearly defined

key performance indicators (KPIs) for each campaign and identified methods to further enhance customer communications

- PSEG Long Island submitted all quarterly marketing and spending reports.

BS-19 - Reputation Management – Positive Media Sentiment

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$173,737.64		

J F M A M J J A S O N D **BS-19 Reputation Management - Positive Media Sentiment** OSA Incentive: \$173,738



Metric Definition
Achieve Positive Sentiment on at least 30% of media stories

Calculation
(Positive Sentiments** / Total Media Stories)*100

Positive Sentiment enhances company perception, raises awareness, or educates customers by mentioning a program or initiative, and/or pulls through messaging or data points from PSEG Long Island.

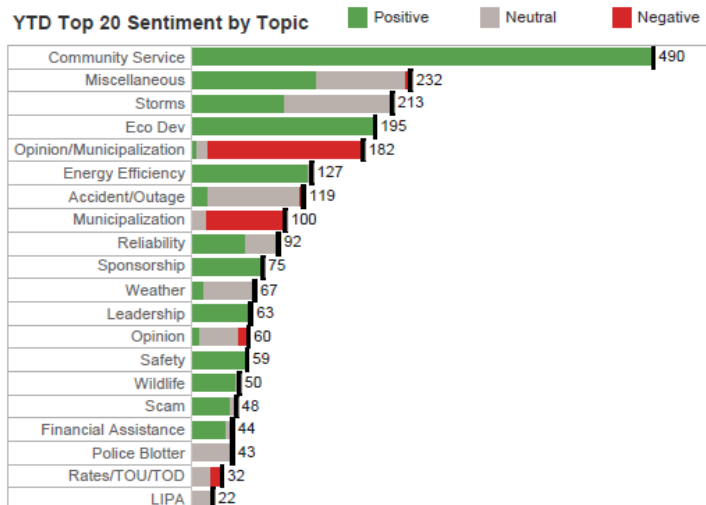
YTD

2023	62.0%
2022	63.1%

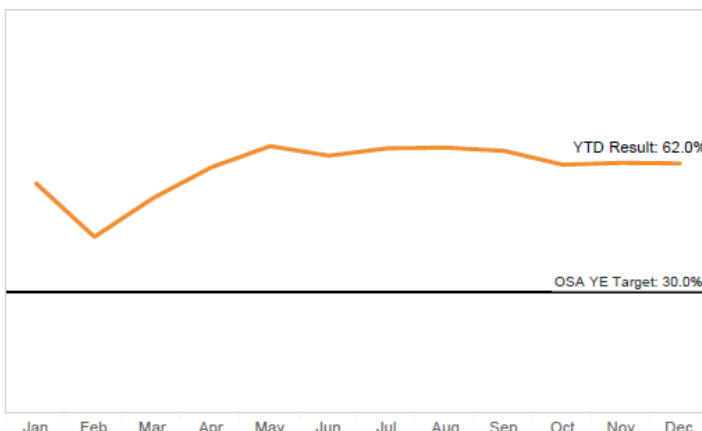
Month

2023	61.0%
2022	59.6%

YTD Top 20 Sentiment by Topic



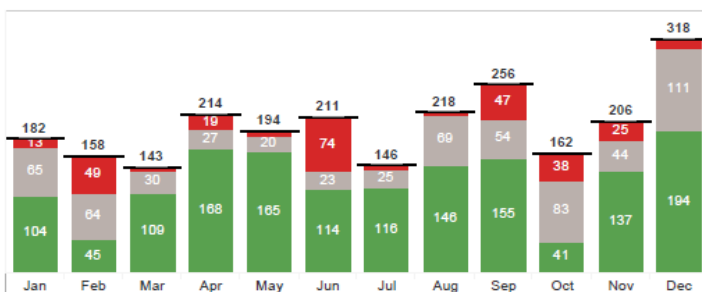
YTD Result	OSA YE Target	OSA YE Forecast
62.0%	30.0%	↑



Total Media Stories

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
MTD Stories	182	158	143	214	194	211	146	218	256	162	206	318
YTD Stories	182	340	483	697	891	1,102	1,248	1,466	1,722	1,884	2,090	2,408

Monthly News Stories by Sentiment



Summary

- PSEG Long Island achieved a positive sentiment on 62.0% of media stories.
- There was 2,408 media stories in 2023. The breakdown of sentiment is:
 - Positive: 1,494
 - Neutral: 615
 - Negative: 299

BS-20 - Reputation Management – Share of Voice

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$173,737.64		

J F M A M J J A S O N D **BS-20 Reputation Management - Share of Voice** OSA Incentive: \$173,738



YTD Result	OSA YE Target	OSA YE Forecast
100.0%	50.0%	↑

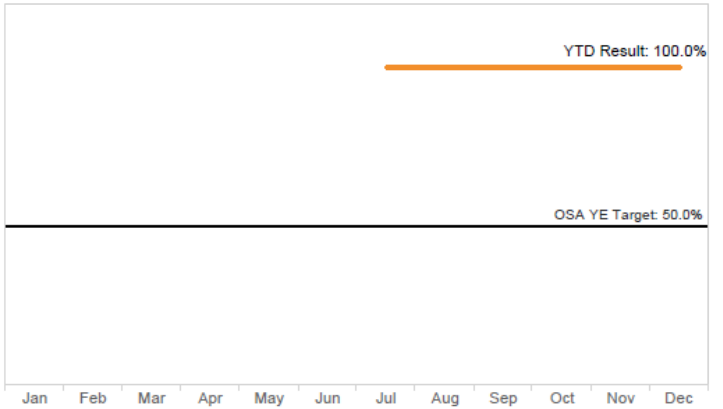
Metric Definition

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

Calculation

$(\text{Share of Voice} / \text{Crisis Event}) * 100$

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



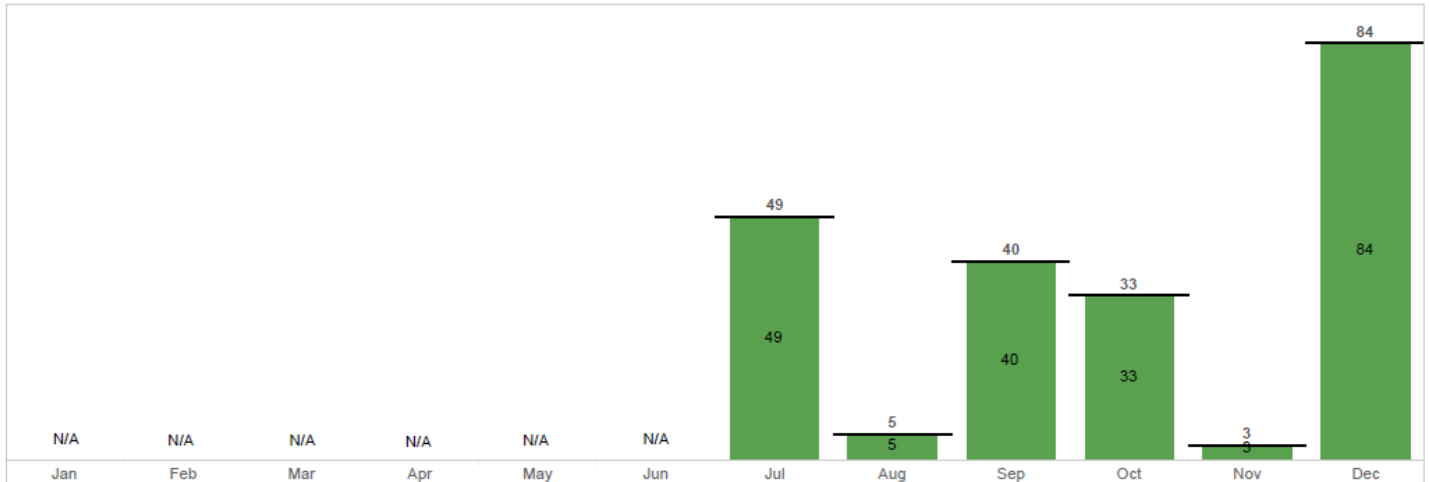
YTD



MTD



Share of Voice during Crisis Events - Monthly ■ Yes ■ No



Summary

- PSEG Long Island achieved a Share of Voice of 100% during storm and other crisis events.
- There was 84 media stories during these periods and PSEG Long Island’s Share of Voice was present in every story.

BS-21 - Social Media Engagement and Following

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$289,562.73	Comments	Achieved all 4 sub metric targets

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

BS-21 Social Media Engagement and Following

OSA Incentive: \$289,563



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

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

Calculation

On Blue Sky Days:

- 90% of cases related to personal health and safety responded within 1 hours.
- 90% of cases related to any other topic responded within 3 hours.

During Major Storms:

- 85% of cases related to personal health and safety responded within 3 hours
- 85% of cases related to any other topic responded within 5 hours

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

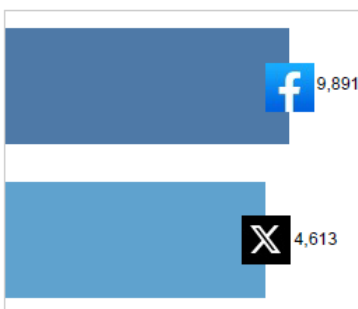
YTD



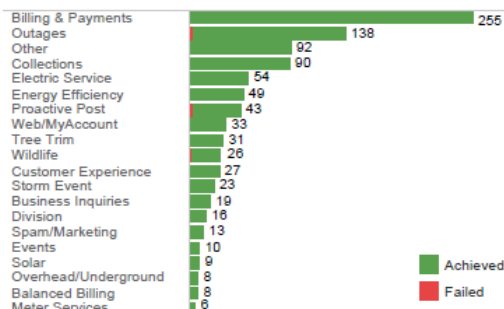
Social Media Engagement and Following YTD vs Target

	# of Cases	% Achieved	Target	Pass/Fail	Pass Fail %
Blue Sky - Personal Health and Safety	14	100.0%	90.0%	Pass	100.0%
Blue Sky - Other	1,511	99.2%	90.0%	Pass	100.0%
Major Storm - Personal Health and Safety	N/A	N/A	N/A	Pass	100.0%
Major Storm - Other	39	100.0%	85.0%	Pass	100.0%

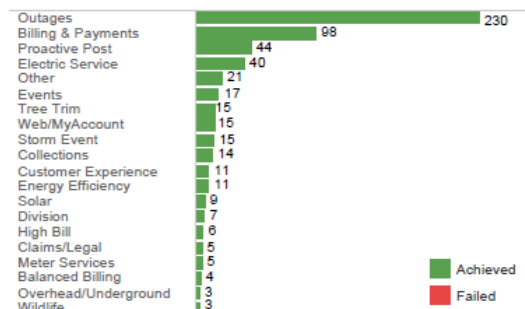
YTD Message Breakdown



Top 20 YTD Facebook Service Case Category



Top 20 YTD Twitter Service Case Category



Monthly Breakdown of Cases

	J	F	M	A	M	J	J	A	S	O	N	D	YTD
Blue Sky - Personal Healthy and Safety	3	4	1	0	0	2	0	3	1	0	0	0	14
Blue Sky - Other	127	152	113	165	103	114	178	170	97	92	101	99	1,511
Major Storm - Personal Healthy and Safety	0	0	0	0	0	0	0	0	0	0	0	0	0
Major Storm - Other	0	0	0	0	0	0	0	0	11	0	0	28	39

YTD Performance

Blue Sky - Personal Safety	100.0%
Blue Sky - Other	99.2%
Storm - Other	100.0%

Sub-Metric A: Blue Sky – Personal Health and Safety

- PSEG Long Island had 14 Blue Sky – Personal Health and Safety cases and responded to 14 (100.0%) of them within the targeted 1 hour time period identified in the metric exceeding the target of 90.0%.

Sub-Metric B: Blue Sky – Other

- PSEG Long Island had 1,511 Blue Sky – Other cases and responded to 1,499 (99.2%) of them within the targeted 3 hour time period identified in the metric exceeding the target of 90.0%

Sub-Metric C: Major Storm – Personal Health and Safety

- There were no cases during 2023 that met this criteria so this category was not applicable

Sub-Metric D: Major Storm – Other

- PSEG Long Island had 39 Major Storm – Other cases and responded to 39 (100.0%) of them within the targeted 5 hour time period identified in the metric exceeding the target of 85.0%.

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

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$347,475.27		

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.	2/14/2023	Achieved	Approved
BS-22.02	Provide a Monthly Status Report demonstrating metric performance for the prior month.	3/13/2023	Achieved	Approved
BS-22.03	Provide a Monthly Status Report demonstrating metric performance for the prior month.	4/14/2023	Achieved	Approved
BS-22.04	Provide a Monthly Status Report demonstrating metric performance for the prior month.	5/12/2023	Achieved	Approved
BS-22.05	Provide a Monthly Status Report demonstrating metric performance for the prior month.	6/14/2023	Achieved	Approved
BS-22.06	Provide a Monthly Status Report demonstrating metric performance for the prior month.	7/18/2023	Achieved	Approved
BS-22.07	Provide a Monthly Status Report demonstrating metric performance for the prior month.	8/14/2023	Achieved	Approved
BS-22.08	Provide a Monthly Status Report demonstrating metric performance for the prior month.	9/14/2023	Achieved	Approved
BS-22.09	Provide a Monthly Status Report demonstrating metric performance for the prior month.	10/13/2023	Achieved	Approved
BS-22.10	Provide a Monthly Status Report demonstrating metric performance for the prior month.	11/14/2023	Achieved	Approved
BS-22.11	Provide a Monthly Status Report demonstrating metric performance for the prior month.	12/14/2023	Achieved	Approved
BS-22.12	Provide a Monthly Status Report demonstrating metric performance for the prior month.	1/14/2024	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 2023, PSEG Long Island had 9 storms that met the criteria under the metric.
- PSEG Long Island must meet both the Accuracy and Timeliness standard on ≥ 90% of storm events

BS-23 - FEMA Tropical Storm Isaias Grant - Engineering to Support

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$173,737.64		

BS-23		FEMA Tropical Storm Isaias Grant - Engineering to Support		
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
BS-23.01	Submit schedule for binder delivery for LIPA approval. Update Smartsheet deliverables to reflect LIPA-approved schedule.	1/13/2023	Achieved	Approved
BS-23.02	Provide a Monthly Status Report demonstrating metric performance for the prior month.	2/14/2023	Achieved	Approved
BS-23.03	Provide a Monthly Status Report demonstrating metric performance for the prior month.	4/14/2023	Achieved	Approved
BS-23.04	Provide a Monthly Status Report demonstrating metric performance for the prior month.	5/15/2023	Achieved	Approved
BS-23.05	Provide a Monthly Status Report demonstrating metric performance for the prior month.	6/15/2023	Achieved	Approved
BS-23.06	Provide a Monthly Status Report demonstrating metric performance for the prior month.	7/14/2023	Achieved	Approved
BS-23.07	Provide a Monthly Status Report demonstrating metric performance for the prior month.	8/15/2023	Achieved	Approved
BS-23.08	Provide a Monthly Status Report demonstrating metric performance for the prior month.	9/14/2023	Achieved	Approved

Summary

- The objective of this metric was for PSEG Long Island to complete the engineering required in a timely and complete manner to support the FEMA storm hardening grant application associated with Tropical Storm Isaias.
- PSEG Long Island delivered a schedule for binder delivery that was approved by LIPA.
- PSEG Long Island delivered all engineering binder packages to FEMA in batches ensuring that all were delivered to FEMA by deliverable target due date of July 31, 2023.

BS-24 - Improve the Accuracy of Asset Records for Outside Plant

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$173,737.64		

BS-24 Improve the Accuracy of Asset Records for Outside Plant				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
BS-24.01	Submit PIP to meet all project requirements. Update Smartsheet for LIPA-approved deliverables.	1/31/2023	Achieved	Approved
BS-24.02	Provide a status report demonstrating metric performance for quarter ended March 31, 2023.	4/14/2023	Achieved	Approved
BS-24.03	Provide a status report demonstrating metric performance for quarter ended June 30, 2023.	7/21/2023	Achieved	Approved
BS-24.04	Provide a status report demonstrating metric performance for quarter ended September 30, 2023.	10/20/2023	Achieved	Declined
BS-24.05	Provide a status report demonstrating metric performance for quarter ended Dec 31, 2023.	1/26/2024	Achieved	Declined

Summary

- The objective of this goal was for PSEG Long Island to improve the accuracy of asset records for outside utility plant. This metric was designed to implement the recommendations of the LIPA-commissioned report from PA Consulting "End-to-End Review -- Maintaining Accurate Property Records," including the requirements of a LIPA-approved PIP.
- PSEG Long Island submitted a PIP to meet all project requirements by January 31, 2023.
- PSEG Long Island far exceeded all of the requirements recommended in the End-to-End process review recommendation. The PIP for the metric further outlined the expectations and assigned monthly targets to each of the sub-activities in the metric. PSEG Long Island was short one folder review in the Month of November but substantially exceeded the YE targets of doubling the number of mapping folder reviews at each of the four electric divisions.
- PSEG Long Island has kicked off a continuous improvement project for OP2 process to identify process improvements and implement solutions that addresses time lag of folder transferring from the operating area to the mapping area.

BS-32 - Update Low and Moderate Income (LMI) Tariff and Billing

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$41,785.00	Compensation Reallocated per the agreed metric language	

BS-32 Update Low and Moderate Income (LMI) Tariff and Billing				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
BS-32.01	PSEG to submit PIP for modification of LMI discount billing. Update the Metric deliverables in Smartsheet to include the LIPA-approved PIP deliverables and dates in 2023.	3/31/2023	Achieved	Approved
BS-32.02	Draft tariff proposal provided to LIPA and DPS	2/28/2023	Achieved	Approved
BS-32.03	Final tariff proposal approved by LIPA for April SAPA	3/31/2023	Achieved	Approved
BS-32.04	Final IT requirements approved by LIPA	9/15/2023	Project Cancelled by LIPA	Project Cancelled by LIPA
BS-32.05	LIPA Board approval	7/31/2023	Project Cancelled by LIPA	Project Cancelled by LIPA
BS-32.06	Functional and Technical Requirements	9/15/2023	Project Cancelled by LIPA	Project Cancelled by LIPA
BS-32.07	Technical Design	10/9/2023	Project Cancelled by LIPA	Project Cancelled by LIPA
BS-32.08	Communications Plan	10/13/2023	Project Cancelled by LIPA	Project Cancelled by LIPA
BS-32.09	Test Strategy and Test Plans. Test Strategy and Test Plans for all planned testing, including Unit, System Integration and UAT testing. Test Plans should include any Test Scripts, Test Scenarios, Test Cases, and Test Data to be utilized in the testing.	10/9/2023	Project Cancelled by LIPA	Project Cancelled by LIPA
BS-32.10	Requirements Traceability Matrix (RTM)	10/2/2023	Project Cancelled by LIPA	Project Cancelled by LIPA
BS-32.11	Test Results and Artifacts for Unit/System Integration Testing. Includes all deliverables specified in the Quality Assurance Plan Section applicable to Unit/System Integration testing.	10/23/2023	Project Cancelled by LIPA	Project Cancelled by LIPA
BS-32.12	Test Results and Artifacts for UAT. End to End test. Includes all deliverables specified in the Quality Assurance Plan Section applicable to User Acceptance testing.	11/20/2023	Project Cancelled by LIPA	Project Cancelled by LIPA
BS-32.13	Communication and Training Artifacts. Shall include talking points regarding how the minimum bill calculation works.	12/22/2023	Project Cancelled by LIPA	Project Cancelled by LIPA
BS-32.14	Signoff	12/29/2023	Project Cancelled by LIPA	Project Cancelled by LIPA
BS-32.15	Project Close-Out Report. Shall at the least include basic statistics of customer interaction, such as # of customer inquiries and service location of each inquiry.	2/28/2024	Project Cancelled by LIPA	Project Cancelled by LIPA

Summary

- On Wednesday, July 26, 2023, PSEG Long Island received an e-mail from LIPA electing to cancel metric BS-32 Low Income Minimum Bill Proposal.
- Below is the language in the exclusion criteria for the metric:
 - After March 31, 2023 and before August 1, 2023: If, for reasons unrelated to PSEG LI's performance of the above requirements, LIPA decides to cancel the project, the DPS declines to provide a written recommendation to the Board, or the Board declines to adopt the Tariff proposal, then 25% of the incentive compensation allocated to this metric will be awarded in full for PSEG LI's completed deliverables, and the remaining 75% of the incentive compensation will be reallocated pro-rata to the other metrics in the Business Services Scope Function.

- PSEG Long Island earned the 25% and reallocated the remaining 75% among the scope function in alignment with the exclusion language.

BS-33 - Consolidate Real Estate Footprint

Metric Type	Quantitative	Metric Performance	↑ Partially Achieved (90%)
Incentive Compensation Claim	\$312,727.75		

BS-33 Consolidate Real Estate Footprint				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
BS-33.01	Provide LIPA with summary of early lease termination negotiations with each landlord for the customer service centers (Lindenhurst and Seaford), and an estimate of costs of termination and removal of any assets from the leased properties	3/31/2023	Exempted via Approved Exception Request	Exempted via Approved Exception Request
BS-33.02	Develop 1st floor operational consolidation plan (1st floor expires 7-31-23) onto the 2nd floor including estimated cost	7/31/2023	Achieved	Approved
BS-33.06	Negotiate a three (3) years lease extension for the 2nd floor of Bethpage	7/31/2023	Achieved	Achieved
BS-33.07	Provide LIPA with summary of lease termination negotiations with each landlord for the customer service centers (Lindenhurst & Seaford only), and an estimate of costs of termination and removal of any assets from the leased properties	3/31/2023	Achieved	Approved
BS-33.08	Finalize lease termination for the customer service centers.	8/31/2023	Achieved	Approved
BS-33.09	Develop 2nd floor reconfiguration plan to support consolidation implementation of 1st floor Operations (IT, HR, Payroll). Considering EAMS logistics plan	7/31/2023	Achieved	Approved
BS-33.10	Finalize lease termination for Bethpage office space	Within 30 calendar days of LIPA's approval ...	Exempted via Approved Exception Request	Exempted via Approved Exception Request
BS-33.11	Remove all PSEG Long Island assets remaining in the Uniondale suite and vacate premises, including directing PSEGLI employees to remove any remaining personal items from the Uniondale suite	1/31/2023	Achieved	Approved
BS-33.12	Prepare Meter services long range (10 year) plan for Hauppauge training facility and consolidated meter inventory. The long-term plan should document the capacity and storage needs by year for meters/inventory with alternatives considered at existing locations. It needs to assess training facility options within the current properties.	11/15/2023	Achieved	Declined
BS-33.13	Provide notice of intent to (early) terminate the lease at the Hauppauge warehouse to landlord	Within 10 calendar days of LIPA's approval ...	Exempted via Approved Exception Request	Exempted via Approved Exception Request
BS-33.14	Relocate or sell inventory currently stored at Hauppauge warehouse	6/15/2023	Achieved	Approved
BS-33.15	Finalize lease termination for Hauppauge warehouse	Within 30 calendar days of LIPA's approval ...	Exempted via Approved Exception Request	Exempted via Approved Exception Request
BS-33.16	Far Rockaway Customer Office-Evaluate overall office footprint and presence requirements and develop a proposed solution for future need, dependent on decision on 2023 customer offices activity results through July 2023	8/15/2023	Achieved	Declined Identified this would be subsequently approved – Change in Leadership at LIPA
BS-33.17	Provide lease disposition notice of intent (run to end of lease termination) for Lindenhurst and Seaford Customer Offices	5/1/2023	Achieved	Approved
BS-33.01	Provide LIPA with summary of early lease termination negotiations with each landlord for the customer service centers (Lindenhurst and Seaford), and an estimate of costs of termination and removal of any assets from the leased properties	3/31/2023	Exempted via Approved Exception Request	Exempted via Approved Exception Request

Summary

- The objective of BS-33 metric was to Implement Project Implementation Plan (PIP) to support a strategy to consolidate LIPA's real estate footprint. The metric covered the (i) termination of leases for certain customer service centers at Far Rockaway, Coram, Seaford, and Lindenhurst, (ii) office space in Bethpage, (iii) warehouse space in Hauppauge, and (iv) PSEG LI dedicated space in Uniondale.
- The compensation for the metric was broken down into 3 components with the following allocations:
 - 50% of compensation for completion of deliverables related to the Customer Offices
 - 40% of compensation for completion of deliverables related to Bethpage and the Hauppauge.
 - 10% of compensation for completion of the deliverables related to the Uniondale space.

Uniondale Space (10% of Compensation)

- PSEG Long Island removed all PSEG Long Island assets remaining in the Uniondale suite and vacated premises except for some PSEG LI IT equipment that will remain in order to support existing Security systems (Site Access Control and Monitoring) prior to the January 31, 2023 delivery date.

Customer Offices (40% of Compensation)

- Below is a summary of the Customer Office leases:
 - Coram - per the lease agreement terms, there is no required notification to landlord, we are not exercising our lease extension options. This lease will expire on December 31, 2023
 - Lindenhurst - per the lease agreement terms, there is no required notification to the landlord, we are not exercising our lease extension options. This lease will expire on February 29, 2024.
 - Far Rockaways – a final determination was made to not exercise our lease extension option and our current lease will expire on August 31, 2024. PSEG LI is currently reviewing alternative options in order to maintain a presence in the Rockaways and continue to service this community, as part of the program any proposed option will contain a small customer service area to accommodate customer visits, as defined under BS-33.16.
 - Seaford – this facility does not have an early termination clause; therefore the lease cannot be terminated until its current expiration date of December 11, 2028 and PSEGLI/LIPA are contractually responsible for the full term of this agreement . The landlord has been actively marketing the site in order to engage a new tenant which would release us of our agreement obligation once executed. Presently, there are no immediate plans to utilize this facility, however, we continue to review alternative options both internally and externally.
- PSEG Long Island achieved all deliverables associated with the Customer Office Facilities. There is one item above that is noted as declined but the Metric Lead at the time noted that if the Far Rockaways lease disposition that we would not exercise the lease extension option and that we would continue to evaluate space and foot print in the Far Rockaways area of the service territory.

Bethpage and Hauppauge/Meter Services (40% of Compensation)

Bethpage Facility

- PSEG Long Island developed 1st floor operational consolidation plan onto the 2nd floor including estimated cost
- Develop 2nd floor reconfiguration plan to support consolidation implementation of 1st floor Operations (IT, HR, Payroll).
- PSEG Long Island negotiated a lease extension for the 2nd floor of Bethpage
- PSEG Long Island achieved all deliverables associated with the Bethpage Facility.

Hauppauge/Meter Services Facilities

- Under LIPA's IV&V review of AMI implement it was noted that PSEG LI has excess inventory of specific meter types from the AMI implementation. LIPA proposed PSEG LI evaluate a potential sale back of excess inventory to the vendor.
- PSEG Long Island and LIPA completed a cost benefit analysis for the potential sale back of the meters. Based on the financial model outcome, PSEG LI had concerns moving forward with the meter sale and asked LIPA via a letter on April 4, 2023 to provide their explicit approval to move forward with the meter sale.

- On May 3, 2023, LIPA provided a response noting the concerns and confirmed the position to complete the sale of 24,768 excess meters back to the meter vendor. PSEG Long Island would need to start repurchasing meters in 2027 based on burn rate calculations.
- The Bellport storage facility for meters was vacated and release by lead expiration on May 31st.
- The Bethpage storage facility for meters was vacated and release by the lease expiration on June 30th. PSEG LI shipped the 24,768 excess meters back to the meter vendor.
- The Meter Vendor sent a letter to PSEG LI on October 27, 2023 stating: “Due to these changes in the global supply chain condition, [the vendor] is no longer able to offer the opportunity to buy back Focus AXe form 1S and 2S meters from PSEG-Long Island. There were multiple factors that necessitated this decision, including multiple meter order cancellations from other customers and changes to meter types available in the marketplace.”
- PSEG Long Island requested an extension for the 10 year plan but provide LIPA with spatial needs with the meter buy back sale cancellation.
- PSEG Long Island is currently evaluating meter warehousing options including: 1.) Vendor Warehoused, 2.) Third Party Warehoused and 3.) Additional Leased Space.
- PSEG Long Island is claiming partial credit for this effort as we worked through the analysis, facility consolidation, shipped the meters to vendor for meter sell back which was subsequently cancelled due to economic factors outside of PSEG Long Island control and provided spatial requirements for now increased capacity of meters. PSEG Long Island continues to work through plan for take back of additional meters.

Customer Services

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

Metric Type	Qualitative	Metric Performance	↑ Achieved (Partially – 50%)
Incentive Compensation Claim	\$188,326.77	Comments	Achieved 2 of 4 Projects

Project #1: Accelerated Payment Posting Feasibility Study

Project Status: **Parties Not Aligned - Dispute**

CS-01.1 Delivery of Strategic Customer Experience & Billing Projects – Accelerated Payment Posting Feasibility				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-01.02	Accelerated Payment Posting Feasibility Study - Provide objective, evaluation criteria, assessment approach, and report format for study	02/28/23	Parties Not Aligned	Declined
CS-01.04	Accelerated Payment Posting Feasibility - Provide study findings & recommendation	09/30/23	Parties Not Aligned	Declined
CS-01.05	Accelerated Payment Posting Feasibility Study - Provide Project Implementation Plan (PIP) if approved to proceed with implementation. Update the Metric deliverables in Smartsheet to include the LIPA-approved PIP deliverable due dates.	10/31/23	Parties Not Aligned	Declined

Summary

- PSEG Long Island and LIPA had differing views regarding the value associated with completing this project. PSEG LI believes that the customer research was not appropriately completed to warrant this project and on a legacy system such as CAS. PSEG Long Island also did not see the immediate benefit for the customer. PSEG Long Island also noted concerns regarding CAS resources to be able to complete the feasibility study. During a 12/13/22 meeting, PSEG LI expressed all the above concerns about the accelerated payment posting project in CS-1. LIPA agreed to consider alternatives as a substitution for this project. In response, PSEG LI offered alternatives to this project scope that we believe offered better customer value as this was a study, and what PSEG LI was offering was a solution. PSEG LI initially offered multifactor authentication and then offered three Mobile Application enhancement projects as a substitute to the Accelerated Payment Posting Feasibility Study. During active negotiations and discussion of alternatives, LIPA abruptly ended discussions and would no longer discuss alternate projects.

Project #2: Kiosk Implementation

Project Status: **Achieved**

CS-01 Delivery of Strategic Customer Experience & Billing Projects – Kiosk Implementation				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-01.16	Kiosk - Provide draft Project Implementation Plan. Update the Metric deliverables in Smartsheet to include the LIPA-approved final PIP deliverable due dates once vendor impacts are known.	02/28/23	Achieved	Approved
CS-01.63	Kiosk - Vendor Selection Criteria	02/28/23	Achieved	Approved
CS-01.64	Kiosk - Contract performance metrics and penalties	03/27/23	Achieved	Approved
CS-01.65	Kiosk - Contract signing with Kiosk Vendor	03/31/23	Achieved	Approved
CS-01.18	Kiosk - Finalized Kiosk Payment requirements	05/15/23	Achieved	Approved
CS-01.61	Kiosk - Phase 1 Project Plan	05/15/23	Achieved	Approved
CS-01.41	Kiosk - Payment Agreement - Business Requirements	06/01/23	Achieved	Approved
CS-01.19	Kiosk - Functional & Technical Design Documents	06/02/23	Achieved	Approved
CS-01.42	Kiosk - Customer Satisfaction feedback survey - Baseline survey pre-launch	06/14/23	Achieved	Approved
CS-01.67	Kiosk - Procure construction services and permitting	06/23/23	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-01.21	Kiosk - Provide customer communication & marketing plan (excludes DPAs). Update due dates for deliverables in Smartsheets related to the marketing plan (collateral and execution).	06/30/23	Achieved	Approved
CS-01.43	Kiosk - Updated Business Process documents	06/30/23	Achieved	Approved
CS-01.68	Kiosk - Commence Construction site development based on Permit Issuance	07/06/23	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-01.20	Kiosk - Provide Requirements Traceability Matrix & test plan.	07/14/23	Achieved	Approved
CS-01.44	Kiosk - Testing Strategy	07/14/23	Achieved	Approved
CS-01.45	Kiosk - SIT Test Results	08/04/23	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-01.26	Kiosk - Provide July's performance results and details of expected outcome targets.	08/10/23	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-01.62	Kiosk - Payment Agreement: Project Dates by for software development related activities	08/22/23	Achieved	Approved
CS-01.47	Kiosk - Test Closure Memo	08/25/23	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-01.27	Kiosk - Provide August's performance results and details of expected outcome targets.	09/10/23	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-01.22	Kiosk - Inform LIPA of go-live decision and submit completed go-live checklist that supports decision.	10/09/23	Achieved	Declined
CS-01.46	Kiosk - UAT Test Results	10/09/23	Achieved	Declined
CS-01.28	Kiosk - Provide monthly performance results	10/10/23	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-01.23	Kiosk - Go-live - one kiosk	10/16/23	Exception Filed	Declined

CS-01 Delivery of Strategic Customer Experience & Billing Projects – Kiosk Implementation				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-01.29	Kiosk - Provide monthly performance results	11/10/23	Achieved	Declined
CS-01.25	Kiosk - Go-live - remaining three kiosks	11/17/23	Achieved	Approved
CS-01.30	Kiosk - Provide monthly performance results	12/10/23	Achieved	Approved
CS-01.55	Kiosk - Payment Agreement: Functional and Technical Design (specifications) documents	12/14/23	Achieved	Approved
CS-01.24	Kiosk - Collect initial customer feedback beyond go-live. Assess results of a representative sample against customer satisfaction hypothesis.	12/20/23	Achieved	Approved
CS-01.31	Kiosk - Provide final performance results and details demonstrating the achievement of the expected outcome target.	12/31/23	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-01.48	Kiosk - Marketing and Communications Collateral	As approved in CS-01.21	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-01.52	Kiosk - Payment Agreement Marketing and Communications Collateral	As approved in CS-01.21	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-01.50	Kiosk - Payment Agreement: System/Functional/Technical Requirements	As approved in CS-01.62	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-01.54	Kiosk - Payment Agreement: Updated Business Process documents	As approved in CS-01.62	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-01.57	Kiosk - Payment Agreement: SIT Test Results	As approved in CS-01.62	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-01.59	Kiosk - Payment Agreement: Test Closure Memo	As approved in CS-01.62	Exempted via Approved Exception Request	Exempted via Approved Exception Request

Summary

- Kiosk Implementation – This project will include procuring, installing and promoting four in wall or outside standalone kiosk designs based on the most cost-effective solution at each of the following locations – Brentwood, Hicksville, Hewlett, and Riverhead.
- PSEG Long Island met all of the deliverables above. There are some deliverables noted as declined above from LIPA. These deliverables that were declined exceptions were requested for new requirements and functionality that was brought forth by LIPA as the project was in flight that needed to be developed and tested which had an impact on schedule and delivery.
- The schedule was extended to accommodate the additional Paymentus API development needed to support updated and clarified requirements including specific cash overpayment and velocity limit scenarios. CityBase development depends on having a final, stable Paymentus API to integrate with, so the build phase of the CityBase implementation was delayed until the final API was available. The API was not available at the expected time, causing further delays in the project timeline as CityBase had to rearrange their existing development calendar and commitments to support the PSEG LI development.
- PSEG Long Island went live with four payment kiosks in 2023 in the locations identified in the metric. From go-live through year-end 689 PSEG Long Island customers made 837 payments for ~\$350K of payments. Kiosk traffic continues to pick up and be adopted by customers as an additional payment channel. From Go-Live through February 2024, 2,193 PSEG Long Island customers made 3,165 payments for ~\$1.3M.
- The project was a success and PSEG Long Island’s claim aligns with the successful implementation of the Kiosks at the four locations noted in the metric while dealing with incremental scope that was added while the project was in flight.

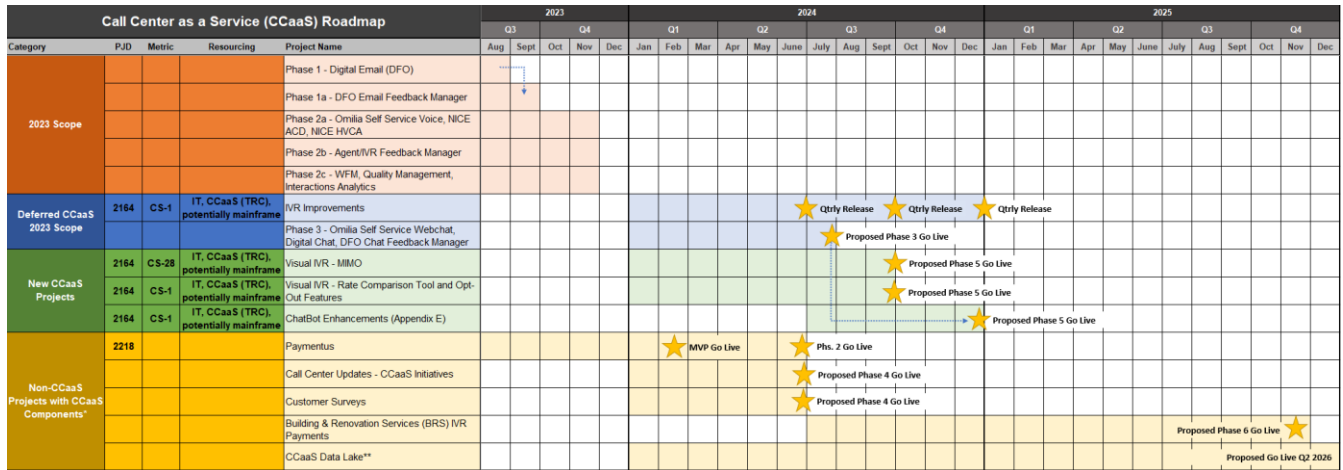
Project #3: CCaaS Roadmap

Project Status: **Achieved**

CS-01 Delivery of Strategic Customer Experience & Billing Projects – CCaaS Roadmap				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-01.33	CCaaS Roadmap - Submit Aug 2023 - Dec 2025 CCaaS business driven roadmap.	07/31/23	Achieved	Approved

Summary

- The CCaaS Roadmap project requested PSEG Long Island in consultation with LIPA to develop a Business-Driven Roadmap (August 2023 - December 2025) for CCaaS. The plan should include identification of improvement initiatives (Voice of Customer/CSAT, Call Sentiment, Operation Efficiencies, Process Optimizations, Self-Service Containment, etc.) through the application of the CCaaS platform. In addition, the plan needed to include a gap analysis between the current state and system capabilities aligned with industry best practices. The plan also needed to include business benefits, prioritization, sequencing, detailed and specific scope, level of effort, and estimated cost.
- PSEG Long Island submitted a CCaaS roadmap on July 31, 2023. PSEG Long Island presented in this three-year Call Center as a Service (CCaaS) roadmap, a proposed path to deliver on the five identified objectives through a portfolio of initiatives, offering a comprehensive strategy to provide enhanced customer and customer service representative experiences. The initiatives are prioritized based on the expected impact on the customer and Call Center Operations, other projects dependencies, budget considerations and time constraints. The five identified objectives in PSEG Long Island’s CCaaS Roadmap include: 1.) Voice of the Customer, 2.) Call Sentiment, 3.) Operational Efficiencies, 4.) Process Optimizations and 5.) Self-Service Containment.



*Dates are owned by the respective project teams
 ** Dependent on LIPA's approval of the Standard Data Access Platform Roadmap

Figure 1 - CCaaS Roadmap

Project #4: Credit Card Implementation

Project Status: **Did Not Achieve**

CS-01 Delivery of Strategic Customer Experience & Billing Projects – Credit Card Implementation				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-01.07	Credit Card Implementation - Provide business requirements for MVP informed by 2022 transactional survey feedback. Update the Metric deliverables in Smartsheet to include the LIPA-approved PIP deliverable due dates.	01/31/23	Achieved	Approved
CS-01.34	Credit Card Implementation - Submit the final project plan/deliverables for MVP phase in an updated PIP. Update the MVP phase Metric deliverables in Smartsheet to include the revised LIPA-approved PIP deliverables and due dates.	01/31/23	Achieved	Approved
CS-01.08	Credit Card Implementation - Provide the functional and technical design documents for MVP phase.	02/20/23	Achieved	Approved
CS-01.09	Credit Card Implementation - Provide Requirements Traceability Matrix for MVP phase.	03/31/23	Achieved	Approved
CS-01.36	Credit Card Implementation - Submit testing strategy for MVP phase.	03/31/23	Achieved	Approved
CS-01.10	Credit Card Implementation - Provide customer communication/marketing plan for MVP phase	04/17/23	Achieved	Approved
CS-01.37	Credit Card Implementation - Provide updated business and technical processes/procedures for MVP phase	04/21/23	Achieved	Approved
CS-01.38	Credit Card Implementation - Provide customer hypothesis	06/02/23	Achieved	Approved
CS-01.35	Credit Card Implementation - Submit the final project plan/deliverables for FINAL phase in an updated PIP. Update the FINAL phase Metric deliverables in Smartsheet to include the revised LIPA-approved PIP deliverables and due dates.	06/30/23	Achieved	Approved
CS-01.69	Credit Card Implementation - Provide business requirements for FINAL phase	06/30/23	Did Not Achieve	Declined
CS-01.11	Credit Card Implementation - Inform LIPA of go-live decision and submit completed go-live checklist that supports decision for MVP phase.	07/11/23	Did Not Achieve	Declined
CS-01.39	Credit Card Implementation - Provide UAT/SIT results for MVP phase	07/11/23	Did Not Achieve	Declined
CS-01.40	Credit Card Implementation - Provide training documentation & updated Call Center business process/procedure documents (from CS-01.37) for MVP phase.	07/11/23	Achieved	Approved
CS-01.12	Credit Card Implementation - Go-live - MVP	07/26/23	Did Not Achieve	Declined
CS-01.70	Credit Card Implementation - Provide the functional and technical design documents for FINAL phase.	07/31/23	Did Not Achieve	Declined
CS-01.71	Credit Card Implementation - Submit testing strategy for FINAL phase.	09/01/23	Did Not Achieve	Declined
CS-01.72	Credit Card Implementation - Provide Requirements Traceability Matrix for FINAL phase.	09/01/23	Did Not Achieve	Declined
CS-01.73	Credit Card Implementation - Provide customer communication/marketing plan for FINAL phase	09/01/23	Did Not Achieve	Declined
CS-01.13	Credit Card Implementation - 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.	09/15/23	Did Not Achieve	Declined
CS-01.74	Credit Card Implementation - Update business and technical process/procedure documents for FINAL phase.	09/15/23	Did Not Achieve	Declined
CS-01.75	Credit Card Implementation - Provide UAT/SIT results for FINAL phase	10/31/23	Did Not Achieve	Declined
CS-01.76	Credit Card Implementation - Inform LIPA of go-live decision and submit completed go-live checklist that supports decision for FINAL phase.	10/31/23	Did Not Achieve	Declined
CS-01.14	Credit Card Implementation - Go-live - final solution	11/15/23	Did Not Achieve	Declined

Summary

- PSEG Long Island did not achieve the outcome of the Credit Card Implementation Projects. The project went live in January of 2024. There was a delay of go-live because of associated security penetration testing that took longer than anticipated/initially scheduled.

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

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$251,102.36		

J F M A M J J A S O N D
CS-2 JD Power Residential Survey
OSA Incentive: \$222,853



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".

Calculation

The score will be reported as the JD Power Customer Satisfaction Survey (Residential) score. The metric result for 2023 represents Wave 1, Wave 2, Wave 3 & Wave 4 results fielded in 2023.

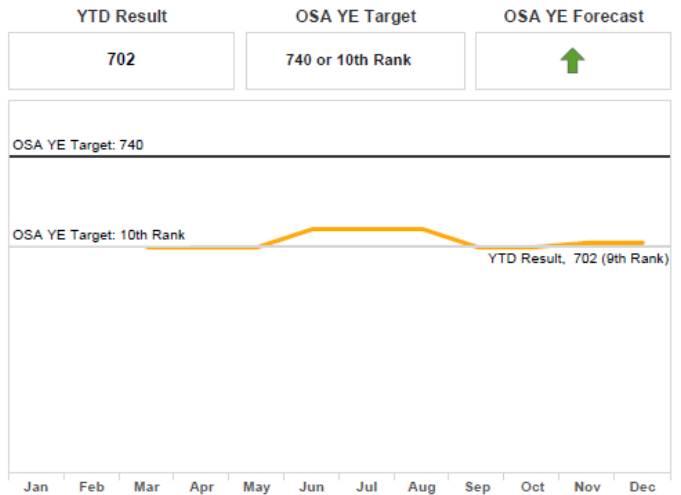
YTD



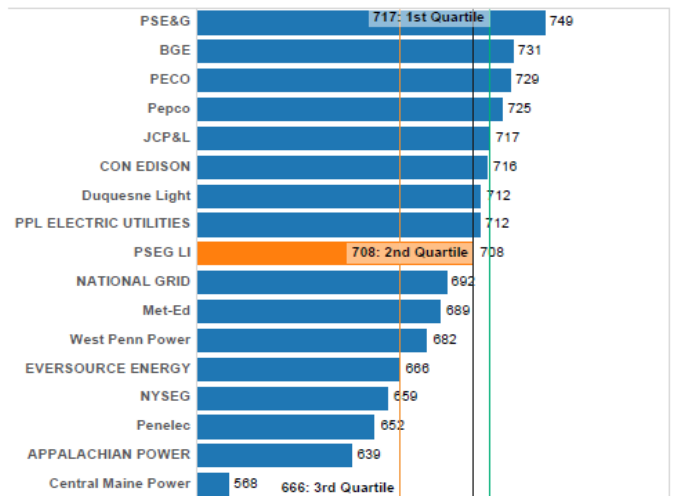
Quarter 4



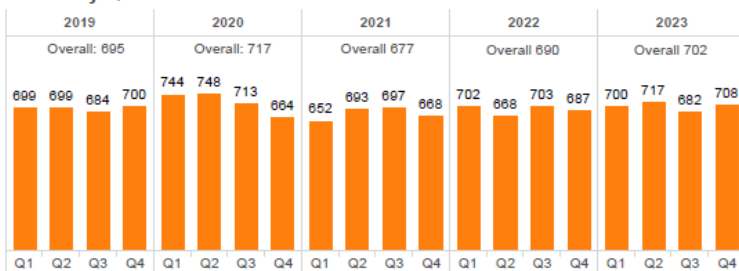
2023 Quarter 4 YTD vs. 1st Quartile	2023		2023		2023	
	YTD	1st Q	YTD	YTD	YTD	YTD
Overall Customer Satisfaction Index	100%	722	702	-20	9	
Power Quality & Reliability Index	25%	765	747	-18	8	
Price Index	20%	652	617	-35	8	
Billing & Payment Index	17%	783	764	-19	11	
Corporate Citizenship Index	17%	678	652	-26	9	
Communications Index	12%	698	692	-6	7	
Customer Care/Service Index	9%	780	774	-6	9	



2023 Quarter 4 Scores



Scores by Quarter & Year



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.	1/31/2023	Achieved	Approved
CS-02.02	Establish 2023 target based on 2022 syndicated results.	1/31/2023	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.	4/10/2023	Exempted via Approved Exception Request	Exempted via Approved Exception Request
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.	7/10/2023	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.	10/10/2023	Achieved	Approved
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.	12/31/2023	Achieved	Approved

CS-02 JD Power Customer Satisfaction Survey (Residential)				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
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	No Status
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	No Status
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	No Status
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	No Status

Summary

- PSEG Long Island finished 2023 with a syndicated score of 702 for J.D. Power Residential. PSEG Long Island completed the year ranked 9th out of 17 large east electric utilities and achieved the target of a score or rank of 740/10th.

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

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$251,102.36		

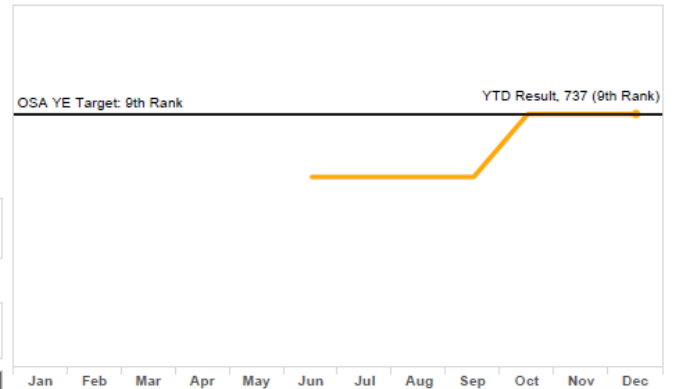
J F M A M J J A S O N D
CS-3 JD Power Business Survey
OSA Incentive: \$222,853



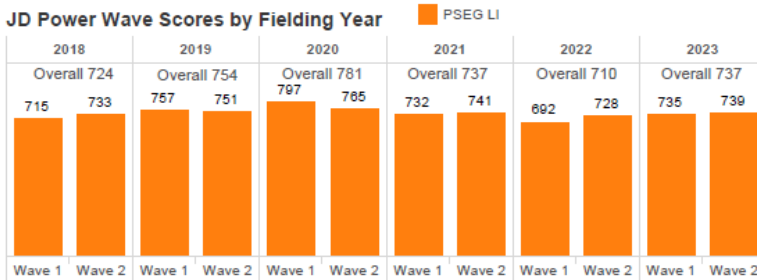
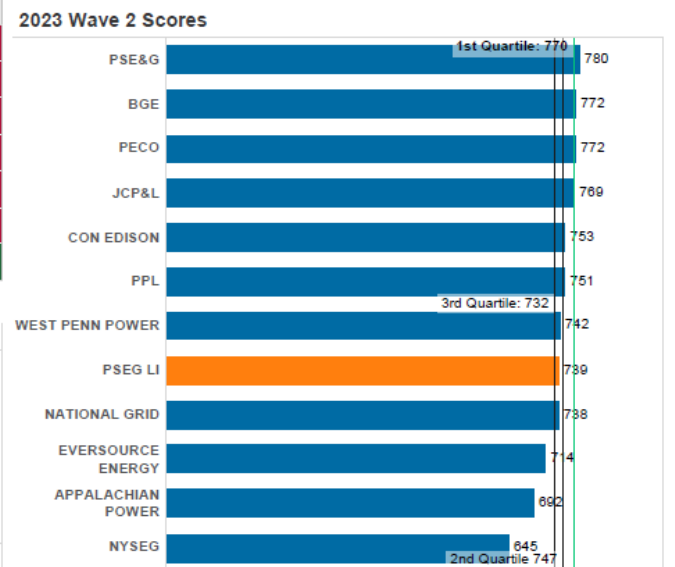
YTD Result	OSA YE Target	OSA YE Forecast
737	9th Rank	↑

Metric Definition
This metric comprises the Overall Satisfaction Index from the JD Power and Associates Annual Electric Utility Customer Satisfaction Study for Business Customers for the "East Region, Large Segment".

Calculation
The score will be as reported as the JD Power Customer Satisfaction Survey (Business) score. The 2023 scorecard will utilize the 2023 Calendar year (CY) JD Power results, which are fielded in 2023.



2023 Wave 2 YTD vs. 1st Quartile	2023		2023		2023	
	W2	1st Q W2	W2	W2	W2	W2
Overall Customer Satisfaction Index	100%	786	737	-29	9	
Power Quality & Reliability Index	24%	801	775	-26	9	
Price Index	19%	705	662	-43	8	
Billing & Payment Index	15%	811	784	-27	9	
Corporate Citizenship Index	15%	722	689	-33	9	
Customer Care/Service Index	14%	812	790	-22	8	
Communications Index	13%	755	729	-26	5	



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.	1/31/2023	Achieved	Approved
CS-03.02	Establish the 2023 position target based on the 2022 syndicated result.	1/31/2023	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.	4/10/2023	Exempted via Approved Exception Request	Exempted via Approved Exception Request
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.	7/31/2023	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.	10/10/2023	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.	12/31/2023	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	No Status
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	No Status

Summary

- PSEG Long Island finished 2023 with a syndicated score of 739 for J.D. Power Business survey. PSEG Long Island completed the year ranked 9th out of 12 large east electric utilities and achieved the target rank of 9th or higher.

CS-04 - CIS Modernization – Phase 1

Metric Type	Qualitative	Metric Performance	↑ Partially Achieved (37.5%) and Reallocated
Incentive Compensation Claim	\$188,326.77		
Additional Comments	PSEG Long Island completed the Business deliverables. PSEG Long Island didn't have adequate funding to complete Readiness deliverables and the project was subsequently put on hold/deferred.		

CS-04		CIS Modernization – Phase 1		
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-04.01	Develop an initial 2023 project plan with tasks, milestones, and dependencies to ensure effective measurement of progress against the 2023 metric deliverables	01/31/23	Achieved	Approved
CS-04.02	Develop final detailed 2023 project plan with tasks, milestones, dependencies, and critical path to ensure effective measurement of progress against the 2023 metric deliverables in Microsoft Project. Project deliverables timeline will be updated based on final plan and below dates will not be valid.	02/28/23	Achieved	Approved
CS-04.03	Develop a high level milestone based project plan including organizational readiness planned activities and draft budget for 2024 and onwards to meet the required budget planning timing.	06/23/23	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-04.04	Complete a stakeholder analysis	06/08/23	Achieved	Approved
CS-04.05	Complete all business process workshops and LIPA approval of associated deliverables in the approved format as prepared for the Move In workshop that include: a. Business Process document that contains: business rules; exceptions and associated responses; data points summary identifying transaction volume and transaction channels; external system(s) used; a list of existing reports; regulatory requirements with specific regulations and the spelled out business requirement that would be part of the RFP, specifically tagged as regulatory, compliance reporting needs, pain points/improvement opportunities, and general improvement opportunities b. Business Process Mapping Document. c. Suppliers, Inputs, Process, Outputs, and Customers Document. d. Associated business requirements to be mapped to the business processes, including additional functionality that can arrive with new CIS or to close gaps	12/08/23	Achieved	Approved
CS-04.06	Submit report of strategic and operational performance metrics that would be impacted by new CIS system and the current state baseline	07/06/23	Achieved	Approved
CS-04.07	Update business and technical requirements, interface, architecture, and business process documentation for business and technical changes implemented in 2023 only for IT and metric projects expected to change and impact CIS. PSEGLI and LIPA to confirm expected changes by April 28, 2023. Delivery date for this will not have any impact on RFP packages readiness or other deliverables. It can be done by end of the year and will be treated as independent exercise.	12/08/23	Achieved	Approved
CS-04.08	Complete deliverables for RFP package which included detailed functional, technical, and integration requirements, for product selection and CIS System Integrator (SI), including scope of work	12/13/23	Did Not Have Adequate Funding	Declined
CS-04.09	Conduct trusted advisor review of vision, guiding principles, business metrics, detailed Business requirements (Functional- Technical, Integration, Security, etc.), detailed Scope of Work, and As-Is Business Process Mapping (SI/ IT Level) for SI RFP. This should also include recommendations on data migration strategy, including consideration of business and regulatory requirements against financial implications. Close any gaps or enhancements required.	12/13/23	Did Not Have Adequate Funding	Declined
CS-04.10	Conduct CIS Organizational Readiness assessment to undertake CIS modernization initiative and submit a final report. Analysis of current organization's ability and identifying staff leads: Resources, skills, availability, organizational and governance structure, and recommendations for the following: a. Change management b. Walk through typical roles, skillsets needed c. Define what success looks like d. Gap between need and roles e. Risk workshop	10/17/23	Did Not Have Adequate Funding	Declined

CS-04 CIS Modernization – Phase 1				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
	f. Staffing plan, including what is inside and outside SI (environmental analysis, PMO, Governance, Project planning)			
CS-04.11	Conduct Data Quality Assessment (DQA) and provide a quality report identifying gaps in data quality (Accuracy, Consistency, and Integrity).	07/13/23	Did Not Have Adequate Funding	Declined
CS-04.12	Provide data cleansing plan for master data attributes to achieve 98% data quality (Accuracy, Consistency, and Integrity)	07/13/23	Did Not Have Adequate Funding	Declined

Summary

PSEG LI delivered on all of the Business deliverables and achieved 37.5% (\$167,140.01) of the allocated compensation.

- Develop an initial 2023 project plan with tasks, milestones, and dependencies to ensure effective measurement of progress against the 2023 metric deliverables
- Develop final detailed 2023 project plan with tasks, milestones, dependencies, and critical path to ensure effective measurement of progress against the 2023 metric deliverables in Microsoft Project. Project deliverables timeline will be updated based on final plan and below dates will not be valid.
- Complete a stakeholder analysis
- Submit report of strategic and operational performance metrics that would be impacted by new CIS system and the current state baseline

PSEG Long Island was in progress and on track for completion of the Readiness initiatives. However, PSEG LI was unable to deliver on the Readiness deliverables because of lack of funding to complete initiatives. The below identified deliverables were part of the readiness deliverables that was worth 62.5% (\$278,566.68) of the allocated compensation:

- Conduct Data Quality Assessment (DQA) and provide a quality report identifying gaps in data quality (Accuracy, Consistency, and Integrity).
- Provide data cleansing plan for master data attributes to achieve 98% data quality (Accuracy, Consistency, and Integrity)
- Conduct CIS Organizational Readiness assessment to undertake CIS modernization initiative and submit a final report. Analysis of current organization's ability and identifying staff leads: Resources, skills, availability, organizational and governance structure, and recommendations for the following:
 - Change management
 - Walk through typical roles, skillsets needed
 - Define what success looks like.
 - Gap between need and roles.
 - Risk workshop
 - Staffing plan, including what is inside and outside SI (environmental analysis, PMO, Governance, Project planning)
 - Complete deliverables for RFP package which included detailed functional, technical, and integration requirements, for product selection and CIS System Integrator (SI), including scope of work
- Conduct trusted advisor review of vision, guiding principles, business metrics, detailed Business requirements (Functional- Technical, Integration, Security, etc.), detailed Scope of Work, and As-Is Business Process Mapping (SI/IT Level) for SI RFP. This should also include recommendations on data migration strategy, including consideration of business and regulatory requirements against financial implications. Close any gaps or enhancements required.
- **PSEG Long Island is recommending a reallocation for the Readiness initiatives because of the lack of funding to complete the associated deliverables. There was not budget available or made available by LIPA for PSEG Long Island to have sufficient funding to provide a reasonable opportunity to achieve the applicable scope under this performance metric.**

CS-05 - Customer Transactional Performance

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$376,653.53		

CS-05 Customer Transactional Performance				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-05.01	For the list of payments made in relation to a separate transaction, define the exceptions/criteria and provide for LIPA approval for exclusion from the payment transaction sample and which transaction type to record the results.	1/13/2023	Achieved	Approved
CS-05.02	Submit list of transactions to be surveyed in 2023.	1/31/2023	Achieved	Approved
CS-05.03	Submit plan to expand the surveyed channels. Update the implementation date in Smartsheets.	1/31/2023	Achieved	Declined
CS-05.04	Submit business rules required to trigger the survey at the appropriate time in the journey. Update the implementation date in Smartsheets.	1/31/2023	Achieved	Declined
CS-05.05	Submit list of proposed supplemental data to enrich reporting of payment, collections, & billing survey results. Update the implementation date in Smartsheets.	1/31/2023	Achieved	Declined
CS-05.06	Submit plan to supplement outage survey results with identified data. Update the implementation date in Smartsheets.	1/31/2023	Achieved	Declined
CS-05.07	Provide recommendations for department-wide survey strategy and approach.	3/31/2023	Achieved	Declined
CS-05.08	Provide 2022 cost per transaction analysis	4/30/2023	Achieved	Approved
CS-05.09	Provide observations and recommendations from survey results and cost per transaction analysis to drive continuous improvement	6/30/2023	Achieved	Approved
CS-05.10	January survey result reports and supporting detail	2/21/2023	Achieved	Declined
CS-05.11	February survey result reports and supporting detail	3/20/2023	Achieved	Approved
CS-05.12	March survey result reports and supporting detail	4/20/2023	Achieved	Approved
CS-05.13	April survey result reports and supporting detail	5/22/2023	Achieved	Approved
CS-05.14	May survey result reports and supporting detail	6/20/2023	Achieved	Approved
CS-05.15	June survey result reports and supporting detail	7/20/2023	Achieved	Approved
CS-05.16	July survey result reports and supporting detail	8/21/2023	Achieved	Approved
CS-05.17	August survey result reports and supporting detail	9/20/2023	Achieved	Approved
CS-05.18	September survey result reports and supporting detail	10/20/2023	Achieved	Approved
CS-05.19	October survey result reports and supporting detail	11/20/2023	Achieved	Approved
CS-05.20	November survey result reports and supporting detail	12/20/2023	Achieved	Approved
CS-05.21	December survey result reports and supporting detail	1/20/2024	Achieved	Approved
CS-05.22	Implement enhancements for survey channel expansion.	As approved in proposal	No Status	No Status
CS-05.23	Implement enhancements for survey trigger business rules.	As approved in proposal	No Status	No Status
CS-05.24	Implement survey reporting enhancements including overall reporting, payment, collections, & billing.	As approved in proposal	No Status	No Status
CS-05.25	Implement survey reporting enhancements for outage.	As approved in proposal	No Status	No Status

Summary

- The objective of this metric is: Drive continuous improvement among various channel transactions through on-going measurement and evaluation of customer satisfaction, transactional ease, utilization volume, and cost per transaction. Enhance the existing survey approach and reporting to deepen customer insights.
- While the objective is reasonable the operationalization of this metric continues to be a moving target while not providing real tangible information for process improvement focus.
- PSEG Long Island continues to have issue with the objectively verifiable nature of this metric. Metric and the deliverables continue to not be objectively verifiable and concrete (3 years running – 2022, 2023 and now 2024). Data collection effort for this metric is administratively burdensome and provides limited value. Inability to align on deliverables has caused much rework and excessive time/effort instead of focusing on true customer research and improvement and streamlining of business processes for the customer benefit. This metric has caused an over analysis of data while driving to conclusions that are not statistically valid and are not improving customer satisfaction.
- Incentive for deliverables that meet the above criteria will be allocated as follows:
 - Base Project and Planning deliverables – 50% of allocated compensation
 - Survey Enhancement Execution deliverables – 33% of allocated compensation
 - Report Enhancement Execution deliverables – 17% of allocated compensation
- Following conversations from Q4 2023 into Q1 2024, LIPA has indicated (on 3/20/24) that they would no longer like to pursue the data automation component in 2024 due to costs/effort. This was PSEG Long Island's initial position in the beginning of 2023, indicating that resources and cost would be significant for unknown benefits at this time.

Items Declined and PSEG Long Island Position:

- **Deliverable: CS-05.03 - Submit plan to expand the surveyed channels. Update the implementation date in Smartsheets – Completed, delivered 03/31/23 per agreed exception date**
 - Declined in Smartsheets with no formal feedback provided. LIPA and PSEGLI agreed that this deliverable could be submitted with the department wide survey strategy (CS-05.07 deliverable), after multiple meetings in January/February (with DPS present).
- **Deliverable: CS-05.04 - Submit business rules required to trigger the survey at the appropriate time in the journey. Update the implementation date in Smartsheets. Completed**
 - Declined in Smartsheets; however this was submitted within 3/31 survey strategy approach (CS-05.07).
- **Deliverable: CS-05.05 - Submit list of proposed supplemental data to enrich reporting of payment, collections, & billing survey results. Update the implementation date in Smartsheets. Completed**
 - Declined in Smartsheets. LIPA acknowledged that PSEGLI submitted list of supplemental data. PSEG LI indicated that this would be a very manual process and would require IT resources/funding to automate reporting on a monthly basis. PSEG LI currently exploring scope, resources, budget, timing to automate this as part of 2024 metric. (Note: LIPA has subsequently in 2024 backed away from this position due to cost/effort and relative value)
- **Deliverable: CS-05.06 - Submit plan to supplement outage survey results with identified data. Update the implementation date in Smartsheets. Completed**
 - Declined in Smartsheets. PSEG LI had been discussing potential options with LIPA throughout the year to accommodate this deliverable. On 7.17 both parties agreed on approach for Q4.
- **Deliverable: CS-05.07 - January survey result reports and supporting detail Completed**
 - Digital – fully delivered on time
 - Phone - LIPA rejection due to low sample size delivered by survey contractor in first month with new surveys (NOTE: monthly deliverable with only one month rejected; all other months met) – this provides more than an adequate sample size to deliver on LIPA's stated objective **Completed**
- **Deliverable: CS-05.07 - Provide recommendations for department-wide survey strategy and approach. Completed**
 - Declined in Smartsheets with no formal feedback provided. Survey enhancement channel dates were dependent on CCaaS go-live which had been postponed until November.

CS-09 - Billing Exception Cycle Time

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$62,775.59		

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

CS-9 Billing Exception Cycle Time

OSA Incentive: \$55,713



Metric Definition

Billing Exception Cycle Time measures the timely rendering of accurate bills to customer. This metric measures the percent of billing exceptions completed within the prescribed three-business day requirement for completion. All bills scheduled for billing that do not have an exception are issued within the 3 business days.

Calculation

Calculated as the number of billing exceptions completed within the required number of business days (three days) divided by the total number of billing exceptions completed by month, expressed as a percentage. Scheduled bills without exceptions are issued within 3 days.

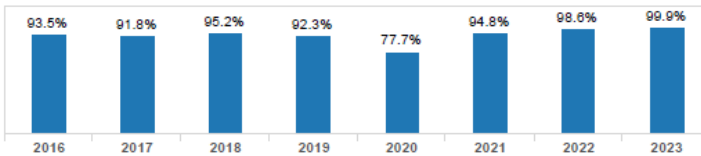
YTD



Month

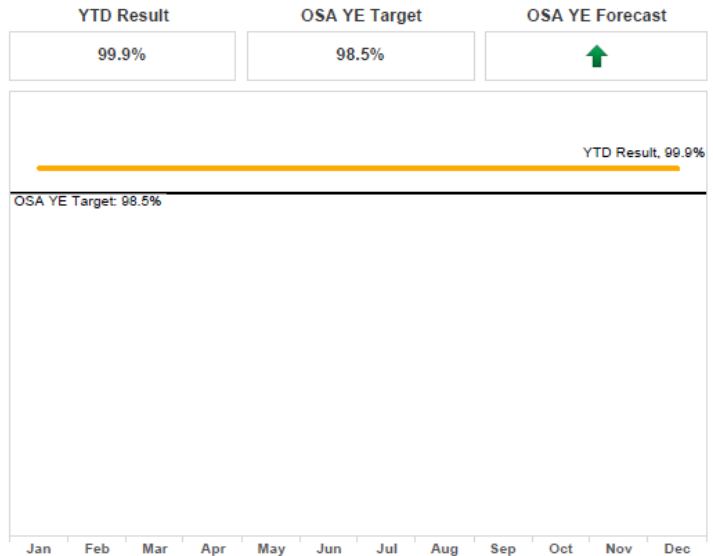


YTD Trend: December

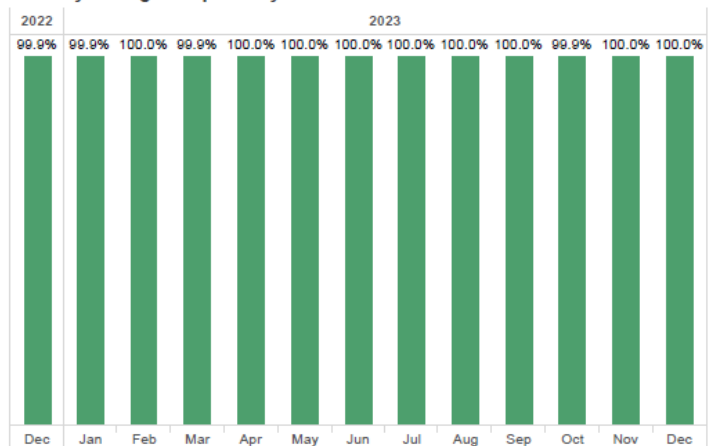


YTD Statistics: December

	Demand	HighLow	MRP1	MRP2	Regular	Total
2022						
Exceptions Completed By Rep	46,334	9,712	1,674	14,909	43,096	115,725
Exceptions Completed in 3 Days	45,405	9,606	1,592	14,802	42,750	114,155
Average days to complete	1.8	1.5	2.0	1.6	1.5	1.7
Billing Exception Cycle Time	98.0%	98.0%	95.1%	99.3%	99.2%	98.6%
2023						
Exceptions Completed By Rep	37,276	8,983	1,048	14,917	42,033	104,257
Exceptions Completed in 3 Days	37,266	8,983	1,047	14,917	42,032	104,245
Average days to complete	1.4	1.2	1.4	1.6	1.2	1.3
Billing Exception Cycle Time	99.9%	100.0%	99.9%	100.0%	99.9%	99.9%



Monthly Billing Exception Cycle Time Results



Summary

- PSEG Long Island achieved a billing exception cycle time of 1.3 days to complete and completed 99.9% of billing exceptions within three days as outlined in the metric.
- PSEG Long Island completed 104,257 billing exceptions by a rep with 104,245 completed within the 3 day targeted window.

CS-10 - Billing Cancelled Rebill

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$125,551.18		

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

CS-10 Billing Cancelled Rebill

OSA Incentive: \$111,427



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

The Service Provider has the option to exclude the highest and lowest performing month from the calculation; however, if Service Provider chooses to exclude any outlier it must exclude both the highest and lowest months.

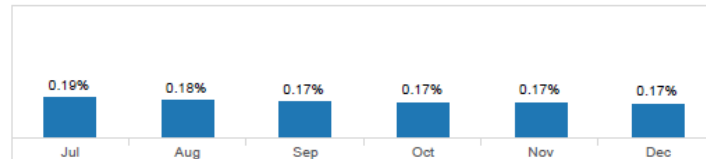
YTD

2023	0.17%
------	-------

Month

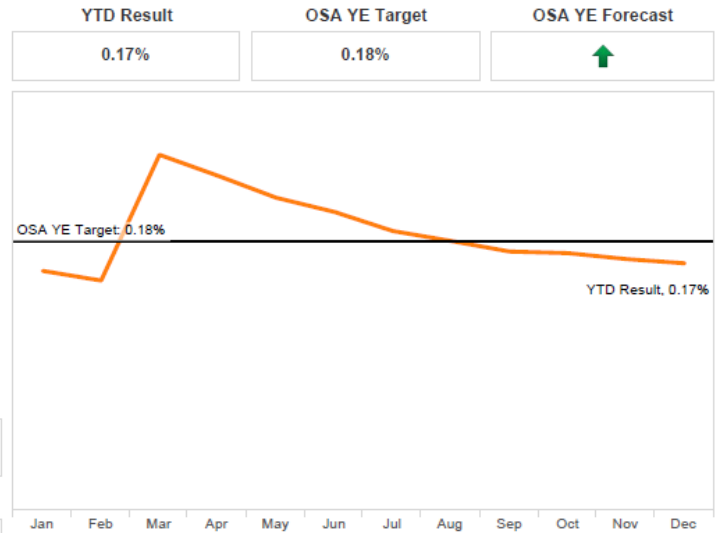
2023	0.13%
------	-------

YTD Billing Cancell Rebill

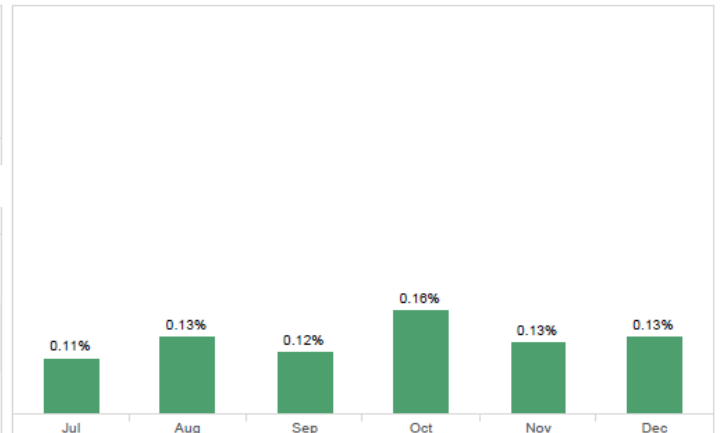


Monthly Statistics:

	Jul	Aug	Sep	Oct	Nov	Dec
Cancelled Rebills	1,236	1,501	1,329	1,817	1,442	1,510
Number of Unique Bills	1,115,530	1,119,104	1,128,817	1,118,498	1,118,942	1,122,711
Billing Cancelled Rebill	0.11%	0.13%	0.12%	0.16%	0.13%	0.13%



Monthly Billing Cancell Rebill



Summary

- PSEG Long Island achieved a cancelled rebill percentage of 0.18% of all unique bills.
- PSEG Long Island 22,140 rebills out of 13,374,028 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		

J F M A M J J A S O N D **CS-11 Contact Center Service Level with Live Agent Calls** OSA Incentive: \$389,993



YTD Result	OSA YE Target	OSA YE Forecast
41.8%	80.0%	↓

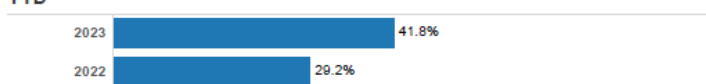
Metric Definition

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

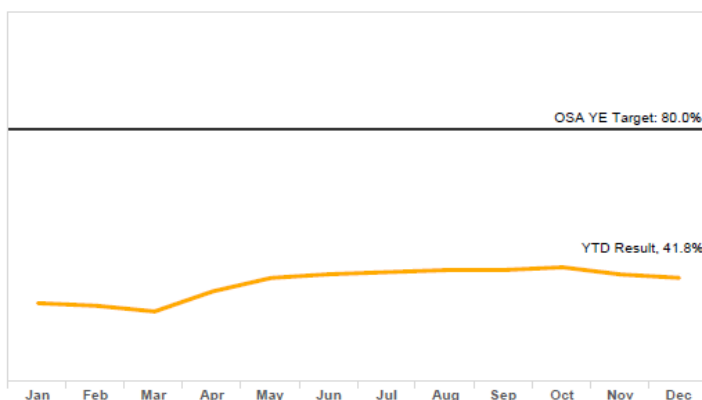
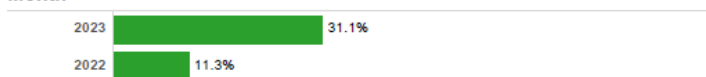
Calculation

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

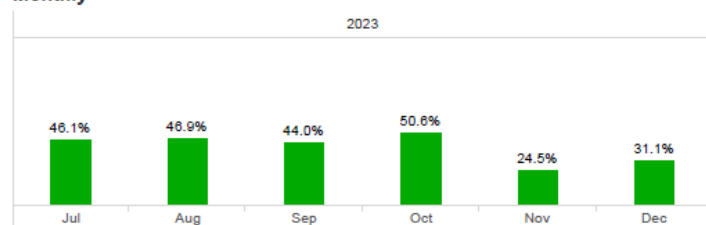
YTD



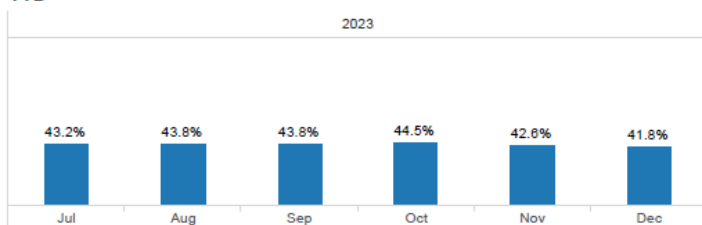
Month



Monthly



YTD



Call Volumes

		2023					
		Jul	Aug	Sep	Oct	Nov	Dec
Monthly	# Answered Within 30 sec (Rep)	49,782	54,978	45,089	52,708	25,462	28,747
	Storm # Answered Within 90 sec (Rep)	0	0	0	0	0	0
	Rep Calls Offered	107,882	117,168	102,589	104,084	103,807	92,348
YTD	# Answered Within 30 sec (Rep)	300,410	355,388	400,477	453,183	478,645	507,392
	Storm # Answered Within 90 sec (Rep)	0	0	0	0	0	0
	Rep Calls Offered	694,781	811,949	914,538	1,018,622	1,122,429	1,214,777

Summary

- PSEG Long Island did not achieve Contact Center Service Level with Live Agent Calls of 80% of calls answered within 30 seconds during blue sky and non-major storm periods and 90 seconds during major storms
- PSEG Long Island answered 507,392 within 30 second with a live rep out of the 1,214,777 rep answered called in 2023. PSEG Long Island answered 41.8% calls within the defined period not achieving the 80.0% targeted performance level.
- PSEG Long Island's average speed of answer was 273 seconds in 2023 or 4.55 minutes.

CS-13 - First Call Resolution (FCR)

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

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

CS-13 First Call Resolution (FCR)

OSA Incentive: \$111,427



Metric Definition

Survey immediately after calls to the residential and commercial customers to measure whether the customer issue was handled on the first call. The question used for calculation of this metric is Question #6 in the survey, the customer is prompted to: Instruction Prompt: "For this question, please answer one for yes or two for no". Question Six: "Was this the first time you called to resolve this issue?"

Calculation

Blended (residential + commercial calls) for issues handled on the first call/ total number of responses (first call + multiple calls)

YTD

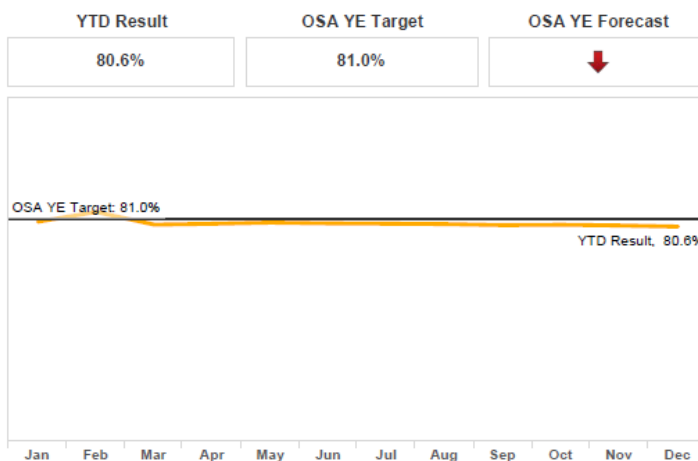


Month

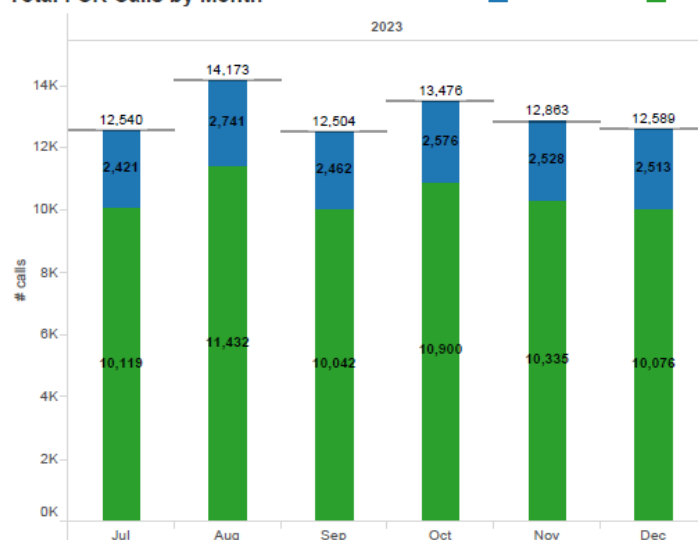


Month Summary

Intent Groups	Residential			Commercial			Blended		
	One	Multi	FCR %	One	Multi	FCR %	One	Multi	FCR %
Total	9,729	2,432	80.0%	347	81	81.1%	10,076	2,513	80.0%
Billing	4,540	923	83.1%	210	39	84.3%	4,750	962	83.2%
Payment	1,815	489	78.8%	52	20	72.2%	1,867	509	78.6%
Request Agent	1,704	541	75.9%	44	14	75.9%	1,748	555	75.9%
Collection	899	252	78.1%	22	1	95.7%	921	253	78.4%
Electric Serv	448	129	77.0%	9	2	81.8%	457	131	77.7%
Meter	181	48	77.0%	9	3	75.0%	170	51	76.9%
Outage	132	41	76.3%	1	2	33.3%	133	43	75.6%
Outbound	13	5	72.2%	0	0	0.0%	13	5	72.2%
TOD	9	2	81.8%	0	0	0.0%	9	2	81.8%
New Jersey	8	2	80.0%	0	0	0.0%	8	2	80.0%
BRS	0	0	0.0%	0	0	0.0%	0	0	0.0%
Energy Eff	0	0	0.0%	0	0	0.0%	0	0	0.0%
New Jersey BI..	0	0	0.0%	0	0	0.0%	0	0	0.0%
Smart Meter	0	0	0.0%	0	0	0.0%	0	0	0.0%
Web/Tech	0	0	0.0%	0	0	0.0%	0	0	0.0%



Total FCR Calls by Month



Summary

- FCR is measured via a Survey immediately after calls to the residential and commercial customers to measure whether the customer issue was handled on the first call. The question used for calculation of this metric is Question #6 in the survey, the customer is prompted to Instruction Prompt: "For this question, please answer one for yes or two for no". Question Six: "Was this the first time you called to resolve this issue?" FCR Rate is calculated as a blend of residential and commercial calls that are handled on the first call by the total number or survey responses.
- PSEG Long Island did not achieve First Call Resolution (FCR) Rate of 80.0%.
- Out of the 147,604 surveys taken by customers, 119,031 or 80.6% of customers answered that their issue was resolved on the first call. The remaining 28,573 customers or 19.4% stated they had to make multiple calls in order to resolve their issue.

CS-14 - Net Dollars Written Off

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

J F M A M J J A S O N D
CS-14 Net Dollars Written Off
OSA Incentive: \$222,853



Metric Definition

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

Calculation

Measured as the total accounts receivable write-offs less recoveries received from January 1, 2023 to December 31, 2023.

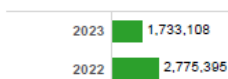
Exclusion:

If a state mandated moratorium on shut-off is instituted for residential customers for more than a month prior to June 2023, the target will be adjusted for the period of time the moratorium is in effect to reflect the impact.

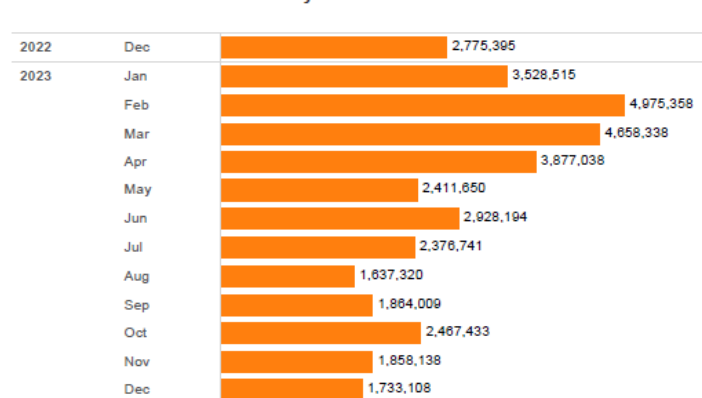
YTD



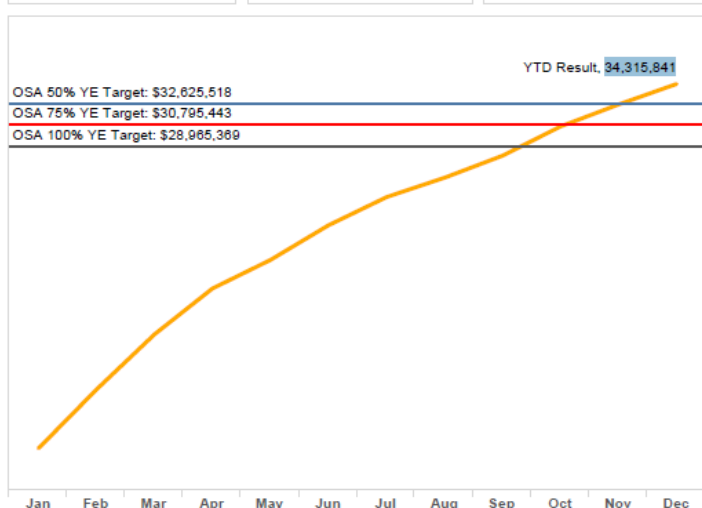
Month



Net Dollars Written Off - Monthly



YTD Result	OSA YE Target	OSA YE Forecast
34,315,841	28,965,369	↓



Monthly Statistics

		Month	YTD
2022	Dec	2,775,395	25,003,088
2023	Jan	3,528,515	3,528,515
	Feb	4,975,358	8,503,873
	Mar	4,658,338	13,162,211
	Apr	3,877,038	17,039,249
	May	2,411,650	19,450,899
	Jun	2,928,194	22,379,092
	Jul	2,376,741	24,755,833
	Aug	1,837,320	26,393,153
	Sep	1,864,009	28,257,162
	Oct	2,467,433	30,724,595
	Nov	1,858,138	32,582,733
	Dec	1,733,108	34,315,841

Summary

- PSEG Long Island did not achieve Net Dollars Written Off Targets of:
 - 100% Target: \$28,965,369
 - 75% Target: \$30,795,443
 - 50% Target: \$32,625,518
- PSEG Long Island's 2023 Net Dollars Written Off performance was \$34,315,841 thus exceeding all of the Net Dollars Written Off Target values.

CS-15 - AR > 90 (No Exclusions)

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

J F M A M J J A S O N D
CS-15 Arrears Aging Percent > 90 Days Past Due
OSA Incentive: \$334,280



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 PSEG LI collection activity is impacted by changes outside of its control which may subsequently affect the performance of field and/or back-office collections, PSEG LI and LIPA mutually agree to renegotiate these targets.

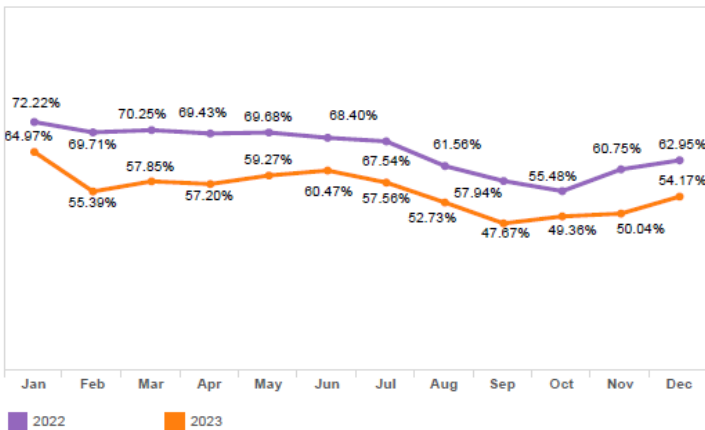
YTD

2023	55.82%
2022	65.63%

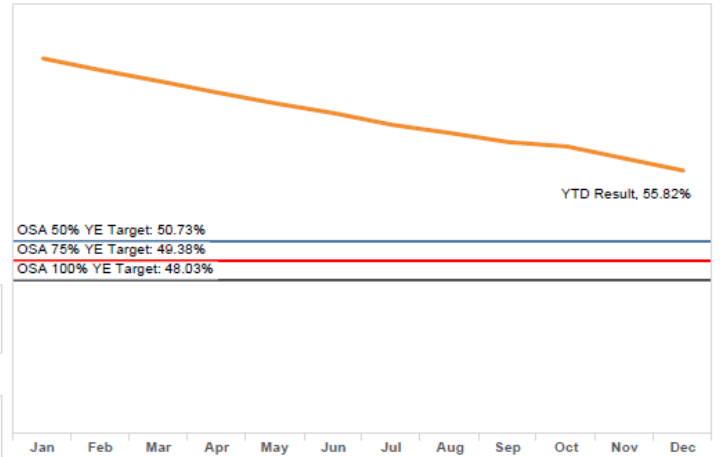
Month

2023	54.17%
2022	62.95%

Monthly AR > 90 Past Due (Year Over Year)



YTD Result	OSA YE Target	OSA YE Forecast
55.82%	48.03%	↓



Monthly Arrears

	2023					
	Jul	Aug	Sep	Oct	Nov	Dec
Current Dollars	346,795,262	304,826,675	335,991,649	218,355,822	202,171,491	196,081,607
30-59 Days	40,402,621	47,731,307	55,839,930	49,783,423	48,403,081	42,483,861
60-89 Days	17,521,129	17,890,164	22,270,842	23,027,151	23,931,672	21,283,877
> 90 Days	78,568,466	73,197,718	71,150,310	70,983,871	72,458,888	75,383,012
Total Arrears	136,492,216	138,819,188	149,261,082	143,794,246	144,793,640	139,150,751
Total Dollars Outstanding	483,287,478	443,645,883	485,252,731	382,150,068	346,965,131	335,232,358

Summary

- PSEG Long Island did not achieve Arrears Aging Percent > 90 Days Past Due targets of:
 - 100% Target: 48.03%
 - 75% Target: 49.38%
 - 50% Target: 50.73%
- PSEG Long Island's 2023 Arrears Aging Percent > 90 Days Past Due was 55.82% thus exceeding all of the Arrears Aging Percent > 90 Days Past Due Target values.
- The targets proposed for 2023 were lower than pre-pandemic levels and the 100 and 75% levels were lower than any operating year performance since PSEG LI has taken over operations. While PSEG Long Island has made substantial progress in reducing arrears post pandemic, targets should be reviewed for reasonableness and achievability.

CS-17 - LMI Program Participation

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

J F M A M J J A S O N D **CS-17 LMI (Low to Moderate Income) Program Participation** OSA Incentive: \$111,427



YTD Result OSA YE Target OSA YE Forecast

39,087	50,000	↓
--------	--------	---

Metric Definition

The number of unique valid LMI program enrollees in any month during the calendar year 2023.

Calculation

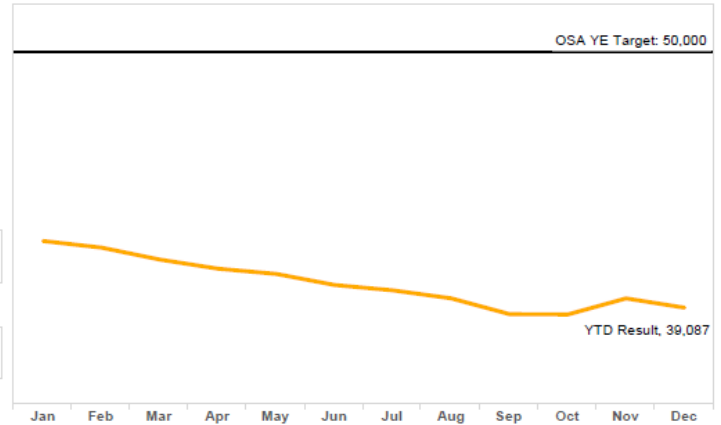
The number of LMI program enrollees in any month during the calendar year 2023.

YTD

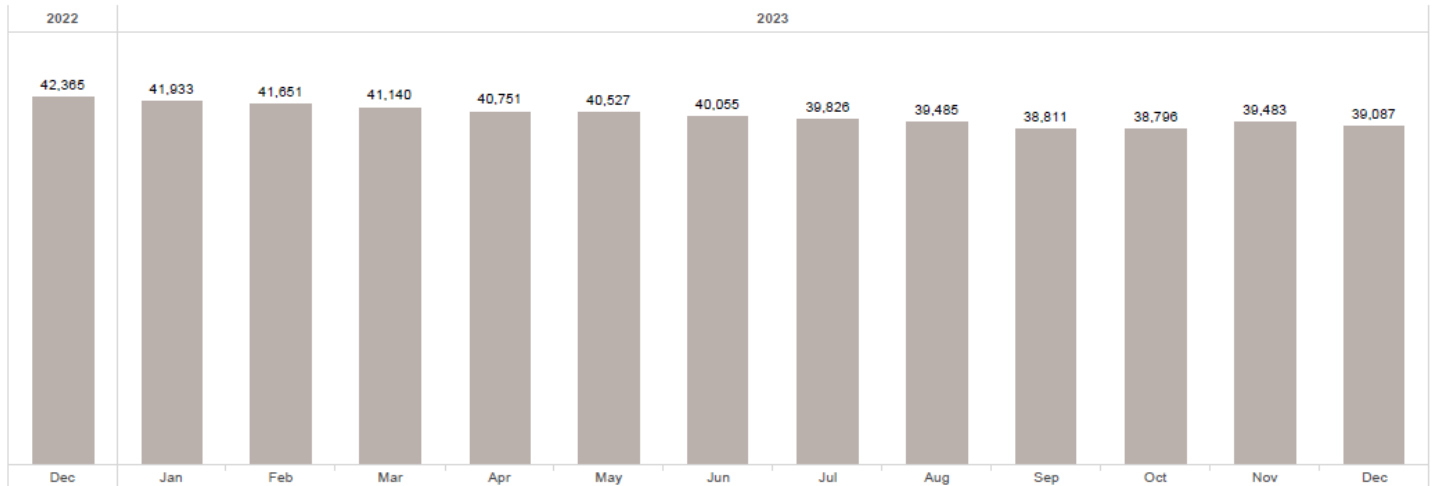
2023	39,087
2022	42,365

Month

2023	39,087
2022	42,365



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 2023.
- January 2023 was the highest number of enrollees which was 41,933 customers enrolled

CS-19 - Customer Complaint Rate

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$125,551.18		

J F M A M J J A S O N D CS-19 Customer Complaint Rate OSA Incentive: \$111,427



YTD Result	OS YE Target	OSA YE Forecast
3.3	4.2	↑

Metric Definition

Total Number of Initial Customer Complaints registered with the NY Department of Public Service/Public Service Commission.

Calculation

Monthly: Initial Complaint Rate = (Initial Complaints Total / Customer Population) * 100,000 Customers

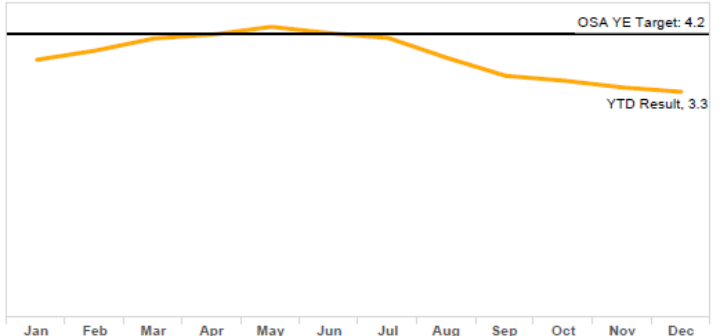
YTD: Rolling 12-month Initial Complaint Rate = [(Rolling 12 Month Initial Complaints Total / 12) / Customer Population] * 100,000 Customers

YTD

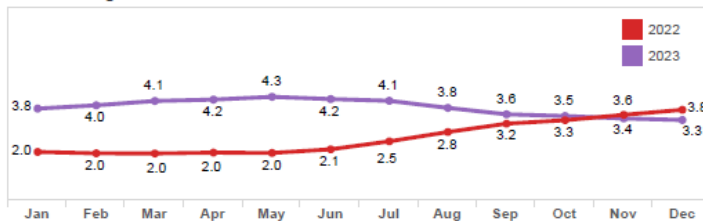
2023	3.3
2022	3.8

Month

2023	3.5
2022	4.3



PSEG Long Island YTD Result



Initial Complaint Rate by Month

	2022												2023											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Central Hudson Gas & Electr..	78.1	81.2	162.3	125.0	67.6	45.7	29.3	49.1	42.9	44.4	46.6	60.2	85.8	79.8	75.8	54.7	46.3	34.8	30.4	28.3	24.9	28.3	26.1	
Con Edison of New York	14.2	24.3	15.0	10.5	10.5	11.7	10.5	12.0	10.2	11.7	11.4	9.7	12.2	10.3	12.7	9.5	9.5	9.5	10.4	11.7	11.4	9.4	7.3	
National Fuel Gas Distribution	2.4	2.6	2.9	2.2	5.9	3.1	3.9	5.9	4.0	5.3	3.7	2.8	4.4	5.1	4.6	4.8	7.7	6.6	6.1	8.3	9.0	5.9	4.6	
National Grid - LI	3.8	4.3	3.4	3.2	2.2	3.5	3.7	5.0	4.0	4.2	4.2	3.0	4.8	2.9	3.0	3.2	4.6	3.5	1.9	3.0	2.7	2.9	4.0	
National Grid-Metro NY	5.0	5.0	4.0	3.6	3.5	4.6	7.5	9.4	7.1	4.6	5.4	6.2	5.7	5.4	6.0	5.0	6.0	5.6	4.4	6.2	7.1	5.9	4.8	
National Grid-Upstate	4.7	4.3	5.6	3.4	5.2	7.0	7.3	9.8	7.0	7.2	4.6	5.3	6.9	5.3	5.3	6.7	7.8	8.6	8.7	8.2	9.5	7.1	7.1	
New York State Electric & G..	8.3	21.8	20.1	12.8	15.3	16.5	16.5	18.8	23.7	26.1	32.9	26.4	51.9	71.0	57.1	39.7	42.1	35.8	23.2	26.4	24.9	26.7	19.5	
Orange & Rockland	9.0	9.9	11.5	5.8	6.6	8.6	10.7	14.0	11.5	6.2	7.8	8.6	16.4	9.8	15.9	9.4	9.8	13.5	15.9	13.9	11.9	7.4	8.6	
Rochester Gas & Electric Co..	16.7	15.8	21.7	21.7	18.8	23.8	23.1	36.8	68.2	121.7	87.1	56.7	82.2	93.1	57.7	42.4	33.8	39.9	27.6	32.6	32.6	29.0	28.1	
PSEG Long Island	2.0	2.0	2.7	2.0	1.9	3.7	5.5	6.8	6.1	3.9	4.3	4.3	2.7	3.6	4.8	2.7	3.3	2.6	4.7	3.3	2.9	3.0	3.1	3.5

Summary

- PSEG Long Island achieved the Customer Complaint Rate targeted performance level of 4.2 complaints per 100,000 customers. PSEG Long Island's 2023 year-end reported complaint rate was 3.3 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 [(466 initial complaints divided by 12 months) divided by 1,160,249 customers] times 100,000 customers equals 3.3 complaints per 100K customers.
- PSEG Long Island finished 2023 tied for the best complaint rate/100k customers among other NYS utilities. PSEG LI was the highest rated utility that was electric only or a combined utility.

1. PSEG Long Island – 3.3
2. National Grid – LI – 3.3
3. National Grid-Metro NY – 5.7
4. National Fuel Gas Distribution – 5.8

5. National Grid-Upstate – 7.2
6. Con Edison of New York – 10.3
7. Orange & Rockland – 11.8
8. New York State Electric & Gas Corp. – 37.1
9. Rochester Gas & Electric Corp. – 46.3
10. Central Hudson Gas & Electric Corp. – 48.0

CS-21 - Outage Information Satisfaction

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

J F M A M J J A S O N D **CS-21 Outage Information Satisfaction** OSA Incentive: \$222,853



Metric Definition

Survey all impacted customers after a residential and commercial customer experience of an outage to measure whether the customer was satisfied when asked the following question on the Chartwell survey, "Overall satisfaction with the information received during the outage". Measured on a scale of 1 to 10 with 10 being extremely satisfied and 1 being extremely dissatisfied.

Calculation

% of Satisfied Customers = Blended (Residential + Commercial responses) with a Rating of 6-10 for the Target Question / Total Number of Responses to the Target Question

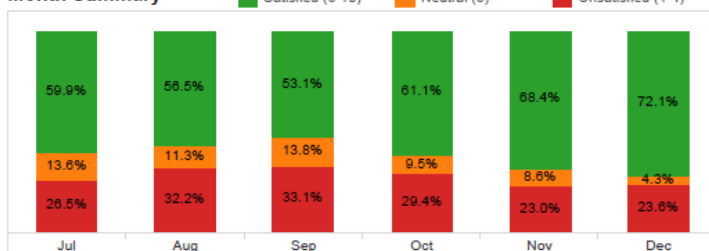
YTD

2023	63.3%
2022	64.4%

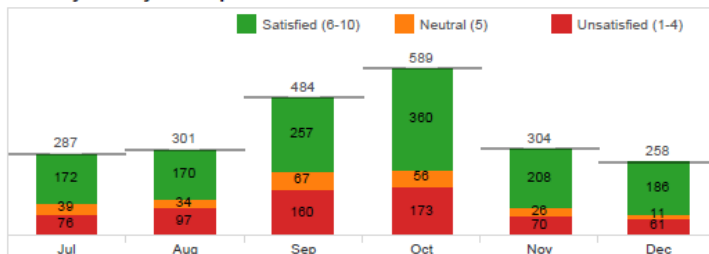
Month

2023	72.1%
2022	64.7%

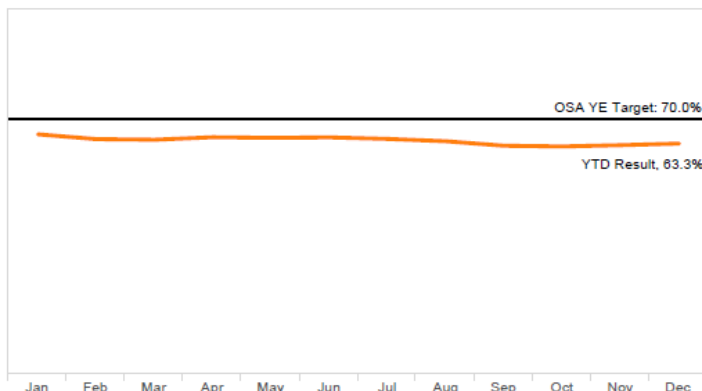
Month Summary



Monthly Survey Participants



YTD Result	OSA YE Target	OSA YE Forecast
63.3%	70.0%	↓



YTD Results

	Unsatisfied (1-4)	Neutral (5)	Satisfied (6-10)
Jul	25.1%	10.4%	64.6%
Aug	25.6%	10.5%	63.9%
Sep	26.5%	10.8%	62.7%
Oct	26.8%	10.7%	62.5%
Nov	26.6%	10.6%	62.8%
Dec	26.5%	10.3%	63.3%

Summary

- PSEG Long Island did not achieve the Outage Information Satisfaction targeted performance level of 70.0%. PSEG Long Island's 2023 year-end Outage Information Satisfaction was 63.3%.
- Although PSEG Long Island did not achieve the performance target there is a limited number of utilities that partake in this survey. PSEG Long Island was the best performing when compared to the other utilities in the overall customer satisfaction with overall performance during outages (Figure CS-21.1 and CS-21.2) and was the second in overall satisfaction with the information received during the outage (Figure CS-21.3).

Rolling 3 month average satisfaction

Average of Rolling3_AvgQ3 by SOM_Date and Utility

Utility ● ATCO ● CPS ● Entergy ● LADWP ● Oncor ● PSEG LI



Values shown represent 3 month rolling average of monthly values for question 3, or up to 3 months for new participants. Average of responses for question 3.

Figure CS-21-1 - Chartwell Tranzact 2023 YE Performance Data Report

Average satisfaction with overall performance for 2023

(Q3) How would you rate your satisfaction with [your utility's] overall performance in handling this outage? - Average rating on a 1-10 scale



Excludes those who answered *Prefer not to answer*.

Figure represents average of monthly values of question 3 for Jan-Dec 2023.

Figure CS-21-2 - Chartwell Tranzact 2023 YE Performance Data Report

Satisfaction with: Overall information received in 2023

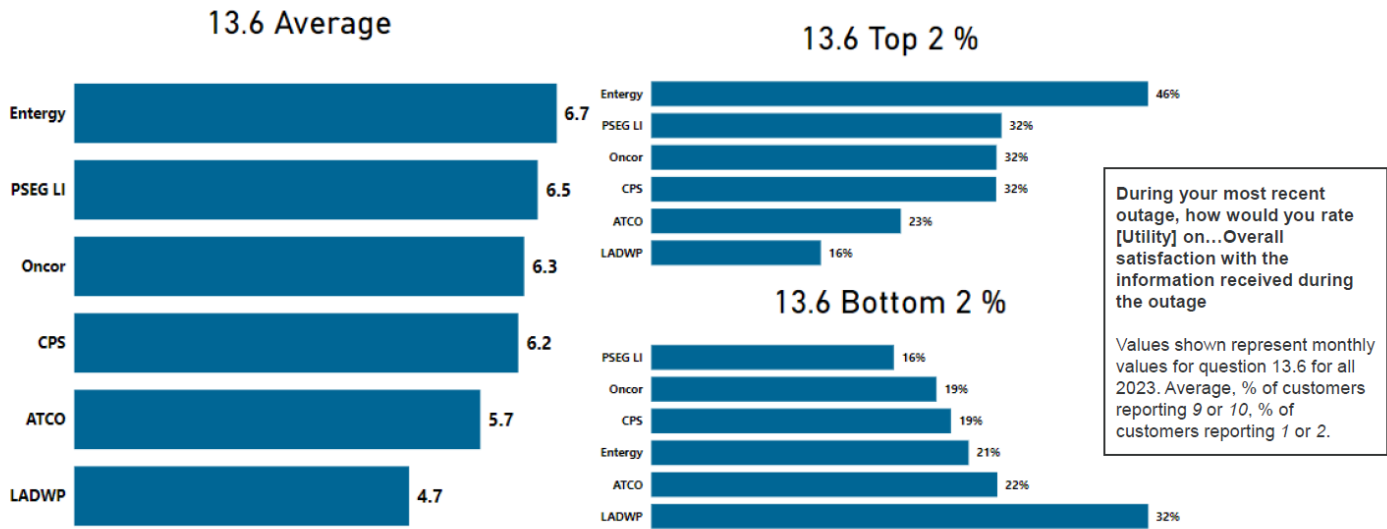


Figure CS-21-3 - Chartwell Tranzact 2023 YE Performance Data Report

Outage communications CSAT trails overall CSAT by 7%+



Source: Chartwell 2023 Residential Consumer Survey n=1,558

Figure CS-21-4 - Chartwell 2023 Residential Consumer Survey

CS-22 - AMI Roadmap and 2023 Improvements

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$125,551.18		

CS-22	AMI Roadmap and 2023 Improvements			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-22.01	Submit the three-year plan for AMI improvements.	7/1/2023	Achieved	Approved
CS-22.02	Submit assessment report on estimate requirements of what is needed to determine plan and proposed schedule. If PSEGLI needs to submit a budget request, provide breakdown of incremental funds required with a breakdown of expenses.	7/15/2023	Achieved	Approved
CS-22.03	Complete commercial disconnect pilot project implementation plan. Update the Metric deliverables in Smartsheet to include LIPA-approved PIP deliverable due dates.	2/28/2023	Achieved	Approved
CS-22.04	Define the proposed use cases for commercial disconnect, hypothesis, and how the population will be selected.	2/28/2023	Achieved	Approved
CS-22.05	Conduct commercial disconnect meter pilot.	10/30/2023	Achieved	Approved
CS-22.06	Produce assessment report of impact and future value proposition for converting the commercial single phase meters with disconnect with recommended deployment Strategy for 2024 based on the results of 2023 pilots of commercial disconnect.	11/30/2023	Achieved	Approved
CS-22.07	Submit plan timeline to investigate collectors in excess of 70% loading. Deliverables to be updated based on the plan timeline.	3/31/2023	Achieved	Approved
CS-22.08	Submit AMI meter latency report.	6/1/2023	Achieved	Approved
CS-22.09	Submit AMI network capacity & failover report.	10/1/2023	Achieved	Approved
CS-22.10	Submit artifacts demonstrating progressing collector loading below 70% according to the plan.	12/9/2023	Achieved	Approved
CS-22.11	Submit the final three-year plan for AMI improvements	10/1/2023	Achieved	Approved
CS-22.12	Complete Project plan template for the roadmap	3/31/2023	Achieved	Approved

Summary

- The objective of this metric was to effectively execute on Advance Metering Infrastructure system enhancements. There were three subprojects under this metric which included:
 - a. Business Enhancement Roadmap
 - b. Commercial Meter Disconnect Pilot
 - c. AMI Meter latency, capacity assessment, failover assessment, deployment of solutions to bring loading below 70%
- PSEG Long Island developed and submitted a business enhancement roadmap from July 1, 2023 through December 2025 to implement LIPA identified AMI improvements and improvement plans developed by PSEG Long Island.
- PSEG Long Island performed a 100 meter pilot of commercial disconnect for commercial Watt-Hour rate 280 with a pilot strategy focused on 2 or more use cases (i.e. collection, advance consumption, seasonal etc.) to assess impact and future value proposition for converting to commercial single phase meters with disconnect. PSEG Long Island also developed a deployment strategy for 2024 based on the results of 2023 pilots of commercial disconnect.
- PSEG Long Island developed and executed a plan to investigate collectors in excess of 70% and maintain loading below 70%, to be in line with industry best practices. This plan will include the following: AMI Meter latency, capacity assessment, failover assessment, deployment of solutions to bring loading below 70% beginning in 2023. Future work will be included in long-term AMI roadmap noted in 1. Upon completion of assessment PSEGLI will submit a budget request, plan, and proposed schedule to LIPA for approval of any incremental funds required.

CS-23 - Deferred Payment Agreement (DPA) Improvement

Metric Type	Qualitative	Metric Performance	↑ Partially Achieved (50%)
Incentive Compensation Claim	\$94,163.38		

CS-23 Deferred Payment Agreement (DPA) Improvement				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-23.01	Benchmark with a minimum of five high performing utilities, with at most three of the utilities being NY utilities, to determine best practices in regard to self-service options, agreement options, success rate of DPA's, # of agreements offered, definition of significant financial change. Complete by February 24, 2023.	2/24/2023	Achieved	Approved
CS-23.02	Develop a DPA policy that defines the required down payment, number of installments, and number of failures and train all customer-facing staff.	4/14/2023	Achieved	Approved
CS-23.03	Submit evidence of corrections to known issues and restrictions in CICS surrounding DPA's.	10/1/2023	Partially Achieved	Declined
CS-23.04	Submit enhanced DPA tracking and reporting.	10/1/2023	Partially Achieved	Declined

Summary

- The objective of CS-23 was to improve compliance with HEFPA regulations by creating consistent standards and guidelines across all customer platforms for deferred payment agreement options. Improve customer experience for establishing a deferred payment agreement while reducing outstanding receivables by improving self-service and customer interactions.
- PSEG Long Island surveyed high-performing utilities based on J. D. Power Overall Satisfaction across New York, New Jersey, Maryland, Pennsylvania and Illinois to determine best practices for Deferred Payment Agreements options including self-service. Below highlights the timeline of the benchmarking review:
 - Back Office Collections (BOC) survey launched December 2022
 - Follow-up discussion to gain further insight January and February 2023
 - Benchmarking of various self-service options used by other utilities
 - Options for incorporating best practices
- PSEG Long Island selected the following utilities for benchmarking:
 - a. National Grid (NatGrid)
 - b. Consolidated Edison (ConEd)
 - c. Baltimore Gas & Electric (BGE)
 - d. Commonwealth Edison (ComEd)
 - e. Philadelphia Electric Company (PECO)
 - f. Public Service Electric & Gas Company (PSE&G)
- PSEG Long Island developed a DPA policy that defined the required down payment, number of installments, and number of failures and train all customer-facing staff. The overall policy covered:
 - a. Standard Policy/Process Documentation Items including: Purpose, Applicability, Policy Ownership, Effective Date, Revisions, Objectives and Definitions.
 - b. The content included
 - a. Types of Deferred Payment Arrangements
 - b. Tariffs or Regulations that Inform the Policy
 - c. Eligibility and Requirements
 - d. Process and Responsibilities
 - e. Agreement Payment Compliance
 - f. Reinstatement
- PSEG Long Island was able to deliver on a portion of the CAS enhancements and DPA Tracking and Reporting. PSEG Long Island wants to note that during metric negotiations it was noted that applicable CAS resources to be able to deliver on the requirements of this metric were prioritized to Time-Of-Day rollout and achievement of all LIPA request was not possible because of the resource constraints. Additional funding would not have solved the

problem as there is a specialized skillset for being able to make coding changes to PSEG Long Island's CAS system and those resources need to be prioritized.

- PSEG Long Island was able to put the following enhancements into production in alignment with the metric:
 1. Correcting the number of Customer Deferred Payment Agreements identifier in CAS
 2. To show the percentage (%) of the DPA down payment
 3. Without accounts with Result Code 11/Letter Code 9
 4. Includes the number of months/years of the agreement
 5. Includes the percent (%) of the down payment
 6. Includes a field to indicate that the customer has an active DCR agreement
 7. Update the Daily DPA Report [AGMD] and the Monthly DPA Report [AGMM] with columns that highlight accounts that exceed terms for greater than 6 months (commercial) and agreements less than \$10.00
- PSEG Long Island was unable to deliver the following enhancements into production because of resource constraints:
 1. Breaking DPA's that haven't paid the full required amount by the required deadline and remain as active on accounts
 2. Modify self-service rules to reduce the % of customers who are unable to utilize self-service because of business rules
 3. To show the difference between an extension (additional time to pay) and a DPA
 4. To show the dollar amount collected on the DPA and the dollar amount collected on current charges
 5. To show the number of reinstated DPAs for each customer
- PSEG Long Island is claiming 50% (\$83,570.00) of allocated compensation for CS-23 given what was achieved and the noted resource constraints identified during the metric process.

CS-24 - Payment Transaction Ease

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$188,326.77		

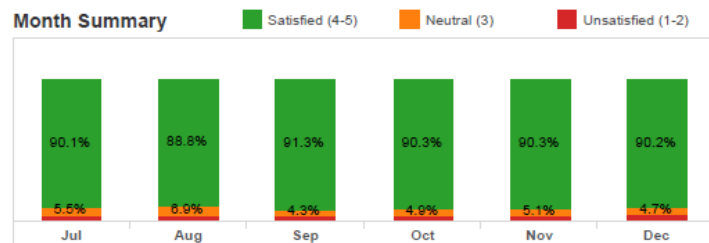
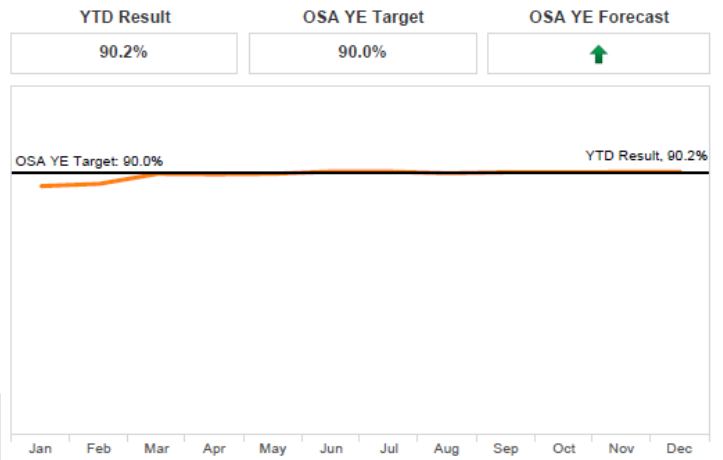
J F M A M J J A S O N D **CS-24 Payment Transaction Ease** OSA Incentive: \$167,140



Survey a representative subpopulation of customers after a contact to make a payment to measure whether the customer perceived the interaction as easy when asked the following question on the transactional performance survey, "How would you rate the ease of your transaction?" Responses are measured on a scale of 1 to 5 with 5 being very easy and 1 being very difficult.

Calculation
 % of Customers Perceived Payment Interaction as Easy = Blended (Live Agent (Phone) + MyAccount Web + MyAccount Mobile App + Text/SMS Responses) with a Rating of 4-5 for the Target Question / Total Number of Responses to the Target Question

Exclusion
 Surveys should exclude 1) payments made via recurring credit card or recurring ACH (Direct Pay), 2) payments made as part of another transactions identified by PSEG LI and approved by LIPA, 3) payments made in channels not listed in the metric definition.

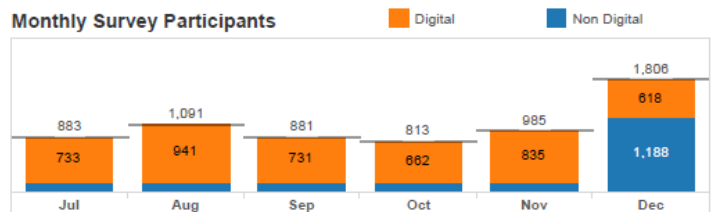


Channel Breakdown By Month

	Jul	Aug	Sep	Oct	Nov	Dec
Payment Transaction - MyAccount (Website)	86.3%	85.4%	89.4%	88.9%	87.6%	84.3%
Payment Transaction - MyAccount (Mobile App)	92.2%	91.7%	91.3%	90.1%	92.5%	89.0%
Payment Transaction - Text	98.7%	98.4%	100.0%	100.0%	97.8%	96.4%
Non Digital	94.0%	90.0%	90.7%	89.4%	90.7%	91.7%

YTD Results

	Unsatisfied (1-2)	Neutral (3)	Satisfied (4-5)
Non Digital	4.5%	4.6%	91.0%
Digital	4.2%	5.8%	89.9%
Overall	4.3%	5.6%	90.2%



Summary

- PSEG Long Island achieved the Payment Transaction Ease targeted performance level of 90.0%. PSEG Long Island's 2023 year-end reported performance was 90.2%.

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

Metric Type	Quantitative	Metric Performance	Reallocate Unable to Measure
Incentive Compensation Claim	Reallocate Unable to Measure		

J F M A M J J A S O N D **CS-25 Interactive Voice Response (IVR) Containment Rate** OSA Incentive: \$222,853



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. Normal hang ups and transfers to payment vendor are considered contained and are to be counted in the numerator. Customer initiated responses to outbound contacts that are routed to the IVR for a follow-up are to be counted in the denominator. Callbacks are only to be counted once in the denominator.

Calculation

% of Calls Contained = (Normal Hang Up + Payment Vendor Transfers) / Total Number of Calls Offered to IVR (including HVCA)

Exclude from the numerator and denominator the following:

1) Performance from March 20, 2023 through June 30, 2023. Targets will not be adjusted for delays in system implementation. 2) Transfers from ACD back to IVR.

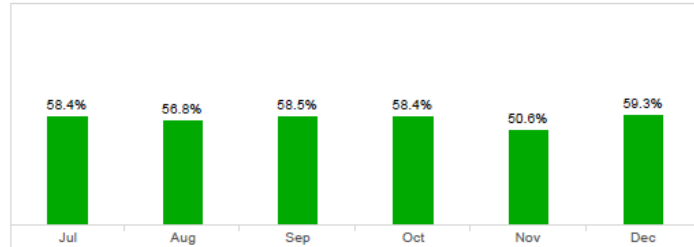
YTD



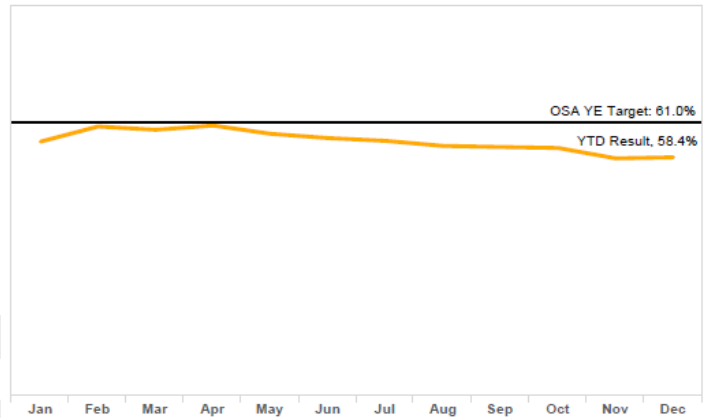
Month



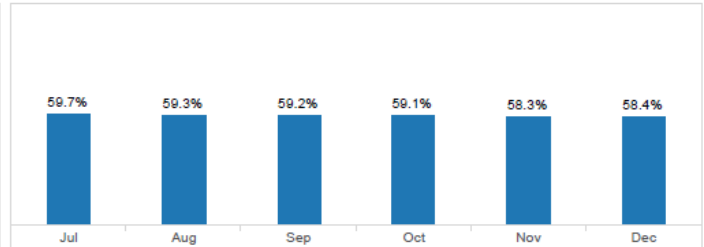
Monthly



YTD Result	OSA YE Target	OSA YE Forecast
58.4%	61.0%	↓



YTD



Call Volumes

		2023					
		Jul	Aug	Sep	Oct	Nov	Dec
Monthly	IVR Calls Answered	274,806	284,870	262,644	264,452	276,672	266,923
	IVR Calls Satisfied	160,578	161,685	153,619	154,527	140,099	158,248
YTD	IVR Calls Answered	1,838,844	2,123,714	2,386,358	2,650,810	2,927,482	3,194,405
	IVR Calls Satisfied	1,096,915	1,258,600	1,412,219	1,566,746	1,706,845	1,865,093

Summary

- PSEG Long Island new IVR went live in November of 2023. This was original go-live date was delayed and then it was mutually agreed to be implemented after storm season in November of 2023. The metric called for a 90 day stabilization period post go-live. This metric is unable to be evaluated against the stated metric criteria because of the timing of go-live. PSEG Long Island is recommending reallocation among the Customer Services function for allocated compensation for this metric.

CS-26 - Life Sustaining Equipment (LSE) Customer Compliance

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$125,551.18		

CS-26 Life Sustaining Equipment (LSE) Customer Compliance				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-26.01	An annual recertification letter will be mailed and emailed if available, to all LSE customers excluding 2022 new enrollments. A request to 2022 new enrollees to validate contact information and to set expectation of the 2024 certification process will be mailed.	1/31/2023	Achieved	Approved
CS-26.02	Update the existing LSE report to ensure all active accounts have the following additional data points: the LSE patient name, patients relationship to Customer of Record (COR), LSE medical device/condition, LSE contact information if not the COR or COR relative, date of last field investigation, the associated result of the last field investigation, and a column representing the last validation.	2/28/2023	Achieved	Approved
CS-26.03	Update the LSE report noted above for all LSE customers who have not validated prior to 1/1/22 to include LexisNexis response on LSE patient status/ location (deceased, moved, still at location) and any updated contact information.	7/31/2023	Achieved	Approved
CS-26.04	A 1st field investigation with the intent to recertify or remove non-eligible customers who did not respond to the annual recertification.	5/31/2023	Achieved	Approved
CS-26.05	A 2nd annual recertification letter must be sent via USPS certified mail to each customer who did not respond to the 1st letter and we had no contact on the 1st field visit.	6/15/2023	Achieved	Approved
CS-26.06	A second field investigation and additional back office research will be conducted to all LSE customers with a last validation prior to 1/1/20 who did not respond to the 1st and 2nd letters and the 1st field visit. A path forward documenting any contact history to address non-responders will be documented for each account.	12/15/2023	Achieved	Approved
CS-26.07	Provide a list of all active LSE account numbers, the LSE patient name, LSE medical device/condition, date of last field investigation, and most recent recertification date.	12/31/2023	Achieved	Approved
CS-26.08	Develop path forward in consultation from DPS and Joint Utility for addressing missing patient information and removal of accounts more than 5 years without a response.	7/1/2023	Achieved	Approved
CS-26.09	PSEGLI to provide documentation on DPS response to the proposed PSEGLI recommendation about proactive DPS letter for addressing accounts more than 5 year without a response and propose action plan with JU, if DPS disagrees with the PSEGLI proposal	7/1/2023	Achieved	Approved
CS-26.10	Submit any LSE customers who has been identified as deceased or moved per Lexis Nexus or the USPS will have documentation submitted to the DPS for approval of removal.	7/31/2023	Achieved	Approved
CS-26.11	Demonstrate efforts to achieve agreement with the JUs and the DPS on an approved path forward for missing information and removal of accounts more than 5 years without a response. If DPS does not agree with the path forward, LIPA will accept clear efforts within the work group to advance this cleanup effort, including but not limited to the championing JU brainstorming of alternatives.	12/15/2023	Achieved	Approved

Summary

- The objective of this metric was for PSEG Long Island to improve the Life Sustaining Equipment (LSE) renewal and removal process by enhancing outreach and data gathering methods while adhering to DPS regulatory requirements.
- PSEG Long Island met all of the metric requirements associated with this metric.

CS-27 – Estimated Billing %

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$125,551.18		

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

CS-27 Estimated Bill %

OSA Incentive: \$111,427



Metric Definition

Measures the percent of bills that received an estimated bill. Estimated accounts are defined as metered accounts that have a current customer of record, including final bills and the account is not billed on an actual read.

Calculation

Calculated as the number of estimated bills divided by the total number of unique bills generated by month, expressed as a percentage.

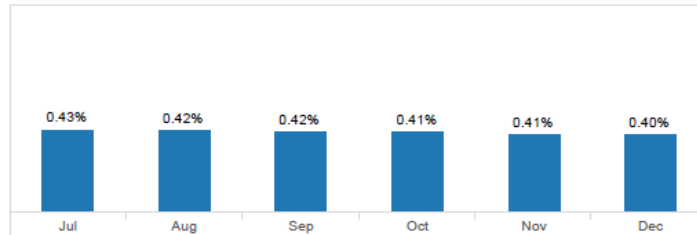
YTD

2023	0.40%
------	-------

Month

2023	0.37%
------	-------

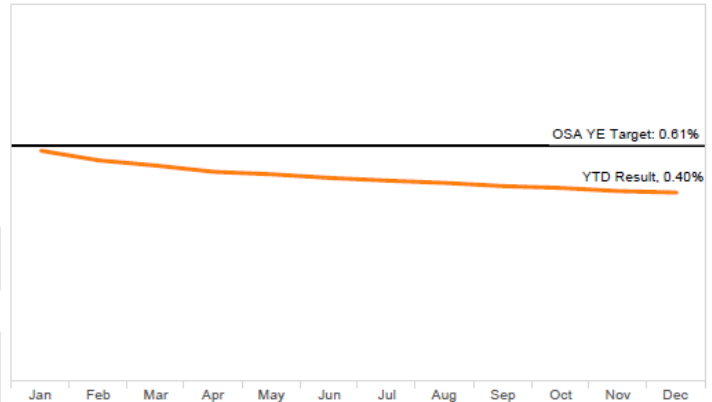
YTD Estimated Bill %



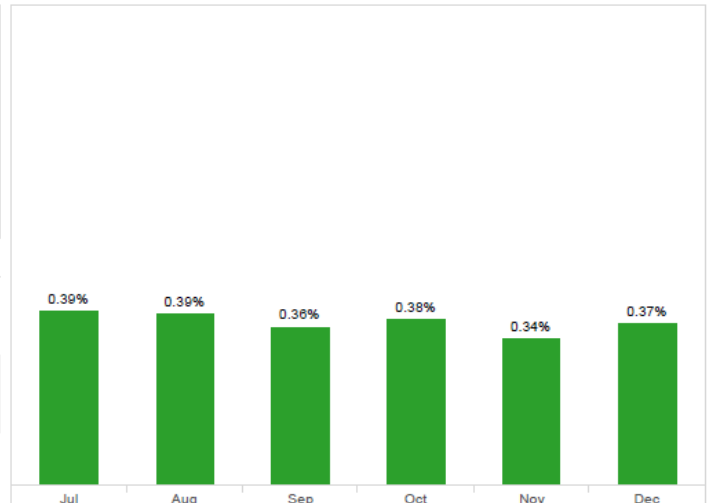
Monthly Statistics

	Jul	Aug	Sep	Oct	Nov	Dec
Estimated Bills	4,389	4,344	4,100	4,207	3,788	4,142
Number of Unique Bills	1,115,530	1,110,104	1,128,817	1,116,496	1,118,942	1,122,711
Estimated Bill %	0.39%	0.39%	0.36%	0.38%	0.34%	0.37%

YTD Result	OSA YE Target	OSA YE Forecast
0.40%	0.61%	↑



Monthly Estimated Bill %



Summary

- PSEG Long Island achieved the Estimated Billing % targeted performance level of 0.61%. PSEG Long Island's 2023 year-end reported complaint rate was 0.40% of all Unique Bills Estimated.
- PSEG Long Island estimated 53,796 bills out of 13,374,028 unique bills in 2023.

CS-28 - Move Process Improvement

Metric Type	Qualitative	Metric Performance	↑ Partially Achieved (50%)
Incentive Compensation Claim	\$94,163.38		

CS-28 Move Process Improvement				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-28.01	Move Process Improvement - Provide Project Implementation Plan. Update the Metric deliverables in Smartsheet to include the LIPA-approved PIP deliverable due dates.	2/21/2023	No Status	Declined
CS-28.02	Move Process Improvement - 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.	11/30/2023	No Status	Declined
CS-28.03	Move Process Improvement - Provide October's performance results and details of expected outcome targets.	11/10/2023	No Status	Declined
CS-28.04	Move Process Improvement - Provide November's performance results and details of expected outcome targets.	12/10/2023	No Status	Declined
CS-28.05	Move Process Improvement - Provide final performance results and details demonstrating the achievement of the expected outcome targets.	12/31/2023	No Status	Declined
CS-28.06	Move Process Improvement - Provide customer journey mapping document.	3/21/2023	No Status	Declined
CS-28.07	Move Process Improvement - Analyze voice of customer transactional survey feedback & obtain best practices from 3 top performers in industry. Compile findings in report to support desired design and submit report to LIPA.	As approved in final PIP	No Status	Declined
CS-28.08	Move Process Improvement - Provide business requirements informed by survey feedback and industry best practices report.	As approved in final PIP	No Status	Declined
CS-28.09	Move Process Improvement - Provide functional design.	As approved in final PIP	No Status	Declined
CS-28.10	Move Process Improvement - Provide Requirements Traceability Matrix	As approved in final PIP	No Status	Declined
CS-28.11	Move Process Improvement - Provide operational readiness documentation including but not limited to business processes/procedures and customer satisfaction hypothesis.	As approved in final PIP	No Status	Declined
CS-28.12	Move Process Improvement - Inform LIPA of go-live decision and submit completed go-live checklist that supports decision.	As approved in final PIP	No Status	Declined
CS-28.13	Move Process Improvement - Go-live	9/30/2023	No Status	Declined

Summary

- PSEG Long Island and LIPA mutually agreed to a refined scope for CS-28 metric in 2023 after misalignment earlier in the year. PSEG Long Island delivered the following in accordance with agreed to refined scope and delivery dates.
 - Website enhancements (went live May 2023)
 - RPA automation to be live in 2023 (went live on 12/19)
 - 2024 PIP delivered in 2023 (date submitted 12/18)
- PSEG Long Island is claiming partial achievement of 50% of the allocated incentive for delivering on the redefined 2023 scope for the CS-28 metric.

CS-29 - AMI Meter Validation, Estimation, Editing Enhancements & Data Reporting

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$188,326.77		

CS-29 AMI Meter Validation, Estimation, Editing Enhancements & Data Reporting				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
CS-29.01	MDM VEE enhancements - Complete project implementation plan. Update the Metric deliverables in Smartsheet to include LIPA approved PIP deliverable due dates.	3/31/2023	Achieved	Approved
CS-29.02	MDM reporting - Go Live.	8/31/2023	Achieved	Approved
CS-29.03	MDM VEE enhancements - Provide functional and technical design	4/30/2023	Achieved	Approved
CS-29.04	MDM VEE enhancements - Provide requirements traceability matrix.	8/23/2023	Achieved	Approved
CS-29.05	MDM VEE enhancements - Provide Go Live Checklist.	8/23/2023	Achieved	Approved
CS-29.06	MDM VEE enhancements - Go Live.	8/31/2023	Achieved	Approved
CS-29.07	AMI reporting - Complete project implementation plan. Update the Metric deliverables in Smartsheet to include LIPA approved PIP deliverable due dates.	2/17/2023	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-29.08	AMI reporting - Provide business requirements.	As approved in final PIP	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-29.09	AMI reporting - Provide functional and technical design.	As approved in final PIP	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-29.10	AMI reporting - Provide requirements traceability matrix.	As approved in final PIP	Exempted via Approved Exception Request	Exempted via Approved Exception Request
CS-29.11	MDM reporting - Finalization of New VEE Reporting requirements and template	6/30/2023	Achieved	Approved
CS-29.12	MDM reporting - Final Post production improvements MDM Daily Reporting for Actual Vs Estimated	10/1/2023	Achieved	Approved
CS-29.13	MDM reporting - Final Post production improvements Business process for Interval data monitoring	10/1/2023	Achieved	Approved
CS-29.14	MDM reporting - Final Post production improvements Billing Interface Performance Data report by Billing Cycle	10/1/2023	Achieved	Approved
CS-29.15	MDM VEE enhancements - Finalize the VEE methodology	6/30/2023	Achieved	Approved

Summary

- The objective of this metric was to effectively execute the Meter Data Management (MDM) Validation, Estimation and Editing Process and Data Reporting
- PSEG Long Island completed a project implementation plan. All deliverables were subsequently added to Smartsheet.
- PSEG Long Island enhanced the MDM Validation, Estimation, and Editing (VEE) process for interval and register reads to provide all missing interval and register reads from MDM consumed by other systems, including TOU billing for AMI meters. The estimate methodology for missing interval and register reads should utilize historical and load profile information.
- PSEG Long Island developed AMI reporting on completeness and quality of AMI interval and register reads measuring key elements related to actuals and estimates along with supporting critical data points to perform root cause analysis. The reporting should allow measurement of the AMI/MDM read performance, as well as, billing interface performance data.

Information Technology

IT-01 - Organizational Maturity Level

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$612,846.69		

IT-01	Organizational Maturity Level			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-01.1	PSEG LI IT Department achieves Maturity Level 3 in the CMMI V2 Development Model and all projects have adopted the CMMI Level 3 processes in accordance with the schedule specified in this metric.	09/01/23	Achieved	Approved
IT-01.2	PSEG LI IT Department determined to be at Maturity Level 3 in the CMMI V2 Development Model via an appraisal conducted by a LIPA consultant, in preparation for a CMMI Benchmark Appraisal to be conducted by a LIPA consultant in 2024 Q2.	12/31/23	Achieved	Open Item

Summary

- The objective of the goal is that PSEG Long Island IT Department achieves an Organizational Maturity Level at CMMI Level 3 in the CMMI V2 Development Model.
- The PSEG Long Island CMMI project team performed an internal evaluation and concluded the PSEG Long Island IT department achieved Maturity Level 3 in the CMMI V2 Development Model on the specified metric schedule. A major input to the determination was an affirming Evaluation Appraisal performed in accordance with ISACA’s CMMI Method Description Document (MDD) standard for performing CMMI Appraisals, and conducted by an independent ISACA-certified Lead Appraiser engaged by PSEG Long Island.
- LIPA has still not conducted its 2023 CMMI V2 Development Model appraisal. PSEG Long Island engaged an ISACA-certified Lead Appraiser to conduct its own CMMI V2 Development Model Evaluation Appraisal, and this claim is based upon the Lead Appraiser’s affirmation that the PSEG Long Island IT department is at Maturity Level 3 in the CMMI DV2 Development Model (please refer to the claim for IT-01.1).

IT-03 - System Resiliency

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

IT-03	System Resiliency			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-03.5	Submit Disaster Recovery Plans for each of the Wave 1 critical systems specified in this metric, that have been reviewed in 2023 and updated as needed.	03/15/23	Parties Not Aligned	Declined
IT-03.1	Submit Business Impact Analysis for each of the Wave 1 critical systems/processes specified in this metric.	03/31/23	Parties Not Aligned	Declined
IT-03.8	Submit Business Impact Analysis for each of the Wave 2 critical systems/processes specified in this metric.	05/01/23	Parties Not Aligned	Declined
IT-03.4	Submit Business Continuity Plans for each of the Wave 1 critical systems/processes specified in this metric, that have been reviewed in 2023 and updated as needed.	05/05/23	Parties Not Aligned	Declined
IT-03.10	Submit Business Continuity Plans for each of the Wave 2 critical systems/processes specified in this metric, that have been reviewed in 2023 and updated as needed.	06/15/23	Parties Not Aligned	Declined
IT-03.12	Submit Disaster Recovery Plans for each of the Wave 2 critical systems/processes specified in this metric, that have been reviewed in 2023 and updated as needed.	06/15/23	Parties Not Aligned	Declined
IT-03.9	Submit Business Impact Analysis for each of the Wave 3 critical systems/processes specified in this metric.	06/15/23	Parties Not Aligned	Declined
IT-03.7	LIPA-approved Disaster Recovery Plans are successfully exercised for each of the Wave 1 critical systems specified in this metric. Successful exercise of a Disaster Recovery Plan is as defined in the Objective section.	06/30/23	Parties Not Aligned	Declined
IT-03.11	Submit Business Continuity Plans for each of the Wave 3 critical systems/processes specified in this metric, that have been reviewed in 2023 and updated as needed.	08/01/23	Parties Not Aligned	Declined
IT-03.13	Submit Disaster Recovery Plans for each of the Wave 3 critical systems/processes specified in this metric, that have been reviewed in 2023 and updated as needed.	08/01/23	Parties Not Aligned	Declined
IT-03.6	Successfully complete a full-scale functional exercise of the LIPA-approved Business Continuity Plans for each of the Wave 1 critical systems/processes specified in this metric, under LIPA observation. Successful exercise of a Business Continuity Plans is as defined in the Objective section.	08/31/23	Parties Not Aligned	Declined
IT-03.14	Successfully complete a full-scale functional exercise of the LIPA-approved Business Continuity Plans for each of the Wave 2 critical systems/processes specified in this metric, under LIPA observation. Successful exercise of a Business Continuity Plan is as defined in the Objective section.	10/01/23	Parties Not Aligned	Declined
IT-03.2	LIPA-approved Disaster Recovery Plans are successfully exercised for each of the Wave 2 critical systems specified in this metric. Successful exercise of a Disaster Recovery Plan is as defined in the Objective section.	10/01/23	Parties Not Aligned	Declined
IT-03.15	Successfully complete a full-scale functional exercise of the LIPA-approved Business Continuity Plans for each of the Wave 3 critical systems/processes specified in this metric, under LIPA observation. Successful exercise of a Business Continuity Plan is as defined in the Objective section.	11/15/23	Parties Not Aligned	Declined
IT-03.3	LIPA-approved Disaster Recovery Plans are successfully exercised for each of the Wave 3 critical systems specified in this metric. Successful exercise of a Disaster Recovery Plan is as defined in the Objective section.	11/15/23	Parties Not Aligned	Declined

Summary

- PSEG Long Island did not achieve the deliverables associated with IT-03. PSEG Long Island and LIPA continue to not be aligned in metric construct and deliverables.
- In 2024 the IT-03 traditional metric has been broken into two separate metrics: 1.) IT-03: System Resiliency - Business Continuity Plans and Functional Drills and 2.) IT-10: System Resiliency - Disaster Recovery Plans and Testing.
- Both metrics require for LIPA to engage a third-party consultant to complete a gap assessment and provide recommendations for developing a resiliency program that ensures that PSEG Long Island can continue to perform its essential functions and deliver core capabilities during and following disruptions to normal operations, including unplanned partial or complete loss of one or more critical systems and/or infrastructure.

- The Consultant will also develop a recommended scope and framework for the resiliency program, including business and technical resiliency; assess the existing resiliency program and plans and provide a gap analysis and findings; provide recommendations for closing any identified gaps, with reasonable timelines for implementation; and develop a roadmap for maturing the resiliency program.
- The Consultant will also provide an achievable IT Systems Business Continuity Action Plan for 2024 targeted at having, by the end of the year, LIPA-approved BCPs . The IT Systems Business Continuity Action Plan will provide recommendations on the systems to be covered in 2024 and the actions required to achieve the target, considering the criticality of the impacted processes and functions, the impacts of any identified gaps, and the level of effort to close them.
- The IT Systems Business Continuity Action Plan will recommend specific deliverables and due dates (mutually agreed upon by LIPA and PSEG Long Island) for 2024, which shall be adopted into this metric on LIPA acceptance of the plan.
- The 2024 approach should provide clarity on metric expectations so PSEG Long Island performance can be adequately measured in regards to System Resiliency.

IT-04 - System and Software Lifecycle Management

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$111,426.67		

IT-04 System and Software Lifecycle Management				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-04.01	Submit updated 2023 IT and OT asset inventory, as specified in this metric.	02/28/23	Achieved	Approved
IT-04.02	Submit 2-year Refresh Plan, updated to account for any relevant changes to the approved 2022 inventory, and extended to 2024.	04/30/23	Achieved	Approved
IT-04.03	All planned work for 2023 in the LIPA-approved Refresh Plan is completed in accordance with the plan.	12/31/23	Achieved	Approved
IT-04.04	All planned work for 2023 for any Life Cycle Planning (LCP) projects that are not in the 2023 Refresh Plan, but are budgeted for 2023, is completed.	12/31/23	Achieved	Approved

Summary

- PSEG Long Island provided 2023 IT and OT asset inventory
- PSEG Long Island submitted 2-year Refresh Plan, updated to account for any relevant changes to the approved 2022 inventory, and extended to 2024.
- PSEG Long Island completed all planned work for 2023 in the LIPA-approved Refresh Plan is completed in accordance with the plan.
- PSEG Long Island completed all planned work for 2023 for any Life Cycle Planning (LCP) projects that are not in the 2023 Refresh Plan, but are budgeted for 2023, is completed.
- LIPA did provide an exception for one project that needed to be pushed into the 2024 workplan. PSEG Long Island had 2 storage projects (SOS 2284 and 2285) that were to be worked on in parallel this year but due to a dependency that was discovered during the implementation, they needed to be done in sequence. Hence the exception request is to deliver 2284 in 2024.
- Overall there was 22 projects identified under IT-04 and PSEG Long Island delivered on 21 of them and LIPA provided the exception noted above for SOS 2284.

IT-05 - System Implementation – 2023 Budget Projects

Metric Type	Qualitative	Metric Performance	↑ Partially Achieved (50%)
Incentive Compensation Claim	\$222,853.34		

- PSEG Long Island is claiming 50% of the allocated incentive compensation for IT-05 because of the breadth of work that was completed in 2023. This overall metric has 19 sub projects in scope. There was a fundamental change in the targets and calculations for IT-05 from 2022 to 2023 in the metric language and criteria which limited any potential for partial incentive compensation. This has such been rectified in the approved metric language in 2024 and PSEG Long Island is basing our claim on work that was completed within the portfolio of IT-05 projects under the construct of the 2022 and 2024 metrics.
- For Tier 1 projects: PSEG Long Island delivered 7 of 9 projects, 1 project was delayed but system was implemented successfully and 1 project was not completed because of prioritization of another rate design implementation. There were 2 additional projects one that had a scope that was not clear/defined and the other is a duplicative effort with IT-06 Standard Data Platform Project.
- For Tier 2 projects: PSEG Long delivered on 3 of 8 projects, 2 projects PSEG Long Island disagrees and disputes that status that LIPA has identified has and 3 projects were truly delayed in implementation.

Tier 1 Project Summary

Project #	Project Name	Performance
IT-05-T1.01	GIS – Long Term Plan, Architecture and Technology Stack Upgrade	Achieved
IT-05-T1.02	DER	Achieved
IT-05-T1.02a	4.01 Strategic Technology Plan Outage Reporting and Communications	Scope Not Clear/Defined
IT-05-T1.03	ADMS Roadmap	Achieved
IT-05-T1.04	MEGA	Achieved
IT-05-T1.05	Regulatory Billing (Solar Communities Credit- FIT V, CCA)	Achieved
IT-05-T1.05a	DIA-01	See Update on Standard Data Platform Project
IT-05-T1.06	CCaaS	Did Not Achieve – Project Go-Live Delayed
IT-05-T1.08	Billing Capability for Standby Rates	Did Not Achieve
IT-05-T1.09	CDG Billing Automation	Achieved
IT-05-T1.11	Enterprise Mobile Strategy	Achieved

IT-05-T1.01 – GIS – Long Term Plan, Architecture and Technology Stack Upgrade

Project Status: **Achieved**

IT-05-T1.01	GIS – Long Term Plan, Architecture and Technology Stack Upgrade			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-05-T1.01.01	GIS - Monthly Reporting of Project Status for the month of December 2022	01/20/23	Achieved	Approved
IT-05-T1.01.02	GIS - Monthly Reporting of Project Status for the month of January 2023	02/10/23	Achieved	Approved
IT-05-T1.01.03	GIS - Monthly Reporting of Project Status for the month of February 2023	03/10/23	Achieved	Approved
IT-05-T1.01.04	GIS - Monthly Reporting of Project Status for the month of March 2023	04/10/23	Achieved	Approved
IT-05-T1.01.05	GIS - Project Close-out Report	06/23/23	Achieved	Approved

Summary

- PSEG Long Island delivered all the project requirements and met all deliverables associated with the GIS – Long Term Plan, Architecture and Technology Stack Upgrade project.

IT-05-T1.02 – DER

Project Status: **Achieved**

IT-05-T1.02		DER		
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-05-T1.02.01	DER - Development and Configuration of Custom Dashboards, Reports and Alarms	01/13/23	Achieved	Approved
IT-05-T1.02.02	DER - Monthly Reporting of Project Status for the month of December 2022	01/20/23	Achieved	Approved
IT-05-T1.02.03	DER - Test Results and Artifacts (including test cases, scripts and data) for completed Functional Testing in QAS environment	04/24/23	Achieved	Approved
IT-05-T1.02.04	DER - Monthly Reporting of Project Status for the month of January 2023	02/10/23	Achieved	Approved
IT-05-T1.02.05	DER - Monthly Reporting of Project Status for the month of February 2023	03/10/23	Achieved	Approved
IT-05-T1.02.06	DER - Monthly Reporting of Project Status for the month of March 2023	04/10/23	Achieved	Approved
IT-05-T1.02.07	DER - Test Management Plan Document	04/27/23	Achieved	Approved
IT-05-T1.02.08	DER - Monthly Reporting of Project Status for the month of April 2023	05/10/23	Achieved	Approved
IT-05-T1.02.09	DER - Monthly Reporting of Project Status for the month of May 2023	06/12/23	Achieved	Approved
IT-05-T1.02.10	DER - Test Results and Artifacts (including test cases, scripts and data) for completed SAT	07/21/23	Achieved	Approved
IT-05-T1.02.11	DER - Monthly Reporting of Project Status for the month of June 2023	07/10/23	Achieved	Approved
IT-05-T1.02.12	DER - Test Results and Artifacts (including test cases, scripts and data) for completed Performance Testing	09/08/23	Achieved	Approved
IT-05-T1.02.13	DER - Monthly Reporting of Project Status for the month of July 2023	08/10/23	Achieved	Approved
IT-05-T1.02.14	DER - Monthly Reporting of Project Status for the month of August 2023	09/11/23	Achieved	Approved
IT-05-T1.02.15	DER - Test Results and Artifacts (including test cases, scripts and data) for completed UAT	09/25/23	Achieved	Approved
IT-05-T1.02.16	DER - Go-Live	10/31/23	Achieved	Approved
IT-05-T1.02.17	DER - Fully tested, documented, and deployed system, with all configuration items in CMDB, and scope delivered.	10/31/23	Achieved	Approved
IT-05-T1.02.18	DER - Monthly Reporting of Project Status for the month of September 2023	10/10/23	Achieved	Approved
IT-05-T1.02.19	DER - Project Close-Out Report	12/30/23	Achieved	Approved
IT-05-T1.02.20	DER - Monthly Reporting of Project Status for the month of October 2023	11/10/23	Achieved	Approved

Summary

- PSEG Long Island delivered all the project requirements and met all deliverables associated with the DER project.

IT-05-T1.02a – 4.01 - Strategic Technology Plan Outage Reporting and Communications

Project Status: **Project Scope Not Clearly Defined**

IT-05-T1.02a	4.01 - Strategic Technology Plan Outage Reporting and Communications			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-05-T1.02(6).01	4.01 - Implementation of Board adopted recommendation (4.01): Business-driven Strategic Technology Plan for Outage Reporting and Communications, as described in the approved Project Implementation Plan, delivered for LIPA approval.	06/30/23	Nothing Provided – Scope Not Clear or Defined	Declined

Summary

- The scope of this project is not clear/well-defined. There was no budget and/or plan for this project in PSEG Long Island's 2023 workplan.

IT-05-T1.03 – ADMS Roadmap

Project Status: **Achieved - Dispute**

IT-05-T1.03 ADMS Roadmap				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-05-T1.03.01	ADMS Roadmap - Functional and Technical Requirements, including use cases that map how information will be used, submitted to LIPA for approval.	03/31/23	Achieved	Declined
IT-05-T1.03.02	ADMS Roadmap - Conceptual Grid-Wide Design	03/31/23	Achieved	Declined

Summary

- PSEG Long Island submitted an ADMS Roadmap in 2022. LIPA and PSEG Long Island were not originally aligned on requested functional and technical requirements. PSEG Long Island has provided additional information and there was additional back and forth with incremental scope and requests. PSEG Long Island submitted a final Roadmap with finalized Functional and Technical requirements for LIPA review. While delayed, PSEG requested appropriate exceptions in a timely manner, which were granted and the final product is currently under LIPA review.

IT-05-T1.04 – MEGA

Project Status: **Achieved**

IT-05-T1.04		MEGA		
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-05-T1.04.01	MEGA - O&M documentation for the deployed MEGA Damage Assessment solution, including comprehensive Operations Runbooks covering the AGOL platform, the Damage Assessment application, and any associated interfaces or APIs	6/30/23	Achieved	Approved

Summary

- PSEG Long Island delivered all the project requirements and met all deliverables associated with the MEGA project.

IT-05-T1.05 – Regulatory Billing (Solar Communities Credit- FIT V, CCA)

Project Status: **Achieved**

IT-05-T1.05 Regulatory Billing (Solar Communities Credit- FIT V, CCA)				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-05-T1.05.	Regulatory Billing - Monthly Reporting of Project Status for the month of March 2023.	04/10/23	Achieved	Approved
IT-05-T1.05.	Regulatory Billing - Monthly Reporting of Project Status for the month of April 2023.	05/10/23	Achieved	Approved
IT-05-T1.05.	Regulatory Billing - Monthly Reporting of Project Status for the month of May 2023.	06/10/23	Achieved	Approved
IT-05-T1.05.01	Test Results and Artifacts for UAT	01/30/23	Achieved	Approved
IT-05-T1.05.02	Communication and Training Artifacts	02/18/23	Achieved	Approved
IT-05-T1.05.03	Signoff	02/28/23	Achieved	Approved
IT-05-T1.05.04	Updated O&M processes, procedures and policies,	03/28/23	Achieved	Approved
IT-05-T1.05.05	Fully tested, documented and deployed system, with all configuration items in CMDB	03/28/23	Achieved	Approved
IT-05-T1.05.06	Project Close-Out Report	03/30/23	Achieved	Approved
IT-05-T1.05.07	Regulatory Billing - Monthly Reporting of Project Status for the month of December 2022.	01/20/23	Achieved	Approved
IT-05-T1.05.08	Regulatory Billing - Monthly Reporting of Project Status for the month of January 2023	02/10/23	Achieved	Approved
IT-05-T1.05.09	Regulatory Billing - Monthly Reporting of Project Status for the month of February 2023	03/10/23	Achieved	Approved

Summary

- PSEG Long Island delivered all the project requirements and met all deliverables associated with the Regulatory Billing (Solar Communities Credit- FIT V, CCA) project.

IT-05-T1.05a – DIA-01

Project Status: **See Update on Standard Data Platform Project**

IT-05-T1.05a	DIA-01			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-6 T1.5.3	DIA-01 - Master Data Analytics Project Plan, providing a plan and long-term roadmap as specified in the attached "LIPA-PSEG-2022-IT-6 System Implementation Board Project Improvement Plans (PIPs) (Tier 1 and 2)" metric document, and including a Phase 1 deployment by the end of 2022, is developed and submitted to LIPA for approval.	06/30/23	See Update on Standard Data Platform Project	Declined

Summary

- This project overlaps with IT-06.T1.02 – Standard Data Platform Phase 2 – Please review summary under that project update.

IT-05-T1.06 – CCaaS

Project Status: **Did Not Achieve**

IT-05-T1.06		CCaaS		
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-05-T1.06	CCaaS - Functional & Technical Design Documents - Omilia P1 B3	01/09/23	Did Not Achieve	Declined
IT-05-T1.06	CCaaS - Requirements Traceability Matrix - Omilia P1 B1-3	01/09/23	Did Not Achieve	Declined
IT-05-T1.06	CCaaS - Change management and Training plan	01/16/23	Did Not Achieve	Declined
IT-05-T1.06.01	CCaaS - Requirements Traceability Matrix - NICE P1 B2	01/18/23	Did Not Achieve	Declined
IT-05-T1.06.02	CCaaS - Functional & Technical Design Documents - Omilia P1 B4	01/19/23	Did Not Achieve	Declined
IT-05-T1.06.03	CCaaS - Monthly Reporting of Project Status for the month of December 2022	01/20/23	Achieved	Approved
IT-05-T1.06.04	CCaaS - Functional & Technical Design Documents - NICE P1 FL2W	01/20/23	Did Not Achieve	Declined
IT-05-T1.06.05	CCaaS - Functional & Technical Design Documents - NICE P1 B3	01/30/23	Did Not Achieve	Declined
IT-05-T1.06.06	CCaaS - Requirements Traceability Matrix - Omilia P1 B4	01/30/23	Did Not Achieve	Declined
IT-05-T1.06.07	CCaaS - Performance/Stress Testing Results Evidence	01/30/23	Did Not Achieve	Declined
IT-05-T1.06.08	CCaaS - Monthly Reporting of Project Status for the month of January 2023	02/10/23	Achieved	Approved
IT-05-T1.06.09	CCaaS - Functional & Technical Design Documents - NICE P1 B4	02/14/23	Did Not Achieve	Declined
IT-05-T1.06.10	CCaaS - Test Results/Artifacts - NICE P1 B1	02/16/23	Did Not Achieve	Declined
IT-05-T1.06.11	CCaaS - Requirements Traceability Matrix - NICE P1 B3	02/28/23	Did Not Achieve	Declined
IT-05-T1.06.12	CCaaS - Test Results/Artifacts - Omilia P1 B1-3	03/08/23	Did Not Achieve	Declined
IT-05-T1.06.13	CCaaS - Monthly Reporting of Project Status for the month of February 2023	03/10/23	Achieved	Approved
IT-05-T1.06.14	CCaaS - Requirements Traceability Matrix - NICE P1 B4	03/10/23	Did Not Achieve	Declined
IT-05-T1.06.15	CCaaS - Requirements Traceability Matrix - NICE P1 FL2W	03/13/23	Did Not Achieve	Declined
IT-05-T1.06.16	CCaaS - Test Results/Artifacts - NICE P1 B2	03/28/23	Did Not Achieve	Declined
IT-05-T1.06.17	CCaaS - Requirements Traceability Matrix - NICE P1 FM	03/29/23	Did Not Achieve	Declined
IT-05-T1.06.18	CCaaS - Functional & Technical Design Documents - NICE P1 FM	03/31/23	Did Not Achieve	Declined
IT-05-T1.06.19	CCaaS - Business rule evaluation	03/31/23	Did Not Achieve	Declined
IT-05-T1.06.20	CCaaS - Communications plan	03/31/23	Did Not Achieve	Declined
IT-05-T1.06.21	CCaaS - Penetration Testing Results Evidence	04/03/23	Did Not Achieve	Declined
IT-05-T1.06.22	CCaaS - Test Results/Artifacts - Omilia P1 B4	04/04/23	Did Not Achieve	Declined
IT-05-T1.06.23	CCaaS - Test Results/Artifacts - NICE P1 B3	04/06/23	Achieved	Approved
IT-05-T1.06.24	CCaaS - Monthly Reporting of Project Status for the month of March 2023.	04/10/23	Achieved	Approved
IT-05-T1.06.25	CCaaS - Test Results/Artifacts - NICE P1 FL2W	04/10/23	Did Not Achieve	Declined
IT-05-T1.06.26	CCaaS - Test Results/Artifacts - NICE P1 B4	04/12/23	Did Not Achieve	Declined
IT-05-T1.06.27	CCaaS - Test Results/Artifacts - NICE P1 FM	04/17/23	Did Not Achieve	Declined
IT-05-T1.06.28	CCaaS - System retirement plan	04/17/23	Did Not Achieve	Declined
IT-05-T1.06.29	CCaaS - Functional & Technical Design Documents - NICE P1 WFM	04/25/23	Achieved	Approved

IT-05-T1.06		CCaaS		
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-05-T1.06.30	CCaaS - Functional & Technical Design Documents - Phase 2	04/25/23	Did Not Achieve	Declined
IT-05-T1.06.31	CCaaS - Requirements Traceability Matrix - NICE P1 WFM	04/25/23	Did Not Achieve	Declined
IT-05-T1.06.32	CCaaS - Requirements Traceability Matrix - NICE P1 QMA	04/25/23	Did Not Achieve	Declined
IT-05-T1.06.33	CCaaS - Requirements Traceability Matrix - NICE P1 IA	04/25/23	Did Not Achieve	Declined
IT-05-T1.06.34	CCaaS - Regression Test Results Evidence - QMA/IA	04/26/23	Did Not Achieve	Declined
IT-05-T1.06.35	CCaaS - Functional & Technical Design Documents - NICE P1 QMA	04/27/23	Achieved	Approved
IT-05-T1.06.36	CCaaS - Functional & Technical Design Documents - NICE P1 IA	04/27/23	Achieved	Approved
IT-05-T1.06.37	CCaaS - Regression Test Results Evidence - WFM	04/28/23	Did Not Achieve	Declined
IT-05-T1.06.38	CCaaS - Regression Test Results Evidence - CXone	05/01/23	Did Not Achieve	Declined
IT-05-T1.06.39	CCaaS - Executed Go- live decision checklist for delivery - Phase 1	05/01/23	Did Not Achieve	Declined
IT-05-T1.06.40	CCaaS - Test Results/Artifacts - NICE P1 WFM	05/08/23	Did Not Achieve	Declined
IT-05-T1.06.41	CCaaS - Go Live Phase 1 (NICE, Omilia, NQM, NFM, NWF, Frontline)	05/08/23	Did Not Achieve	Declined
IT-05-T1.06.42	CCaaS - Monthly Reporting of Project Status for the month of April 2023.	05/10/23	Achieved	Approved
IT-05-T1.06.43	CCaaS - Requirements Traceability Matrix - Phase 2	05/10/23	Did Not Achieve	Declined
IT-05-T1.06.44	CCaaS - Test Results/Artifacts - NICE P1 QMA	05/12/23	Did Not Achieve	Declined
IT-05-T1.06.45	CCaaS - Test Results/Artifacts - NICE P1 IA	05/12/23	Did Not Achieve	Declined
IT-05-T1.06.46	CCaaS - Test Closure Memo - Phase 1	05/12/23	Did Not Achieve	Declined
IT-05-T1.06.47	CCaaS - Executed Go- live decision checklist for delivery - Phase 2	06/05/23	Did Not Achieve	Declined
IT-05-T1.06.48	CCaaS - Monthly Reporting of Project Status for the month of May 2023.	06/10/23	Achieved	Approved
IT-05-T1.06.49	CCaaS - Test Results/Artifacts - Phase 2	06/12/23	Did Not Achieve	Declined
IT-05-T1.06.50	CCaaS - Go Live Phase 2 (Webchat & Biometrics)	06/12/23	Did Not Achieve	Declined
IT-05-T1.06.51	CCaaS - Test Closure Memo - Phase 2	06/19/23	Did Not Achieve	Declined
IT-05-T1.06.52	CCaaS - Monthly Reporting of Project Status for the month of June 2023.	07/10/23	Achieved	Approved
IT-05-T1.06.53	CCaaS - Enhancement decision matrix and roadmap	07/31/23	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-05-T1.06.54	CCaaS - Monthly Reporting of Project Status for the month of July 2023.	08/10/23	Achieved	Approved

Summary

- Although the dates on the PIP were missed, all deliverables for the project were submitted and reviewed in meetings with LIPA.
- Original go-live date was May 2023. Delivered in November 2023 based on mutual agreement not to deploy the system during storm season.
- Delivered in November with agreed upon materials. Continued to have meetings with Carolyn and Sarah and implementation went well and we are in production.

IT-05-T1.08 – Billing Capability for Standby Rates

Project Status: **Did Not Achieve**

IT-05-T1.08 Billing Capability for Standby Rates				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-05-T1.08.01	Billing capability for standby rates, to be optional for all commercial customers	12/29/23	No Status	Declined

Summary

- This project was originally planned for 2022. The Standby Rate project was deferred to 2023 because the order had not yet been issued by the Public Service Commission. The order was issued in October 2023 and LIPA requested a PIP. PSEG Long Island resources that work on rate changes projects were focused on TOD rate implementation which was a priority and PSEG Long Island did not provide a PIP for this work effort.

IT-05-T1.09 – CDG Billing Automation

Project Status: **Achieved**

IT-05-T1.09 CDG Billing Automation				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-05-T1.09.01	CDG Automated Billing - Monthly Reporting of Project Status for the month of December 2022.	01/20/23	Achieved	Approved
IT-05-T1.09.02	CDG Automated Billing - Monthly Reporting of Project Status for the month of January 2023.	02/10/23	Achieved	Approved
IT-05-T1.09.05	CDG Automated Billing - Monthly Reporting of Project Status for the month of February 2023.	03/10/23	Achieved	Approved
IT-05-T1.09.07	CDG Automated Billing - Monthly Reporting of Project Status for the month of March 2023.	04/10/23	Achieved	Approved
IT-05-T1.09.08	CDG Automated Billing - Monthly Reporting of Project Status for the month of April 2023.	05/10/23	Achieved	Approved
IT-05-T1.09.09	CDG Automated Billing - Monthly Reporting of Project Status for the month of May 2023.	06/10/23	Achieved	Approved
IT-05-T1.09.13	CDG Automated Billing - Monthly Reporting of Project Status for the month of June 2023.	07/10/23	Achieved	Approved
IT-05-T1.09.14	CDG Automated Billing - Monthly Reporting of Project Status for the month of July 2023.	08/10/23	Achieved	Approved
IT-05-T1.09.04	CDG Automated Billing - Updated Statements for LIPA	04/24/24	Exception Request Approved	Exception Request Approved
IT-05-T1.09.03	CDG Automated Billing - Development & Unit Test	05/27/24	Exception Request Approved	Exception Request Approved
IT-05-T1.09.06	CDG Automated Billing - System Integration Testing	06/21/24	Exception Request Approved	Exception Request Approved
IT-05-T1.09.10	CDG Automated Billing - UAT complete	07/19/24	Exception Request Approved	Exception Request Approved
IT-05-T1.09.11	CDG Automated Billing - Go-live Readiness	08/02/24	Exception Request Approved	Exception Request Approved
IT-05-T1.09.12	CDG Automated Billing - Go-live	08/07/24	Exception Request Approved	Exempted via Approved Exception Request
IT-05-T1.09.15	CDG Automated Billing - Project Close-Out Report	12/12/24	Exception Request Approved	Exception Request Approved

Summary

- PSEG Long Island delivered all the project requirements and met all deliverables associated with the CDG Billing Automation project.

IT-05-T1.11 – Enterprise Mobile Strategy

Project Status: **Achieved**

IT-05-T1.11 Enterprise Mobile Strategy				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-05-T1.11.01	Enterprise Mobile Strategy - Long-term Enterprise Mobile Plan with sequencing and prioritization, submitted for LIPA approval.	06/30/23	Achieved	Approved
IT-05-T1.11.02	Enterprise Mobile Strategy - Long-term Field Work Management/Mobile App Strategy document, as specified in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, delivered for LIPA approval.	06/30/23	Achieved	Approved

Summary

- PSEG Long Island delivered all the project requirements and met all deliverables associated with the Enterprise Mobile Strategy project.

Tier 2 Project Summary

Project #	Project Name	Performance
IT-05-T2.02	CyberArk for CNI	Did Not Achieve
IT-05-T2.03	Cybersecurity Program	Did Not Achieve (Completed 3 of 4 projects)
IT-05-T2.04	Dragos for CNI	Did Not Achieve
IT-05-T2.05	Industrial Defender for DSCADA	Achieved
IT-05-T2.06	AVLS Integration with Physical ID Badge System	Dispute
IT-05-T2.07	AMI System Enhancements	Dispute – Completed All Three Projects on Schedule
IT-05-T2.08	Suffolk County Sewage Billing	Achieved
IT-05-T2.09	Rate Change Enhancements	Achieved

IT-05-T2.02 – CyberArk for CNI

Project Status: **Did Not Achieve**

IT-05-T2.02	CyberArk for CNI			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-05-T2.02.01	CyberArk for CNI - Detailed Project and Deployment Plan	01/13/23	Achieved	Approved
IT-05-T2.02.02	CyberArk for CNI - Project Team Kick-Off Meeting Notes	01/19/23	Achieved	Approved
IT-05-T2.02.03	CyberArk for CNI - Monthly Reporting of Project Status for the month of December 2022.	01/20/23	Achieved	Approved
IT-05-T2.02.04	CyberArk for CNI - Bill of Materials/Project BOM Schedule	01/31/23	Achieved	Approved
IT-05-T2.02.05	CyberArk for CNI - Monthly Reporting of Project Status for the month of January 2023.	02/10/23	Achieved	Approved
IT-05-T2.02.06	CyberArk for CNI - Pilot System Selection Criteria and Selected Systems List	02/20/23	Achieved	Approved
IT-05-T2.02.08	CyberArk for CNI - Detailed Design document describing functional requirements, requirements traceability matrix, technical approach and system architecture (Deliverable: Requirements document and RTM, Technical Design Document)	03/07/23	Achieved	Approved
IT-05-T2.02.09	CyberArk for CNI - Pilot CyberArk system instance installed (Deliverable: Pilot system diagram)	03/08/23	Achieved	Approved
IT-05-T2.02.10	CyberArk for CNI - Monthly Reporting of Project Status for the month of February 2023.	03/10/23	Achieved	Approved
IT-05-T2.02.13	CyberArk for CNI - Monthly Reporting of Project Status for the month of March 2023.	04/10/23	Achieved	Approved
IT-05-T2.02.14	CyberArk for CNI - Pilot Vaulting & Password rotation configured & tested (Deliverable: Documentation of capabilities configured & tested)	04/14/23	Achieved	Approved
IT-05-T2.02.15	CyberArk for CNI - Project Risk Mitigation Plan	05/05/23	Achieved	Approved
IT-05-T2.02.16	CyberArk for CNI - Monthly Reporting of Project Status for the month of April 2023.	05/10/23	Achieved	Approved
IT-05-T2.02.17	CyberArk for CNI - Monthly Reporting of Project Status for the month of May 2023.	06/10/23	Achieved	Approved
IT-05-T2.02.18	CyberArk for CNI - Monthly Reporting of Project Status for the month of June 2023.	07/09/23	Achieved	Approved
IT-05-T2.02.20	CyberArk for CNI - Monthly Reporting of Project Status for the month of July 2023.	08/09/23	Achieved	Approved
IT-05-T2.02.21	CyberArk for CNI - Monthly Reporting of Project Status for the month of August 2023.	09/10/23	Achieved	Approved
IT-05-T2.02.22	CyberArk for CNI - DSCADA System Integration Testing & Results document (System functional, Policies & Security)	10/04/23	Achieved	Approved
IT-05-T2.02.23	CyberArk for CNI - Monthly Reporting of Project Status for the month of September 2023	10/10/23	Achieved	Approved
IT-05-T2.02.24	CyberArk for CNI - DSCADA PROD Deployment Checklist and Readiness Status	10/30/23	Achieved	Approved
IT-05-T2.02.25	CyberArk for CNI - Finalized (with operations and engineering approval) DSCADA Implementation Plan	11/07/23	Achieved	Approved

IT-05-T2.02 CyberArk for CNI				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-05-T2.02.26	CyberArk for CNI - Monthly Reporting of Project Status for the month of October 2023	11/10/23	Achieved	Approved
IT-05-T2.02.29	CyberArk for CNI - Monthly Reporting of Project Status for the month of November 2023	12/10/23	Achieved	Approved
IT-05-T2.02.11	CyberArk for CNI - Pilot Windows systems on boarded to Pilot CyberArk instance (minimum of 5 systems onboarded) (Deliverable: Documentation of onboarded systems)	12/15/23	Achieved	Approved
IT-05-T2.02.19	CyberArk for CNI - DSCADA FAT/SAT/System Security Plan	12/15/23	Achieved	Approved
IT-05-T2.02.07	CyberArk for CNI - Remainder of Scope license purchase (Deliverable: Purchase request)	02/15/24	Exception Request Approved	Exception Request Approved
IT-05-T2.02.27	CyberArk for CNI - DSCADA System Sign-Off/Acceptance Approval, Completion of training, and ATO documents	02/28/24	Delayed	Declined
IT-05-T2.02.28	CyberArk for CNI - DSCADA CyberArk Go-Live/Deployment Report	02/28/24	Delayed	Declined
IT-05-T2.02.30	CyberArk for CNI - DSCADA Go-Live Gap Analysis/Lessons Learned	02/28/24	Delayed	Declined
IT-05-T2.02.12	CyberArk for CNI - Purchase/Receipt of CyberArk HW/SW/Licenses (Deliverable: HW/SW License schedule)	04/12/24	Exception Request Approved	Exception Request Approved

Summary

- The CyberArk for CNI project is behind schedule due to competing resource availability for network support in DSCADA, architecture review and sign off in EMS from both CNI and CSRC teams.

IT-05-T2.03 – Cybersecurity Program

Project Status: **Did Not Achieve** (3 of 4 Projects Completed)

IT-05-T2.03 Cybersecurity Program				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-05-T2.03.04	Cybersecurity Program - SNARE - Detailed project plan	01/07/23	Achieved	Approved
IT-05-T2.03.13	Cybersecurity Program - Service Now Operational Enhancements - CMDB Data Model to support ServiceNow Common Service Data Model; Technical Solution Design & Architecture; Governance & Operational Process Model; Use Case & Workflow document; Test Case document	01/09/23	Completed - Delayed	Declined
IT-05-T2.03.14	Cybersecurity Program - Service Now Operational Enhancements - RTM, per PIP	01/09/23	Achieved	Approved
IT-05-T2.03.15	Cybersecurity Program - Service Now Operational Enhancements - Detailed Project Plan	01/09/23	Achieved	Approved
IT-05-T2.03.05	Cybersecurity Program - SNARE - Purchase receipt/invoice for HW/SW licenses	01/17/23	Achieved	Approved
IT-05-T2.03.01	Cybersecurity Program - Monthly Reporting of Project Status for the month of December 2022.	01/23/23	Achieved	Approved
IT-05-T2.03.19	Cybersecurity Program - Service Now CISO Dashboard - CMDB Data Model to support ServiceNow Common Service Data Model; Technical Solution Design & Architecture; Governance & Operational Process Model; Use Case & Workflow document; Test Case document	01/23/23	Completed - Delayed	Declined
IT-05-T2.03.20	Cybersecurity Program - Service Now CISO Dashboard - List of prioritized KPIs	01/23/23	Completed - Delayed	Declined
IT-05-T2.03.06	Cybersecurity Program - SNARE - Requirements Traceability Matrix	01/28/23	Completed - Delayed	Declined
IT-05-T2.03.28	Cybersecurity Program - SourceFire Network Security Monitoring Capability Upgrade - Purchase Receipt/Invoice of HW/SW/Licenses	01/31/23	Achieved	Approved
IT-05-T2.03.16	Cybersecurity Program - Service Now Operational Enhancements - Workflow Implementation completion Dashboard views	02/06/23	Achieved	Approved
IT-05-T2.03.17	Cybersecurity Program - Service Now Operational Enhancements - Test Strategy and Test Plans for all planned testing, including Functional, System Integration, UAT and Security testing as applicable.	02/06/23	Completed - Delayed	Declined
IT-05-T2.03.21	Cybersecurity Program - Service Now CISO Dashboard - List of data sources and tools to support KPI usage	02/06/23	Completed - Delayed	Declined
IT-05-T2.03.02	Cybersecurity Program - Monthly Reporting of Project Status for the month of January 2023.	02/10/23	Achieved	Approved
IT-05-T2.03.07	Cybersecurity Program - SNARE - Detailed design artifacts, functional specifications, system architecture, system security plan	02/11/23	Completed - Delayed	Declined
IT-05-T2.03.29	Cybersecurity Program - SourceFire Network Security Monitoring Capability Upgrade - HW/SW built and configured	02/14/23	Achieved	Approved
IT-05-T2.03.08	Cybersecurity Program - SNARE - Architecture/Security Review & Sign-Off	02/18/23	Completed - Delayed	Declined
IT-05-T2.03.30	Cybersecurity Program - SourceFire Network Security Monitoring Capability Upgrade - Initial system configuration complete	02/21/23	Achieved	Approved
IT-05-T2.03.31	Cybersecurity Program - SourceFire Network Security Monitoring Capability Upgrade - Test Strategy and Test Plans for all planned testing, including Functional, System Integration, UAT and Security testing as applicable.	02/21/23	Completed - Delayed	Declined
IT-05-T2.03.09	Cybersecurity Program - SNARE - Test Strategy and Test Plans for all planned testing, including Functional, System Integration, UAT and Security testing as applicable.	02/25/23	Completed - Delayed	Declined
IT-05-T2.03.18	Cybersecurity Program - Service Now Operational Enhancements - Test results document	03/06/23	Achieved	Approved
IT-05-T2.03.03	Cybersecurity Program - Monthly Reporting of Project Status for the month of February 2023.	03/10/23	Achieved	Approved
IT-05-T2.03.22	Cybersecurity Program - Service Now CISO Dashboard - List of defined metrics & associated requirements	03/13/23	Completed - Delayed	Declined
IT-05-T2.03.23	Cybersecurity Program - Service Now CISO Dashboard - List of refinements needed to support Security Operations Enhancements	03/20/23	Completed - Delayed	Declined
IT-05-T2.03.24	Cybersecurity Program - Service Now CISO Dashboard - Detailed Project Plan	03/27/23	Completed - Delayed	Declined
IT-05-T2.03.41	Cybersecurity Program - Service Now Operational Enhancements - User Acceptance testing document; Automation tools testing document	04/03/23	Achieved	Approved
IT-05-T2.03.42	Cybersecurity Program - Service Now Operational Enhancements - Full Test Results for all conducted testing	04/03/23	Achieved	Approved
IT-05-T2.03.34	Cybersecurity Program - Monthly Reporting of Project Status for the month of March 2023	04/10/23	Achieved	Approved

IT-05-T2.03 Cybersecurity Program				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-05-T2.03.43	Cybersecurity Program - Service Now Operational Enhancements - User Training workshop	04/17/23	Achieved	Approved
IT-05-T2.03.45	Cybersecurity Program - Service Now CISO Dashboard - Test Strategy and Test Plans for all planned testing, including Functional, System Integration, UAT and Security testing as applicable.	04/23/23	Achieved	Approved
IT-05-T2.03.44	Cybersecurity Program - Service Now CISO Dashboard - List of Metric Sourced & Dashboards	04/24/23	Completed - Delayed	Declined
IT-05-T2.03.35	Cybersecurity Program - Monthly Reporting of Project Status for the month of April 2023	05/10/23	Achieved	Approved
IT-05-T2.03.32	Cybersecurity Program - SourceFire Network Security Monitoring Capability Upgrade - Full Test Results for all conducted testing	05/15/23	Completed - Delayed	Declined
IT-05-T2.03.33	Cybersecurity Program - SourceFire Network Security Monitoring Capability Upgrade - Deployed to all in scope systems	05/15/23	Completed - Delayed	Declined
IT-05-T2.03.10	Cybersecurity Program - SNARE - Packaged installation for testing, and test results	05/21/23	Completed - Delayed	Declined
IT-05-T2.03.46	Cybersecurity Program - Service Now CISO Dashboard - List of Test Cases & Test Results Workflows	05/22/23	Achieved	Approved
IT-05-T2.03.11	Cybersecurity Program - SNARE - Deployment Testing test results	05/25/23	Completed - Delayed	Declined
IT-05-T2.03.55	Cybersecurity Program - SourceFire Network Security Monitoring Capability Upgrade - Transition, and training complete	05/29/23	Achieved	Approved
IT-05-T2.03.12	Cybersecurity Program - SNARE - Full Test Results for all conducted testing	05/31/23	Completed - Delayed	Declined
IT-05-T2.03.37	Cybersecurity Program - SNARE - Deployed in Disaster Recovery environment (Melville)	05/31/23	Completed - Delayed	Declined
IT-05-T2.03.47	Cybersecurity Program - Service Now CISO Dashboard - Completed UAT Testing & Flaw Remediation document	06/05/23	Achieved	Approved
IT-05-T2.03.48	Cybersecurity Program - Service Now CISO Dashboard - Full Test Results for all conducted testing	06/05/23	Achieved	Approved
IT-05-T2.03.56	Cybersecurity Program - SourceFire Network Security Monitoring Capability Upgrade - Detailed design and specifications of deployed system; Updated O&M processes, procedures, and policies	06/06/23	Achieved	Approved
IT-05-T2.03.57	Cybersecurity Program - SourceFire Network Security Monitoring Capability Upgrade - Project Close-Out Report and Artifacts	06/06/23	Completed - Delayed	Declined
IT-05-T2.03.36	Cybersecurity Program - Monthly Reporting of Project Status for the month of May 2023	06/12/23	Achieved	Approved
IT-05-T2.03.49	Cybersecurity Program - Service Now CISO Dashboard - User training workshop	06/12/23	Completed - Delayed	Declined
IT-05-T2.03.25	Cybersecurity Program - PKI/CA Deployment in PACS - Installation package ready build and test	06/15/23	Targeted Completion 4/30/2024	Declined
IT-05-T2.03.26	Cybersecurity Program - PKI/CA Deployment in PACS - Test Strategy and Test Plans for all planned testing, including Functional, System Integration, UAT and Security testing as applicable.	06/15/23	Targeted Completion 4/30/2024	Declined
IT-05-T2.03.38	Cybersecurity Program - SNARE - Deployed to all in scope systems	06/15/23	Completed - Delayed	Declined
IT-05-T2.03.39	Cybersecurity Program - SNARE - Detailed design and specifications of deployed system; Updated O&M processes, procedures, and policies	06/29/23	Completed - Delayed	Declined
IT-05-T2.03.40	Cybersecurity Program - SNARE - Project Close-Out Report and Artifacts	06/29/23	Completed - Delayed	Declined
IT-05-T2.03.27	Cybersecurity Program - PKI/CA Deployment in PACS - Deployment package built and tested with test results; Full test results for all conducted testing	06/30/23	Completed - Delayed	Declined
IT-05-T2.03.58	Cybersecurity Program - Monthly Reporting of Project Status for the month of June 2023.	07/10/23	Completed - Delayed	Declined
IT-05-T2.03.50	Cybersecurity Program - PKI/CA Deployment in PACS - Deployed to production systems	07/15/23	Targeted Completion 4/30/2024	Declined
IT-05-T2.03.62	Cybersecurity Program - Service Now Operational Enhancements - Detailed design and specifications of deployed system; Updated O&M processes, procedures, and policies	07/16/23	Completed - Delayed	Declined
IT-05-T2.03.63	Cybersecurity Program - Service Now Operational Enhancements - Project Close-Out Report and Artifacts	07/16/23	Completed - Delayed	Declined
IT-05-T2.03.61	Cybersecurity Program - Service Now Operational Enhancements - Post-deployment support	07/17/23	Completed - Delayed	Declined
IT-05-T2.03.51	Cybersecurity Program - PKI/CA Deployment in PACS - Deployment metrics are met	07/30/23	Targeted Completion 4/30/2024	Declined

IT-05-T2.03 Cybersecurity Program				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-05-T2.03.52	Cybersecurity Program - PKI/CA Deployment in PACS - Transition complete	08/07/23	Targeted Completion 4/30/2024	Declined
IT-05-T2.03.59	Cybersecurity Program - Monthly Reporting of Project Status for the month of July 2023.	08/10/23	Achieved	Approved
IT-05-T2.03.53	Cybersecurity Program - PKI/CA Deployment in PACS - Final system documentation (including updated detailed design and specifications of deployed system); Updated O&M processes, procedures, and policies	08/14/23	Targeted Completion 4/30/2024	Declined
IT-05-T2.03.54	Cybersecurity Program - PKI/CA Deployment in PACS - Project Close-Out Report and Artifacts	08/21/23	Targeted Completion 4/30/2024	Declined
IT-05-T2.03.64	Cybersecurity Program - Service Now CISO Dashboard - Post-deployment support	08/28/23	Completed - Delayed	Declined
IT-05-T2.03.65	Cybersecurity Program - Service Now CISO Dashboard - Detailed design and specifications of deployed system; Updated O&M processes, procedures, and policies	08/28/23	Completed - Delayed	Declined
IT-05-T2.03.66	Cybersecurity Program - Service Now CISO Dashboard - Project Close-Out Report and Artifacts	08/28/23	Completed - Delayed	Declined
IT-05-T2.03.60	Cybersecurity Program - Monthly Reporting of Project Status for the month of August 2023.	09/11/23	Achieved	Approved

Summary

- The Cybersecurity Program project consisted of 4 subprojects. The four subprojects included:
 1. Service Now Operational Enhancements
 2. SNARE
 3. SourceFire Network Security Monitoring Capability Upgrade
 4. PKI/CA Deployment in PACS
- The following projects were completed but were delayed in their implementation:
 1. Service Now Operational Enhancements
 2. SNARE
 3. SourceFire Network Security Monitoring Capability Upgrade
- The PKI/CA Deployment in PACS is the only remaining project that is open and delayed and has a targeted completion of April 30, 2024.

IT-05-T2.04 – Dragos for CNI

Project Status: **Did Not Achieve**

IT-05-T2.04 Dragos for CNI				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-05-T2.04.01	Dragos for CNI - DSCADA: Acceptance Approval & Sign-off	01/06/23	Completed - Delayed	Declined
IT-05-T2.04.03	Dragos for CNI - Monthly Reporting of Project Status for the month of December 2022.	01/20/23	Achieved	Approved
IT-05-T2.04.05	Dragos for CNI - Monthly Reporting of Project Status for the month of January 2023.	02/10/23	Achieved	Approved
IT-05-T2.04.08	Dragos for CNI - Monthly Reporting of Project Status for the month of February 2023.	03/10/23	Achieved	Approved
IT-05-T2.04.14	Dragos for CNI - Monthly Reporting of Project Status for the month of March 2023.	04/10/23	Achieved	Approved
IT-05-T2.04.15	Dragos for CNI - Monthly Reporting of Project Status for the month of April 2023.	05/10/23	Achieved	Approved
IT-05-T2.04.02	Dragos for CNI - DSCADA: Post Deployment Support / Shadowing / Knowledge transfer (Meeting Minutes)	05/15/23	Completed - Delayed	Declined
IT-05-T2.04.04	Dragos for CNI - EMS: Security Scan for all Dragos appliances (Deliverable: Tenable Vulnerability Scan report)	05/30/23	Completed - Delayed	Declined
IT-05-T2.04.16	Dragos for CNI - Monthly Reporting of Project Status for the month of May 2023.	06/10/23	Achieved	Approved
IT-05-T2.04.06	Dragos for CNI - EMS: Connect and configure Span ports for all EMS sensors (Deliverable: Confirmation from network team)	06/15/23	Completed - Delayed	Declined
IT-05-T2.04.07	Dragos for CNI - EMS: Complete integration testing and generate Dragos reports (Deliverable: Dragos reports)	06/22/23	Completed - Delayed	Declined
IT-05-T2.04.09	Dragos for CNI - EMS: Acceptance Approval & Sign-off	06/23/23	Completed - Delayed	Declined
IT-05-T2.04.11	Dragos for CNI - All Environments: Full Test Results for all conducted testing	06/23/23	Completed - Delayed	Declined
IT-05-T2.04.10	Dragos for CNI - EMS: Post Deployment Support / Shadowing / Knowledge transfer	07/01/23	Completed - Delayed	Declined
IT-05-T2.04.17	Dragos for CNI - All Environments: Review overall OT devices monitoring coverage after completion of above deployment (Deliverable: Identify gap in device monitoring coverage)	07/05/23	Achieved	Approved
IT-05-T2.04.18	Dragos for CNI - Monthly Reporting of Project Status for the month of June 2023	07/10/23	Achieved	Approved
IT-05-T2.04.12	Dragos for CNI - All Environments: Updated O&M processes, procedures and policies	07/15/23	Achieved	Approved
IT-05-T2.04.13	Dragos for CNI - All Environments: Detailed design and specifications documentation of deployed system	07/31/23	Achieved	Approved
IT-05-T2.04.19	Dragos for CNI - All Environments: Recommend additional appliance (SiteStores & Sensors) to cover identified gap. (Deliverable: High level design of recommended expansion of Dragos monitoring infrastructure)	08/04/23	Achieved	Approved
IT-05-T2.04.20	Dragos for CNI - Project Close-Out Report and Artifacts	08/04/23	Achieved	Approved
IT-05-T2.04.21	Dragos for CNI - Monthly Reporting of Project Status for the month of July 2023	08/10/23	Achieved	Approved
IT-05-T2.04.22	Dragos for CNI - Monthly Reporting of Project Status for the month of August 2023	09/10/23	Achieved	Approved

Summary

- The Dragos CNI project was delayed in implementation and went live in September of 2023.

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

Project Status: **Achieved**

IT-05-T2.05 Industrial Defender for DSCADA				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-05-T2.05.01	Industrial Defender - Complete System Integration Testing (Functional and Security)	02/22/23	Achieved	Approved
IT-05-T2.05.02	Go-Live	04/24/23	Achieved	Approved
IT-05-T2.05.03	Baselining of Assets into Industrial Defender; Validation of Cyber Security Alerting	05/24/23	Achieved	Approved

Summary

- PSEG Long Island delivered all the project requirements and met all deliverables associated with the Industrial Defender for DSCADA project.

IT-05-T2.06 – AVLS Integration with Physical ID Badge System

Project Status: **Dispute**

IT-05-T2.06 AVLS Integration with Physical ID Badge System				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-5-T2.06.05	AVLS Integration with Physical ID Badge System - Business Requirements, submitted to LIPA for approval.	06/30/23	Dispute	Declined
IT-5-T2.06.09	AVLS Integration with Physical ID Badge System - Comprehensively tested, documented integration fully deployed, as specified in the LIPA-approved Project Implementation Plan, to be consistent with the scope described in the attached "LIPA-PSEG-2022-IT-5 System Implementation - 2022 Budget Projects (Tier 1 and Tier 2)" metric document, delivered.	06/30/23	Dispute	Declined

Summary

- The scope of this project was to provide the functionality so that when PSEG Long Island employees enter into a fleet vehicle that they would scan their Physical ID Badge to identify. The scope that PSEG Long Island is being decline from LIPA was never part of the scope of the AVLS Integration w/ Physical ID Badge System Project.
- System has canned reports that can be scheduled. Vehicle usage reports with operator name (used for FEMA reimbursements and Non-FEMA Fleet costs verification) and driver scorecards are available through the standard reporting function of the AVLS system. This is the process that is being utilized today.
- The FEMA reporting was never part of the base scope of this project.
- PSEG Long Island also offered Long-Term system approach solution to LIPA for integration with EAMS system which was subsequently put on hold. PSEG Long Island team recommended including this in the EAMS Time and Attendance investment as this was not part of the original AVLS Integration with Physical ID Badge System.

IT-05-T2.07 – AMI System Enhancements

Project Status: **Dispute – Completed All Three Projects on Schedule**

IT-05-T2.07 AMI System Enhancements				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-05-T2.07.01	AMI System Enhancements - Monthly Reporting of Project Status for the month of December 2022	01/20/23	Achieved	Approved
IT-05-T2.07.02	AMI System Enhancements - Monthly Reporting of Project Status for the month of January 2023	02/10/23	Achieved	Approved
IT-05-T2.07.03	AMI System Enhancements - Monthly Reporting of Project Status for the month of February 2023	03/10/23	Achieved	Approved
IT-05-T2.07.04	AMI System Enhancements - Upgrade MDMS - Perform System User Stories testing (MDMS, CAS, ESB, MessageWay)	03/31/23	Achieved	Approved
IT-05-T2.07.05	AMI System Enhancements - Upgrade MDMS - Complete testing/defect remediation phase	03/31/23	Achieved	Approved
IT-05-T2.07.06	AMI System Enhancements - Upgrade MDMS - Update process documentations	03/31/23	Achieved	Approved
IT-05-T2.07.07	AMI System Enhancements - Upgrade MDMS - Go Live	03/31/23	Achieved	Approved
IT-05-T2.07.08	AMI System Enhancements - Monthly Reporting of Project Status for the month of March 2023	04/10/23	Achieved	Approved
IT-05-T2.07.09	AMI System Enhancements - Monthly Reporting of Project Status for the month of April 2023	05/10/23	Achieved	Approved
IT-05-T2.07.10	AMI System Enhancements - Manual Meter Reading - Modified Mainframe Host Processes	05/15/23	Achieved	Approved
IT-05-T2.07.11	AMI System Enhancements - Manual Meter Reading - Creation of Interface to CAD	05/15/23	Achieved	Approved
IT-05-T2.07.12	AMI System Enhancements - Manual Meter Reading - Development of CAD Screens	05/15/23	Achieved	Approved
IT-05-T2.07.13	AMI System Enhancements - Manual Meter Reading - SAS Reports created	05/15/23	Achieved	Approved
IT-05-T2.07.14	AMI System Enhancements - Manual Meter Reading - Testing completed	06/01/23	Completed - Misaligned	Declined
IT-05-T2.07.15	AMI System Enhancements - Monthly Reporting of Project Status for the month of May 2023	06/10/23	Achieved	Approved
IT-05-T2.07.16	AMI System Enhancements - Manual Meter Reading - Develop Process Documentation and Job Aides	06/15/23	Completed - Misaligned	Declined
IT-05-T2.07.17	AMI System Enhancements - Manual Meter Reading - Training completed (Back office Billing, Meter Services)	06/29/23	Completed - Misaligned	Declined
IT-05-T2.07.19	AMI System Enhancements - Transformer Vault Inspections - Define desired frequency in accordance with business need and regulatory requirements; identify resulting appropriate resource requirements; develop requirements for workplan integration	06/29/23	Achieved	Approved
IT-05-T2.07.18	AMI System Enhancements - Manual Meter Reading - Go Live	06/30/23	Completed - Misaligned	Declined
IT-05-T2.07.20	AMI System Enhancements - Monthly Reporting of Project Status for the month of June 2023	07/10/23	Achieved	Approved
IT-05-T2.07.21	AMI System Enhancements - Manual Meter Reading - Decommission MV-RS (Dependent on Section 3 Go Live)	07/31/23	Achieved	Approved
IT-05-T2.07.22	AMI System Enhancements - Transformer Vault Inspections - Develop Business Process and Job Aides	07/31/23	Achieved	Approved
IT-05-T2.07.23	AMI System Enhancements - Monthly Reporting of Project Status for the month of July 2023	08/10/23	Achieved	Approved
IT-05-T2.07.24	AMI System Enhancements - Monthly Reporting of Project Status for the month of August 2023	09/10/23	Achieved	Approved
IT-05-T2.07.25	AMI System Enhancements - Transformer Vault Inspections - Remove Transformer Vaults from MV-RS Routes	10/01/23	Achieved	Approved
IT-05-T2.07.25	AMI System Enhancements - Monthly Reporting of Project Status for the month of September 2023	10/10/23	Achieved	Approved
IT-05-T2.07.26	AMI System Enhancements - Transformer Vault Inspections - Complete Training (Meter Services)	10/15/23	Achieved	Approved
IT-05-T2.07.27	AMI System Enhancements - Monthly Reporting of Project Status for the month of October 2023	11/10/23	Achieved	Approved
IT-05-T2.07.28	AMI System Enhancements - Transformer Vault Inspections - System Go-Live	12/01/23	Achieved	Approved
IT-05-T2.07.29	AMI System Enhancements - Monthly Reporting of Project Status for the month of November 2023	12/10/23	Achieved	Approved

Summary

- The AMI System Enhancements project had 3 subprojects which included:
 1. Upgrade MDMS
 2. Transformer Vault Inspections
 3. Manual Meter Reading
- Upgrade MDMS, Transformer Vault Inspections were completed on time. The Manual Meter Reading and MVRS retirement was also completed on time within the target due date for the project delivery but the declined state was because of a disagreement between the parties because of the scope and requirements that LIPA was requesting. PSEG Long Island went forward with retirement of the system as the parties were unable to reach consensus.

IT-05-T2.08 – Suffolk County Sewage Billing

Project Status: **Achieved**

IT-05-T2.08 Suffolk County Sewage Billing				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-05-T2.08.01	Suffolk County Sewage Billing Project - Monthly Reporting of Project Status for the month of December 2022	01/20/23	Achieved	Approved
IT-05-T2.08.02	Suffolk County Sewage Billing Project - Monthly Reporting of Project Status for the month of January 2023	02/10/23	Achieved	Approved
IT-05-T2.08.03	Suffolk County Sewage Billing Project - Business Process Document	02/28/23	Achieved	Approved
IT-05-T2.08.04	Suffolk County Sewage Billing Project - Monthly Reporting of Project Status for the month of February 2023	03/10/23	Achieved	Approved
IT-05-T2.08.05	Suffolk County Sewage Billing Project - CAS CICS screen test results w/ evidence	03/15/23	Achieved	Approved
IT-05-T2.08.07	Suffolk County Sewage Billing Project - Account Migration Plan	03/15/23	Achieved	Approved
IT-05-T2.08.06	Suffolk County Sewage Billing Project - Training Documents	03/30/23	Achieved	Approved
IT-05-T2.08.08	Suffolk County Sewage Billing Project - Go-Live decision checklist	03/30/23	Achieved	Approved
IT-05-T2.08.09	Suffolk County Sewage Billing Project - Monthly Reporting of Project Status for the month of March 2023	04/10/23	Achieved	Approved
IT-05-T2.08.10	Suffolk County Sewage Billing Project - Monthly Reporting of Project Status for the month of April 2023	05/10/23	Achieved	Approved
IT-05-T2.08.11	Suffolk County Sewage Billing Project - Monthly Reporting of Project Status for the month of May 2023	06/12/23	Achieved	Approved
IT-05-T2.08.12	Suffolk County Sewage Billing Project - Project Closure Memo	06/30/23	Achieved	Approved

Summary

- PSEG Long Island delivered all the project requirements and met all deliverables associated with the Suffolk County Sewage Billing project.

IT-05-T2.09 – Rate Change Enhancements

Project Status: **Achieved**

IT-05-T2.09 Rate Change Enhancements				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-05-T2.09.01	Rate Change Enhancements - Monthly Reporting of Project Status for the month of December 2022.	01/20/23	Achieved	Approved
IT-05-T2.09.02	Rate Change Enhancements - January test activities (unbilled reporting and street light testing)	01/31/23	Achieved	Approved
IT-05-T2.09.03	Rate Change Enhancements - Monthly Reporting of Project Status for the month of January 2023.	02/10/23	Achieved	Approved
IT-05-T2.09.04	Rate Change Enhancements - Project Close-Out Report	02/28/23	Achieved	Approved
IT-05-T2.09.05	Rate Change Enhancements - Monthly Reporting of Project Status for the month of February 2023.	03/10/23	Achieved	Approved

Summary

- PSEG Long Island delivered all the project requirements and met all deliverables associated with the Rate Change Enhancements projects.

IT-06 - Project Performance – New 2023 Projects

Metric Type	Qualitative	Metric Performance	↑ Partially Achieved (50%)
Incentive Compensation Claim	\$278,566.68		

- PSEG Long Island is claiming 50% of the allocated incentive compensation for IT-06 because of the breadth of work that was completed in 2023. This overall metric has 16 sub projects in scope. There was a fundamental change in the targets and calculations for IT-06 from 2022 to 2023 in the metric language and criteria which limited any potential for partial incentive compensation. This has such been rectified in the approved metric language in 2024 and PSEG Long Island is basing our claim on work that was completed within the portfolio of IT-06 projects under the construct of the 2022 and 2024 metrics.
- For Tier 1 projects: PSEG Long Island delivered 4 of 5 projects, 1 project partially achieved and LIPA rejected moving forward with scope of project that would have satisfied open items.
- For Tier 2 projects: PSEG Long delivered on 2 of 7 projects, 2 of 7 projects are delayed, 2 projects had no approved funding with 1 project not even in PSEG LI's workplan, and 1 project deferred until 2025.
- For Tier 3 projects: PSEG Long Island delivered on 3 of 4 projects and 1 of 4 projects were delayed because of alignment and dependency on system separation.

Tier 1 Project Summary

Project #	Project Name	Performance
IT-06.T1.01	Contact Center as a Service (CCaaS) Analytics	Did Not Achieve
IT-06.T1.02	Standard Data Platform Phase 2	Achieved
IT-06.T1.03	SailPoint Access Control	Achieved – Go-Live on Target
IT-06.T1.04	IT Data Analytics 2023 / U2.0 Transition	Achieved
IT-06.T1.05	Cybersecurity Continuous Improvement for CNI	Achieved

IT-06.T1.01 – Contact Center as a Service (CCaaS) Analytics

Project Status: **Did Not Achieve**

IT-06.T1.01 Contact Center as a Service (CCaaS) Analytics				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-06.T1.01.01	Salesforce Applications Replacement - Provide evaluation of Salesforce email use cases and decisions	03/24/23	Achieved	Approved
IT-06.T1.01.02	Submit PIP for Salesforce replacement; Update the Metric deliverables in Smartsheet to include the PIP deliverables and dates in 2023.	04/30/23	Achieved	Approved
IT-06.T1.01.03	Provide a plan to operationalize CCaaS's advanced analytics and reporting. Plan will utilize all purchased analytics products and address the scenarios defined in #2. Evidence of methodology to include frequency and of pulling, analyzing and consolidating results	07/31/23	Did Not Achieve	Declined
IT-06.T1.01.04	Submit 3-year CCaaS Business driven strategic plan	07/30/23	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-06.T1.01.05	Demonstrate analytics and reporting methodology utilization by providing customer contact analysis, findings, and proposed continuous improvement enhancements.	12/28/23	Did Not Achieve	Declined

Summary

- PSEG Long Island implemented Interactions Analytics (delayed due to base implementation that got implemented in Nov 2023) and was tracked as part of CCaaS project. PSEG Long Island also proposed Performance Analytics (another module of NICE) that would meet the last deliverable in Smartsheet, however LIPA rejected it and said they did not see value in implementing that product.

IT-06.T1.02 – Standard Data Platform Phase 2

Project Status: **Achieved**

IT-06.T1.02 Standard Data Platform Phase 2				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-06.T1.02.01	Standard Data Platform Phase 2 - Detailed Project Implementation Plan, to be submitted for LIPA approval	03/31/23	Achieved	Declined
IT-06.T1.02.02	Delivery of all scope identified in the LIPA approved Project Implementation Plan	12/31/23	Achieved	Declined

Summary

- The objective of this effort is to create a standard, enterprise-wide data platform that provides PSEGLI business stakeholders, LIPA, and the DPS seamless and effective access to financial, operational, and performance data with a self-service capability to query data and perform analysis. The Standardized Data Access Platform should reduce the need for users to manually consolidate information from multiple data sources and enable stakeholders to access pertinent data in an efficient manner.
- The Standardized Data Access Platform (SDAP) will extend current capabilities implemented in PSEGLI's enterprise architecture, through the enhancement of existing data lake capabilities and the addition of data from identified key data sources. The enhancements will support more robust data querying capabilities, including exploratory analysis, ad hoc reporting, and other capabilities through standardized tools and access to existing capabilities.
- Despite the LIPA Board Resolution of 2021, the scope to accomplish the SDAP project has never been finalized, and as a result, LIPA and their consultants continue to expand and evolve this project without specificity and without regard to the reasonably proposed scope. The PSEG LI team has provided multiple and various roadmaps and timelines with data source priorities that have never been accepted by LIPA. In 2022, the team created a cloud based platform to support SDAP requirements and delivered a solution that provides ongoing replication of SAP Financial data (read only). PSEG Long Island has also completed these projects without LIPA providing associated funding for doing the work.
- In 2023, LIPA requested an accelerated approach for delivery of the remaining SDAP scope, which was provided by PSEG LI in May 2023 along with the required funding.
- Two months later, LIPA responded with voluminous modifications and additional scope with only \$300,000 of bridge funding released out of \$2.4M budgeted. In addition to not providing necessary funding, the impact of these proposed changes by LIPA defeats the ability to qualify the PSEG LI proposal as an accelerated approach.
- While PSEG LI's original approach was to get LIPA the data as quickly as possible, project deliverables and documentation continue to be modified by LIPA to assert its involvement in what is being proposed.
- PSEG Long Island delivered on Phase II functionality of the project without applicable approved funding from LIPA. The Phase II component of this project included:
 1. PS & PM (Work Management): Plan, Design, and Iterative Delivery of data in SDAP
 2. SCM/MM (Inventory): Plan & Design and Iterative Delivery of data in SDAP

IT-06.T1.03 – SailPoint Access Control

Project Status: **Achieved**

IT-06.T1.03 SailPoint Access Control				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-06.T1.03.01	SailPoint Access Control - Detailed Project Implementation Plan, to be submitted for LIPA approval	03/31/23	Achieved	Approved
IT-06.T1.03.02	Delivery of all scope identified for 2023 in the LIPA approved Project Implementation Plan	12/31/23	Submitted Awaiting LIPA Review/Approval	Declined
IT-06.T1.03.08	Test Management Plan (PSEGLI-SGP-TP012)	01/31/24	Achieved	Approved
IT-06.T1.03.09	Solution Design, Dev and Integration (PSEGLI-SGP-PR004)	01/31/24	Submitted Awaiting LIPA Review/Approval	Declined
IT-06.T1.03.10	Solution Design Specification (PSEGLI-SGP-TP007)	12/15/23	Achieved	Approved
IT-06.T1.03.11	System Integration Plan (PSEGLI-SGP-TP009)	01/31/24	Achieved	Approved
IT-06.T1.03.12	Requirements Traceability Matrix (PSEGLI-SGP-TP006)	01/31/24	Achieved	Approved
IT-06.T1.03.13	Requirements Test Plan Matrix	02/14/24	Submitted Awaiting LIPA Review/Approval	Declined
IT-06.T1.03.14	System Integration Testing and Results Document (PSEGLI-SGP-TP039)	02/29/24	Submitted Awaiting LIPA Review/Approval	Declined
IT-06.T1.03.15	Integration (AD, Lifecycle Events and Access Review and Policies and Access Request) Test Plan including use cases which are relevant.	02/29/24	Submitted Awaiting LIPA Review/Approval	Declined
IT-06.T1.03.16	Integration Test Scripts addressing all the use cases identified in the test plan along with strategy for test data management.	02/29/24	Submitted Awaiting LIPA Review/Approval	Declined
IT-06.T1.03.17	Production Acceptance Document (PSEGLI-SGP-TP036)	03/29/24	Exception Request Approved	Exception Request Approved
IT-06.T1.03.18	Runbook (PSEGLI-SGP-TP038) Test Results	03/29/24	Exception Request Approved	Exception Request Approved
IT-06.T1.03.19	Updated Runbook (PSEGLI-SGP-TP038)	03/29/24	Exception Request Approved	Exception Request Approved
IT-06.T1.03.20	Test Results	03/29/24	Exception Request Approved	Exception Request Approved

Summary

- The project and go-live on the original PIP were, and still are, scheduled to be completed in Q2 2024. Due to scope changes, moving from IIQ on-prem to an IdentityNow SaaS based implementation, combined with over two months of delays due to access requests, certain PIP interim deliverables required exception requests. Those exception request were approved and SailPoint Access Management is still on-track for the go-live implementation in April 2024. The SailPoint team regularly meets with LIPA to review the outstanding exception requests and pending deliverables. All outstanding deliverables are currently submitted and awaiting feedback/approval from LIPA.

IT-06.T1.04 – IT Data Analytics 2023 / U2.0 Transition

Project Status: **Achieved**

IT-06.T1.04 IT Data Analytics 2023 / U2.0 Transition				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-06.T1.04.01	IT Data Analytics 2023 / U2.0 Transition - Two-year Business Driven Roadmap (2023- 2024), to be submitted for LIPA approval	02/28/23	Achieved	Approved
IT-06.T1.04.02	IT Data Analytics 2023 / U2.0 Transition - Detailed Project Implementation Plan, to be submitted for LIPA approval	03/31/23	Achieved	Approved
IT-06.T1.04.03	Delivery of all scope identified in the LIPA approved Project Implementation Plan	12/31/23	Achieved	Approved

Summary

- PSEG Long Island delivered all the project requirements and met all deliverables associated with the IT Data Analytics 2023 / U2.0 Transition project.

IT-06.T1.05 – Cybersecurity Continuous Improvement for CNI

Project Status: **Achieved**

IT-06.T1.05 Cybersecurity Continuous Improvement for CNI				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-06.T1.05.01	Cybersecurity Continuous Improvement for CNI - Detailed Project Implementation Plan, to be submitted for LIPA approval	03/31/23	Achieved	Approved
IT-06.T1.05.02	Requirements Traceability Matrix (RTM) reviewed by LIPA (Deliverable: RTM document)	02/21/23	Achieved	Approved
IT-06.T1.05.02	Delivery of all scope identified in the LIPA approved Project Implementation Plan	12/31/23	Achieved	Declined
IT-06.T1.05.03	Detailed Technical Design (Deliverable: Technical Design document)	03/17/23	Achieved	Approved
IT-06.T1.05.04	Develop Technical Architecture Document, including architecture diagram, hardware and infrastructure specifications, covering all environments. Network Architecture/ IT Security Sign-Off, submit system architecture and system security plan for review by LIPA and approval (Deliverable: Security System Plan Document)	03/23/23	Achieved	Approved
IT-06.T1.05.05	Test Strategy and Test Plans for all planned testing, including Functional and IT Security testing. Test Plans should include any Test Scripts, Test Cases, Test Data utilized in the testing, Check lists. (Deliverable: Testing Plan document)	05/19/23	Achieved	Approved
IT-06.T1.05.06	Configure/Implement PKI in Test/QAS environment and conduct testing. Provide full Test Results for Testing (Functional, System Baselines and IT Security plan) (Deliverable: Test Results for Testing Plan document)	06/16/23	Achieved	Approved
IT-06.T1.05.07	Develop a deployment plan (Go-Live) in coordination with operations and engineering. (Deliverable: Deployment Plan document)	06/30/23	Achieved	Approved
IT-06.T1.05.08	Provide vulnerability test scan results at the conclusion of the project to validate that the Certificates of Authority are being properly issued	02/29/24	Achieved	Declined
IT-06.T1.05.09	System Operations and Maintenance Run book (Deliverable: Run book)	08/31/23	Achieved	Approved
IT-06.T1.05.10	Project Closure (Lessons learned, close out financials, project closure in ServiceNow)	01/31/24	Achieved	Approved

Summary

- The Cybersecurity Continuous Improvement for CNI program had one open deliverable. IT-06.T1.05.08 - Provide vulnerability test scan results at the conclusion of the project to validate that the Certificates of Authority are being properly issued. PSEG Long Island has provided artifacts in support of achievement of deliverable for LIPA's review and consideration for the only item that is open and declined.

Tier 2 Project Summary

Project #	Project Name	Performance
IT-06.T2.01	Customer Communications Tool for Double Wood Poles	Dispute – Project Not in Workplan/Funded
IT-06.T2.02	ADMS Phase 1	Project Deferred
IT-06.T2.03	Cybersecurity Continuous Improvement	Did Not Achieve
IT-06.T2.04	Salesforce Applications Replacement	Did Not Achieve
IT-06.T2.05	SPLUNK Life Cycle Upgrade	Achieved
IT-06.T2.06	Application and Infrastructure Monitoring Consolidation - Planning	Dispute – Project Not Funded
IT-06.T2.07	Enterprise Time & Attendance Phase 2	Achieved

IT-06.T2.01 – Customer Communications Tool for Double Wood Poles

Project Status: **Dispute**

IT-06.T2.01	Customer Communications Tool for Double Wood Poles			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-06.T2.01.01	Develop a project plan to incorporate NJUNS data/pole locations from GIS into the KUBRA platform	06/30/23	Dispute	Declined

Summary

- The Customer Communications tool for Double Wood Poles was not a project in PSEG Long Island’s workplan and there was no allocated funding and/or resources in the budget to complete this project. There was no collaboration from LIPA with PSEG Long Island prior to inclusion of this project in the 2023 metric and the scope was not defined. There was no PSEG LI project sponsor and/or owner and there was no collaboration from LIPA to raise this as a project for inclusion.

IT-06.T2.02 – ADMS Phase 1

Project Status: **Project Deferred**

IT-06.T2.02		ADMS Phase 1		
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-06.T2.02.01	Detailed Project Implementation Plan, to be submitted for LIPA approval	12/31/25	Project Deferred	Project Deferred

Summary

- The ADMS Phase 1 project was deferred.

IT-06.T2.03 – Cybersecurity Continuous Improvement

Project Status: **Did Not Achieve - Delayed**

IT-06.T2.03 Cybersecurity Continuous Improvement				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-06.T2.03.01	Detailed Project Implementation Plan, to be submitted for LIPA approval	06/30/23	Achieved	Approved
IT-06.T2.03.02	Delivery of all scope identified in the LIPA approved Project Implementation Plan	01/19/24	Delayed	Declined
IT-06.T2.03.03	CCI - Monthly Reporting of Project Status for the month of June 2023	07/10/23	Achieved	Approved
IT-06.T2.03.04	CCI - Monthly Reporting of Project Status for the month of July 2023	08/10/23	Achieved	Approved
IT-06.T2.03.05	CCI - Monthly Reporting of Project Status for the month of August	09/11/23	Achieved	Approved
IT-06.T2.03.06	Project Execution Plan (PEP) (TP002) and Detailed Project Schedule.	07/13/23	Achieved	Approved
IT-06.T2.03.07	Business Requirements (TP005)	07/27/23	Achieved	Approved
IT-06.T2.03.08	Evidence of CRISP Purchase	07/27/23	Achieved	Approved
IT-06.T2.03.09	Solution Design (TP007)	08/10/23	Achieved	Approved
IT-06.T2.03.10	Test Management Plan for CRISP - User Acceptance Test only	11/10/23	Achieved	Approved
IT-06.T2.03.11	Program Socialization Deck	04/30/23	Achieved	Approved
IT-06.T2.03.11	Runbook	11/10/23	Achieved	Approved
IT-06.T2.03.12	Operational Readiness Review (TP034)	12/22/23	Achieved	Approved
IT-06.T2.03.12.1	Validate Agent Deployment - Production	05/15/23	Achieved	Approved
IT-06.T2.03.13	Production Acceptance (TP036)	12/22/23	Achieved	Approved
IT-06.T2.03.13.1	Update WAS Scanning SOP	06/19/23	Achieved	Approved
IT-06.T2.03.14	Update Compliance Instructions/Standards	06/30/23	Achieved	Approved
IT-06.T2.03.14	Project Execution Plan (PEP) (TP002) and Detailed Project Schedule.	07/13/23	Achieved	Approved
IT-06.T2.03.15	Include AWS Scan in Scanning SOP	06/30/23	Achieved	Approved
IT-06.T2.03.15	PSEGLI-SGP-TP005 - Business Requirements Document for Tenable system updates	07/27/23	Achieved	Approved
IT-06.T2.03.16	Project Execution Plan (PEP) (TP002) and Detailed Project Schedule.	06/30/23	Achieved	Approved
IT-06.T2.03.16	PSEGLI-SGP-TP012 - Test Management Plan for Tenable capabilities	11/10/23	Achieved	Approved
IT-06.T2.03.17	Business Requirements (TP005)	06/30/23	Achieved	Approved
IT-06.T2.03.17	Gap Analysis Report (gap between the current capability and the desired capability)	09/29/23	Achieved	Approved
IT-06.T2.03.18	Alternative Evaluation (TP008)	07/13/23	Achieved	Approved
IT-06.T2.03.19	Evidence of RAD Security Tool Purchase	08/17/23	Achieved	Approved
IT-06.T2.03.20	Solution Design (TP007)	11/10/23	Achieved	Approved
IT-06.T2.03.21	RAD Tool Test Environment Deployment	09/14/23	Achieved	Approved
IT-06.T2.03.22	User Acceptance Testing Report	01/12/24	Delayed	Declined
IT-06.T2.03.23	Rogue Asset Discovery Runbook	01/12/24	Achieved	Approved
IT-06.T2.03.24	Operational Readiness Review (TP034)	01/12/24	Delayed	Declined
IT-06.T2.03.25	Project Execution Plan (PEP) (TP002) and Detailed Project Schedule.	07/27/23	Achieved	Approved
IT-06.T2.03.26	Architecture Review	07/27/23	Achieved	Approved
IT-06.T2.03.27	Business Requirements (TP005)	08/17/23	Achieved	Approved
IT-06.T2.03.28	Gap Analysis Report (gap between the current capability and the desired capability)	10/29/23	Achieved	Approved
IT-06.T2.03.29	Alternative Evaluation (TP008)	08/30/23	Achieved	Approved
IT-06.T2.03.30	Evidence of API Security Tool Purchase	09/21/23	Achieved	Approved
IT-06.T2.03.31	Solution Design (TP007)	09/21/23	Achieved	Approved
IT-06.T2.03.32	CCI - Monthly Reporting of Project Status for the month of September 2023	10/10/23	Achieved	Approved
IT-06.T2.03.33	CCI - Monthly Reporting of Project Status for the month of October 2023	11/10/23	Achieved	Approved
IT-06.T2.03.34	CCI - Monthly Reporting of Project Status for the month of November 2023	12/11/23	Achieved	Approved
IT-06.T2.03.35	Tenable Runbook	10/19/23	Achieved	Approved

IT-06.T2.03 Cybersecurity Continuous Improvement				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-06.T2.03.36	Compliance Scanning SOP	11/29/23	Achieved	Approved
IT-06.T2.03.37	Production Acceptance (TP036)	11/29/23	Achieved	Approved
IT-06.T2.03.39	Production Acceptance (TP036)	10/20/23	Achieved	Approved
IT-06.T2.03.40	API Tool Test Environment Deployment	11/17/23	Achieved	Approved
IT-06.T2.03.41	User Acceptance Test Report	01/19/24	Delayed	Declined
IT-06.T2.03.42	Runbook	12/22/23	Dispute	Declined
IT-06.T2.03.43	Operational Readiness Review (TP034)	01/19/24	Delayed	Declined
IT-06.T2.03.44	Production Acceptance (TP036)	01/12/24	Delayed	Declined

Summary

- The 2023 Cybersecurity Continuous Improvement project is delayed due to resource constraints and will be delivered in 2024.

IT-06.T2.04 – Salesforce Applications Replacement

Project Status: **Did Not Achieve – Smart Form Scope Delayed**

IT-06.T2.04 Salesforce Applications Replacement				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-06.T2.04.01	Detailed Project Implementation Plan, to be submitted for LIPA approval	06/30/23	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-06.T2.04.02	Email Phase: Go-live	08/18/23	Achieved	Approved
IT-06.T2.04.02	Delivery of all scope identified in the LIPA approved Project Implementation Plan	12/31/23	Exempted via Approved Exception Request	Exempted via Approved Exception Request
IT-06.T2.04.03	Email Phase: Submit finalized business requirements	06/23/23	Achieved	Approved
IT-06.T2.04.04	Provide detailed project plan (workplan)	06/30/23	Achieved	Approved
IT-06.T2.04.05	Provide Test Strategy	07/21/23	Achieved	Approved
IT-06.T2.04.06	Email Phase: Submit final training documentation	07/26/23	Achieved	Approved
IT-06.T2.04.07	Email Phase: Provide functional & technical design documents	08/04/23	Achieved	Approved
IT-06.T2.04.08	Email Phase: Provide requirement traceability matrix (RTM)	07/28/23	Achieved	Approved
IT-06.T2.04.09	Smart Form Phase: Provide functional & technical design documents	09/08/23	Achieved	Approved
IT-06.T2.04.10	Email Phase: Provide SIT/UAT test results	08/11/23	Achieved	Approved
IT-06.T2.04.11	Email Phase: Provide go/no-go decision with supporting checklist	08/14/23	Achieved	Approved
IT-06.T2.04.12	Email Phase: Provide final business process document	08/18/23	Achieved	Approved
IT-06.T2.04.13	Email Phase: Provide test closure memo	08/14/23	Achieved	Approved
IT-06.T1.03.03	Project Kick-Off presentation with Meeting Minutes (PSEGLI-SGP-TP037)	09/05/23	Achieved	Approved
IT-06.T1.03.04	Project Execution Plan (PEP) (PSEGLI-SGP-TP002)	09/05/23	Achieved	Approved
IT-06.T1.03.05	Business Requirements Document (PSEGLI-SGP-TP005)	12/04/23	Achieved	Approved
IT-06.T1.03.06	Requirements Clarification (PSEGLI-SGP-TP004)	09/05/23	Achieved	Approved
IT-06.T1.03.07	Cyber Risk Assessment Questionnaire (PSEGLI-SGP-TP028)	09/05/23	Achieved	Approved
IT-06.T2.04.14	Smart Form Phase: Submit final training documentation	11/10/23	Delayed	Declined
IT-06.T2.04.15	Smart Form Phase: Provide penetration test results	11/17/23	Delayed	Declined
IT-06.T2.04.16	Smart Form Phase: Provide performance test results	11/24/23	Delayed	Declined
IT-06.T2.04.17	Smart Form Phase: Provide SIT/UAT test results	11/30/23	Delayed	Declined
IT-06.T2.04.18	Smart Form Phase: Provide test closure memo	12/05/23	Delayed	Declined
IT-06.T2.04.19	Smart Form Phase: Provide go/no-go decision with supporting checklist	12/05/23	Delayed	Declined
IT-06.T2.04.20	Smart Form Phase: Go-live	12/08/23	Delayed	Declined
IT-06.T2.04.21	Smart Form Phase: Submit business requirements	08/18/23	Achieved	Approved
IT-06.T2.04.22	Smart Form Phase: Provide web page mockups	10/27/23	Achieved	Approved
IT-06.T2.04.23	Smart Form Phase: Provide requirement traceability matrix (RTM)	09/29/23	Achieved	Approved
IT-06.T2.04.24	Smart Form Phase: Provide final business process document	11/24/23	Delayed	Declined

Summary

- The Salesforce Applications Replacement project consisted of 2 subprojects which included:
 - Email Phase
 - Smart Form Phase
- The E-mail phase was delivered timely and the Smart Form phase was delayed from the initial planned delivery.

IT-06.T2.05 – SPLUNK Life Cycle Upgrade

Project Status: **Achieved**

IT-06.T2.05 SPLUNK Life Cycle Upgrade				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-06.T2.05.01	Detailed Project Implementation Plan, to be submitted for LIPA approval	06/30/23	Achieved	Approved
IT-06.T2.05.02	Delivery of all scope identified in the LIPA approved Project Implementation Plan	12/31/23	Achieved	Approved
IT-06.T2.05.03	SPLUNK - Monthly Reporting of Project Status for the month of June 2023	08/10/23	Achieved	Approved
IT-06.T2.05.04	SPLUNK - Monthly Reporting of Project Status for the month of July 2023	08/10/23	Achieved	Approved
IT-06.T2.05.05	Solution Implementation Kick Off	09/15/23	Achieved	Approved
IT-06.T2.05.06	Release Planning	09/15/23	Achieved	Approved
IT-06.T2.05.07	Configuration Management Plan	09/15/23	Achieved	Approved
IT-06.T2.05.08	Cyber Risk Assessment/SIVR Questionnaire	09/15/23	Achieved	Approved
IT-06.T2.05.09	Test Management Plan	09/15/23	Achieved	Approved
IT-06.T2.05.10	Quality Assurance Plan	09/15/23	Achieved	Approved
IT-06.T2.05.11	Security Test Requirements	09/15/23	Achieved	Approved
IT-06.T2.05.12	Solution Design for new Splunk Cloud (SaaS) environment and Splunk forwarding layer setup (Test Environment Architecture, Test Environment Application Inventory, Production Environment Architecture , Production Environment Application Inventory)	09/29/23	Achieved	Approved
IT-06.T2.05.13	Requirements Traceability Matrix	09/15/23	Achieved	Approved
IT-06.T2.05.14	SPLUNK - Monthly Reporting of Project Status for the month of August 2023	09/15/23	Achieved	Approved
IT-06.T2.05.15	SPLUNK - Monthly Reporting of Project Status for the month of September 2023	10/10/23	Achieved	Approved
IT-06.T2.05.16	New Splunk Test environment and connection of Splunk forwarders	10/13/23	Achieved	Approved
IT-06.T2.05.17	Test Cases	10/13/23	Achieved	Approved
IT-06.T2.05.18	Requirements Traceability Matrix (Continue from planning phase)	11/03/23	Achieved	Approved
IT-06.T2.05.19	SPLUNK - Monthly Reporting of Project Status for the month of October 2023	11/10/23	Achieved	Approved
IT-06.T2.05.20	New Splunk PROD environment.	11/13/23	Achieved	Approved
IT-06.T2.05.21	Setup of Splunk forwarders to new Splunk Cloud (SaaS).	11/13/23	Achieved	Approved
IT-06.T2.05.22	Installation of applications to Splunk Cloud (SAAS).	11/13/23	Achieved	Approved
IT-06.T2.05.23	Requirements Traceability Matrix (Continue from planning phase)	11/20/23	Achieved	Approved
IT-06.T2.05.24	Lessons Learned Document	12/22/23	Achieved	Approved
IT-06.T2.05.25	Project Runbook	12/22/23	Achieved	Approved
IT-06.T2.05.26	Operational Readiness Review	12/22/23	Achieved	Approved
IT-06.T2.05.27	Production Acceptance	12/22/23	Achieved	Approved
IT-06.T2.05.28	System Testing	12/22/23	Achieved	Approved
IT-06.T2.05.29	Go-Live Checklist	12/22/23	Achieved	Approved
IT-06.T2.05.30	Go-Live	12/22/23	Achieved	Approved
IT-06.T2.05.31	SPLUNK - Monthly Reporting of Project Status for the month of November 2023	12/11/23	Achieved	Approved
IT-06.T2.05.31	Disaster Recovery Plan for Splunk	01/19/24	Achieved	Approved
IT-06.T2.05.32	UAT Disaster Recovery Test Results	02/16/24	Achieved	Approved
IT-06.T2.05.33	HyperCare Issue Status	03/29/24	Achieved	Approved
IT-06.T2.05.34	Transition to Operations Support Team	03/29/24	Achieved	Approved
IT-06.T2.05.35	Project closeout	03/29/24	Achieved	Approved

Summary

- PSEG Long Island delivered all the project requirements and met all deliverables associated with the SPLUNK Life Cycle Upgrade project.

IT-06.T2.06 – Application and Infrastructure Monitoring Consolidation - Planning

Project Status: **Dispute – Project Not Funded**

IT-06.T2.06 Application and Infrastructure Monitoring Consolidation - Planning				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-06.T2.06.01	Detailed Project Implementation Plan, to be submitted for LIPA approval	06/30/23	Project Not Funded	Declined
IT-06.T2.06.02	Delivery of all scope identified in the LIPA approved Project Implementation Plan	12/31/23	Project Not Funded	Declined

Summary

- This project was rejected by LIPA during Q4-2022 budget review. PSEG LI did not have the funding to complete this project. Therefore, no work effort planned and/or completed in 2023.

IT-06.T2.07 – Enterprise Time & Attendance Phase 2

Project Status: **Achieved**

IT-06.T2.07 Enterprise Time & Attendance Phase 2				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-06.T2.07.01	Detailed Project Implementation Plan, to be submitted for LIPA approval	08/15/23	Achieved	Approved
IT-06.T2.07.02	Delivery of all scope identified in the LIPA approved Project Implementation Plan	12/31/23	Achieved	Approved

Summary

- PSEG Long Island delivered all the project requirements and met all deliverables associated with the Enterprise Time & Attendance Phase 2 project.

Tier 3 Project Summary

Project #	Project Name	Performance
IT-06.T3.01	CG Concentrator Replacement	Achieved
IT-06.T3.02	Primavera Upgrade	Achieved
IT-06.T3.03	Outage and Incident Communications – Phase 2	Achieved
IT-06.T3.04	IT Portfolio Planning System	Delayed

IT-06.T3.01 – CG Concentrator Replacement

Project Status: **Achieved**

IT-06.T3.01		CG Concentrator Replacement		
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-06.T3.01.01	Detailed Project Implementation Plan, to be submitted for LIPA approval	07/07/23	Achieved	Approved
IT-06.T3.01.02	Delivery of all scope identified in the LIPA approved Project Implementation Plan	12/31/23	Achieved	Approved
IT-06.T3.01.03	Baseline Schedule and Updated PIP	12/15/23	Achieved	Approved

Summary

- PSEG Long Island delivered all the project requirements and met all deliverables associated with CG Concentrator Replacement project.

IT-06.T3.02 – Primavera Upgrade

Project Status: **Achieved**

IT-06.T3.02		Primavera Upgrade		
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-06.T3.02.01	Detailed Project Implementation Plan, to be submitted for LIPA approval	06/30/23	Achieved	Declined
IT-06.T3.02.02	Delivery of all scope identified in the LIPA approved Project Implementation Plan	12/31/23	Achieved	Approved

Summary

- The Primavera P6 Upgrade was completed prior to June 30, 2023 prior to submission of the PIP.
- PSEG Long Island has provided a project implementation plan and artifacts for closeout.

IT-06.T3.03 – Outage and Incident Communications - Phase 2

Project Status: **Achieved**

IT-06.T3.03 Outage and Incident Communications - Phase 2				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-06.T3.03.01	Detailed Project Implementation Plan, to be submitted for LIPA approval	06/30/23	Achieved	Approved
IT-06.T3.03.02	Delivery of all scope identified in the LIPA approved Project Implementation Plan	12/31/23	Achieved	Approved
IT-06.T3.03.03	Monthly Reporting of Project Status for the month of July 2023	08/11/23	Achieved	Approved
IT-06.T3.03.04	Gap Analysis Document. It should explain the gap between the current state and the future state. It should also identify the systems and/or artifacts impacted for reaching the future state.	08/25/23	Achieved	Approved
IT-06.T3.03.05	Solution Implementation Kick Off	08/25/23	Achieved	Approved
IT-06.T3.03.06	Release Planning	08/25/23	Achieved	Approved
IT-06.T3.03.07	Configuration Management Plan	08/25/23	Achieved	Approved
IT-06.T3.03.08	Cyber Risk Assessment/SIVR Questionnaire	08/25/23	Achieved	Approved
IT-06.T3.03.09	Test Management Plan	08/25/23	Achieved	Approved
IT-06.T3.03.10	Quality Assurance Plan	08/25/23	Achieved	Approved
IT-06.T3.03.11	Monthly Reporting of Project Status for the month of August 2023	09/11/23	Achieved	Approved
IT-06.T3.03.12	Security Test Requirements	09/22/23	Achieved	Approved
IT-06.T3.03.13	Solution Design for Mulesoft and IMS updates	09/22/23	Achieved	Approved
IT-06.T3.03.14	Requirements Traceability Matrix	09/22/23	Achieved	Approved
IT-06.T3.03.15	Monthly Reporting of Project Status for the month of September 2023	10/10/23	Achieved	Approved
IT-06.T3.03.16	API Development Mulesoft	10/27/23	Achieved	Approved
IT-06.T3.03.17	IMS Salesforce Updates	10/27/23	Achieved	Approved
IT-06.T3.03.18	Test Cases and Unit Test Results	10/27/23	Achieved	Approved
IT-06.T3.03.19	Requirements Traceability Matrix (Continue from planning phase)	10/27/23	Achieved	Approved
IT-06.T3.03.20	Monthly Reporting of Project Status for the month of October 2023	11/10/23	Achieved	Approved
IT-06.T3.03.21	Lessons Learned Document	12/22/23	Achieved	Approved
IT-06.T3.03.22	Project Runbook	12/22/23	Achieved	Approved
IT-06.T3.03.23	Operational Readiness Review	12/22/23	Achieved	Approved
IT-06.T3.03.24	Production Acceptance	12/22/23	Achieved	Approved
IT-06.T3.03.25	UAT Testing	12/22/23	Achieved	Approved
IT-06.T3.03.26	Go-Live Checklist	12/22/23	Achieved	Approved
IT-06.T3.03.27	Monthly Reporting of Project Status for the month of November 2023	12/11/23	Achieved	Approved
IT-06.T3.03.28	Go-Live	12/22/23	Achieved	Approved
IT-06.T3.03.29	HyperCare Issue Status	12/22/23	Achieved	Approved
IT-06.T3.03.30	Project closeout	12/22/23	Achieved	Approved

Summary

- PSEG Long Island delivered all the project requirements and met all deliverables associated with Outage and Incident Communications - Phase 2 project.

IT-06.T3.04 – IT Portfolio Planning System

Project Status: **Delayed**

IT-06.T3.04 IT Portfolio Planning System				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
IT-06.T3.04.01	Detailed Project Implementation Plan, to be submitted for LIPA approval	06/30/23	Delayed	Declined
IT-06.T3.04.02	Delivery of all scope identified in the LIPA approved Project Implementation Plan	12/31/23	Delayed	Declined

Summary

- Project is delayed because of dependencies associated with System Separation plan.

IT-07 - System Segregation

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$668,560.02		

IT-07	System Segregation			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-07.01	Bundle 1 PIP submission	03/31/23	Achieved	1st Revision Requested
IT-07.03	System Segregation - Monthly Reporting of Project Status for the month of April 2023	05/10/23	Achieved	Approved
IT-07.04	System Segregation - Monthly Reporting of Project Status for the month of May 2023	06/09/23	Achieved	Approved
IT-07.02	Bundle 2 PIP submission to LIPA	06/30/23	Achieved	3rd Revision Requested
IT-07.07	System Segregation - Monthly Reporting of Project Status for the month of June 2023	07/10/23	Achieved	Approved
IT-07.08	System Segregation - Monthly Reporting of Project Status for the month of July 2023	08/10/23	Achieved	Approved
IT-07.05	Bundle 1 RFP System Integrator Selection	08/24/23	No Status	No Status
IT-07.09	System Segregation - Monthly Reporting of Project Status for the month of August 2023	09/10/23	Achieved	Approved
IT-07.06	Bundle 3 PIP submission to LIPA	09/30/23	Achieved	2nd Revision Requested
IT-07.10	System Segregation - Monthly Reporting of Project Status for the month of September 2023	10/10/23	Achieved	Approved
IT-07.11	System Segregation - Monthly Reporting of Project Status for the month of October 2023	11/10/23	Achieved	Approved
IT-07.12	System Segregation - Monthly Reporting of Project Status for the month of November 2023	12/11/23	Achieved	Approved
IT-07.13	All planned scope and work for 2023 in the LIPA Board-approved IT System Separation Plan ("the Plan"), and in any approved detailed plans, roadmaps and strategies subsequently developed by the joint LIPA and PSEG Long Island IT Team pursuant to the Plan, will be completed in 2023 in accordance with the Plan and the above mentioned associated planning materials. Metric deliverables will be updated in Smartsheet upon the approval of the System Separation Plan and associated planning materials.	12/31/23	Achieved	1st Revision Requested

Summary

- The metric calls for “All planned scope and work for 2023 in the LIPA Board-approved IT System Separation Plan ("the Plan"), and in any approved detailed plans, roadmaps and strategies subsequently developed by the joint LIPA and PSEG Long Island IT Team pursuant to the Plan, will be completed in 2023 in accordance with the Plan and the above mentioned associated planning materials. Metric deliverables will be updated in Smartsheet upon the approval of the System Separation Plan and associated planning materials.”
- This project has been managed in collaboration and alignment with LIPA throughout 2023 and PSEG Long Island was open and transparent working through the project and is surprised to see the PIPs have been declined by LIPA.
- IT-07.01, IT-07.02, IT-07.06 were the originally approved and agreed-upon Metrics between LIPA and PSEGLI, supporting the DPS summarized write-up shown as IT-07.13. These 3 specific Metrics represent the total sum of the agreement between the parties for 2023 performance metrics related to System Separation.
- IT-07.01 required “Bundle 1 PIP submission” by 3/31/2023. This document was submitted by PSEGLI to LIPA on 3/30/23 as evidenced in LIPA’s Smartsheet system. The first response for this PIP was not received from LIPA until 11/10/2023, with requested changes as further discussed below.
- IT-07.02 required “Bundle 2 PIP submission to LIPA” by 6/30/2023. This document was submitted by PSEGLI to LIPA on 6/30/2023 as evidenced in LIPA’s Smartsheet system. On 8/4/2023, LIPA requested a copy of the PIP be provided in Word format as the original delivery was in PDF, which was subsequently submitted. On 9/20/2023, LIPA then Rejected the PIP and provided requested changes further discussed below.

- IT-07.06 for the “Bundle 3 PIP submission to LIPA” was due 9/30/2023, and was submitted on 9/29/2023 as evidenced in LIPA’s Smartsheet system. On 10/27/2023, LIPA rejected the document requesting changes, which are further discussed below.
- The majority of change requests submitted by LIPA across all 3 PIPs were voluminous, and failed to recognize or consider the requirements pursuant to the OSA and established facts. Some examples include:
 1. The pre-existing standard template for LIPA PIP documents did not include many additional information subsequently requested, such as: providing consultant resumes or the definition of what PSEG/PSEGLI procedures for standard conduct of business such as Schedule management should include.
 2. The PIP document is not an opportunity to identify new or additional Metrics deliverables beyond those to which the parties agreed (such as adding Monthly Program Reporting) nor is it proper for LIPA to use a PIP to request documents that would normally be provided in response to a formal IR (invoices, quotes, etc.).
 3. The LIPA IT executive agreement that White Papers would be created to document the System Separation team’s technical recommendation to the separation approach by system; NOT that they were or would become a deliverable intended to be included in any PIPs. White Papers were never contemplated for use between the parties.
 4. PIPs had never been used with the parties to document a Program-level (i.e. multiple projects) plan before, so PSEGLI adapted the standard singular Project format as part of the first PIP submittal in March for Bundle 1. The understanding within the Executive Steering Committee with LIPA was that adaptation would necessitate some summarization of activities and information to support the consolidated approach, especially in light of the fact that the Bundle sub-projects would not all be traveling the same exact timeline or involve all the same vendors for execution.
 5. If accepted, the changes requested by LIPA in the October-November rejections would significantly re-define the relationship of LIPA and PSEGLI by expanding LIPA’s IV&V role for active systems from the standard industry accepted definition of “independent verification and validation” of activities performed. This is also in contradiction to the definition of IV&V as contemplated in the OSA, which applies to IT Systems only, and not project management, procurement, or budgets. The changes requested specifically sought to make LIPA an active participant within in-flight projects with approval authority and rights that would seriously impact project timelines and significantly increase the cost of any work to be done as a result, such as:
 - Add LIPA cost management reviews/approvals at every project deliverable
 - Add LIPA IV&V team for consultation to all discussions related to project management, business, technical, procurement, testing, change management, “etc.” during the execution of the project
 - Add LIPA IV&V team weekly meetings for all 72 projects to review technical and financial status
 - Add LIPA IV&V team to the internal PSEG EPMO Quality Assurance review process
 - Add LIPA IV&V team to have full access to in-work artifacts through internal working team SharePoint sites
- These requested changes were not agreed upon by PSEGLI because they would materially change the relationship that is governed by the legal arrangement within the OSA.
- To summarize, the submittal of the PIPs for Bundles 1, 2 and 3 to LIPA as per the agreed upon Metrics of 3/31, 6/30 and 9/30 respectively, were met as evidenced by LIPA’s own tracking system.
- Subsequent LIPA requests for changes, including those that cannot be agreed to because they exceed the scope of a PIP, were simply not part of any agreed upon Metrics. Accordingly, LIPA cannot unilaterally make such changes/demands.
- The PIPs will continue to be modified and updated as projects continue to evolve and mature, as has been agreed to and is in keeping with standard project management processes.
- In point of this fact, the delays and scope changes related to the contract execution associated with Bundle 1 scope (i.e. establish partnership with a System Integrator to perform all work needed in conjunction with establishing LI-specific implementations for all the software tools listed in Bundle 1 in a coordinated manner) in particular have been driven by LIPA’s unnecessary interference into the PSEG procurement award and negotiation process – one of the very activities which PSEG has been engaged to perform in alignment with its procedures and processes as required under the OSA.

- LIPA first delayed the RFP by demanding the addition of new bidders (who did not meet the requirements for inclusion per the prior RFI process) late in the initial bid stage in late 2022, pushing initial SI contract award estimates from the end of January 2023 to March 2023.
- LIPA next delayed the process when the initial RFP responses and resulting award recommendation in March 2023 were unsatisfactory due to costs that exceeded their original expectations. In April, LIPA requested PSEGLI reduce the scope of work for the RFP by moving those activities to the Program team (as-is analysis, gathering of existing documentation, etc.) or pushing out to separate agreements, and then re-bidding the reduced scope. The redefinition process, to include the gathering of the as-is documentation and analysis of the system, pushed the Round 2 bid process out over the summer of 2023 and resulted in a final award recommendation in September.
- Then LIPA and their Legal counsel engaged in the resulting contract negotiations, including demands to make changes to an existing Master agreement in place between PSEG and the awardee, which resulted in eventual final settlement in January 2024, with the contract subsequently issued in February after all the necessary regulatory, security, risk and financial PSEG approvals were obtained.
- This chain of events related to Bundle 1 has delayed the original expected start of work by 12 months, which now impacts the execution of the other projects in the rest of the scope as well due to relationships and dependencies and the limited capacity for resources to accomplish all work concurrently.

IT-08 - Cyber Security Organization - Structure, Staff & Capabilities Review

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$222,853.34		

IT-08	Cyber Security Organization - Structure, Staff & Capabilities Review			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (per Smartsheet)
IT-08.1	Submit 2023 Positions PIP for the filling of critical positions that have been approved and budgeted to be filled in 2023.	01/31/23	Achieved	Approved
IT-08.2	PSEG Long Island has fully participated in study, including making relevant personnel available and providing requested information and data, in a timely manner.	10/18/23	Achieved	Approved
IT-08.4	Submit Cyber Security Organization PIP to implement the study recommendations.	12/22/23	Achieved	Approved
IT-08.5	Submit Job Descriptions for Director-level, Manager-level, and staff-level critical positions to be filled in 2024.	01/22/24	Achieved	Approved
IT-08.6	Submit Budget for implementation of PIP in 2024.	08/31/23	Achieved	Approved
IT-08.7	PSEGLI to submit artifacts evidencing completion of 2023 PIP deliverables.	12/31/23	Achieved	Approved
IT-08.8	Hiring completed for critical positions that were approved to be filled in 2023.	04/30/24	Pending	Pending

Summary

- PSEG Long Island submitted 2023 Positions PIP for the filling of critical positions that have been approved and budgeted to be filled in 2023
- PSEG Long Island submitted budget for implementation of PIP in 2024.
- PSEG Long Island participated in a Structure, Staff & Capabilities Review study that PSEG Long Island received on October 6, 2023 conducted by Ernst & Young.
- PSEG Long Island submitted a PIP to implement the study recommendations.
- PSEG Long Island submitted Job Descriptions for Director-level, Manager-level, and staff-level critical positions to be filled in 2024.
- Submitted artifacts evidencing completion of 2023 PIP deliverables.
- PSEG Long Island has hired 12 of the 14 identified roles. PSEG Long Island has been working on hiring the remaining two roles. Multiple candidates have been reviewed for the two open roles issues regarding competing offers, background investigations have led to extended timeline.

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	\$278,566.68		

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	Develop a scope of work, in consultation with LIPA, for 2023 follow-on studies recommended in the IRP. The collaboration will begin in 2022 soon after the IRP results are available. Potential scope of work may include 1) resiliency plan based on the results of the IRP, 2) identification of site-specific storage needs, and 3) analysis of resource characteristics required to replace existing generation.	1/31/2023	Achieved	Approved
PS&CE-01.02	Submit a final revision of the work scope addressing LIPA feedback for LIPA approval. This will include the work to be conducted, expected deliverables and timelines within the approved budget. Update Smartsheet for work scope deliverables from LIPA-approved plan.	3/31/2023	Achieved	Approved
PS&CE-01.03	Complete Q2 planned deliverables and provide to LIPA a quarterly deliverables status report.	6/30/2023	Achieved	Approved
PS&CE-01.04	Complete Q3 planned deliverables and provide to LIPA a quarterly deliverables status report.	9/30/2023	Achieved	Approved
PS&CE-01.05	Complete Q4 planned deliverables and submit to LIPA a quarterly status update.	12/31/2023	Approved	Approved
PS&CE-01.06	East End Retirements SOW: Identify reliability needs and operational concerns	9/29/2023	Achieved	Approved
PS&CE-01.07	Operational Resource Margin SOW: Preliminary findings on Operational Resource Margin	9/29/2023	Achieved	Approved
PS&CE-01.08	Resource Adequacy SOW: Deliver preliminary findings for IRM, Zone K LCR, and Zone K capacity position (excess/deficiencies)	10/31/2023	Achieved	Approved
PS&CE-01.09	Resource Adequacy SOW: Final Report	12/30/2023	Achieved	Approved
PS&CE-01.10	East End Retirements SOW: Final Report	12/30/2023	Achieved	Approved
PS&CE-01.11	Operational Resource Margin SOW: Final Report	12/30/2023	Achieved	Approved
PS&CE-01.12	Optimal Locations for Energy Storage: Final Report	12/31/2023	Achieved	Approved
PS&CE-01.13	Steam Deactivation Steady State Analysis: Identification of Reliability Needs and Operational Concerns	12/30/2023	Achieved	Approved

Summary

- PSEG Long Island developed a scope of work, in consultation with LIPA, for 2023 follow-on studies recommended in the IRP. The collaboration will begin in 2022 soon after the IRP results are available.
- PSEG Long Island submitted a final revision of the work scope addressing LIPA feedback for LIPA approval.
- PSEG Long Island completed all planned quarterly deliverable as well as quarterly status updates.
- PSEG Long Island delivered requirements under the SOWs and final reports for the following:
 - East End Retirements
 - Operational Resource Margin
 - Resource Adequacy
 - Optimal Locations for Energy Storage
 - Steam Deactivation Steady State Analysis

PS&CE-02 - Complete Energy Storage Request for Proposal (RFP) Follow-on Activities

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$222,853.34		

PS&CE-02	Complete Energy Storage Request for Proposal (RFP) Follow-on Activities			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
PS&CE-02.01	Submit a project plan for completing negotiations by 6/30/2023 with successful bidders in the Battery Storage RFP.	2/15/2023	Achieved	Approved
PS&CE-02.02	Submit a revised project plan addressing LIPA feedback for approval. Update Smartsheet for key project plan deliverables from LIPA-approved project plan.	2/28/2023	Achieved	Approved
PS&CE-02.03	Complete Q1 planned deliverables and submit to LIPA a quarterly deliverables status report.	3/31/2023	Achieved	Approved
PS&CE-02.04	Complete negotiations with successful bidders. If negotiations are not completed, submit proposed extended schedule with appropriate justification that meets the Exclusion criteria, for LIPA approval.	6/30/2023	Achieved	Approved
PS&CE-02.05	Complete Q2 planned deliverables and submit to LIPA a quarterly deliverables status report.	6/30/2023	Achieved	Approved
PS&CE-02.06	Complete Q3 planned deliverables and submit to LIPA a quarterly deliverables status report.	9/30/2023	Achieved	Approved
PS&CE-02.07	Complete Q4 planned deliverables and submit to LIPA a quarterly deliverables status report.	12/31/2023	Achieved	Approved
PS&CE-02.08	Complete environmental review of selected projects by 9/30/23. If LIPA determined that contract negotiations should continue beyond 06/30/2023, complete negotiations. If negotiations and/or environmental review are not completed, submit proposed extended schedule with appropriate justification that meets the Exclusion criteria, for LIPA approval.	9/30/2023	Achieved	Approved
PS&CE-02.09	If LIPA determined that negotiations should continue beyond 09/30/2023, complete contract negotiations. Obtain LIPA Board of Trustees approval of completed contracts and submit approved contracts to the NYS OAG and OSC. If negotiations and/or environmental reviews are not completed, submit proposed extended schedule with appropriate justification that meets the Exclusion criteria, for LIPA approval.	12/31/2023	Achieved	Approved

Summary

- PSEG Long Island submitted a project plan for completing negotiations by 6/30/2023 with successful bidders in the Battery Storage RFP.
- PSEG Long Island complete all planned quarterly deliverables and submitted quarterly deliverable status reports.
- PSEG Long Island met all requirements under the metric.

PS&CE-03 - Energy Efficiency Annualized Energy Savings

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$278,566.68		

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

PS&CE-3 Energy Efficiency Annualized Energy Savings

OSA Incentive: \$278,567



Metric Definition

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

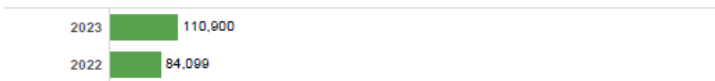
Calculation

Annual MMBtu saved; gross savings at the meter.

YTD



Month



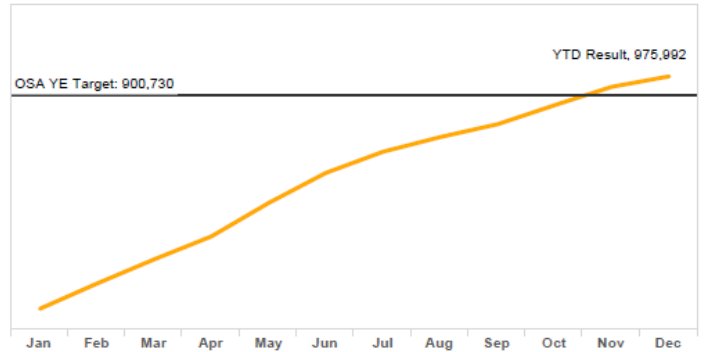
YTD Result

975,992

OSA YE Target

900,730

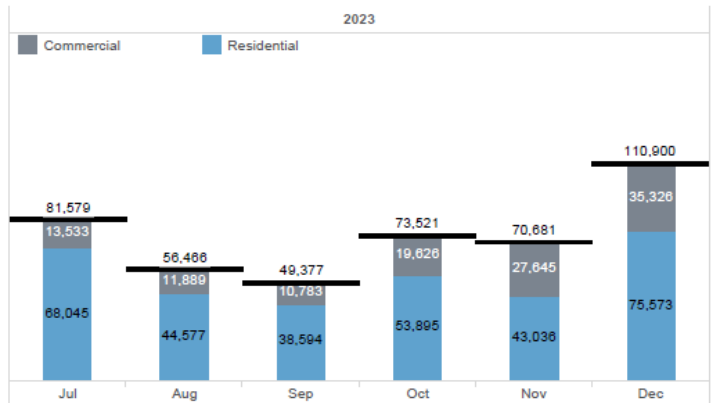
OSA YE Forecast



Annualized Energy Savings (MMBtu) vs. Target Program

Customer Type	Program	YTD Value	YTD Target
Residential	Efficient Products	429,983	339,857
	Home Comfort	184,211	110,518
	Home Energy Management	118,214	111,770
	Home Performance w/ENERGY STAR	35,206	31,426
	Residential Energy Affordability Partnership (REAP)	11,977	10,884
	All Electric homes	577	1,038
Commercial	Commercial Efficiency	169,017	286,309
	Multi Family Homes	28,828	8,928
Grand Total	Total Efficiency	975,992	900,730

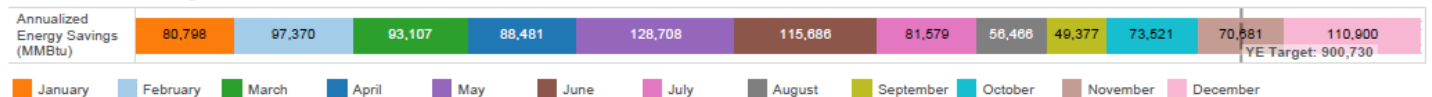
Monthly MMBtu



Annualized Energy Savings (MWh)

Customer Type	YTD Value	YTD Target
Residential	170,022	142,452
Commercial	53,016	92,082
Grand Total	223,037	234,534

YTD Value vs. Target



Summary

- PSEG Long Island achieved 2023 Energy Efficiency Annualized Energy Savings (MMBtu) target of 900,730 MMBtu with year-end performance of 975,992 MMBtu.

PS&CE-05 - Beneficial Electrification

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$111,426.67		

J F M A M J J A S O N D **PS&CE-5 Beneficial Electrification** OSA Incentive: \$111,427



Metric Definition

Achieve the following implementation targets by December 31, 2023:

1. Pay rebates for 7,000 new heat pumps in incentive programs.
2. Pay rebates for 1,656 housing units served by cold climate whole house heat pumps in incentive programs.
3. Achieve at least 10,884 MMBTU of energy savings from the low income REAP program.
4. Enroll 50 buildings in the multi-family (more than 4 dwelling units per building) rebate program.

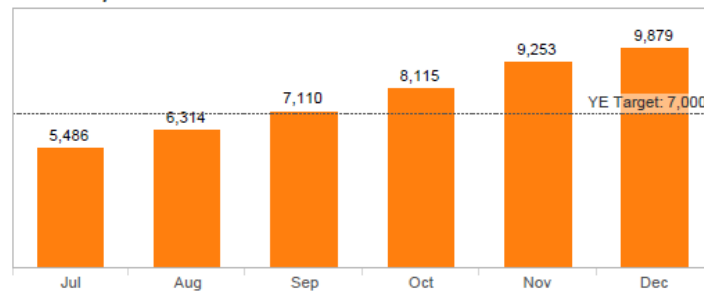
Calculation

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

YTD



Heat Pumps - YTD

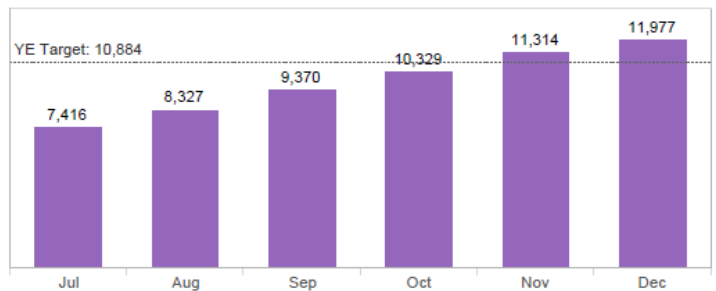


YTD Result	OSA YE Target	OSA YE Forecast
100.0%	100.0%	↑

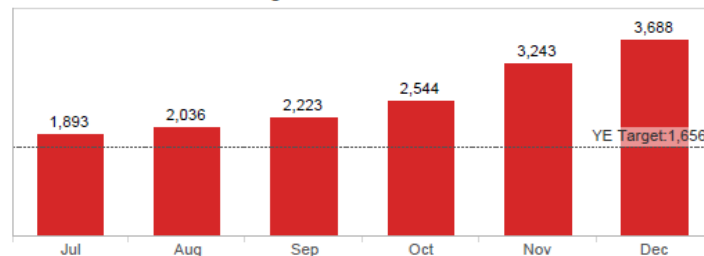
Beneficial Electrification - YTD vs Target

	YTD Value	YTD Target	YTD %	Pass/Fail	Pass/Fail %
Heat Pumps	9,879	7,000	141.1%	Pass	100.0%
Cold Climate WHHP Housing Units	3,688	1,656	222.7%	Pass	100.0%
MMBTU Low Income REAP	11,977	10,884	110.0%	Pass	100.0%
Multi-family # of Buildings	238	50	476.0%	Pass	100.0%

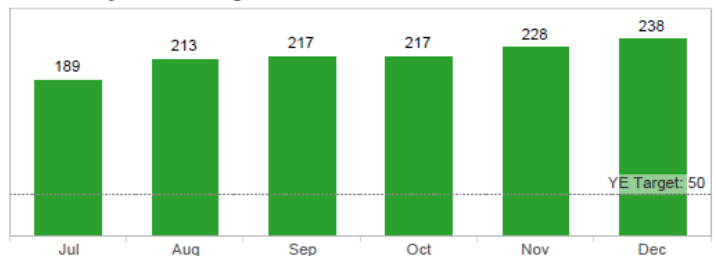
MMBTUs Low Income REAP - YTD



Cold Climate WHHP Housing Units - YTD



Multi-family # of Buildings - YTD



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

Sub-Metric A: Heat Pump Rebates

- PSEG Long Island paid rebates for 9,879 new heat pumps versus target 7,000 heat pumps – target achieved.

Sub-Metric B: Cold Climate Whole House Heat Pump (WHHP) Rebates

- PSEG Long Island paid rebates for 3,688 Cold Climate WHHP Rebates versus target 1,656 Cold Climate WHHP Rebates – target achieved

Sub-Metric C: MMBTU of Energy Savings from the low income REAP Program

- PSEG Long Island achieved MMBtu energy savings of 11,977 MMBtus versus target of 10,884 MMBtus in the Low Income REAP program – target achieved.

Sub-Metric D: Multi-family (more than 4 dwelling units per building) Rebate Program

- PSEG Long Island enrolled 238 Multi-family buildings (more than 4 dwelling units per building) in the multi-family rebate program versus target of 50 – target achieved.

PS&CE-06 - Electric Vehicle (EV) Make Ready

Metric Type	Quantitative	Metric Performance	↑ Partially Achieved
Incentive Compensation Claim	\$55,713.34 (50% of compensation)	Comments	Achieved 2 of 4 Sub-metric (50% of compensation)

PS&CE-6 Electric Vehicles (EV) Make Ready OSA Incentive: \$111,427



Metric Definition

Achieve the following implementation targets by December 31, 2023

1. Enroll 110 DCFC ports in make-ready infrastructure incentive
2. Energize 103 DCFC Ports;
3. Enroll 450 Level 2 ports in make-ready infrastructure incentives
4. Energize 400 Level 2 Ports.

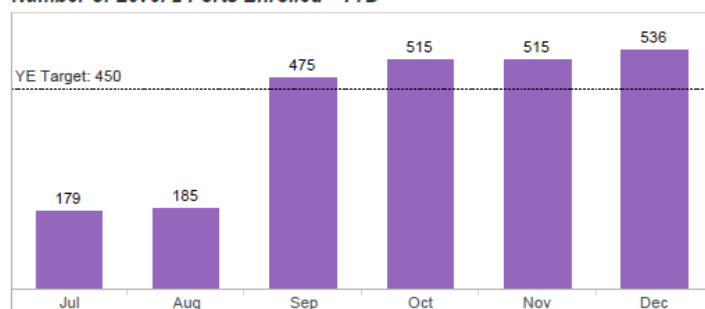
Calculation

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

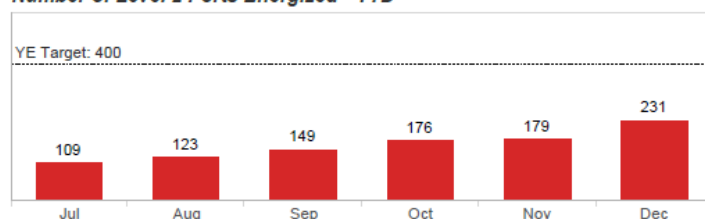
YTD



Number of Level 2 Ports Enrolled - YTD



Number of Level 2 Ports Energized - YTD

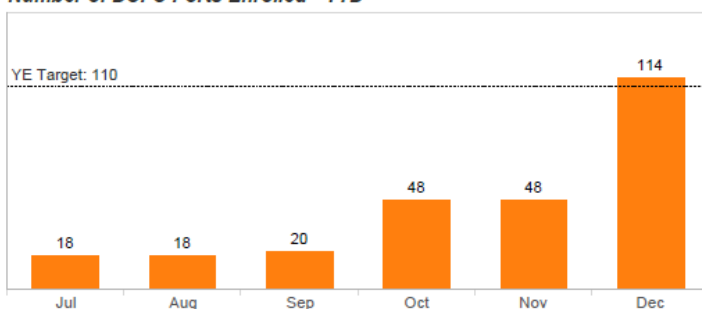


YTD Result	OSA YE Target	OSA YE Forecast
50.0%	100.0%	↑

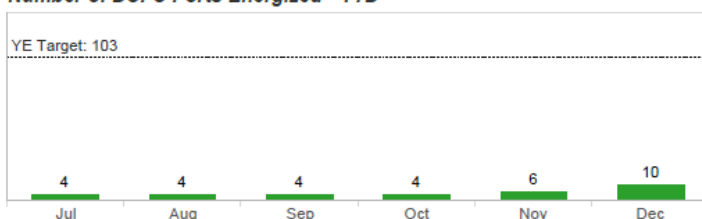
EV Make Ready - YTD vs Target

	YTD Value	YTD Target	YTD % Target	Pass/Fail	Pass/Fail %
DCFC Ports Enrolled	114	110	103.6%	Pass	100.0%
DCFC Ports Energized	10	103	9.7%	Fail	0.0%
Level 2 Ports Enrolled	536	450	119.1%	Pass	100.0%
Level 2 Ports Energized	231	400	57.8%	Fail	0.0%

Number of DCFC Ports Enrolled - YTD



Number of DCFC Ports Energized - YTD



- PSEG Long Island achieved 2 of the 4 Electric Vehicle (EV) Make Ready targets. Each target above is worth 25% of the total incentive and is measured on a pass/fail basis. A pass is earned by full completion of that target.

Sub-Metric A: Enrollment of DCFC ports in make-ready infrastructure incentive

- PSEG Long Island enrolled 114 DCFC ports in make-ready infrastructure incentive vs target of 110 enrollments – target achieved.

Sub-Metric B: Energizing of DCFC Ports

- PSEG Long Island energized 10 DCFC Ports vs target of 103 energized ports – target not achieved.

Sub-Metric C: Enrollment of Level 2 ports in make-ready infrastructure incentives

- PSEG Long Island enrolled 536 Level 2 ports in make-ready infrastructure incentives vs target of 450 enrollments – target achieved.

Sub-Metric D: Energizing of Level 2 Ports.

- PSEG Long Island energized 231 Level 2 ports vs target of 400 energized ports – target not achieved.

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
Incentive Compensation Claim	\$554,904.82	↑ Partially Achieved (83%)

PSEG Long Island is not sharing the Smartsheet record as it been updated with the latest schedule and doesn't appropriately display the updated schedule

Summary

- PSEG Long Island achieved 2/3rd of the incentive compensation allocated to this metric for successful completion of the final Go-live (implement system functionality) for new customer accounts opened in 2024
- The remaining 1/3rd of the incentive compensation allocated to this metric for successful completion of all interim deliverables, per the agreed-upon dates. Unfortunately the dates have not been updated in the system for the rebaselining of the program as the parties are still working through finalizing the exception.
- PSEG Long Island is recommending that the remaining 1/3rd allocation be prorated based on achievement. Based on PSEG Long Island's substantial completion of interim deliverables (at least 50% of them) and is submitting claim for 83% of the overall compensation for PS&CE-08 for 2023 (67% + 16%)

PS&CE-11 - Implementation of Utility 2.0 Projects

Metric Type	Quantitative	Metric Performance	↑ Partially Achieved
Incentive Compensation Claim	\$210,254.09 (80% of compensation)	Achieved 4 out of 5 projects – Suffolk County Bus Scope moved in 2024 Electric Vehicle Metric (PS&CE-14)	

Project #1: Miller Place Battery Project

Project Status: **Achieved**

PS&CE-11	Implementation of Utility 2.0 Projects – Miller Place Battery			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
Miller Place Battery Project				
PS&CE-11.08	Utility-scale storage Miller Place: Submit artifacts to demonstrate all 2023 deliverables complete	12/31/2023	Achieved	Approved
PS&CE-11.13	Submit Project Implementation Plan (including expected outcomes) for LIPA approval - Utility-scale storage Miller Place. Update the Metric deliverables in Smartsheet to include the LIPA-approved PIP deliverables and dates in 2023.	2/15/2023	Achieved	Approved

Summary

The Grid Storage Program originally offered an opportunity for third party developers to procure, install, maintain (and possibly operate) utility-scale storage on LIPA's system, currently at Miller Place, to defer T&D capital investments where feasible. These projects were projected to also support NY State's goal of installing 1,500MW of energy storage by 2025 and 3,000MW by 2030. The Project was cancelled by LIPA on 3.24.2024 after revised business cases deemed traditional wire solutions to be significantly more cost effective.

Project #2: Storage Hosting Capacity Map

Project Status: **Achieved**

PS&CE-11	Implementation of Utility 2.0 Projects			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
Storage Hosting Capacity Map				
PS&CE-11.01	Submit Project Implementation Plan (including expected outcomes) for LIPA approval - Storage hosting capacity maps. Update the Metric deliverables in Smartsheet to include the LIPA-approved PIP deliverables and dates in 2023.	3/1/2023	Achieved	Approved
PS&CE-11.03	Storage hosting capacity maps: go live	12/31/2023	Achieved	Approved

Summary

The Storage Hosting Capacity Maps project builds on the successful deployment of the Stage 3 Hosting Capacity Maps in 2021 and provides insight into potential favorable locations to interconnect storage resources. Storage Hosting Capacity Maps provide non-binding guidance to interconnection customers on the capacity that is available to interconnect on LIPA system. The storage hosting capacity map went live on 12/21/2023.

Project #3: Electric Vehicle (EV) Hosting Capacity Map

Project Status: **Achieved**

PS&CE-11	Implementation of Utility 2.0 Projects			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
Electric Vehicle (EV) Hosting Capacity Map				
PS&CE-11.09	Submit Project Implementation Plan (including expected outcomes) for LIPA approval - EV load serving capacity maps. Update the Metric deliverables in Smartsheet to include the LIPA-approved PIP deliverables and dates in 2023.	3/1/2023	Achieved	Approved
PS&CE-11.04	EV load serving capacity maps: go live	12/31/2023	Achieved	Approved

Summary

The EV Hosting Capacity Maps project builds on the successful deployment of the Stage 3 Hosting Capacity Maps in 2021 and provides insight into potential favorable locations to interconnect storage resources. EV Load Serving Capacity Maps will help facilitate EV charging equipment deployment throughout PSEG LI's service territory and serve as an informational tool for customers. The EV hosting capacity map went live on 12/21/2023.

Project #4: Residential Storage Incentive Program

Project Status: **Achieved**

PS&CE-11	Implementation of Utility 2.0 Projects			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
Residential Storage Incentive Program				
PS&CE-11.14	Submit Project Implementation Plan (including expected outcomes) for LIPA approval - Residential energy storage incentive. Update the Metric deliverables in Smartsheet to include the LIPA-approved PIP deliverables and dates in 2023.	3/1/2023	Achieved	Approved
PS&CE-11.16	Residential Energy Storage Incentive: Delivery for LIPA approval of documented final program design	7/1/2023	Achieved	Approved
PS&CE-11.02	Residential Energy Storage Incentive: Demonstrated go live to customers	9/1/2023	Achieved	Approved

Summary

The PSEG Long Island Residential Energy Storage System Incentive Program aims to make \$1,800,000 in funding available for customers who install qualifying energy storage systems paired with solar PV. The goal of this program is to provide customers with financial support to purchase and install energy storage systems. An enhanced incentive will be available for households that qualify as low-to-moderate income and customers located in designated Disadvantaged Area Communities. The Residential Energy Storage System Incentive Program represents an extension of the current NYSERDA Energy Storage Incentive Program. The PSEG-LI Residential Energy Storage Incentive Program will continue to utilize the existing NYSERDA framework. In order to receive the incentives, the company must be a NYSERDA-approved participating contractor, adhere to the terms and conditions set forth in the NY-Sun Upstate + Long Island Program Manual. Systems must enroll in the PSEG LI Demand Response program.

Project #5: Suffolk County Bus Make-Ready Pilot

Project Status: **Defer to 2024 PS&CE-14 Metric as Overall Scope (No Longer in Scope of 2023 Metric)**

PS&CE-11	Implementation of Utility 2.0 Projects			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
Residential Storage Incentive Program				
PS&CE-11.11	Submit Project Implementation Plan (including expected outcomes) for LIPA approval - Suffolk County bus make-ready pilot. Update the Metric deliverables in Smartsheet to include the LIPA-approved PIP deliverables and dates in 2023.	8/4/2023	Defer to 2024 PS&CE-14 Metric	Defer to 2024 PS&CE-14 Metric
PS&CE-11.06	Suffolk County Bus make-ready pilot: Submit artifacts to demonstrate all pilot project deliverables complete	12/31/2023	Defer to 2024 PS&CE-14 Metric	Defer to 2024 PS&CE-14 Metric

Summary

PSEG Long Island proposes to support the EV make-ready infrastructure for Suffolk County's EV buses. Through this initiative, PSEG Long Island will work with Suffolk County to construct and contribute funds to the make-ready infrastructure for two 1.5 MW charging sites, once Suffolk County finalizes their plans and purchases the charging ports.

Project #6: Integrated Energy Data Resource (IEDR) Platform

Project Status: **Defer to 2024 – Outside of PSEG Long Island Control**

PS&CE-11	Implementation of Utility 2.0 Projects			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
Integrated Energy Data Resource (IEDR) Platform				
PS&CE-11.10	Submit Project Implementation Plan (including expected outcomes) for LIPA approval - IEDR platform. Update the Metric deliverables in Smartsheet to include the LIPA-approved PIP deliverables and dates in 2023.	2/15/2023	Achieved	Approved
PS&CE-11.05	Integrated Energy Data Resource (IEDR) platform: Submit artifacts to demonstrate completion of IT infrastructure needed to enable delivery of data from data sources to IEDR platform	12/31/2023	Defer to 2024 Outside of PSEG LI Control	Defer to 2024 Outside of PSEG LI Control

Summary

PSEG Long Island aims to support NYSERDA in their development of a statewide centralized platform will allow effective access to useful energy data and information from New York's electric, gas, and steam utilities – and other sources – to support new and innovative clean energy business models that deliver benefits to New York energy customers.

Project #7: Connected Buildings Pilot

Project Status: **Did Not Achieve**

PS&CE-11	Implementation of Utility 2.0 Projects			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
Connected Building Pilots				
PS&CE-11.12	Submit Project Implementation Plan (including expected outcomes) for LIPA approval - Connected buildings pilot. Update the Metric deliverables in Smartsheet to include the LIPA-approved PIP deliverables and dates in 2023.	2/15/2023	Achieved	Approved
PS&CE-11.15	Connected buildings pilot: Demonstrated completion of customer enrollment, device activation, and utility receipt of device data for 75 customers	12/31/2023	Achieved	Approved

PS&CE-11.07	Connected buildings pilot: Complete a pilot assessment report for the first year by 12/31/2023.	3/31/2024	Did Not Achieve	Declined
-------------	---	-----------	------------------------	-----------------

Summary

PSEG Long Island proposes a technology pilot to demonstrate the benefits of integrated controls in homes and buildings to enable customer devices to respond directly and autonomously to utility price and dispatch signals. In particular, the pilot seeks to demonstrate a holistic solution that can demonstrate interoperability among a variety of devices from different manufacturers, simplifying communications and control signals between the utility and customer devices. By yearend 2023, 65 participants were approved, 14 projects were completed, and all panels were committed to projects.

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

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$278,566.68		

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	Submit assessment of available third-party tools for customer and contractor estimation of heat pump bill savings / customer economics. Recommended decision, with supporting analysis, to either (a) use third-party tool, or (b) develop customized tool for customer and contractor estimation of heat pump bill savings / customer economics. Submit PIP (including expected outcomes) to implement recommended decision by year end 2023 for LIPA approval. Update the Metric deliverables in Smartsheet to include the LIPA-approved PIP deliverables and dates.	3/31/2023	Achieved	Approved
PS&CE-13.02	Customer Outreach and Marketing Plan for segment-specific targeted outreach and marketing. Scope of plan to include customer segments identified in the 2022 LIPA consultant study as high value opportunities for heat pump conversion in 2023. Update the Metric deliverables in Smartsheet to include the LIPA-approved plan deliverables and dates in 2023.	5/30/2023	Achieved	Approved
PS&CE-13.03	PIP (including expected outcomes) to reward high-performing contractors and improve vetting of preferred contractor network delivered for LIPA approval. Update the Metric deliverables in Smartsheet to include the LIPA-approved PIP deliverables and dates in 2023.	5/1/2023	Achieved	Approved
PS&CE-13.04	Tool for customer and contractor estimation of heat pump bill savings / customer economics linked to or embedded in PSEGLI website deployed and meets expected outcomes.	12/15/2023	Achieved	Approved
PS&CE-13.05	Customer Calculator - Submit purchase agreement with Apogee	8/1/2023	Achieved	Approved
PS&CE-13.06	Customer Calculator - Finalize business requirements	7/17/2023	Achieved	Approved
PS&CE-13.07	Customer Calculator - Finalize project plan	7/17/2023	Achieved	Approved
PS&CE-13.08	Customer Calculator - Submit configuration and integration documentation	7/28/2023	Achieved	Approved
PS&CE-13.09	Customer calculator - Submit customer communication and marketing plan and documentation	8/2/2023	Achieved	Approved
PS&CE-13.10	Customer Calculator - Submit testing strategy	8/2/2023	Achieved	Approved
PS&CE-13.11	Customer Calculator - Submit updated business process documents	8/30/2023	Achieved	Approved
PS&CE-13.12	Customer Calculator - Submit SIT test results	9/28/2023	Achieved	Approved
PS&CE-13.13	Customer Calculator - Submit UAT test results	9/18/2023	Achieved	Approved
PS&CE-13.14	Customer Calculator - Provide employee training documentation	10/2/2023	Achieved	Approved
PS&CE-13.15	Customer Calculator - Provide go/no-go decision checklist	9/29/2023	Achieved	Approved
PS&CE-13.16	Customer Calculator - Submit test closure memo	9/29/2023	Achieved	Approved
PS&CE-13.17	Customer Calculator - Go Live & begin tracking visits to website	10/1/2023	Achieved	Approved
PS&CE-13.18	Customer Calculator - Provide monthly performance results and details of expected outcome targets - October 2023	11/18/2023	Achieved	Approved
PS&CE-13.19	Customer Calculator - Submit roadmap to guide future planning	12/1/2023	Achieved	Approved
PS&CE-13.20	Final customer heat pump economics calculator is fully functional and stable	12/15/2023	Exempted Via Approved Exception Request	Exempted Via Approved Exception Request
PS&CE-13.21	Customer Calculator - Provide monthly performance results and details of expected outcome targets - November 2023	12/18/2023	Achieved	Approved
PS&CE-13.22	Customer Calculator - Provide monthly performance results and details of expected outcome targets - December 2023	1/18/2024	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-13.23	Supply Chain Dev - Submit monthly project status report versus the work plan, including KPI - August 2023	9/12/2023	Achieved	Approved
PS&CE-13.24	Supply Chain Dev - Submit monthly project status report versus the work plan, including KPI - September 2023	10/11/2023	Achieved	Approved
PS&CE-13.25	Supply Chain Dev - Submit monthly project status report versus the work plan, including KPI - October	11/13/2023	Achieved	Approved
PS&CE-13.26	Supply Chain Dev - Submit monthly project status report versus the work plan, including KPI - November	12/12/2023	Achieved	Approved
PS&CE-13.27	Supply Chain Dev - Submit monthly project status report versus the work plan, including KPI - December	1/11/2024	Achieved	Approved
PS&CE-13.28	Supply Chain Dev - Submit LMI engagement plan	12/15/2023	Achieved	Approved
PS&CE-13.29	Supply Chain Dev - Submit 2024 Engagement and Implementation Expansion Action Plan	12/15/2023	Achieved	Approved
PS&CE-13.30	Supply Chain Dev - Provide evidence that contractor enrollment improvement implemented	11/1/2023	Achieved	Approved
PS&CE-13.31	Supply Chain Dev - Demonstrate application process improvement. Unified application for whole home electrification especially LMI application	12/31/2023	Achieved	Approved
PS&CE-13.32	Supply Chain Dev - Demonstrate simplified inspection process. Streamlined inspection process to eliminate friction with contractors and faster project completion	12/31/2023	Achieved	Approved
PS&CE-13.33	Supply Chain Dev - Payment processing. (a)Deliver a short term solution aimed at reducing time associated with rebate payments to contractors.	12/31/2023	Achieved	Approved
PS&CE-13.34	Supply Chain Dev - Midstream Design vision, guiding principle and outline, leveraging UCS 44 recommendations. Provide LIPA with an outline of proposed midstream program design based on initial discussions with Con Edison and potentially NYSEERDA	10/13/2023	Achieved	Approved
PS&CE-13.35	Supply Chain Dev - Stakeholder engagement. Conduct workshops to deliberate midstream program design with stakeholders including LIPA and provide documented summary and actions to explore in the workshop	10/20/2023	Achieved	Approved
PS&CE-13.36	Supply Chain Dev - Midstream recommendation. PSEG LI and TRC determination if a Midstream Program is an appropriate implementation model. PSEG LI and TRC will provide details that support recommendation.	12/15/2023	Achieved	Approved
PS&CE-13.37	Supply Chain Dev - Design/update tool list for incentive.	10/13/2023	Achieved	Approved
PS&CE-13.38	Supply Chain Dev - publish Tool incentive	11/1/2023	Achieved	Approved
PS&CE-13.39	Supply Chain Dev - Air to Water Heat Pump Incentives (Launch). Complete review of all data sheets and Joint Utility recommendations for implementation. Summary report on planned actions enabling April 1, 2024, launch submitted to LIPA.	12/1/2023	Achieved	Approved
PS&CE-13.40	Supply Chain Dev - Installer Training Plan. Present a proposed plan for coordination with NYSEERDA about training program designs and resources and share list of identified contractor training resources on Long Island.	12/15/2023	Achieved	Approved
PS&CE-13.41	Supply Chain Dev - Identify potential case studies, develop draft case studies in agreed format	9/23/2023	Achieved	Approved
PS&CE-13.42	Supply Chain Dev - Approved Case Studies	10/1/2023	Achieved	Approved
PS&CE-13.43	Supply Chain Dev - Round 1 Case Studies Published. Publish on website and share to Clean Energy Hub.	11/1/2023	Achieved	Approved

Summary

- PSEG Long Island completed the following projects:
 1. Assessment of available third-party tools for residential customer estimation of heat pump bill savings / customer economics. Recommended decision, with supporting analysis, to either (a) use third-party tool or (b) develop customized tool for customer and contractor estimation of heat pump bill savings / customer economics, which may also be used by contractors for rough estimation. Assessment and recommended decision to be provided by 3/31/2023 including PIP (with expected outcomes) to implement by year end 2023.
 2. Customer Outreach and Marketing Plan (COMP) for segment-specific targeted outreach and marketing, by six months following receipt of LIPA final heat pump goal analysis and recommendations. Scope of

plan to include customer segments identified in 2022 consultant study as high value opportunities for heat pump conversion in 2023.

3. PIP (including expected outcomes) to reward high-performing contractors and improve vetting of preferred contractor network delivered for LIPA approval by 5/1/2023.
- The compensation for this metric was as outlined below:
 1. 3 out of 3 = 100% payout of allocated incentive compensation
 2. 2 out of 3 = 50% payout of allocated incentive compensation
 - PSEG Long Island met the criteria on all three projects in scope in the metric.

Electric T&D

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

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

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 14,2023	4/14/2023	Achieved	Approved
T&D-01.02	Submit 2nd Quarter status report of Asset Inventory collected and uploaded to EGIS by July 14,2023	7/14/2023	Achieved	Approved
T&D-01.03	Submit 3rd Quarter status report of Asset Inventory collected and uploaded to EGIS by October 16, 2023.	10/16/2023	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.	12/31/2023	Did Not Achieve	Declined
T&D-01.05	Submit 4th Quarter status report of Asset Inventory collected and uploaded to EGIS by January 15, 2024.	1/15/2024	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 is: 545,255. The T&D-1 Metric specifies 33.3% of poles to be field verified, which translates to 181,750 required pole field verifications in 2023.
- PSEG Long Island worked throughout the year on the required field verifications and completed a total of 137,076 field verifications by the end of 2023, which did not meet the required number of 181,750. Delays in the selection & implementation of an alternate data collection application put achieving this goal in 2023 out of reach. For the data that has been field verified, a QA/QC review of all field tabulated information is performed prior to updating GIS. The vast majority of field inspection data has been forwarded over to our Mapping group to be processed and uploaded into GIS. YTD, the total # of records that have been QA/QC verified and updated in GIS is 1,385. PSEGLI's mapping group plans to bring on additional resources to help catch up with the backlog of GIS updates in early 2024.

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

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$180,691.90		

T&D-02 Asset Management Program Implementation - Asset Inventory				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-02.01	Complete implementation of initiatives 2 (Clarify / emphasize Asset Management Accountabilities about overall life-cycle optimization of assets), 3.2 (Define a Communication Strategy), and 5.4 (Develop and Formalize a Vision for Asset Management of the T&D System of the Future) of the Asset Management Implementation Plan (AM PIP).	9/20/2023	Achieved	Approved
T&D-02.02	Submit 3rd Quarter status report.	10/16/2023	Achieved	Approved
T&D-02.03	Complete implementation of initiatives 7.1 (Right Size AM Organization), 7.2 (Assess Skills / Knowledge Gaps), 8 (Review AM System Documentation), 14.3 (Internal Audit Process Review), and 14.4 (Review / Refine the IDA Process) of AM PIP.	11/30/2023	Achieved	Approved
T&D-02.04	Submit 4th Quarter status report.	1/25/2024	Achieved	Approved
T&D-02.05	Submit 1st Quarter status report.	4/14/2023	Achieved	Approved
T&D-02.06	Complete implementation of initiatives 5.3 (Clarify approach to Stakeholder Management) and 6 (Revisit and refine (as necessary) overall Asset Management roles across the organization) of AM PIP.	6/30/2023	Achieved	Approved
T&D-02.07	Submit remaining 12 Asset Management Plans (AMPs) – Develop and submit the specific AMPs for Overhead assets per the agreed-to format.	7/7/2023	Achieved	Approved
T&D-02.08	Submit Updated SAMP.	7/7/2023	Achieved	Approved
T&D-02.09	Submit 2nd Quarter status report.	7/14/2023	Achieved	Approved
T&D-02.10	Submit revised 12 AMPs addressing LIPA's comments - 30 days after receipt of LIPA's comments.	30 days after receipt of LIPA's comments	Achieved	Approved
T&D-02.11	Submit revised SAMP addressing LIPA's comments - 30 days after receipt of LIPA's comments.	30 days after receipt of LIPA's comments	Achieved	Approved
T&D-02.12	Submission of the 2022 Annual Reliability Assessment of Asset Performance by August 31, 2023, reporting the results of an annual reliability assessment of asset performance and including a plan to address identified deficiencies. The format of the report shall be similar to the 2020 Reliability Assessment of Plant Asset Performance report, which was submitted to LIPA on June 30, 2021.	8/31/2023	Achieved	Approved

Summary

- T&D-2 : To implement an effective Enterprise Asset Management (EAM) Program consistent with both the ISO-55000 principles and the Asset Management Recommendations adopted by the LIPA Board of Trustees (AM-1 and AM-2).
- Work under T&D-2 is covered under three distinct work streams
 - Organizational alignment with ISO 55001
 - Complete implementation of initiatives 2, 3.2, and 5.4 of the Asset Management Implementation Plan (AM PIP) (TD-2.1, Due: 9/20/23 - **Completed**)
 - Complete implementation of initiatives 7.1, 7.2, 8, 14.3, and 14.4 of AM PIP (TD-2.3, Due: 11/30/23 – **Completed**)
 - Complete Implementation of Initiatives 5.3 and 6 of AM PIP (TD-2.6, Due: 6/30/23 - **Complete**)
 - 2. Update Strategic Asset Management Plan (SAMP), and remaining twelve (12) Asset Management Plans (AMPs) (**All Complete**)
 - 1) Submit remaining 12 Asset Management Plans (AMPs) – Develop and submit the specific AMPs (TD-2.7, Due: 7/7/23) (**Complete**)
 - 2) Submit Updated Strategic Asset Management Plan (SAMP) (TD-2.8, Due: 7/7/23) (**Complete**)

- 3) Submit revised 12 AMPs addressing LIPA's comments - 30 days after receipt of LIPA's comments (TD-2.10, Due: **N/A**)
 - 4) Submit revised SAMP addressing LIPA's comments - 30 days after receipt of LIPA's comments (TD-2.11, Due: N/A – **N/A**)
3. Submission of the 2022 Annual Reliability Assessment of Asset Performance by August 31, 2023, reporting the results of an annual reliability assessment of asset performance and including a plan to address identified deficiencies. The format of the report shall be similar to the 2020 Reliability Assessment of Plant Asset Performance report, which was submitted to LIPA on June 30, 2021. (TD-2.12, Due: 8/31/23)
- The Asset Management Organization completed work on this deliverable and it was transmitted to LIPA ahead of its due date. (**Complete**)

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

Metric Type	Qualitative	Metric Performance	Reallocate Among Scope
Incentive Compensation Claim	Reallocate Among Scope		

T&D-03		Enterprise Asset Management System Implementation Plan		
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-03.01	EAMS System Integrator (SI) Selection and Procurement: Select and procure the best-fit EAM System implementer through rigorous evaluation to minimize delivery risk to be completed and approved by LIPA.	4/28/2023	Project Cancelled/Deferred	Project Cancelled/Deferred
T&D-03.02	Complete Pilot User Acceptance testing.	TBD	Project Cancelled/Deferred	Project Cancelled/Deferred
T&D-03.02	Complete Pilot users training.	TBD	Project Cancelled/Deferred	Project Cancelled/Deferred
T&D-03.04	Go Live for Pilot.	TBD	Project Cancelled/Deferred	Project Cancelled/Deferred
T&D-03.05	Executed EAMS solution/implementer contracts verified by LIPA	3/30/2023	Project Cancelled/Deferred	Project Cancelled/Deferred
T&D-03.06	Setup Development / Test instance.	TBD	Project Cancelled/Deferred	Project Cancelled/Deferred
T&D-03.07	Complete discovery workshops/detail requirements/System Specifications for inside and outside plant assets.	TBD	Project Cancelled/Deferred	Project Cancelled/Deferred
T&D-03.08	Submit Pilot PIP, including scope and schedule. Update deliverables in Smartsheet to reflect LIPA approved PIP.	TBD	Project Cancelled/Deferred	Project Cancelled/Deferred
T&D-03.09	Configure Development/Test Environment	TBD	Project Cancelled/Deferred	Project Cancelled/Deferred
T&D-03.10	Complete unit testing for Pilot.	TBD	Project Cancelled/Deferred	Project Cancelled/Deferred
T&D-03.11	Complete Pilot interfaces development.	TBD	Project Cancelled/Deferred	Project Cancelled/Deferred
T&D-03.12	Complete Pilot integration testing.	TBD	Project Cancelled/Deferred	Project Cancelled/Deferred

Summary

- Project was put on hold/deferred. PSEG Long Island is reallocating applicable incentive compensation evenly among the Electric T&D Function. Details of reallocated values for the T&D function are included in the payout summary.

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

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

J F M A M J J A S O N D **T&D-4 T&D System Relay Operations - Relay Mis-Operations** OSA Incentive: \$111,427



Metric Definition

Relay mis-operations occur when:

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

Calculation

Improvement as recorded by the number of relay operations on the Transmission & Distribution system in 2023 compared to the 2022 target level.

Exclusions

Distribution feeder relay mis-operations.

YTD

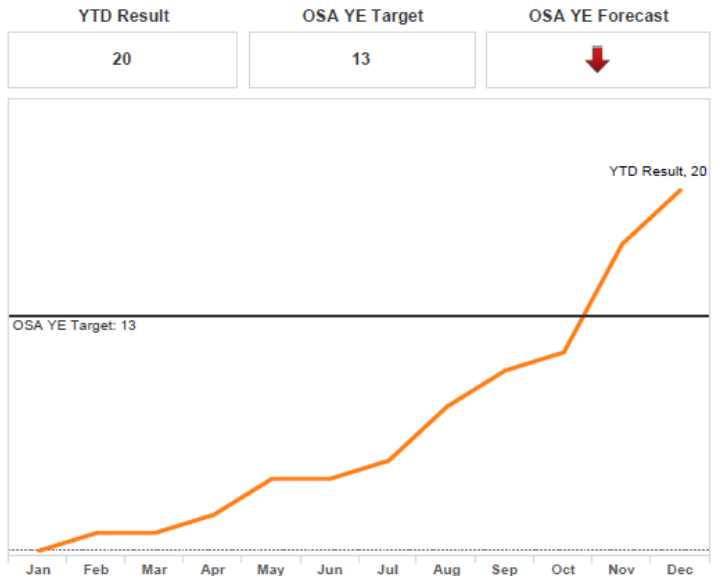


Month



YTD Events

Month of Incident Date	Substation	Description
October	6H Hauppauge	On 10/20/23 at 1335, 6H Hauppauge 138 Bus 1 and Bank 2 differential operated. Target reported are Bank 2 IJD B and C phase targets. There were no 138 Bus 1
September	8AX Patchogue	8AX Patchogue 650 appears to have overtrip for a fault on 69-776 7RM Bayport to 7M Macarthur...
	3R West Hempstead	The 13KV 3R-100 bus tie breaker opened. A full positive DC ground in station as a result of the switchgear cubicle failure and there is carbon through the switchgear
	9DF Deerfield	Deerfield 620 breaker tripped when it was closed to energize Bank 2...
August	2AB Corona Ave	2AB GCB 650 trip and reclose simultaneous to 69-262 (2K 6130 and 3J 610) trip .Investigation found the breaker status contact to the SEL-321 line relay was incorr.
	4W Roosevelt	Roosevelt 310 and 4W-110 breakers tripped, 310 reclosed for a fault on 33-354 (4N Maple Ave to 5R Bellmore). Investigation found the 5R 320 line relays associate
	4X Bar Beach	Transmission Operations was switching out a clearance at 4X Bar Beach. When 650 was opened by supervisory control, 4X-110 appears to have opened uncomm
	8E Centereach	Transmission circuit 69-843, 8GX West Yaphank to 8D Holbrook with tapped transmission load 8SC Medford(Gershow) tripped for a fault. At the same time 8E Cent
July	8GX West Yaphank/8.	Transmission circuit 69-840/839/842, 8GX West Yaphank to 8D Holbrook with tapped transmission load 8SC Medford(Gershow) tripped for a fault. At the same time
	5U Massapequa	Transmission circuit 69-571 (5D to 5G) tripped with lightning strike at the time of trip. The 5U Massapequa 610 a/w 69-572 to 5G also tripped at the same time. Inv.
	6L Nesconset	Cap Bank tripped simultaneous to 69-849 (8GX to 8HX). ...
		Cap Bank tripped simultaneous to 69-851 (8GX to 8HX). ...
		Cap Bank tripped simultaneous to 69-849 (8GX to 8HX)...
May	8AX Patchogue	Cap Bank tripped simultaneous to 69-849 (8GX to 8HX). ...
	9L East Hampton	9L-782 tripped during high loads. IJCV b phase target. Voltages to IJCV OK. Severe unbalance. AS founds on IJCV did not find issue. Load check on IJCV seem.
	5R Bellmore	Relay tech was troubleshooting a feeder breaker 5R-391 failing to close via supervisory report and 5R-391 opened. This cause loss of load on 5R-391. As part of ty.
April	9R Bridgehampton	Bridgehampton Bank 1 tripped during energizing from return switching causing 650 and 630 breakers to open resulting in the loss of source to Buell, Culloden Point,
February	8AX Patchogue	8AX Patchogue 650 appears to have overtrip for a fault on 69-779 7RM Bayport to 7XM Great River. ...
	2AB Corona Ave	On 2/1/2023 an A to B phase to phase fault occurred on 69-262 (2K Valley Stream – 3J Whiteside). The 3J Whiteside GCB610 protection correctly cleared on Zone



Summary

- Relay mis-operations occur when:
 - Any failure of a Protection System element to operate within the specified time when a fault or abnormal condition occurs within a zone of protection.
 - Any operation for a fault not within a zone of protection (other than operation as backup protection for a fault in an adjacent zone that is not cleared within a specified time for the protection for that zone).
 - Any unintentional Protection System operation when no fault or other abnormal condition has occurred unrelated to on-site maintenance and testing activity.
 - Protection System operations due to non-field resource design and settings error.
- PSEG Long Island had 20 mis-operations in 2023 which was worse than the targeted level of 13

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

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$120,461.27		

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

T&D-5 Transmission & Distribution Inadvertent Operation Events

OSA Incentive: \$111,427



Metric Definition

An Operating Error is defined as any Transmission or Distribution incident resulting from an incorrect action of a PSEG LI employee that results in one of the following:

1. Customer outages (momentary or sustained).
2. Unintended operation of a switching or protection device such as a breaker, fuse, switch, disconnect, tap, or ASU.

Calculation

Improvement as recorded by the number of Operating Errors on the Transmission and Distribution system in 2023 compared to the 2022 target level.

Exclusions:

Relay mis-operation due to non-field resource design and settings errors counted under Metric T&D-4 – "Transmission & Distribution System Relay Operations – Relay Mis-Operations".

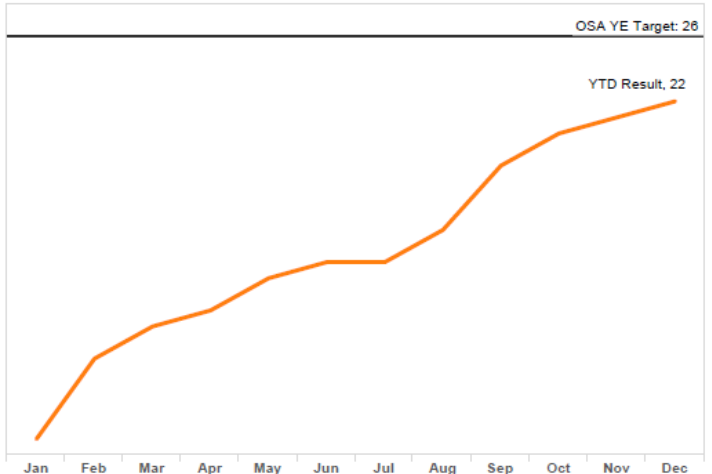
YTD

2023	22
2022	23

Month

2023	1
2022	1

YTD Result	OSA YE Target	OSA YE Forecast
22	26	↑



YTD Events

Month of Incident Date	Event ID	Incident Description
December	31652	On 12/11/2023 at 1514 hours, the Senior System Operator inadvertently opened the MABS-614 at 3D Manhasset associated with 60-368 (3D Manhasset - 3LG North Hills) while building the Day Ahead Operations Study Case on the EMS system. No customer load was affected. Investigation is in progress.
November	31588	While performing trip testing associated with 13kV Bus 2 at 7H Babylon Substation, an apprentice relay technician inadvertently operated the control handle a/w MABS 611 while training with another relay technician. This caused a momentary outage to Bank #1 and associated feeders: 7H-809, 7H-871, 7H-872, 7H-938.
October	30418	A Lineman was sizing up a load-side cut-out tap for a new temp pole line, when he lost control of the tap. The tap made contact with the energized line-side of the cut-out and the grounded load-side phase of the future new line. The distribution circuit locked out under an NRA.
	30454	A relay technician was applying final settings for the East End 33kV Conversion when line 33-932 tripped, causing a momentary outage to feeders 9NR-4L4 and 4L5 and the 9K Culloden Substation. The relay tech had previously completed the final settings changes for line relays for Line 33-943 and SEL 311 for Line 33-942 ..
September	29223	While performing circuit load relief, switching error occurred that dropped load to 2285 customers for 52 seconds.
	29226	A Hawkeye UG Contractor crew- under the direction of a PSEGLI Construction Supervisor- performed switching to energize new underground primary cable. A switching error occurred dropping load to 22 customers for 27 minutes
	29280	An electric technician was de-wiring a capacitor bank associated with GCB 690 when 69kV Bus 2 tripped causing a momentary outage to customer feeders 9DF-2K6 and 9DF-2K7
	30493	A Bancker UG electric crew was restoring a scheduled outage when a fuse outage occurred.
August	29166	An Elecnor Hawkeye UG crew struck a LIRR railroad feeder while excavating using a backhoe.
	29189	A relay technician was performing load checks at 8B Peconic when the Bank 1 differential protection picked up causing a momentary outage to feeders 8B-951 and 8B-952 and tripping 69-889. It was found that the relay tech did not correctly isolate the Bank Dif Relay (SEL 587) when taking load checks.
June	26790	While performing ATO testing on ATO 7998, Mercy Hospital experienced a momentary outage

Summary

- Operating Errors are defined as any Transmission or Distribution incident resulting from an incorrect action of a PSEG LI employee that results in one of the following:
 - Customer outages (momentary or sustained).
 - Unintended operation of a switching or protection device such as a breaker, fuse, switch, disconnect, tap, or ASU.
- PSEG Long Island had 22 inadvertent operations in 2023, which achieved targeted performance levels of 26 inadvertent operations.

T&D-06 - Primary and Alternative Transmission Control Center Replacement

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$301,153.16		

T&D-06 Primary and Alternative Transmission Control Center Replacement				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-06.01	Submit an updated Project Implementation Plan to LIPA for the Design and construction of the new PTCC by March 31, 2023. Update the metric deliverables in Smartsheet for the LIPA approved PIP.	4/1/2023	Achieved	Approved
T&D-06.02	Secure site for PTCC	5/31/2023	Achieved	Approved
T&D-06.04	Identify PTCC project support team (Lead SMEs) and required resources	6/16/2023	Achieved	Approved
T&D-06.05	Develop draft RFP for Architectural & Engineering (A&E) Services	6/30/2023	Achieved	Approved
T&D-06.03	Desktop Environmental Review Report (Phase I) of the project site(s) and relevant adjoining properties	7/21/2023	Achieved	Approved
T&D-06.07	Environmental Phase II Review (if necessary)	7/31/2023	Achieved	Approved
T&D-06.06	Identify Project Construction Manager	8/31/2023	Achieved	Approved
T&D-06.10	Key Stakeholder Final Confirmation of Design Program and Space Needs (what is co-located)	9/29/2023	Achieved	Approved
T&D-06.11	Develop and Issue RFP for Video Wall Solution and Integrator	12/29/2023	Achieved	Approved
T&D-06.08	Issue A&E Firm RFP	3/18/2024	Future Deliverable	Future Deliverable
T&D-06.13	Contract Award for Video Wall Solution and Integrator Executed	5/15/2024	Future Deliverable	Future Deliverable
T&D-06.09	Contract Award for A&E Firm Executed	6/28/2024	Future Deliverable	Future Deliverable

Summary

- PSEG Long Island submitted an updated Project Implementation Plan to LIPA for the Design and construction of the new PTCC.
- PSEG Long Island completed the following deliverables:
 - Secure site for PTCC
 - Identify PTCC project support team (Lead SMEs) and required resources
 - Develop draft RFP for Architectural & Engineering (A&E) Services
 - Desktop Environmental Review Report (Phase I) of the project site(s) and relevant adjoining properties
 - Environmental Phase II Review (if necessary)
 - Identify Project Construction Manager
 - Key Stakeholder Final Confirmation of Design Program and Space Needs (what is co-located)
 - Develop and Issue RFP for Video Wall Solution and Integrator
- The following deliverables were deferred to 2024 as this is a multi-year effort:
 - Issue A&E Firm RFP
 - Contract Award for Video Wall Solution and Integrator Executed
 - Contract Award for A&E Firm Executed

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

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$361,383.80		

J F M A M J J A S O N D T&D-7 System Average Interruption Duration Index (SAIDI) Reliability OSA Incentive: \$334,280



Metric Definition

Total duration of interruption for the average customer during each Contract Year, computed in accordance with IEEE Standard 1366, Section 4.2.2. Exclusions for Major Storms will be applied as per NY Department of Public Service and NYCRR 97.1.

Calculation

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

Where,

r_i = Restoration time, minutes.

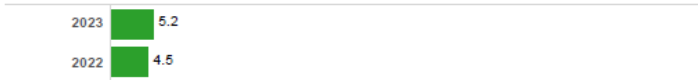
N_i = Total number of customers interrupted 5 minutes or more.

NT = Total number of customers served.

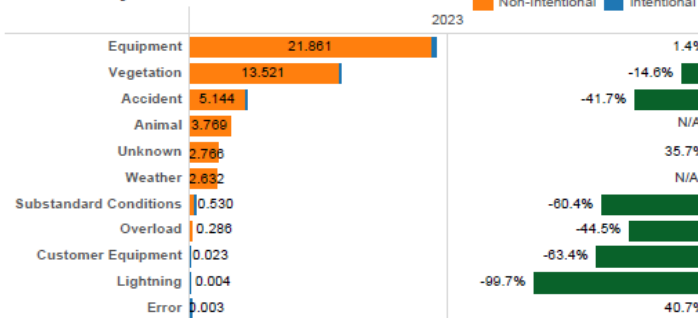
YTD



Month

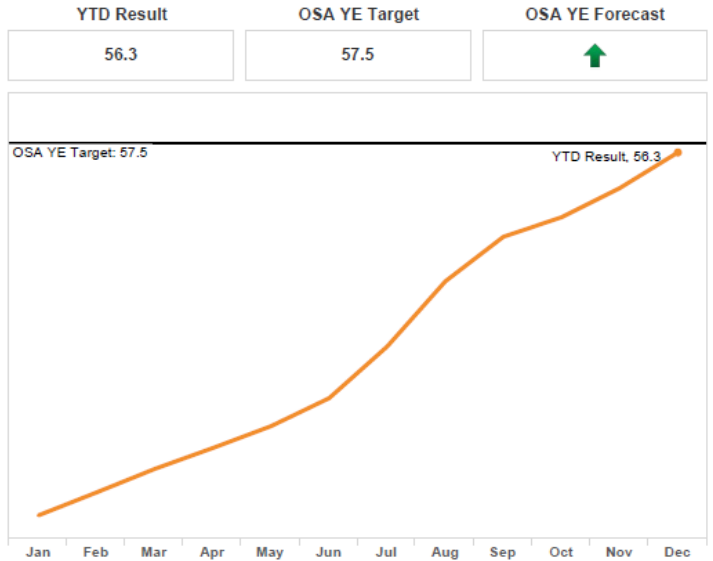


YTD SAIDI by Cause

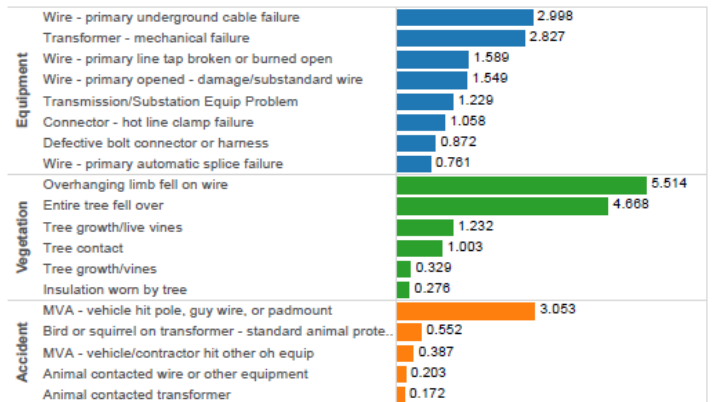


Transmission and Distribution SAIDI

Transmission/Substation & TBD	1.94
Distribution	54.36



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 achieved a System Average Interruption Duration Index (SAIDI) of 56.3 minutes in 2023 achieving the targeted performance level of 57.5 minutes.

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

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$240,922.53		

J F M A M J J A S O N D **T&D-8 System Average Interruption Frequency Index (SAIFI) Reliability** OSA Incentive: \$222,853



Metric Definition

Frequency of sustained interruption 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,

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

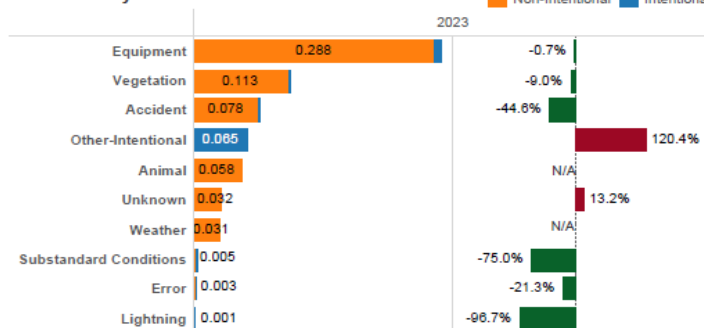
YTD

2023	0.69
2022	0.88

Month

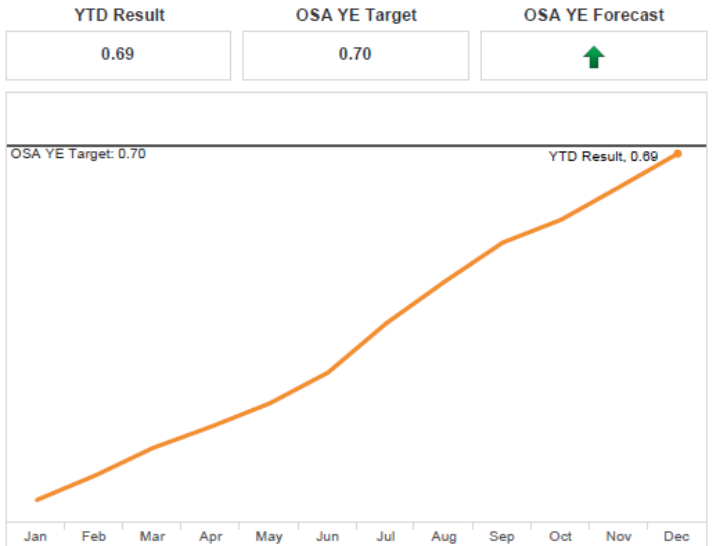
2023	0.06
2022	0.05

YTD SAIFI by Cause

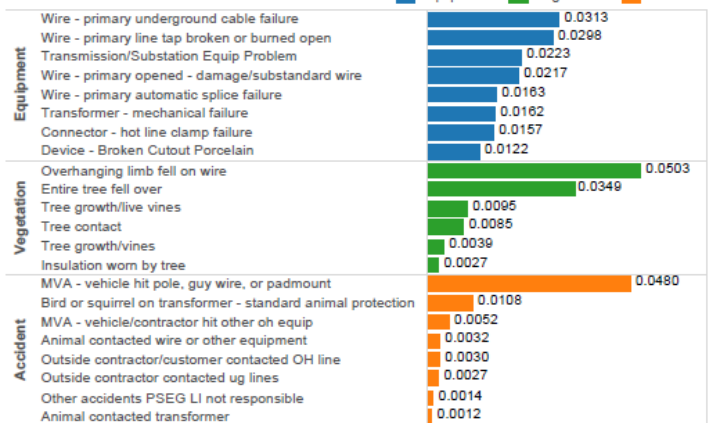


Transmission and Distribution SAIFI

Transmission/Substation & TBD	0.050
Distribution	0.837



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 achieved a System Average Interruption Frequency Index (SAIFI) of 0.69 in 2023 achieving the targeted performance level of 0.70.

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

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$180,691.90		

J F M A M J J A S O N D **T&D-9 Momentary Average Interruption Frequency Index (MAIFI) Reliability** OSA Incentive : \$167,140



Metric Definition

Frequency of momentary interruption within a Contract Year.

Calculation

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

YTD



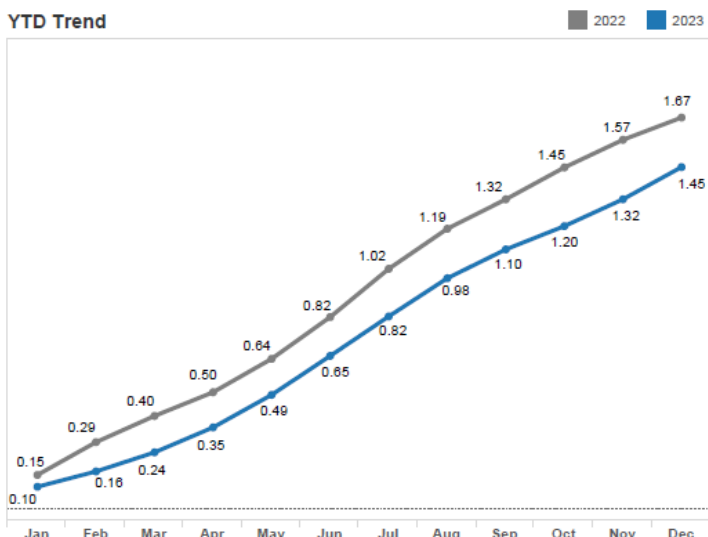
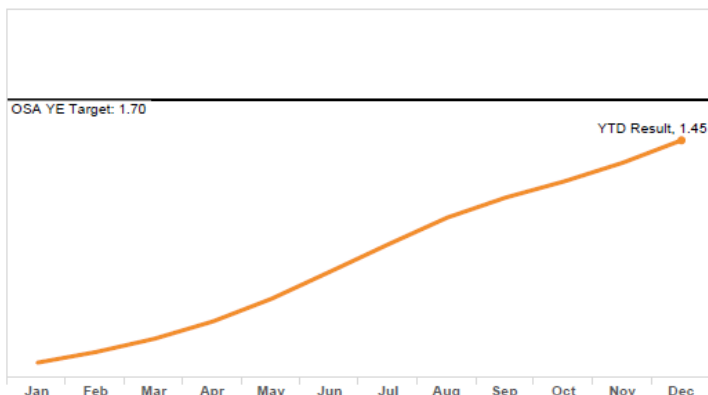
Month



Monthly Statistics

	2022		2023	
	Interruptions	MAIFI	Interruptions	MAIFI
January	166,838	0.15	109,732	0.10
February	159,557	0.14	74,578	0.07
March	127,565	0.11	93,086	0.08
April	115,350	0.10	121,639	0.11
May	162,439	0.14	158,617	0.14
June	203,316	0.18	189,973	0.17
July	234,425	0.20	192,370	0.17
August	194,929	0.17	186,096	0.16
September	143,307	0.13	140,543	0.12
October	154,978	0.14	113,430	0.10
November	134,346	0.12	130,729	0.11
December	108,201	0.09	156,839	0.14
Total	1,905,251	1.67	1,667,632	1.45
Customers Served	1,144,195		1,146,481	

YTD Result	OSA YE Target	OSA YE Forecast
1.45	1.70	↑



Summary

- PSEG Long Island achieved a Momentary Average Interruption Frequency Index (MAIFI) of 1.45 in 2023 achieving the targeted performance level of 1.70.

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

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

J F M A M J J A S O N D **T&D-10 Sustained Multiple Customer Outages (MCO) - 4 or More** OSA Incentive: \$139,283



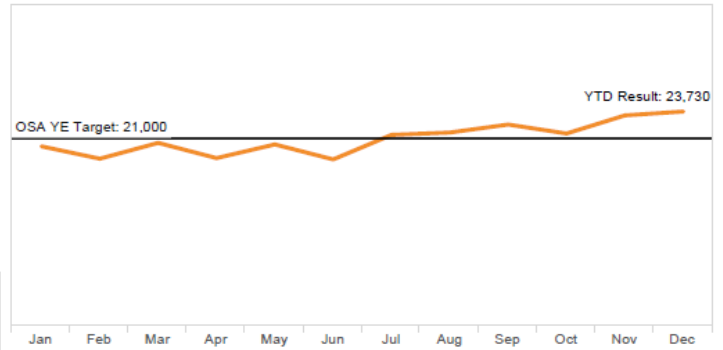
Rolling 12 Month Result	OSA YE Target	OSA YE Forecast
23,730	21,000	↓

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. The metric measures the number of customers that have experienced 4 or more sustained interruptions (5 minutes or greater in duration) over a rolling 12-month period.

Calculation

Count of customers experiencing 4 or more sustained interruptions in the last 12 months, excluding major events consistent with the Department of Public Service guidelines.



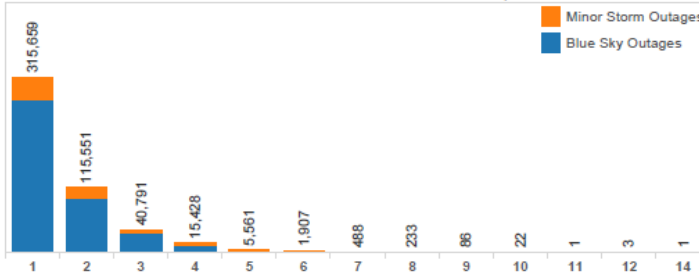
Rolling 12-Months



Customers Experiencing X Outages

Rolling 12 Months as of December

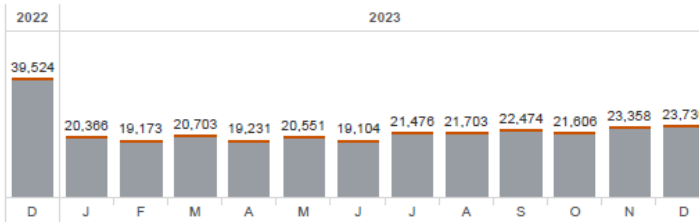
Colors reflect % of customer outages (rather than individual customers) that were:



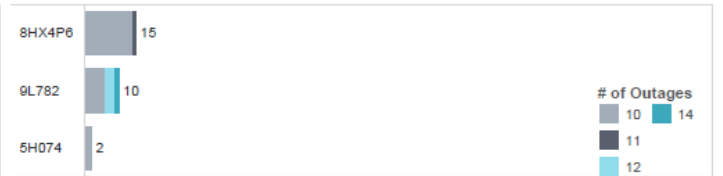
Customers Experiencing X Outages by Month

		7+	8+	9+	10+	11+	12+	13+	14+	15+	Zero Outages
2022	December	1,227	640	473	163	0	0	0	0	0	648,033
2023	January	1,232	645	457	160	0	0	0	0	0	651,807
	February	1,087	585	385	141	0	0	0	0	0	665,467
	March	884	561	317	140	0	0	0	0	0	667,181
	April	715	391	180	13	0	0	0	0	0	669,481
	May	858	284	22	3	0	0	0	0	0	674,074
	June	702	99	23	2	0	0	0	0	0	675,854
	July	573	165	62	31	28	14	10	0	0	675,798
	August	581	178	66	32	28	14	13	4	4	666,291
	September	749	321	73	28	14	4	4	0	0	657,185
	October	800	258	59	40	14	10	4	4	1	659,219
	November	963	337	100	43	11	10	4	4	1	654,166
	December	834	348	113	27	5	4	1	1	0	650,750

Historical Rolling 12 Month Results



Circuits with Customers Experiencing 10 or More Outages



Note: The chart above only shows customers experiencing 10+ outages on a single circuit. It does not account for customers that have experienced outages on more than one circuit.

Summary

- Sustained Multiple Customer Outages (S-MCO) is the count of customers experiencing 4 or more sustained interruptions in the last 12 months, excluding major events consistent with NYCRR 97.1.
- PSEG Long Island's 2023 S-MCO performance was 23,730 customers, which was worse than the YE target of 21,000 customers.
- While the 2023 S-MCO target was not achieved, PSEG Long Island's performance level's met the LIPA Board Policy of being top decile – please see below exhibit of PSEG Long Island's performance of CEM₄ which is S-MCO but displayed as % of customers rather than as a customer count.

Exhibit T&D-10.01 – Sustained MCO/CEMI₄ Benchmark

Sustained Multiple Customer Outages

(CEMI₄ - % of Customers w/ 4 or more outages > 5 Minutes)

Source: EEI Reliability Report

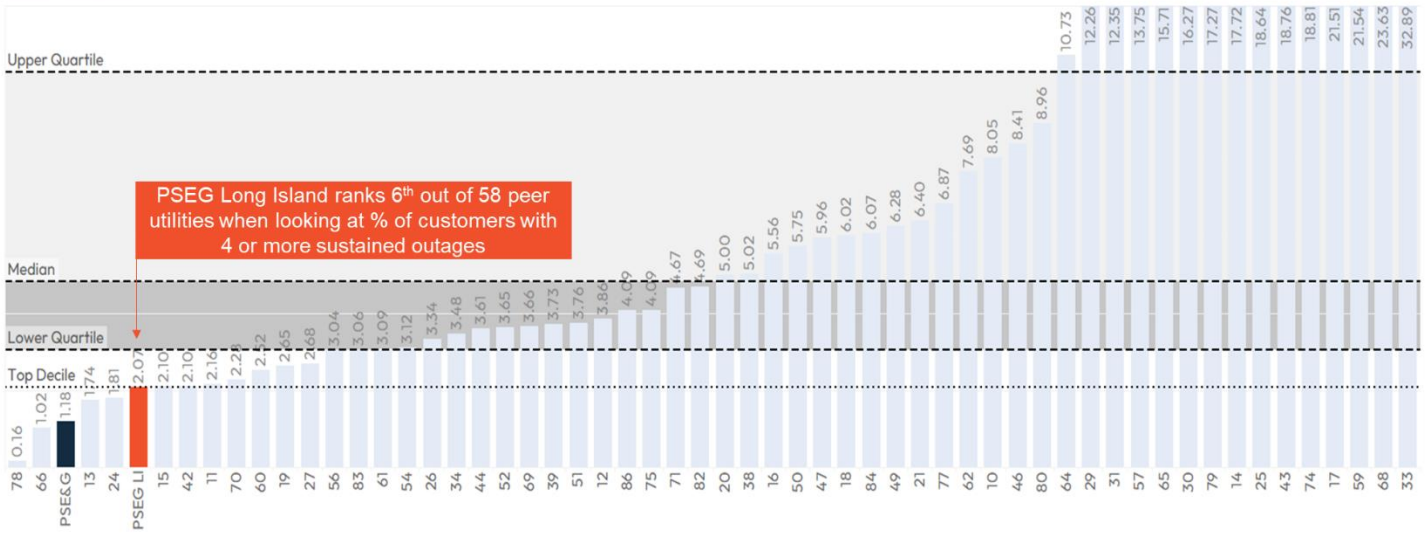


Exhibit T&D-10.01 – Source: Edison Electric Institute – Reliability Survey Report

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

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$90,345.95		

J F M A M J J A S O N D **T&D-11 Reduce Repeat Customer Sustained Multiple Customer Outages (S-MCOs)** OSA Incentive: \$83,570



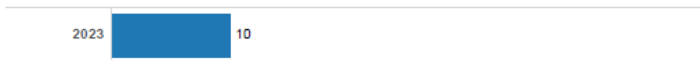
Metric Definition

Provide an improved level of reliability for multi-year repeat customers that have experienced 4 or more sustained interruptions (> 5 minutes or greater in duration) over a multi-year period. The metric measures a defined number of multi-year repeat S-MCO customers (281 customers) who have experienced 4 or more sustained interruptions (> 5 minutes or greater in duration) over a multi-year period. The targeted performance level is to reduce the identified customer group (as of September 30, 2022) by 90% of S-MCO customers. Computed in accordance with IEEE Standard 1366, Section 4.2.1. Exclusions for Major Storms will be applied as per NYS Department of Public Service (NYS DPS) and NYCRR 97.1.

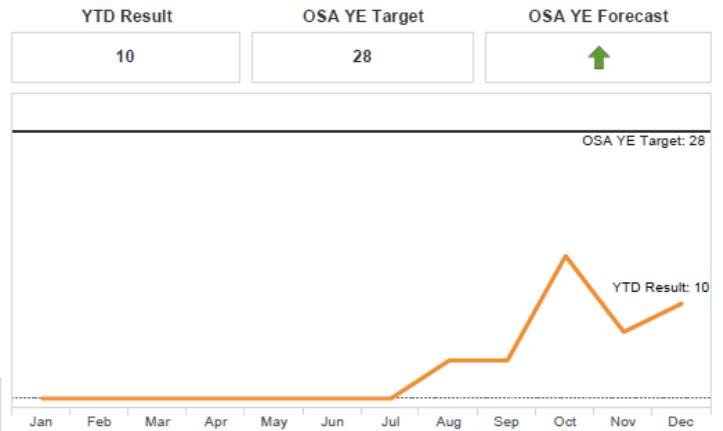
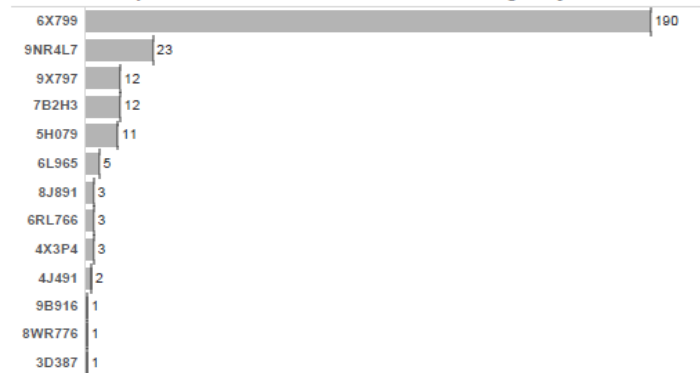
Calculation

Count of 2023 S-MCO Customers from defined population

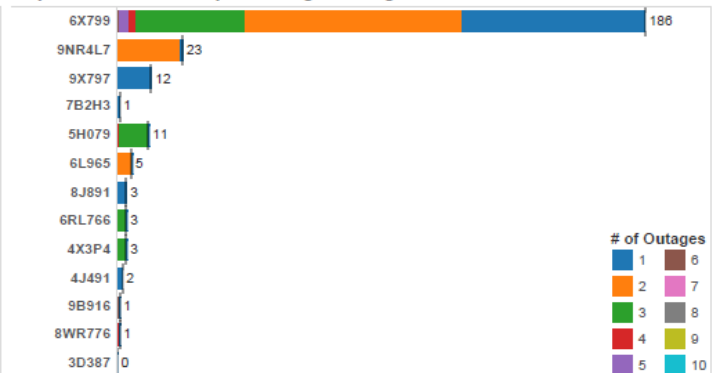
YTD



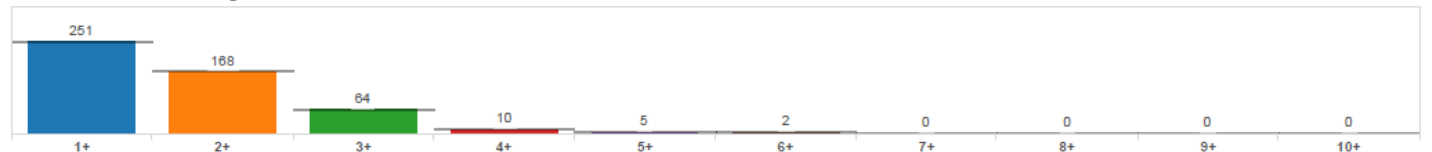
2020-2022 Repeat Customers with 4+ Sustained Outages by Circuit



Repeat Customers Experiencing X Outages



Customers with X Outages



Summary

- Reduced Repeat Customers Sustaining Multiple Customer Outages (repeat S-MCO) provides an improved level of reliability for multi-year repeat customers that have experienced 4 or more sustained interruptions (> 5 minutes or greater in duration) over a multi-year period. The metric measures a defined number of multi-year repeat S-MCO customers (231 customers) who have experienced 4 or more sustained interruptions (> 5 minutes or greater in duration) over a three year period. The targeted performance level would be to reduce the current customer set by 80% of repeat S-MCO customers. Computed in accordance with IEEE Standard 1366, Section 4.2.1. Exclusions for Major Storms will be applied as per NYS Department of Public Service (NYS DPS) and NYCRR 97.1. Sustained Customers Interruptions is total number of customers interruptions for more than 5 minutes
- PSEG Long Island's 2023 repeat S-MCO performance was 10 customers, which was better than the YE target of 28 customers.

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

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$120,461.27		

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

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

OSA Incentive: \$111,427



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

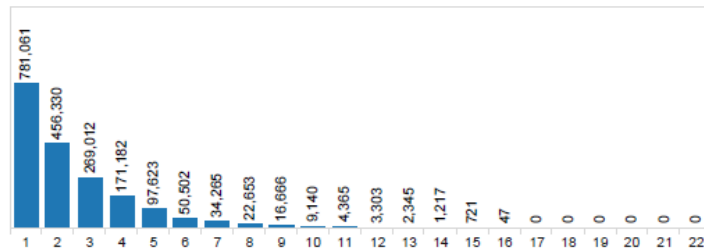
Excludes only Major Storms as defined by NY Department of Public Service and NYCRR 97.1.

Rolling 12-Months

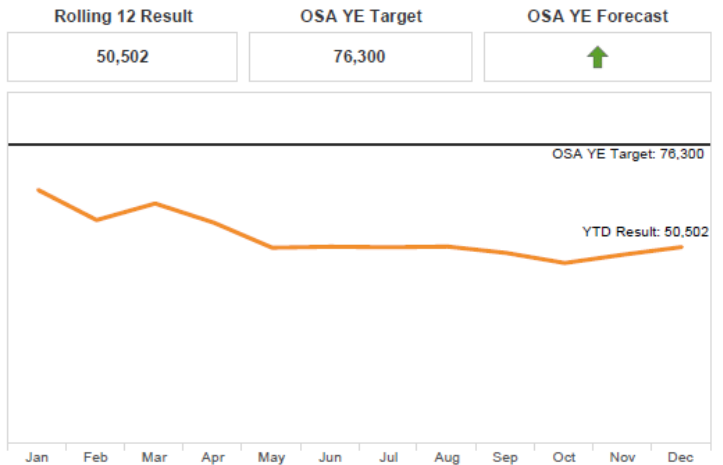
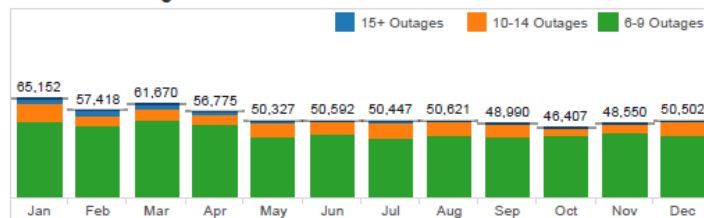


Customers Experiencing X Outages

Rolling 12 Months as of December



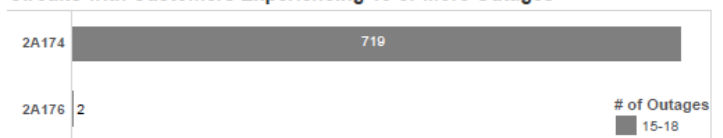
Historical Rolling 12 Month Results



Customers Experiencing X Outages by Month

		16+	17+	18+	19+	20+	21+	22+	23+	24+	No Outages
2022	Dec	2,139	2,072	1,938	1,260	938	0	0	0	0	373,549
	Jan	2,134	2,068	1,935	1,259	937	0	0	0	0	375,398
	Feb	2,100	1,289	1,278	0	0	0	0	0	0	389,491
	Mar	2,843	1,287	314	0	0	0	0	0	0	393,431
	Apr	1,120	1,112	24	0	0	0	0	0	0	397,344
2023	May	1,119	1,118	818	0	0	0	0	0	0	392,672
	Jun	1,116	1,116	823	797	789	0	0	0	0	394,820
	Jul	1,111	1,109	818	793	790	227	37	0	0	402,763
	Aug	396	37	0	0	0	0	0	0	0	394,140
	Sep	24	0	0	0	0	0	0	0	0	386,489
	Oct	0	0	0	0	0	0	0	0	0	386,632
	Nov	316	316	316	316	316	316	316	316	315	379,204
	Dec	47	0	0	0	0	0	0	0	0	365,420

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 2023 M-MCO performance was 50,502 customers, which was better than the YE target of 76,300 customers.

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

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

J F M A M J J A S O N D **T&D-13 Serious Injury Incident Rate (SIIR)** OSA Incentive: \$222,853



YTD Result	OSA YE Target	OSA YE Forecast
0.06	0.00	↓

Metric Definition

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

Calculation

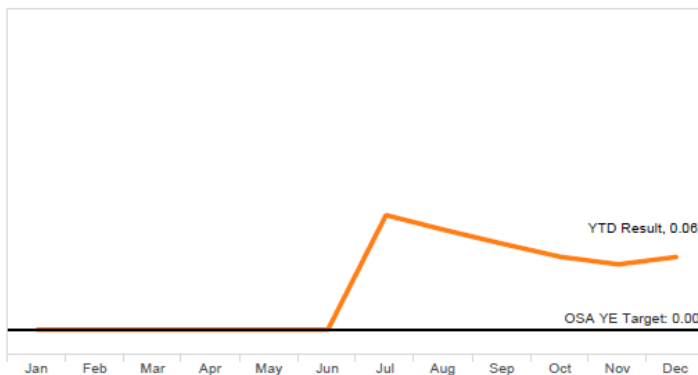
Number of cases X 200,000 hrs / Total Exposure hours worked (Note: 200,000 = 100 employees x 2,000 hours per employee per year)

YTD

2023	0.06
2022	0.03

Month

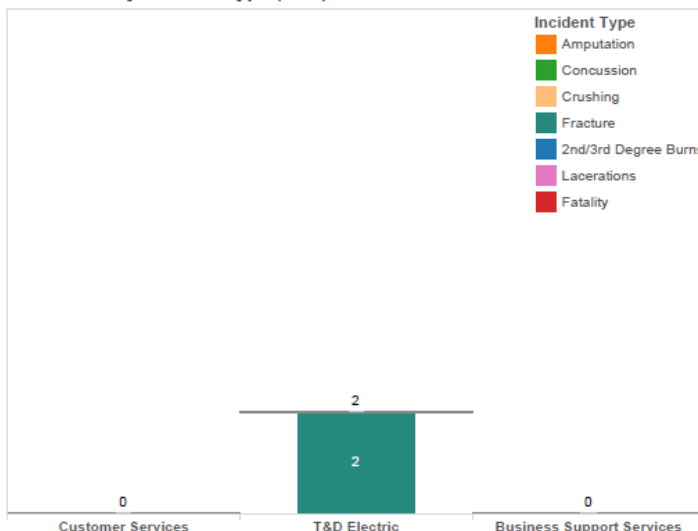
2023	0.00
2022	0.00



YTD Summary

		Exposure Hours	Serious Injury Incidents	Serious Injury Incident Rate (SIIR)
Customer Services	Employees	1,168,884	0	0.00
	Contractors	2,672	0	0.00
T&D Electric	Employees	2,484,802	1	0.08
	Contractors	1,805,794	1	0.12
Business Support Services	Employees	1,242,754	0	0.00
	Contractors	534,525	0	0.00
PSEG LI	CS	1,171,556	0	0.00
	T&D	4,090,596	2	0.10
	BSS	1,777,278	0	0.00
	PSEG LI	7,039,430	2	0.06

SIIR Cases by Incident Type (YTD)



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 two serious injury in 2023.
 - Incident 1 Summary (Employee): T&D Electric Operations Incident – Occurred on 7/28/2023
 - A Serviceman lost his footing while carrying a ladder uphill across uneven ground at in Plainview. He attempted to arrest his fall with his left leg and injured it. An ambulance was called on his

behalf and he was transported to Plainview Hospital to be evaluated. The employee fractured multiple bones. The employee required surgery. The employee has remained out of work since 7/29/2023. The employee has since returned to work.

- Incident 2 Summary (Contractor): Contractor Incident – Occurred on 6/27/2023
 - A unit price crew second-step apprentice employee was cleaning out the bucket of the truck located at the Hicksville yard. During this task, they slipped off the cat walk falling to the ground injuring their head and left wrist. 911 was called and the employee was transferred by ambulance to Nassau University Medical Center for evaluation. The employee sustained fractures and had surgery.
- PSEG Long Island had 2 incidents and none were considered life-altering incidents.

T&D-14 - OSHA Recordable Incidence Rate

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$240,922.53		

J F M A M J J A S O N D
T&D-14 OSHA Recordable Incidence Rate
OSA Incentive: \$222,853



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

Calculation

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

YTD

2023	0.65
2022	0.72

Month

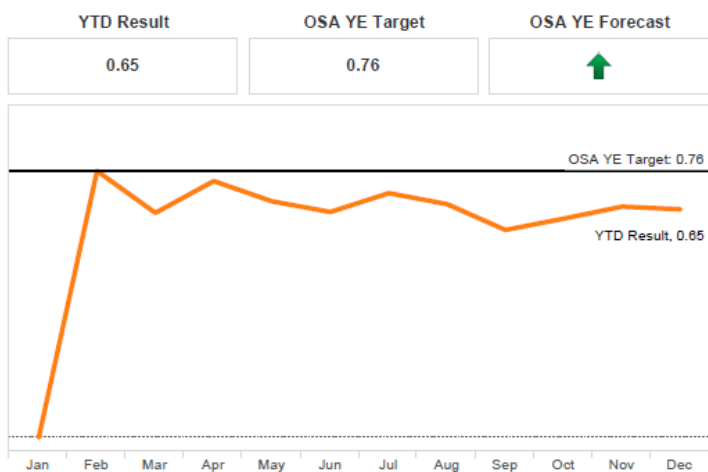
2023	0.56
2022	0.53

YTD Summary

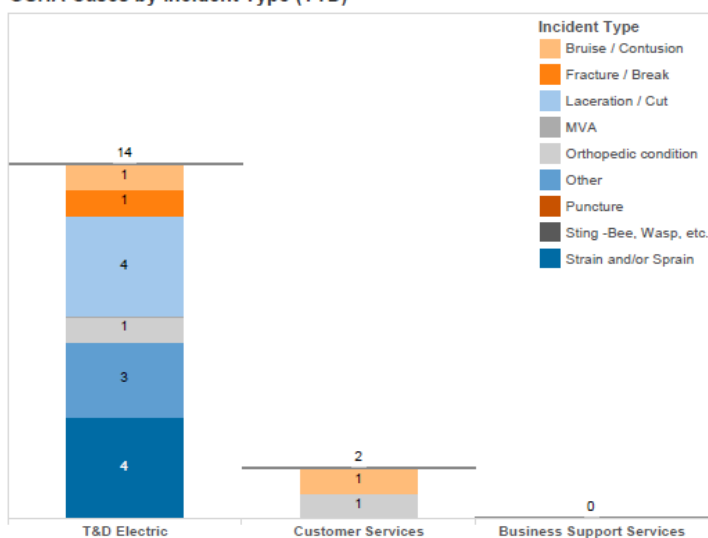
	Exposure Hours	OSHA Incidents	Incidence Rate
Customer Services	1,168,884	2	0.34
T&D Electric	2,484,802	14	1.13
Business Support Services	1,242,754	0	0.00
PSEG LI	4,896,439	16	0.65

Month Summary

	Exposure Hours	OSHA Incidents	Incidence Rate
Customer Services	87,753	0	0.00
T&D Electric	184,404	1	1.08
Business Support Services	87,126	0	0.00
PSEG LI	359,282	1	0.56



OSHA Cases by Incident Type (YTD)



Summary

- PSEG Long Island achieved an OSHA Recordable incident rate of 0.65 vs a targeted rate a 0.76
- Total illness and injury rate. The total OSHA (Occupational Safety and Health Administration) recordable injury and illness cases based on the exposure of 100 full-time workers, using 200,000 hours as the equivalent. This metric includes hearing loss.
- There was 4,896,439 exposure hours from PSEG LI employees in 2023
- There was a total of 16 OSHA recordable incidents in 2023
- The incident rate performance was (16 OSHA recordable incidents times 200,000 hours) divided by 4,896,439 exposure hours for a rate of 0.65.

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

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

J F M A M J J A S O N D **T&D-15 OSHA Days Away Rate (Severity)** OSA Incentive: \$222,853



YTD Result	OSA YE Target	OSA YE Forecast
10.13	8.51	↓

Metric Definition

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

Calculation

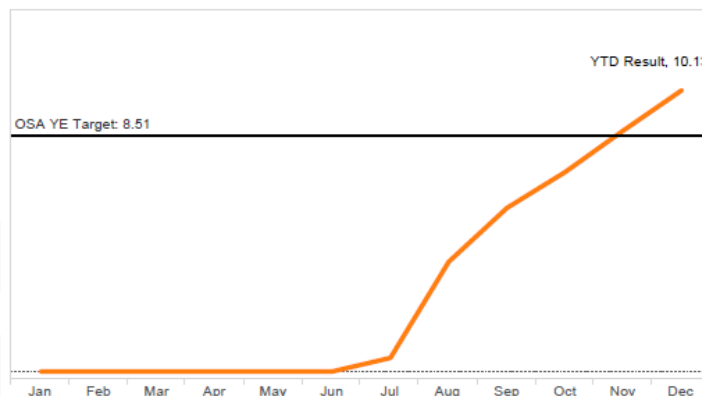
Total number of Lost Time Days due to injury x 200,000 / Total hours worked.

YTD

2023	10.13
2022	11.07

Month

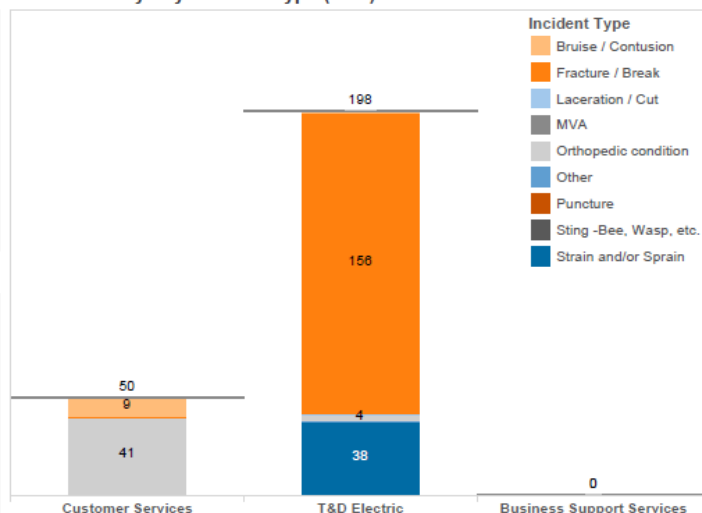
2023	28.39
2022	2.11



YTD Summary

	Exposure Hours	Lost Time Days	Days Away Rate
Customer Services	1,168,884	50	8.56
T&D Electric	2,484,802	198	15.94
Business Support Services	1,242,754	0	0.00
PSEG LI	4,896,439	248	10.13

Lost Time Days by Incident Type (YTD)



Month Summary

	Exposure Hours	Lost Time Days	Days Away Rate
Customer Services	87,753	0	0.00
T&D Electric	184,404	51	55.31
Business Support Services	87,126	0	0.00
PSEG LI	359,282	51	28.39

Summary

- PSEG Long Island completed 2023 with an OSHA Days Away Severity rate of 10.13 days vs a targeted rate a 8.51 days thus missing the targeted performance rate.
- The severity of OSHA (Occupational Safety and Health Administration) incidents that have occurred as measured by the number of lost workdays that can be attributed to an OSHA incident. The calculation is Total number of Lost Time Days due to injury x 200,000 / Total hours worked.
- There was 4,896,439 exposure hours from PSEG LI employees in 2023.
- There was a total of 248 lost time days due to injury in 2023.
- The Days Away Severity rate performance was (248 lost time days due to injury times 200,000 hours) divided by 4,896,439 exposure hours for a rate a 10.13 days.

T&D-16 - Motor Vehicle Accident (MVA) Rate

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$180,691.90		

J F M A M J J A S O N D T&D-16 Motor Vehicle Accident (MVA) Rate OSA Incentive: \$167,140



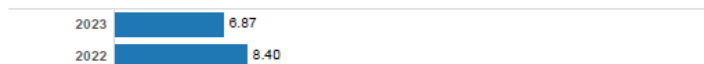
Metric Definition

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

Calculation

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

YTD



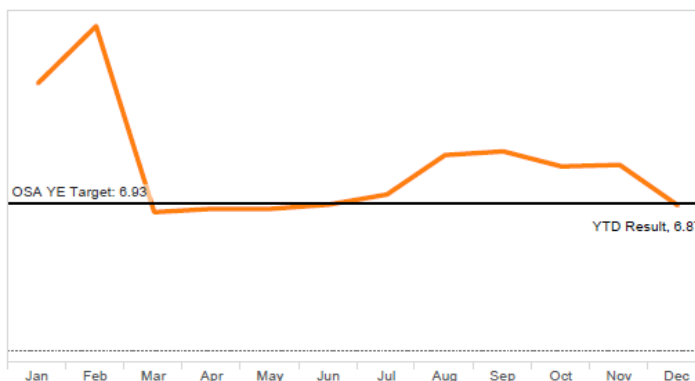
Month



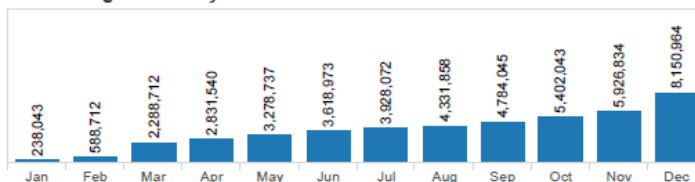
PSEG LI YTD Summary

	Miles Driven	Motor Vehicle Accidents	Motor Vehicle Accident Rate
Electric Operations	5,256,971	36	6.85
Customer Services	1,805,793	16	8.86
Business Support Services	1,088,200	4	3.68
PSEG Long Island	8,150,964	56	6.87

YTD Result	6.87	OSA YE Target	6.93	OSA YE Forecast	↑
------------	------	---------------	------	-----------------	---



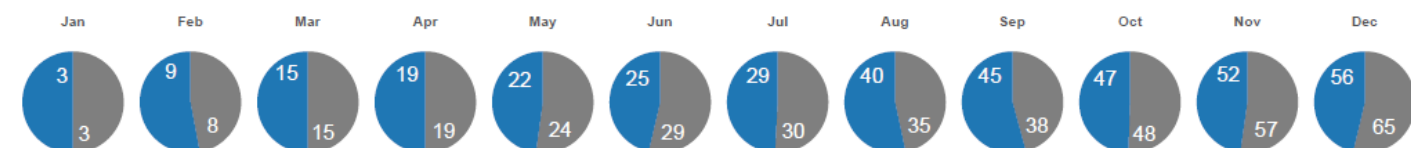
YTD Mileage Summary - PSEG LI



Red Light Tickets

		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2022	Month Value	6	10	3	10	3	16	8	10	3	14	11	4
	YTD Value	6	16	19	29	32	48	56	66	69	83	94	98
2023	Month Value	8	3	9	11	11	14	11	14	9	11	3	7
	YTD Value	8	11	20	31	42	56	67	81	90	101	104	111

YOY Accidents - YTD



Summary

- PSEG Long Island achieved a Motor Vehicle Accident (MVA) rate of 6.87 vs a targeted rate of 6.93.
- The MVA Rate is a safety measure rate that compares the total number of motor vehicle accidents relative to the total number of miles driven for a given period. This number is inclusive of all motor vehicle accidents whether PSEG LI or the other vehicle is at fault in the accident. The rate is based on number of incidents per 1,000,000 miles driven.
- There was 8,150,964 miles driven by PSEG LI employees in 2023
- There was 56 motor vehicle accidents in 2023 regardless if fault.
- The Motor Vehicle Accident (MVA) rate performance was (56 motor vehicle accidents times 1,000,000 miles) divided by 8,150,964 miles driver, which equals a rate of 6.87.
- There was a restatement/true up of mileage in December of 2023 that was completed by PSEG Long Island. PSEG Long Island is reviewing the restatement with LIPA. It was a visual restatement utilizing odometer readings to ensure mileage was appropriately being captured.

T&D-17 - Work Management Enhancements - Short-Term Scheduling

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$120,461.27		

T&D-17 Work Management Enhancements - Short-Term Scheduling				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-17.1	PSEG LI to hold kickoff meeting with LIPA and DPS to review 2023 implementation schedule to roll out short-term scheduling for division yard level inside plant work.	2/16/2023	Achieved	Approved
T&D-17.2	Submit 1st Quarter Status Report of Ongoing Schedule Development.	4/15/2023	Achieved	Approved
T&D-17.3	PSEG LI to demonstrate the development and utilization of integrated work tools at the Yard level for Inside Plant by July 31, 2023.	7/31/2023	Achieved	Approved
T&D-17.4	Submit 3rd Quarter Short-Term Scheduling Report.	10/10/2023	Achieved	Approved
T&D-17.5	Submit 4th Quarter Short-Term Scheduling Report.	1/10/2024	Achieved	Approved

Summary

- The objective of this metric was Enhance work management process by continued development of the integrated work tool that consolidates all work that is aligned with the annual budget and work plan and provides the following functionality to improve the ability to create short-term plans and schedules at the Yard level for Inside Plant by July 31, 2023.
- PSEG Long Island held kickoff meeting with LIPA and DPS to review 2023 implementation schedule to roll out short-term scheduling for division yard level inside plant work.
- PSEG Long Island demonstrated the development and utilization of integrated work tools at the Yard level for Inside Plant by July 31, 2023.
- PSEG Long Island submitted all associated quarterly reports for short-term scheduling.

T&D-18 – Work Management Enhancements - Workforce Management Plans

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$301,153.16		

T&D-18 Work Management Enhancements - Workforce Management Plans				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-18.1	Submission of 2024 Workforce Management Plan for LIPA approval by August 1, 2023 (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.	8/1/2023	Achieved	Approved
T&D-18.2	Successfully execute all elements of the LIPA-approved 2023 Workforce Management Plan by December 31, 2023.	12/31/2023	Achieved	Approved
T&D-18.3	PSEG LI hold Q1 quarterly review meeting with LIPA to review progress of proactive programs. - Plan Vs. Actual Units Complete YTD - Planned Vs. Forecast Units Complete PYE	4/13/2023	Achieved	Approved
T&D-18.4	PSEG LI hold Q2 quarterly review meeting with LIPA to review progress of proactive programs. - Plan Vs. Actual Units Complete YTD - Planned Vs. Forecast Units Complete PYE	7/13/2023	Achieved	Approved
T&D-18.5	PSEG LI hold Q3 quarterly review meeting with LIPA to review progress of proactive programs. - Plan Vs. Actual Units Complete YTD - Planned Vs. Forecast Units Complete PYE	10/12/2023	Achieved	Approved
T&D-18.6	PSEG LI hold Q4 quarterly review meeting with LIPA to review progress of proactive programs. - Plan Vs. Actual Units Complete YTD - Planned Vs. Forecast Units Complete PYE	1/18/2024	Achieved	Approved

Summary

- PSEG Long Island submitted a 2022 Workforce Management Plan. The Workforce Management Plans included monthly and annual resource plans for all Capital and O&M work to be completed. The metric calls to successfully execute all elements of the 2022 Workforce Management Plan by December 31, 2022. The elements of the 2022 Workforce Management Plan include:
 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 2023 Workforce Management Plan. The Workforce Management Plans included monthly and annual resource plans for all Capital and O&M work to be completed.
- PSEG Long Island successfully executed all elements of the 2023 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-21 - Work Management Enhancements - KPIs & Dashboards

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$120,461.27		

T&D-21 Work Management Enhancements - KPIs & Dashboards				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-21.1	PSEG LI to hold kickoff meeting with LIPA and DPS to review schedule for Rollout Key Performance Indicator (KPI) dashboards and reports at the Supervisor Level to drive performance improvement of the workforce	2/15/2023	Achieved	Approved
T&D-21.2	Submit 1st Quarter Status Report	4/15/2023	Achieved	Approved
T&D-21.3	By July 31, 2023, establish and Rollout Key Performance Indicator (KPI) dashboards and reports at the Supervisor Level to drive performance improvement of the workforce.	7/31/2023	Achieved	Approved
T&D-21.4	Submit 3rd Quarter Status Report.	10/10/2023	Achieved	Approved
T&D-21.5	Submit 4th Quarter Status Report.	1/10/2024	Achieved	Approved

Summary

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

T&D-23 - Employee Overtime

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$180,691.90		

J F M A M J J A S O N D **T&D-23 Employee Overtime** OSA Incentive: \$167,140



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 overtime hours as a percentage of non-storm productive hours.

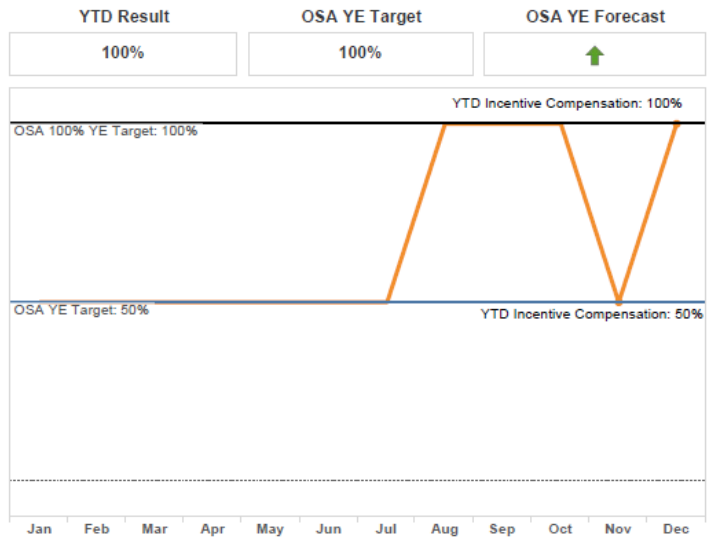
Exclusions:

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

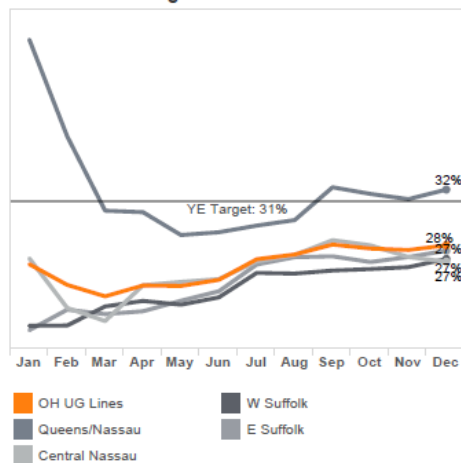
Target:

At or below stated OT levels for the major workforce groups in the identified areas, rounded to the nearest whole percentage point.
 - Successfully meet 3/3 targets = 100% of incentive compensation
 - Successfully meet 2/3 targets = 50% of incentive compensation
 - Achieve less than 2/3 targets = 0% of incentive compensation..

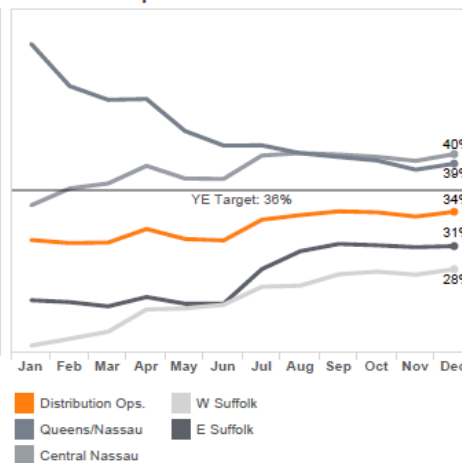
YTD



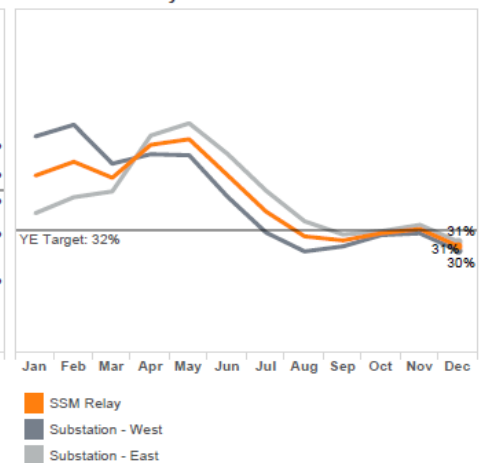
Overhead/ Underground Lines



Distribution Operations



Substation/ Relay Maintenance



Summary

- PSEG Long Island successfully met 3/3 overtime targets. This achievement allocates 100% of incentive compensation.
- PSEG Long Island Overhead/Underground Lines organization finished 2023 with and Overtime percentage of 28% vs a target of 31%.
- PSEG Long Island Distribution Ops organization finished 2023 with and Overtime percentage of 34% vs a target of 36%.
- PSEG Long Island Substation and Relay Maintenance organization finished 2023 with and Overtime percentage of 31% vs a target of 32%.

T&D-24 – Vegetation Management - Cycle Tree Trim with Veg Intelligence

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$240,922.53		
Dispute on Performance Outcome	PSEG Long Island disagrees with LIPA declining this metric. Rationale is provided in the additional comment section under the budget performance category.		

T&D-24 Vegetation Management - Cycle Tree Trim with Veg Intelligence				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-24.01	Submit PIP for Vegetation Intelligence Program by March 15, 2023 and execution of all elements identified in 2023 as per schedule. Update Smartsheet deliverables for LIPA-approved PIP.	6/22/2023	Exempted via Approved Exception Request	Exempted via Approved Exception Request
T&D-24.02	Submit August report of work completed vs. schedule and budget at the monthly meeting.	9/19/2023	Achieved	Approved
T&D-24.03	Submit September report of work completed vs. schedule and budget at the monthly meeting.	10/17/2023	Achieved	Approved
T&D-24.04	Submit October report of work completed vs. schedule and budget at the monthly meeting.	11/21/2023	Achieved	Approved
T&D-24.05	Submit November report of work completed vs. schedule and budget at the monthly meeting.	12/19/2023	Achieved	Approved
T&D-24.06	Submit 2023 YE closeout report of work completed vs. schedule and budget at the monthly meeting.	2/23/2024	Achieved	Declined
T&D-24.07	Submit YE 2022 closeout report at monthly meeting. Report should include work completed vs. schedule and budget.	1/27/2023	Achieved	Approved
T&D-24.08	Submit January report of work completed vs. schedule and budget at the monthly meeting.	2/14/2023	Achieved	Approved
T&D-24.09	Submit February report of work completed vs. schedule and budget at the monthly meeting.	3/21/2023	Achieved	Approved
T&D-24.10	Submit March report of work completed vs. schedule and budget at the monthly meeting.	4/18/2023	Achieved	Approved
T&D-24.11	Submit April report of work completed vs. schedule and budget at the monthly meeting.	5/16/2023	Achieved	Approved
T&D-24.12	Submit May report of work completed vs. schedule and budget at the monthly meeting.	6/20/2023	Achieved	Approved
T&D-24.13	Submit June report of work completed vs. schedule and budget at the monthly meeting.	7/18/2023	Achieved	Approved
T&D-24.14	Submit July report of work completed vs. schedule and budget at the monthly meeting.	8/15/2023	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)	Achieved	Plan	183	172	199	219	198	208	192	177	167	197	170	139	2,221	2,221	100.0%	2,221	2,221	2,221
			Forecast	160	250	216	174	219	216	201	179	188	199	156	63						
			Actual	160	250	216	174	219	216	201	179	188	199	156	63						
	Cycle Trim (Circuits)	Achieved	Forecast	9	17	19	12	22	14	25	19	18	26	14	12	207	207	100.0%	207	207	207
Actual	9		17	19	12	22	14	25	19	18	26	14	12								

Summary:

- PSEG Long Island completed 2,221 miles and 207 circuits for 100% of the vegetation management plan.
- PSEG Long Island achieved the: “By December 31, 2023, execution of 100.0% of the work identified in the approved 2023 Vegetation Management Work Plan approved in August of 2022. To be considered trimmed and count towards metric achievement, 100% of a circuit must be trimmed in the year.”

Budget Performance

Metric #	Program	YE Status		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Actual	Initial Plan	Initial YE Target	YTD % Complete vs Initial Target	Topside Adjustments	Updated Final Plan	Updated Final Target	YTD % Complete
T&D-24	Cycle Trim	On Track	Plan	\$1,754,790	\$1,754,790	\$1,754,790	\$1,754,790	\$1,754,790	\$1,754,790	\$1,754,790	\$1,754,790	\$1,754,790	\$1,754,790	\$1,754,790	\$1,754,785								
			Forecast	\$1,660,332	\$2,587,615	\$2,344,045	\$1,705,714	\$2,270,991	\$2,233,466	\$2,066,765	\$1,883,572	\$1,737,971	\$1,880,080	\$1,603,708	\$571,502	\$22,545,762	\$21,057,475	\$22,110,349	107.1%	\$500,000	\$21,557,475	\$22,635,349	104.6%
			Actual	\$1,660,332	\$2,587,615	\$2,344,045	\$1,705,714	\$2,270,991	\$2,233,466	\$2,066,765	\$1,883,572	\$1,737,971	\$1,880,080	\$1,603,708	\$571,502								

Summary:

- PSEG Long Island YE spend for Cycle Tree Trim was \$22.546M compared to an initial updated final budget of \$21.557M² and target of \$22.635M or 104.6% of plan.
- PSEG Long Island was within the +5.0% threshold utilizing the budget realignment as discussed in the Budget Review section.

Additional Comments

- PSEG LI was aware and communicated with LIPA from the beginning of the year (January status update) that the budget at the programmatic level was insufficient to stay within the overall budget adherence target for the Cycle Trim program. PSEG LI had adequate funding within the vegetation management area budgeted but it was the allocation among the three sub programs. Below outlines a timeline of events to realign the budget with the planned spending:
- PSEG Long Island notified LIPA that budget was insufficient within the at the January results review meeting on February 14, 2023 and every subsequent monthly meeting.
- **Budget Amendment Request** – On March 20, 2023 – PSEG Long Island sent a letter to LIPA requesting budget amendments for the Vegetation Management Program. PSEG Long Island requested additional funding for the Distribution cycle tree trim program to be able to complete the planned work within the budgetary thresholds.
- **LIPA Response to Budget Amendment Request** – On April 25, 2023, LIPA responded to PSEG Long Island’s letter rejecting the budget amendment request and stated “PSEG Long Island is obligated to develop accurate budgets for the LIPA Board’s consideration and is in control of the bid process, timing, and contract terms. Inaccurate budgeting is not “beyond the reasonable control of the Service Provider,” and therefore is not a Non-Storm Emergency. LIPA went on to recommend that **“PSEG Long Island should pursue internal offsets as part of its responsibility to manage the utility within reasonable budgets. This could include reviewing the spending projections for the non-Metric categories of the Distribution Vegetation Management Program.** The unexpected can and does occur; however, if every cost above a reasonable budget is a Non-Storm Emergency, there is from a practical standpoint no budget at all.”
- **PSEG Long Island Metric Exception** – On July 19, 2023 – PSEG Long Island based on LIPA’s recommendation submitted and exception to reallocate the distribution vegetation management programmatic budgets to align with forecasted spend to **responsibly within the constraints of the Vegetation Management programmatic budget and utilize internal offsets to align to expected unit completion and budget adherence targets.** The request was a topside adjustment to move \$500K of funding into the Cycle Trim program from the other 2 programs. This was communicated to the LIPA during monthly meetings and was discussed prior to the exception being filed. There was expectation that the metric exception would be approved as both parties seemed to be aligned and on the same page but the exception was subsequently rejected by LIPA on September 09, 2023. PSEG Long Island believes that the rejection for the metric exception was unreasonably withheld as the need for incremental funding in the Cycle Trim project/program was noted since the initial January performance meeting between the parties on February 14, 2023. PSEG LI believes that the solution we provided is in alignment with our rights with the 2nd A&R Operating Services Agreement and targeted the expected outcomes that were delivered to complete the associated full vegetation management program inclusive of all components within the budgetary guidelines of +5% (105%) of the overall spend.
- PSEG Long Island identified the budgetary issues and tried to work with LIPA to realign the budgets with the planned spend. Based on the 2nd Amended and Restated Operation Services Agreement there are no thresholds identified for LIPA approval for reallocation of funds within a director area. PSEG LI submitted the exception for notification purposes of the intent to reallocate the budget at the program levels to align with spend. PSEG LI was transparent throughout the process and feel as though we exercised all reasonable options to mitigate the issue and rebalance the budget to align with planned spend and that the notifications were provided early and discussed monthly at the meetings to discussion unit completion and budget adherence.

² Please see additional budgetary discussion under the additional comments section

- LIPA also offered to “consider all vegetation management activities as a whole (i.e., trim-to-sky, cycle trim, and vegetation intelligence), and agree to true up the budget to actual spend up to the unit volumes specified in the related metrics at year-end.”
- PSEG Long Island did true up all vegetation management activities as a whole and that is what PSEG Long Island’s basis of PSEG Long Island’s overall claim. From a vegetation management perspective, PSEG Long Island when considering all vegetation management activities as a whole completed 108.3% of units exceeding the planned units and at 103.2% of the budget maintaining the budgetary threshold of +5%.

T&D-25 - Vegetation Management - Trim-To-Sky (TTS) Circuits

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$301,153.16		

T&D-25 Vegetation Management Work Plan - Trim-To-Sky (TTS) Circuits				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-25.01	Submit YE 2022 closeout report at monthly meeting. Report should include work completed vs. schedule and budget.	1/27/2023	Achieved	Achieved
T&D-25.02	Submit August report of work completed vs. schedule and budget at the monthly meeting.	9/19/2023	Achieved	Approved
T&D-25.03	Submit September report of work completed vs. schedule and budget at the monthly meeting.	10/17/2023	Achieved	Approved
T&D-25.04	Submit October report of work completed vs. schedule and budget at the monthly meeting.	11/21/2023	Achieved	Approved
T&D-25.05	Submit November report of work completed vs. schedule and budget at the monthly meeting.	12/19/2023	Achieved	Approved
T&D-25.06	Submit 2023 YE closeout report of work completed vs. schedule and budget at the monthly meeting.	2/23/2024	Achieved	Achieved
T&D-25.07	Submit January report of work completed vs. schedule and budget at the monthly meeting.	2/14/2023	Achieved	Approved
T&D-25.08	Submit February report of work completed vs. schedule and budget at the monthly meeting.	3/21/2023	Achieved	Approved
T&D-25.09	Submit March report of work completed vs. schedule and budget at the monthly meeting.	4/18/2023	Achieved	Approved
T&D-25.10	Submit April report of work completed vs. schedule and budget at the monthly meeting.	5/16/2023	Achieved	Approved
T&D-25.11	Submit May report of work completed vs. schedule and budget at the monthly meeting.	6/20/2023	Achieved	Approved
T&D-25.12	Submit June report of work completed vs. schedule and budget at the monthly meeting.	7/18/2023	Achieved	Approved
T&D-25.13	Submit July report of work completed vs. schedule and budget at the monthly meeting.	8/15/2023	Achieved	Approved
T&D-25.14	Verification report, including schedule execution and budget spending, to be submitted to LIPA	1/31/2024	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-25	Trim to Sky (Circuits)	Achieved	Plan	12	16	23	18	16	23	22	18	14	19	11	15	207	207	100.0%	207	207	207
			Forecast	2	16	15	10	15	17	26	35	17	22	9	23						
			Actual	2	16	15	10	15	17	26	35	17	22	9	23						

Summary:

- PSEG Long Island completed 207 circuits and achieved the year-end target of 207 circuits
- PSEG Long Island achieved the: “By December 31, 2023, execution of 100.0% of the work identified in the approved 2023 Vegetation Management Work Plan approved in August of 2022. To be considered trimmed and count towards metric accomplishment, 100% of the circuit must be trimmed to the first protective device. Circuits with no trim required to the first protective device do not count towards metric accomplishment.”

Budget Performance

Metric #	Program	YE Status		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Actual	Initial Plan	Initial YE Target	YTD % Complete vs Initial Target	Topside Adjustments	Updated Final Plan	Updated Final Target	YTD % Complete
T&D-25	Trim to Sky	Achieved	Plan	\$125,883	\$125,883	\$125,883	\$125,883	\$125,883	\$125,883	\$125,883	\$125,883	\$125,883	\$125,883	\$125,883	\$125,887	\$1,222,668	\$1,510,600	\$1,586,130	80.9%	-\$300,000	\$1,210,600	\$1,271,130	101.0%
			Forecast	\$18,305	\$79,509	\$69,400	\$92,912	\$62,185	\$103,030	\$131,288	\$194,554	\$130,003	\$102,880	\$68,681	\$169,922								
			Actual	\$18,305	\$79,509	\$69,400	\$92,912	\$62,185	\$103,030	\$131,288	\$194,554	\$130,003	\$102,880	\$68,681	\$169,922								

Summary:

- PSEG Long Island YE spend for Trim-to-Sky was \$1.223M compared to an initial updated final budget of \$1.211M and target of \$1.271M or 101.0% of plan.

- PSEG Long Island achieved the target budget plan of +5.0% (105% of planned budget) threshold regardless of the realignment.

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

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$361,383.80		
Dispute on Performance Outcome	PSEG Long Island and LIPA continue to disagree on scope of Hazard Tree removal program.		

T&D-26	Vegetation Management Work Plan - Hazard Tree Removal			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-26.02	Submit September report of work completed vs. schedule and budget at the monthly meeting.	10/17/2023	Achieved	Approved
T&D-26.03	Submit October report of work completed vs. schedule and budget at the monthly meeting.	11/21/2023	Achieved	Approved
T&D-26.04	Submit November report of work completed vs. schedule and budget at the monthly meeting.	12/19/2023	Achieved	Approved
T&D-26.05	Submit 2023 YE closeout report of work completed vs. schedule and budget at the monthly meeting.	1/31/2024	Achieved	Declined
T&D-26.06	Submit January report of work completed vs. schedule and budget at the monthly meeting.	2/14/2023	Achieved	Approved
T&D-26.07	Submit February report of work completed vs. schedule and budget at the monthly meeting.	3/21/2023	Achieved	Approved
T&D-26.08	Submit March report of work completed vs. schedule and budget at the monthly meeting.	4/18/2023	Achieved	Approved
T&D-26.09	Submit April report of work completed vs. schedule and budget at the monthly meeting.	5/16/2023	Achieved	Approved
T&D-26.10	Submit May report of work completed vs. schedule and budget at the monthly meeting.	6/20/2023	Achieved	Approved
T&D-26.11	Submit June report of work completed vs. schedule and budget at the monthly meeting.	7/18/2023	Achieved	Approved
T&D-26.12	Submit July report of work completed vs. schedule and budget at the monthly meeting.	8/15/2023	Achieved	Approved
T&D-26.13	Submit August report of work completed vs. schedule and budget at the monthly meeting.	9/19/2023	Achieved	Approved

Units Completed(Base)

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-26 Total Original	Original Hazard Tree Program (Limbs)	Plan		149	196	278	372	401	358	409	387	386	344	349	328	5,149	3,957	130.1%	3,957	5,149	3,957
		Forecast		93	159	186	906	461	446	798	792	350	958	0	0						
		Actual		93	159	186	906	461	446	798	792	350	958	0	0						
	Original Hazard Tree Program (Trees)	Plan		234	333	507	679	737	651	764	716	709	594	606	568	7,040	7,098	99.2%	7,098	7,040	7,098
		Forecast		307	342	505	1,280	496	524	595	809	879	1,303	0	0						
		Actual		307	342	505	1,280	496	524	595	809	879	1,303	0	0						
	Original Hazard Tree Program (Total)	Plan		383	529	785	1,051	1,138	1,009	1,173	1,103	1,095	938	955	896	12,189	11,055	110.3%	11,055	12,189	11,055
		Forecast		400	501	691	2,186	957	970	1,393	1,601	1,229	2,261	0	0						
		Actual		400	501	691	2,186	957	970	1,393	1,601	1,229	2,261	0	0						

Summary:

- PSEG Long Island completed 12,189 units (5,149 limbs and 7,040 trees) and exceeded the year-end target of 11,055 units.
- PSEG Long Island achieved the: “By December 31, 2023, execution of 100.0% of the work identified in the approved 2023 Vegetation Management Work Plan.”

Units Completed(Extended)

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-26 (Incremental Trees/Limbs)	Hazard Tree Program (Incremental Limbs for 2024 Allocation)	Green	Plan																				
			Forecast												293	287	580	N/A	N/A	N/A	580	N/A	
			Actual												293	287							
	Hazard Tree Program (Incremental Trees for 2024 Allocation)	Green	Plan																				
			Forecast													438	2,385	2,823	N/A	N/A	N/A	2,823	N/A
			Actual													438	2,385						

Summary:

- Because of the unresolved dispute regarding the hazard tree program and the exclusion of limbs, PSEG Long Island targeted completion of 14,000 units (9,000 trees and 5,000 limbs) in alignment with the 2024 negotiated targeted levels.
- PSEG Long Island completed an additional 3,403 units (2,823 trees and 580 limbs).

Units Completed(Total)

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	
Total Hazard Tree	Hazard Tree Program (Limbs)	Green	Plan	149	196	278	372	401	358	409	387	386	344	349	328							
			Forecast	93	159	186	906	461	446	798	792	350	958	293	287		5,729	5,000	114.6%	5,000	5,729	5,000
			Actual	93	159	186	906	461	446	798	792	350	958	293	287							
	Hazard Tree Program (Trees)	Green	Plan	234	333	507	679	737	651	764	716	709	594	606	568							
			Forecast	307	342	505	1,280	496	524	595	809	879	1,303	438	2,385		9,863	9,000	109.6%	9,000	9,863	9,000
			Actual	307	342	505	1,280	496	524	595	809	879	1,303	438	2,385							
	Hazard Tree Program (Total)	Green	Plan	383	529	785	1,051	1,138	1,009	1,173	1,103	1,095	938	955	896							
			Forecast	400	501	691	2,186	957	970	1,393	1,601	1,229	2,261	731	2,672		15,592	14,000	111.4%	14,000	15,592	14,000
			Actual	400	501	691	2,186	957	970	1,393	1,601	1,229	2,261	731	2,672							

Summary:

- Overall, PSEG Long Island completed 15,592 units (9,863 trees and 5,729 limbs). This exceeded the 14,000 units with a distribution of greater than 9,000 trees and greater than 5,000 limbs.

Budget Performance (Base)

Metric #	Program	YE Status		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Actual	Initial Plan	Initial YE Target	YTD % Complete vs Initial Target	Topside Adjustments	Updated Final Plan	Updated Final Target	YTD % Complete	
T&D-26 Total Original	Original Hazard Tree Program (Limbs)	Green	Plan	\$334,043	\$334,043	\$334,043	\$334,043	\$334,043	\$334,043	\$334,043	\$334,043	\$334,043	\$334,043	\$334,043	\$334,042									
			Forecast	\$80,360	\$109,243	\$183,308	\$528,333	\$389,747	\$466,587	\$654,734	\$617,327	\$338,906	\$945,922	\$0	\$0		\$4,314,466	\$4,008,515						
			Actual	\$80,360	\$109,243	\$183,308	\$528,333	\$389,747	\$466,587	\$654,734	\$617,327	\$338,906	\$945,922	\$0	\$0									
	Original Hazard Tree Program (Trees)	Green	Plan	\$551,748	\$551,748	\$551,748	\$551,748	\$551,748	\$551,748	\$551,748	\$551,748	\$551,748	\$551,748	\$551,748	\$551,748	\$551,744								
			Forecast	\$354,865	\$251,481	\$505,114	\$741,234	\$505,450	\$559,297	\$483,625	\$630,577	\$851,137	\$1,286,573	\$0	\$0		\$6,169,354	\$6,620,972						
			Actual	\$354,865	\$251,481	\$505,114	\$741,234	\$505,450	\$559,297	\$483,625	\$630,577	\$851,137	\$1,286,573	\$0	\$0									
Original Hazard Tree Program (Total)	Green	Plan	\$885,791	\$885,791	\$885,791	\$885,791	\$885,791	\$885,791	\$885,791	\$885,791	\$885,791	\$885,791	\$885,791	\$885,791	\$885,786									
		Forecast	\$435,225	\$360,724	\$688,421	\$1,269,567	\$895,197	\$1,025,885	\$1,138,360	\$1,247,904	\$1,190,042	\$2,232,495	\$0	\$0		\$10,483,820	\$10,629,487	\$11,160,961	98.6%	-\$200,000	\$10,429,487	\$10,950,961	100.5%	
		Actual	\$435,225	\$360,724	\$688,421	\$1,269,567	\$895,197	\$1,025,885	\$1,138,360	\$1,247,904	\$1,190,042	\$2,232,495	\$0	\$0										

Summary:

- PSEG Long Island YE spend for Hazard Tree (Base) was \$10.484M compared to the target budget range of \$10.429M-\$10.951M. PSEG Long Island achieved the budget targeted threshold range of +5% within the budget or 100.5% of plan.

Budget Performance (Extended)

Metric #	Program	YE Status		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Actual	Initial Plan	YE Target	YTD % Complete vs Initial Target	Topside Adjustments	Updated Final Plan	Updated Final Target	YTD % Complete		
T&D-26 (Incremental Trees/Limbs)	Hazard Tree Program (Incremental Limbs for 2024 Allocation)	Green	Plan																						
			Forecast													\$292,413	\$190,489	\$482,902	\$0	\$0		\$500,000	\$500,000	\$525,000	96.6%
			Actual													\$292,413	\$190,489								
	Hazard Tree Program (Incremental Trees for 2024 Allocation)	Green	Plan																						
			Forecast													\$437,122	\$1,582,985	\$2,020,107	\$0	\$0		\$2,000,000	\$2,000,000	\$2,100,000	101.0%
			Actual													\$437,122	\$1,582,985								

Summary:

- PSEG Long Island self-funded the extended program because the prior year dispute was not resolved and PSEG Long Island aimed to achieve the agreed upon target and ratios in the 2024 approved metric. YE spend for

Hazard Tree (Extended) was \$2.503M compared to the incremental spend target of \$2.500M-\$2.625M. PSEG LI achieved the incremental units on budget and in alignment with unit spending on the base program.

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

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$301,153.16		

T&D-27 Storm Hardening Work Plan - Overhead Hardening				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-27.1	Submit PJD(s) for LIPA approval by March 15, 2023 that identify the work plan associated with improving system performance by engineering and rebuilding a minimum of 17.4 miles of identified circuits utilizing spacer cable. The identified circuits shall include the two worst performing circuits based on vegetation-caused outages. If spacer cable cannot be installed safely by PSEG-LI along certain portions of the branch lines, then the minimum mainline mileage to be converted shall be 13 miles.	03/15/23	Achieved	Approved
T&D-27.2	Submit 1st Quarter report of work completed vs. schedule and budget.	04/14/23	Achieved	Approved
T&D-27.3	Submit 2nd Quarter report of work completed vs. schedule and budget.	07/14/23	Achieved	Approved
T&D-27.4	By August 31, 2023, submit a 2024 Storm Hardening Work Plan for mainline and branches that includes a minimum of 25% of the identified circuit mileage to be rebuilt utilizing spacer cable..	08/31/23	Achieved	Approved
T&D-27.5	Submit 3rd Quarter report of work completed vs. schedule and budget.	10/16/23	Achieved	Approved
T&D-27.6	Submit artifacts related to completion of hardening of a minimum of 17 miles utilizing spacer cable including the two worst performing circuits due to vegetation-caused outages. (The minimum will be 13 miles if certain portions of the branch lines cannot be safely converted to spacer cable.)	12/15/23	Exempted via Approved Exception Request	Exempted via Approved Exception Request
T&D-27.7	Submit Verification Report of work completed vs. schedule and budget.	01/15/24	Achieved	Approved

T&D-27 - Overhead Storm Hardening



Metric #	SOS ID	Program	PJD Update Log	Update Summary	YE Status	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec	YE Actual	YE Plan	YTD Target (95%)	YE Target (95%)
T&D-27	1891	Overhead Hardening	PJD Approved by LIPA on 9/12.	YE Plan was 71.8 miles. PJD was updated and approved by LIPA to revise to 78.6 miles.	Plan	4.6	6.1	7.7	7.4	7.1	8.1	6.7	8.1	6.1	6.0	6.7	4.2	78.8	78.6	74.7	74.7
					Actual	4.6	6.1	7.7	7.4	7.1	8.1	6.7	8.1	5.9	6.8	7.2	3.2				

T&D-27 - Overhead Storm Hardening



Metric #	SOS ID	Program	PJD Update Log	Update Summary	YTD Actual Spend	YE Plan	Projected YE	Target Range (Low End)	Target Range (High End)
T&D-27	1891	Overhead Hardening	Sep-22	2023 Work Plan/Budget Approved	\$73,746,580.10	\$75,000,000	\$73,746,580	\$71,250,000	\$78,750,000

Summary

- From January 2023 through December 2023, Power On completed a total of 78.76 miles of mainline & branch line storm hardening. This equates to a very slight overrun of 0.16 miles or 100.2% of mileage completed from the latest LIPA-approved PJD.
 - In August 2023, Power On updated the PJD to reflect an increase in 2023 mileage to 78.6 miles with no change in the approved 2023 budget. The revised PJD was approved by LIPA in September.
- From January 2023 through December 2023, Power on spent \$73.746M or 98.3% of the approved 2023 budget of \$75M this is within the budget threshold of +5%.

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

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$180,691.90		

T&D-28	Storm Hardening Work Plan - Underground Hardening			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-28.1	Submit 1st Quarter report of work completed vs. schedule and budget.	04/14/23	Achieved	Approved
T&D-28.2	Submit 2nd Quarter report of work completed vs. schedule and budget.	07/14/23	Achieved	Approved
T&D-28.3	Submit a 2024 Storm Hardening Work Plan - Underground Hardening and budget.	08/31/23	Achieved	Approved
T&D-28.4	Submit 3rd Quarter report of work completed vs. schedule and budget.	10/16/23	Achieved	Approved

Summary

- PSEG Long Island completed all quarterly reports
- PSEG Long Island provided a 2024 Storm Hardening workplan for Underground hardening.

T&D-29 - T&D System Enhancements

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$180,691.90		

T&D-29	T&D System Enhancements			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-29.1	Submit 1st Quarter status report.	04/14/23	Achieved	Approved
T&D-29.2	Submit 2nd Quarter status report.	07/14/23	Achieved	Approved
T&D-29.3	Submit a 2024 Storm Hardening Work Plan - Transmission Load Pocket PJD that identifies the work to be completed for the second-highest priority Transmission Load Pocket identified in the 2022 Plan.	08/31/23	Achieved	Approved
T&D-29.4	Submit artifacts that at least one distribution hosting capacity project began construction.	11/15/23	Achieved	Approved
T&D-29.5	Submit 3rd Quarter status report.	10/16/23	Achieved	Approved
T&D-29.6	Submit Verification Report.	01/15/24	Achieved	Approved

Summary

- PSEG Long Island submitted all quarterly status reports
- PSEG Long Island submitted a 2024 Storm Hardening Work Plan - Transmission Load Pocket PJD that identifies the work to be completed for the second-highest priority Transmission Load Pocket identified in the 2022 Plan.
- PSEG Long Island execute work associated with Transmission Load Pockets Projects and Hosting Capacity workplans and provided verifications reports.

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

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$301,153.16		

T&D-30 Storm Hardening Work Plan - ACRV Commissioning Program				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-30.1	Submit 1st Quarter status report.	04/14/23	Achieved	Approved
T&D-30.2	Submit 2nd Quarter status report.	07/14/23	Achieved	Approved
T&D-30.3	Submit a 2024 Storm Hardening Work Plan and budget that, at a minimum: identifies locations, schedules, cost estimates, and creates PJDs for ACRVs to be commissioned as tripping devices for 2024	08/31/23	Achieved	Approved
T&D-30.4	Submit 3rd Quarter status report.	10/16/23	Achieved	Approved
T&D-30.5	Submit Verification Report.	01/15/24	Achieved	Approved

Summary

- PSEG Long Island submitted all quarterly status reports and YE verification report.
- PSEG Long Island submitted an initial 2024 Storm Hardening work plan. The initial plan was superseded by the 2024 metric request which called for additional units that were not envisioned nor known at the time of the initial 2024 plan submission. PSEG Long Island submitted a secondary plan that aligned with the expectations set forth in the 2024 metric to achieve the targeted overall units.
- The 2023 TD30-ACRV Commissioning program has scheduled 10 ASUV locations to be converted to ACRVs. The following table and the attached itemizes the 10 locations for 2023.

2023 ACRV Implementation Schedule

Division	Circuit	Substation	ASUV/ Gridnumber	ASUV address	Date Commissioned
1	2ABS24	ZAB Corona Avenue	ACRV-299 :016201010	P# 45, 389 Dogwood Av, West Hempstead, NY	02/22/23
1	2ABS26	ZAB Corona Avenue	ACRV-202 :008445524	P# 55, 875 Elmont Rd, N Valley Stream, NY	02/22/23
1	2WB559	ZWB Barrett	ACRV-203 :017372040	P# 10.5, 2940 Lincoln Av, Oceanside NY	02/22/23
2	4GH188	4GH Glen Head	ACRV-2272 :012404017	P# 14, 106 Altamont Av, Sea Cliff NY	03/10/23
2	5M104	5M Newbridge	ACRV-2441 :023325680	P# 61, 567 East Meadow Av, East Meadow NY	03/10/23
3	6Q672	6Q Oakwood	ACRV-1261 :029429812	P# 109, 68 Southdown Rd, Huntington NY	03/06/23
3	6UL4K5	6UL Greenlawn	ACRV-3758 :029627626	P# 5, 98 folsom Av, Huntington Station NY	03/06/23
3	7B701	7B Brentwood	ACRV-3586 :040537159	P#71, 471 Old Country rd, Deer Park	03/06/23
4	8BA9N4	8BA West Bartlett	ACRV-4229 :070350634	P# 3, 20 Wilson Av, Middle Island NY	03/09/23
4	8F7H8	8F Pt. Jefferson	ACRV-1539 :061285090	P# 69.5, Old Town Rd, Pt Jeff station, NY	03/09/23

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

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$180,691.90		

T&D-31		Storm Hardening Work Plan - LT5H (ASUV) Program		
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-31.1	Submit 1st Quarter status report.	04/14/23	Achieved	Approved
T&D-31.2	Submit 2nd Quarter status report.	07/14/23	Achieved	Approved
T&D-31.3	Submit a 2024 Storm Hardening Work Plan - LT5H (ASUV) Program and budget.	08/31/23	Achieved	Approved
T&D-31.4	Submit 3rd Quarter status report.	10/16/23	Achieved	Approved
T&D-31.5	Submit Verification Report.	01/15/24	Achieved	Approved

Summary

- PSEG Long Island submitted all quarterly status reports and YE verification report.
- PSEG Long Island submitted an a 2024 Storm Hardening Work Plan - LT5H (ASUV) Program and budget.
- PSEG Long Island installed and commissioned 152 ASUVs in 2023. The YE spend was \$8,610,261.82 vs budget of \$8,680,000.00. PSEG Long Island achieved the targeted units to be installed and commission and achieved the budget adherence target of actual spending within up to +5% of the established budget target, as applied to the actual number of units.

T&D-33 - Execute Real Estate Strategy

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$150,576.58		

T&D-33 Execute Real Estate Strategy				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-33.02	Due diligence draft report for Medford property	07/31/23	Achieved	Approved
T&D-33.03	Implement outreach strategy based on Medford conceptual site development and use	07/14/23	Achieved	Approved
T&D-33.04	Finalize Medford property due diligence per contract of sale	08/14/23	Achieved	Approved
T&D-33.05	Finalize Medford operations yard schematic level design and site development layout	06/30/23	Achieved	Approved
T&D-33.06	Prepare Medford permit matrix and file preliminary applications for necessary permits	08/14/23	Achieved	Approved
T&D-33.07	Close on Medford property purchase	02/29/24	Achieved	Approved
T&D-33.21	Develop draft Property Segmentation Plan that includes written detailed markups of the existing maps or aerial photos of each of the properties depicting LIPA/PSEG LI and NG areas of contemplated use and occupancy based upon operational program requirements (space needs analysis) and agreement by the LIPA/PSEG Long Island and National Grid Operations Teams for Property Groups 2 and 3 and a detailed timeline for segmentation during 2024.	12/29/23	Exempted via Approved Exception Request	Exempted via Approved Exception Request

Summary

- PSEG LI executed all mutually approved and funded deliverables in the PIP that could be completed in 2023
- Several items related to the Medford property were deferred via approved metric exception requests because of extended due diligence and other issues
- This was a transparent and collaborative process worked collaboratively between PSEG Long Island and LIPA.

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

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$240,922.53		

T&D-34 Construction – Quality and Timely Completion of PJDs				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-34.1	Submit preliminary T&D Capital Budget to LIPA, with PJDs substantiating the budget request by July 5.	07/05/23	Achieved	Approved
T&D-34.2	Submit final PJDs to reflecting LIPA's comments on a rolling basis starting July 6 with final PJDs received no later than August 15, 2023.	08/15/23	Achieved	Approved
T&D-34.3	Submit program and blanket PJDs reflecting LIPA comments by September 15, 2023 (PJDs to be included in the PSEG LI Capital Plan reflecting final approved PJDs and Wave 1 metrics) and at minimum list the number units/assets and specific locations scheduled.	09/16/23	Achieved	Approved

Summary

- PSEG LI delivered a preliminary 2024 T&D Capital budget submitted to LIPA prior on 7/05/2023
- PSEG Long submitted final PJDs to reflecting LIPA's comments on a rolling basis starting July 6 with final PJDs received no later than August 15, 2023
- PSEG Long Island submitted program and blanket PJDs reflecting LIPA comments by September 15, 2023 (PJDs to be included in the PSEG LI Capital Plan reflecting final approved PJDs and Wave 1 metrics) and at minimum list the number units/assets and specific locations scheduled.

T&D-35 - Construction - Project Milestones Achieved

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$240,922.53		

T&D-35 Construction - Project Milestones Achieved OSA Incentive: \$222,853



Metric Definition
Completion of defined key project milestones

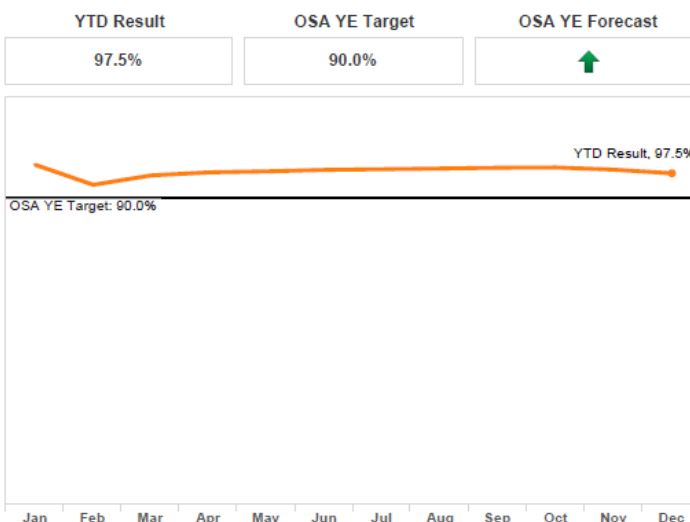
Calculation
Key Milestones Met / Key Milestones Planned

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 the Service Provider.

YTD



Month



YTD Project Milestones Achieved

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Actual	10	6	15	13	7	15	10	15	23	13	11	18
Month Value	Plan	10	7	15	13	7	15	10	15	23	13	20
% Completed	100.0%	85.7%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	91.7%	90.0%
Actual	10	16	31	44	51	66	76	91	114	127	138	156
YTD Value	Plan	10	17	32	45	52	67	77	92	115	128	160
% Completed	100.0%	94.1%	96.9%	97.8%	98.1%	98.5%	98.7%	98.9%	99.1%	99.2%	98.6%	97.5%

Summary

- PSEG Long Island achieved 97.5% of 2023 project milestones achieved vs YE target of 90.0% of planned milestones. A total of 160 milestones have been planned to be accomplished by YE. As of December 2023, 156 milestones out of 160 planned milestones have been met on time.
- Occasionally, specific project schedules are adjusted throughout the year to account for permit delays, easement or municipality approvals, storms, etc. These project schedule updates are submitted by the Project Manager for approval by the Manager of Project Management and the Project Sponsor.
- PSEG Long Island has a structured process for milestone changes, “Key Milestone Change Process” that was followed for any changes of dates to the baseline milestones submitted to LIPA in January 2023 which will need approval and highlighted any changes to the baseline. These Key Milestone Change Forms were approved by PSEG Long Island’s Mg Dir & VP Construction & Ops Svcs and then were subsequently reviewed and approved by LIPA.
- PSEG Long Island’s initial baseline was 191 milestones. PSEG Long Island rebaselined milestones throughout the year where PSEG LI met with LIPA and discussed reasons adjusting the baseline and received LIPA’s approval.

T&D-36 - Construction - Cost Estimating Accuracy

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$240,922.53		

J F M A M J J A S O N D
T&D-36 Construction - Cost Estimating Accuracy
OSA Incentive: \$222,853



Metric Definition

Execution of 2023 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 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

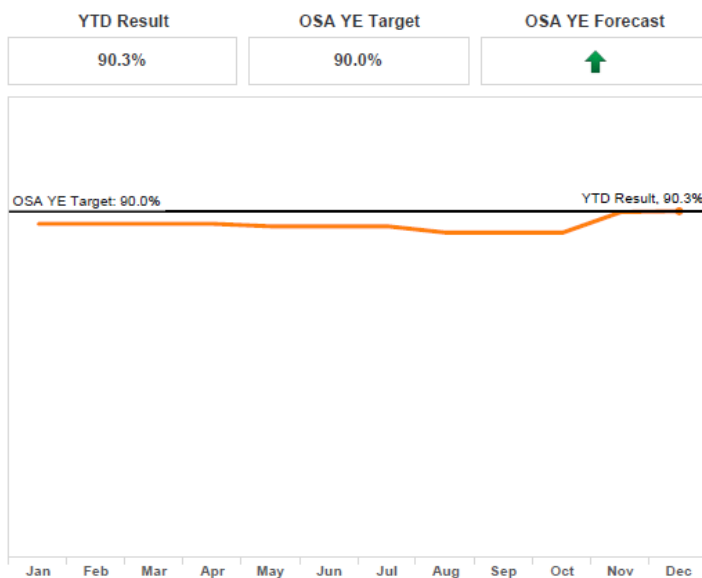
Schedule relief may be granted for delays i) directed or requested by LIPA or ii) situations or business conditions that arise that LIPA determines or agrees are beyond the reasonable control of the Service Provider.

YTD

2023	90.3%
2022	90.7%

Month

2023	91.2%
2022	87.8%



YTD Cost Estimating Projects Closed Out

Closeout Month	Project Title/Description	Definitive Estimate Cost (Base)	Closeout Costs
January	Northport Banks 1-4 Replace Radiators	\$6,309,657.00	\$5,488,728.00
May	Greenlawn to Elwood Splice Project 69-668	\$833,660.00	\$678,364.00
August	Mobile Transformers	\$2,454,637.00	\$2,299,806.91
	Suffolkair New Feeder and 9AU-798 C&R	\$2,067,448.00	\$1,412,835.16
November	2H2AR Arverne-Install New 33 kV Circuit to Far Rockaway ..	\$24,172,763.00	\$23,658,194.00
	Buell 23kV Conversion to 33kV	\$12,006,543.00	\$10,553,587.00
	Great Neck Conversion & Reinforcement for Northwell Hos..	\$2,417,536.00	\$1,345,067.00
	Pilgrim GT - 69kV Bus Reconfiguration	\$1,953,074.00	\$1,586,968.00
December	2BB Broadway C&R	\$6,077,276.00	\$5,295,535.00
	Culloden Point 23KV to 33KV Conversion Project	\$3,231,854.00	\$3,450,219.00
	Garden City C&R Project	\$2,783,167.00	\$2,287,648.00

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 11 projects in 2023 and had an estimating accuracy of 90.3% vs. YE target of 90.0%.
- There was a combined final definitive estimate cost of \$64,307,615 across the 11 projects in scope for 2023. PSEG Long Island closed out the with closeout costs of \$58,056,982 for the 11 projects.

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

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$481,845.06		

	Program	Initial Metric Units	2023 Latest PJD Units	2023 Target Units	2023 Completed Units	% Complete vs. Target Units	Achieved (Y/N)
1	Distribution Circuit Improvement Program	288	288	274	350	121.50%	
2	Transmission Breaker Replacement	15	15	14	15	100.00%	
3	Underground Distribution Cable Upgrades	85,000	132,638	126,006	129,394	97.60%	
4	Distribution Multiple Customer Outages (MCO)	114	85	81	84	98.80%	
5	Residential Underground Cables	70,445	133,043	126,391	127,204	95.60%	
6	Replacement of Non-restorable Distribution Pole Rejects	1,050	1,050	998	1,294	123.20%	
7	Transfer Distribution Facilities to New Telephone Poles (Blanket)	1,793	1,260	1,197	1,226	97.30%	
8	Transformer Monitoring (Purchases and Installations)	50	50	48	50	100.00%	

Summary

- PSEG Long Island completed 8 of 8 programs within the > 95.0% of the planned units/miles for a for the listed Proactive Programs within the established target and based on the latest LIPA approved PJD documentation

T&D-38 - Program Unit Cost Variance

Metric Type	Quantitative	Metric Performance	↑ Partially Achieved (75%)
Incentive Compensation Claim	\$180,691.90		

	Program	Initial Metric Cost/Unit	Latest PJD Cost/Unit	Actual Cost/Unit	Cost/Unit Comparison	2023 Target Cost/Unit (Low)	2023 Target Cost/Unit (High)	Cost/Unit in Range (Y/N)	Achieved (Y/N)
1	Distribution Circuit Improvement Program	\$ 19,956.00	\$ 15,205.00	\$ 15,042.39	98.9%	\$ 14,444.75	\$ 15,965.25		
2	Transmission Breaker Replacement	\$ 167,000.00	\$ 220,000.00	\$ 317,648.80	144.4%	\$ 209,000.00	\$ 231,000.00		
3	Underground Distribution Cable Upgrades	\$ 205.00	\$ 168.00	\$ 169.57	100.9%	\$ 159.60	\$ 176.40		
4	Distribution Multiple Customer Outages (MCO)	\$ 72,852.00	\$ 136,859.00	\$ 135,756.32	99.2%	\$ 130,016.05	\$ 143,701.95		
5	Residential Underground Cables	\$ 206.00	\$ 123.00	\$ 127.58	103.7%	\$ 116.85	\$ 129.15		
6	Replacement of Non-restorable Distribution Pole Rejects	\$ 14,076.00	\$ 11,314.00	\$ 11,837.65	104.6%	\$ 10,748.30	\$ 11,879.70		
7	Transfer Distribution Facilities to New Telephone Poles (Blanket)	\$ 7,135.00	\$ 6,904.00	\$ 7,199.74	104.3%	\$ 6,558.80	\$ 7,249.20		
8	Transformer Monitoring (Purchases and Installations)	\$ 83,000.00	\$ 83,000.00	\$ 85,187.54	102.6%	\$ 78,850.00	\$ 87,150.00		

Summary

- PSEG Long Island completed 7 of 8 programs within the +/- 5% of the planned cost per unit the listed Proactive Programs within the established target and based on the latest LIPA approved PJD documentation.

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

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$120,461.27		

T&D-34	Construction – Quality and Timely Completion of PJDs			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-39.1	100% completion of projects consistent with project design and specifications	12/31/23	Achieved	Approved

Summary

- PSEG Long Island met with LIPA throughout 2023 to discuss capital projects' design/construction approach and adherence to the requirements of SEQRA permits. This metric applied to projects requiring a SEQRA permit and projects exceeding \$1,000,000 completed in 2023.

T&D-40 - Double Woods

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

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

T&D-40 Double Wood Poles

OSA Incentive: \$55,713



YTD Result

OSA YE Target

OSA YE Forecast

7,567

5,829

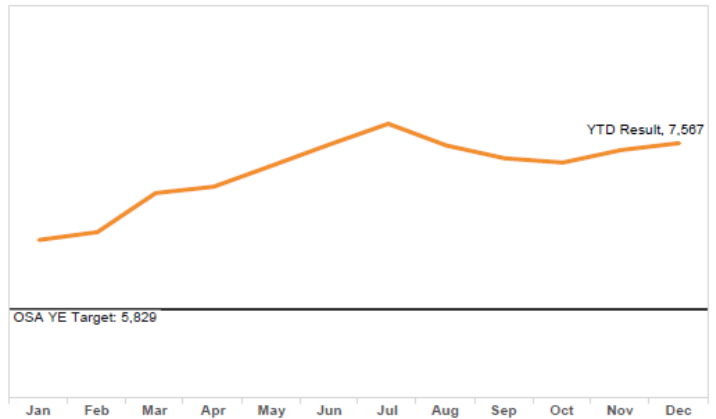


Metric Definition

Amount of double wood poles, as recorded in the National Joint Utilities Notification System (NJUNS), on Dec 31, 2023.

Calculation

Count of double wood poles per NJUNS, on December 31, 2023.



YTD

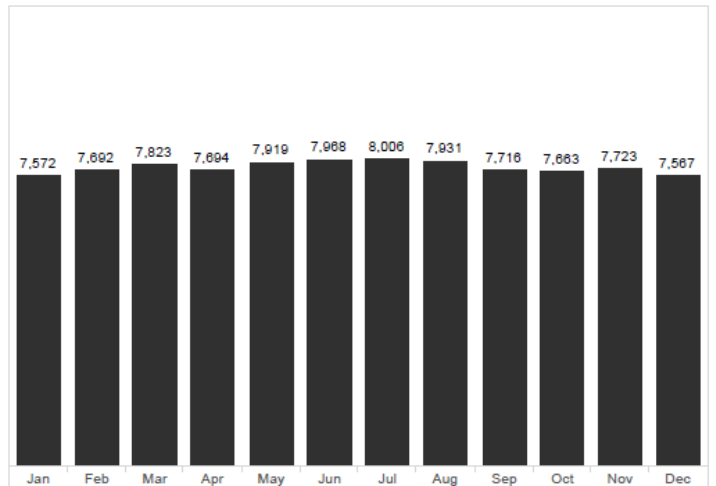
2023	7,567
2022	6,477

MTD

2023	-156
2022	-314

	PSEG - Total Set	VZ - Total Set	Total Poles Set	PSEG - Total Removed	VZ - Total Removed	Total Poles Removed	Net Double Wood
January	593	91	684	42	478	520	7,572
February	542	93	635	31	484	515	7,692
March	635	109	744	80	533	613	7,823
April	520	96	616	69	676	745	7,694
May	750	99	849	64	560	824	7,919
June	717	111	828	62	717	779	7,968
July	530	78	608	71	499	570	8,006
August	580	95	675	78	672	750	7,931
September	529	70	600	98	717	815	7,716
October	622	106	728	77	704	781	7,663
November	560	103	664	59	545	604	7,723
December	214	111	325	58	423	481	7,567

2023 Net Double Woods



Summary

- PSEG Long Island YE Double Wood poles as reported in National Joint Utilities Notification System (NJUNS) was 7,567 vs. a target of 5,829. PSEG Long Island did not achieve targeted performance levels.
- PSEG Long Island continues to meet with Verizon and Altice as coordination between the parties and cooperation from the communications utilities is necessary to achieve the targeted performance levels.

T&D-41 - Program Effectiveness - Vegetation Management

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

OSA Incentive: \$194,997



Metric Definition

Year-Over-Year (YOY) Outage incident reduction of 50% for the circuits actually addressed in the 2022 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 2022 work/upgrades being completed.

Incentive compensation will be allocated as follows:

- 100% for achieving a >= 50.0% YOY outage incident reduction
- 50% for achieving a >= 40.0% YOY outage incident reduction

Calculation

(Year After – Year Before)/Year Before

*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.

Exclusion

Exclusions only for NYS DPS 72-hour storm events

YTD

2023	-18.3%	
------	--------	--

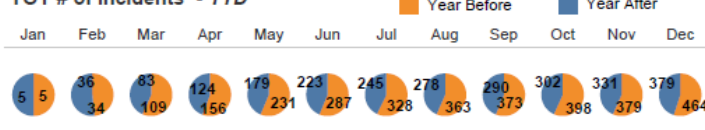
Month

2023		54.8%
------	--	-------

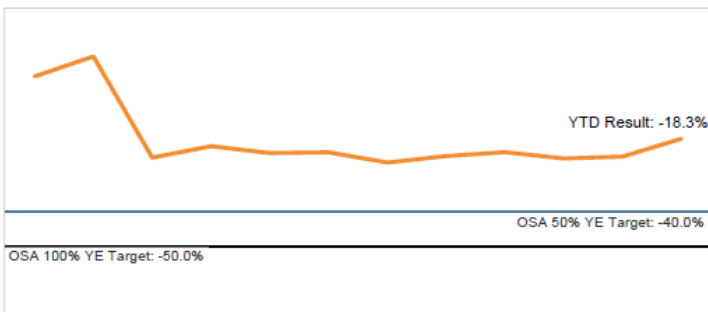
Monthly Summary - Number of Incidents

	Before Incidents	After Incidents
January	5	5
February	29	31
March	75	47
April	47	41
May	75	55
June	56	44
July	41	22
August	35	33
September	10	12
October	25	12
November	35	29
December	31	48

YOY # of Incidents - YTD



YTD Result	OSA YE Target	OSA YE Forecast
-18.3%	-50.0%	↓



Monthly Sample of Incidents by Circuit - December

Circuit	Year Of Trim	Last Trim	Before Incidents	After Incidents
3A7N9	2022	12/28/2022	3	1
3A146	2022	12/12/2022	0	0
3BG068	2022	12/05/2022	2	1
3H154	2022	12/28/2022	0	0
3H156	2022	12/28/2022	0	0
3H158	2022	12/12/2022	0	0
3J5P1	2022	12/08/2022	0	0
3R049	2022	12/15/2022	0	0
4AH136	2022	12/17/2022	1	2
4B117	2022	12/17/2022	4	4
4X6P3	2022	12/28/2022	0	0
6L968	2022	12/09/2022	3	0
6W805	2022	12/09/2022	1	1
6X799	2022	12/19/2022	10	10
7J859	2022	12/01/2022	0	0
7R921	2022	12/02/2022	0	0
7XM984	2022	12/06/2022	0	0
7XM998	2022	12/28/2022	1	2
8W662	2022	12/19/2022	0	12
9B724	2022	12/28/2022	1	0
9C5K2	2022	12/22/2022	2	8
9J957	2022	12/06/2022	3	6
9R783	2022	12/29/2022	0	1

Summary

- PSEG Long Island YE Program Effectiveness – Vegetation Management result was -18.3% reduction vs. a target of -50.0% for 100% of allocated compensation and -40.0% for 50% of allocated compensation. There were 464 incidents before and 379 incidents after. PSEG Long Island did not achieve either targeted performance levels.
- PSEG Long Island does want to note some shortcomings in the measurement of the metric that recently came to light during YE review. For any circuits that had 0 incidents before and 0 incidents after, PSEG Long Island under the current metric definition and calculations structures receives no credit for maintaining no outages on the circuits that had no outages in the prior cycle which would be an indicator of effective vegetation management and tree trim practices.
- Under the scope of the metric in 2024 there was a total of 322 Circuits
 - Of the 322 Circuits – 163 Circuits had zero vegetation related incidents year before trim and year after trim
 - The 163 circuits represents 50.6% of the population of circuits in the metric for 2023 and there is no impact in the metric for maintaining zero vegetation incidents on the circuit because a

percentage change cannot be calculated for circuits that experience 0 incidents before trim as well as 0 incidents after the trim. Because of the limitations noted the overall effectiveness of the program is being under represented

- The remaining 49.4% or 159 circuits experience 464 incidents before and 379 incidents after with a result of -18.3%.
- When utilizing a weighted average based on utilizing 100% effectiveness rate for circuits where there were 0 incidents/outages before and 0 outages/incidents after the results and outcomes would be in alignment with the metric expectations.

Category	Circuits in 2023 Metric	Effectiveness Rate	Allocation	Weighted Average
Circuits with 0 outages before and 0 outages after	163	-100.0%	50.6%	-50.6%
Circuits with outages before and/or after	159	-18.3%	49.4%	-9.0%
Total	322		100.0%	-59.7%

T&D-42 – Estimated Time of Restoration (ETR) Process Enhancements

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$301,153.16		

T&D-42 Estimated Time of Restoration (ETR) Process Enhancements				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-42.1	Develop a PIP for LIPA approval that addresses continued ETR Process Enhancements (applicable for Blue Sky, with a minimum of two factors selected for evaluation.	01/15/23	Achieved	Approved
T&D-42.3	Secure Outage Data Source	03/15/23	Achieved	Approved
T&D-42.2	Identify Potential ETR Factors	04/21/23	Achieved	Approved
T&D-42.4	Q1 PIP update delivered to LIPA and DPS to be reviewed at quarterly meeting between the three Parties	04/21/23	Achieved	Approved
T&D-42.5	LIPA to Provide PSEG LI with PIP Approval and Success Criteria for Go/No Go Decision	06/15/23	Achieved	Approved
T&D-42.6	Perform ETR Impact Analysis to validate the level of impact the selected factors may have on ITR (see separate Project named IT Data Analytics 2023 - IT-6.T1.04)	07/20/23	Achieved	Approved
T&D-42.7	Data Analytics Model - data exploration results presentation	07/20/23	Achieved	Approved
T&D-42.8	Decision Point - Go/No Go based on significance of success criteria (Comparison of 2022 ETR results)	07/20/23	Achieved	Approved
T&D-42.9	Q2 PIP update delivered to LIPA and DPS to be reviewed at quarterly meeting between the three Parties	07/21/23	Achieved	Approved
T&D-42.10	Issue Testing Plan to LIPA	08/30/23	Achieved	Approved
T&D-42.11	Complete Testing - Provide/Present results to LIPA	09/29/23	Achieved	Approved
T&D-42.12	Q3 PIP update delivered to LIPA and DPS to be reviewed at quarterly meeting between the three Parties	10/20/23	Achieved	Approved
T&D-42.13	Operationalize minimum of two (2) factors that yielded a positive customer experience identified from PIP Study into ETR methodology, and customer communications	10/31/23	Achieved	Approved
T&D-42.14	2023 Year-End PIP update delivered to LIPA and DPS to be reviewed at year-end meeting between the three Parties	01/19/24	Achieved	Approved

Summary

- PSEG Long Island develop a PIP to addresses continued ETR Process Enhancements applicable for Blue Sky, with a minimum of two factors selected for evaluation.
- PSEG Long Island delivered the following deliverables:
 - ITR Data Analytics (Presented to LIPA on 07/21/2023)
 - ETR Factor Selection (Accepted by LIPA on 07/28/2023)
 - OMS Testing (Accepted by LIPA on 09/19/2023)
 - ETR Factors (Operationalized in OMS 10/25/2023)
 - ITR Dashboard to Monitor Performance (To be presented to LIPA today 12/12/2023)
- PSEG Long Island operationalized a minimum of two (2) factors that yielded a positive customer experience identified from PIP Study into ETR methodology, and customer communications

T&D-44 - Regulatory Compliance

Metric Type	Hybrid	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$180,691.90		

T&D-44 Regulatory Compliance				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-44.1	Submit a plan for full compliance with the NYS Department of Public Service's Safety Standards, including quality assurance and quality control programs, by April 1, 2023, for implementation beginning January 1, 2024.	04/01/23	Achieved	Approved
T&D-44.2	Q1 report delivered to LIPA and DPS to be reviewed at quarterly meeting between the three Parties	07/31/23	Achieved	Declined
T&D-44.3	Q2 report delivered to LIPA and DPS to be reviewed at quarterly meeting between the three Parties	07/31/23	Achieved	Declined
T&D-44.4	Q3 report delivered to LIPA and DPS to be reviewed at quarterly meeting between the three Parties	10/31/23	Achieved	Declined
T&D-44.5	Q4 report delivered to LIPA and DPS to be reviewed at quarterly meeting between the three Parties	01/12/24	Achieved	Declined

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:
 - a. 100% Self-Reporting of Non-Compliance for the year ending Dec 31, 2023.
 - i. There were 2 self-reports in 2024 that received no follow up actions and/or violations. The self-reports were as follows:
 1. Limited scope of work performed in freshwater and tidal wetland and freshwater and tidal wetland adjacent areas did not comport with NYSDEC Permit #1-4724-01731/00008 & 00009, which NYSDEC issued to PSEG LI on April 11, 2022 (self-disclosure to NYSDEC made on 4/7/23)
 2. A limited scope of work which was supposed to be performed in a wetland adjacent area was conducted in a tidal wetland (self-disclosure to NYSDEC made on 4/21/23)
 - b. Zero violations of Environmental Rules and Regulations for the year ending Dec 31, 2023.
 - i. There were no violations of Environmental Rules and Regulations
 - c. 100% of required Operator Training for the year ending Dec 31, 2023.
 - i. There was 100% completion of operator training
 - d. 100% of BES System Studies for the year ending Dec 31, 2023.
 - i. 100% of BES System Studies were completed – there was a total 13 reports delivered
 - e. Zero violations of all required permitting for the year ending Dec 31, 2023.
 - i. There were no violations
 - f. Comply with all established NYS DPS requirements regarding Event Notifications.
 - i. PSEG Long Island complied with all establish NYS DPS requirements regarding event notifications. PSEG Long Island notifies DPS in alignment with the regulations and reporting standards and also sometimes notifies for transparency purposes. Overall there were 136 notifications that were made in 2023.
 - g. Continue with the current stray voltage & inspection pilot program in 2023 and submit a plan for full compliance with the NYS Department of Public Service's Safety Standards, including quality assurance and quality control programs, by April 1, 2023, for implementation beginning January 1, 2024.

T&D-45 – Physical Security

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$301,153.16		

T&D-45	Physical Security			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-45.1a	Evaluate current camera guidelines, policies, and procedures and identify gaps. This may include identifying additional budget needs and scope.	07/15/23	Achieved	Approved
T&D-45.1b	Evaluate implementation of Motion Detectors and other IDS Systems guidelines, policies and procedures and identify gaps. This may include identifying additional budget needs and scope.	07/31/23	Achieved	Approved
T&D-45.1c	Evaluate the opportunity to implement/create a SharePoint camera system for multiple internal and/or external users, including National Grid. Research guidelines, policies and procedures and identify gaps. This may include identifying additional budget needs and scope.	07/31/23	Achieved	Approved
T&D-45.1d	Complete two (2) of the substation security upgrades as per the Assessment to enhance current Intrusion Detection System (IDS)	12/31/23	Achieved	Approved
T&D-45.1x	Submit a PIP for LIPA approval that incorporates recommendations from 2022 LIPA Physical Security Assessment. Update the Metric deliverables in Smartsheet to include the LIPA-approved PIP deliverables and dates in 2023.	01/20/23	Achieved	Approved
T&D-45.2.1a	Complete mitigation of vegetation at substations identified to be completed in 2023 Q1	03/31/23	Achieved	Approved
T&D-45.2.1b	Complete mitigation of vegetation at substations identified to be completed in 2023 Q2	06/30/23	Achieved	Approved
T&D-45.2.1c	Evaluate and assess vegetation issues of remaining substations identified in the Assessment. This may include a meeting with LIPA to discuss and develop a vegetation security specification, if necessary, for additional future vegetation work at substations. This may also include identifying additional budget needs, vegetation standards, and scope in coordination with LIPA.	08/31/23	Achieved	Approved
T&D-45.2.2a	Evaluate and assess existing conditions for the Hicksville operating yard using the 2022 Assessment to determine applicable issues. This evaluation will be used as a pilot for remaining operating yards to be completed in the future.	07/31/23	Achieved	Approved
T&D-45.2.2b	Using deliverable T&D-45.2.2a, develop vegetation-related guidelines, policies, and procedures which identified gaps for operating yards. This will be done internally. Update accordingly to fully incorporate Physical Security specific issues into overall plans.	08/31/23	Achieved	Approved
T&D-45.2.2c	Issue findings, including budget, involving vegetation issues for applicable Operating Yards reviewed under Deliverables T&D-45.2.2a and 45.2.2b.	12/31/23	Achieved	Approved
T&D-45.2x	Q1 report delivered to LIPA and DPS to be reviewed at quarterly meeting between the three Parties.	04/14/23	Achieved	Approved
T&D-45.3a	Evaluate and assess the applicable issues identified at the eight substations per Assessment. This may include identifying additional budget needs, engineering standards, and scope in coordination with LIPA.	06/15/23	Achieved	Approved
T&D-45.3b	If applicable, using PSEG Long Island Conduit Assessment, put together updated guidelines policies, standards, and procedures needed to mitigate conduit issues.	06/30/23	Achieved	Approved
T&D-45.3x	Q2 report delivered to LIPA and DPS to be reviewed at quarterly meeting between the three Parties. Note: Commencing with Q2, Quarterly Meetings to include IT updates related to the six technology findings per the 2022 Assessment. (This will be done as part of TD-45 Physical Security Quarterly Meeting). - for Q2, this refers to PIP deliverable T&D-45.6a, which is not listed here due to duplication of Quarterly Report deliverable already entered).	07/14/23	Achieved	Approved
T&D-45.4.1a	Mitigate applicable issues identified at the one substation per Assessment	09/30/23	Achieved	Approved
T&D-45.4.1b	Evaluate current inventory storage-related guidelines, policies, and procedures and identify gaps. Update accordingly to fully incorporate Physical Security specific issues into overall plans.	08/31/23	Achieved	Approved
T&D-45.4.1c	Complete PSEG LI assessment involving inventory storage-related issues for materials placed close to fence line in remaining substations not reviewed under the 2022 Assessment.	10/31/23	Achieved	Approved
T&D-45.4.1d	Issue findings involving inventory storage-related issues for materials placed close to fence line in remaining substations not reviewed under the 2022 Assessment.	12/31/23	Achieved	Approved
T&D-45.4.2a	Evaluate and assess the applicable issues identified at the applicable operating yards identified in Assessment in coordination with National Grid. This may include identifying additional budget needs, standards, and scope in coordination with LIPA.	10/31/23	Achieved	Approved

T&D-45		Physical Security		
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-45.4.2b	Complete PSEG LI assessment involving inventory storage-related issues for materials placed close to fence line in remaining operating yards not reviewed under the 2022 Assessment.	12/31/23	Achieved	Approved
T&D-45.4.2c	Issue findings, including budget, involving inventory storage-related issues for materials placed close to the fence line in remaining Operating Yards not reviewed under the 2022 Assessment.	12/31/23	Achieved	Approved
T&D-45.4x	Q3 report delivered to LIPA and DPS to be reviewed at quarterly meeting between the three Parties. Note: Commencing with Q2, Quarterly Meetings to include IT updates related to the six technology findings per the 2022 Assessment. (This will be done as part of TD-45 Physical Security Quarterly Meeting). - for Q3, this refers to PIP deliverable T&D-45.6b, which is not listed here due to duplication of Quarterly Report deliverable already entered).	10/13/23	Achieved	Approved
T&D-45.5.1a	Complete mitigation of fencing issues at substations identified to be completed in 2023 Q1	03/31/23	Achieved	Approved
T&D-45.5.1b	Evaluate and assess fencing issues of remaining substations identified in the 2022 Assessment. This may include identifying additional budget needs and scope in coordination with LIPA.	07/15/23	Achieved	Approved
T&D-45.5.1c	Evaluate and assess fencing issues of remaining substations not identified in the 2022 Assessment. This may include identifying additional budget needs and scope in coordination with LIPA.	10/31/23	Achieved	Approved
T&D-45.5.1d	Complete mitigation of fencing issues at remaining substations identified in 2022 Assessment from deliverable T&D-45.5.1b to be completed in 2023 by PSEG LI Fence Assessment.	12/31/23	Achieved	Approved
T&D-45.5.2a	Evaluate and assess existing conditions for the Hicksville operating yard using the 2022 Assessment to determine applicable issues. This evaluation will be used as a pilot for remaining operating yards to be completed in the future.	07/31/23	Achieved	Approved
T&D-45.5.2b	Using deliverable T&D-45.5.2a, develop fencing-related guidelines, policies, and procedures which identified gaps for operating yards. This will be done internally. Update accordingly to fully incorporate Physical Security specific issues into overall plans.	08/31/23	Achieved	Approved
T&D-45.5.2c	Issue findings, including budget, involving fencing issues for applicable Operating Yards reviewed under Deliverables T&D-45.5.2a and 45.5.2b.	12/31/23	Achieved	Approved
T&D-45.5x	Q4 report delivered to LIPA and DPS to be reviewed at quarterly meeting between the three Parties. Note: Commencing with Q2, Quarterly Meetings to include IT updates related to the six technology findings per the 2022 Assessment. (This will be done as part of TD-45 Physical Security Quarterly Meeting). - for Q4, this refers to PIP deliverable T&D-45.6c, which is not listed here due to duplication of Quarterly Report deliverable already entered).	01/12/24	Achieved	Approved
T&D-45.6d	Assign Business Lead and IT point of contact for each of the 6 findings identified in the 2022 (3rd Party Consultant) Assessment	06/15/23	Achieved	Approved
T&D-45.6e	Install LAN switch for EF Barrett for (3rd Party Consultant Assessment) finding 6.1	06/15/23	Achieved	Approved
T&D-45.6f	Install Garden City Video Wall Monitors for (3rd Party Consultant Assessment) finding 6.4	06/15/23	Achieved	Approved
T&D-45.6g	Connect network for EF Barrett for (3rd Party Consultant Assessment) finding 6.1	06/30/23	Achieved	Approved
T&D-45.6h	CSRC approval for video wall monitors for Garden City (3rd Party Consultant Assessment) finding 6.4 referenced in deliverable T&D-45.6f.	07/31/23	Achieved	Approved
T&D-45.6i	Resolve (3rd Party Consultant Assessment) finding 6.6 intercom issues at 5M, 4G and Shoreham.	08/31/23	Achieved	Approved
T&D-45.6j	Resolve (3rd Party Consultant Assessment) finding 6.3 by obtaining CSRC approval.	08/31/23	Achieved	Approved
T&D-45.6k	Resolve (3rd Party Consultant Assessment) finding 6.2 by installing switch.	09/15/23	Achieved	Approved
T&D-45.6l	Implement solution for (3rd Party Consultant Assessment) finding 6.5 (AMAG issues with DNS servers/network infrastructure).	11/15/23	Achieved	Approved
T&D-45.7a	Complete mitigation of miscellaneous security issues (Findings # 100-107) identified to be completed in 2023 Q1	03/31/23	Achieved	Approved
T&D-45.7b	Complete mitigation of miscellaneous security issues in the 2022 (3rd Party Consultant) Assessment (Findings #100-107) identified to be completed in 2023 Q3.	09/30/23	Achieved	Approved
T&D-45.7c	PSEG Long Island and LIPA to meet and mutually agree on final determination regarding 2023 applicability for the remaining issues identified in the 2022 (3rd Party Consultant) Assessment (Findings # 100-107).	06/15/23	Achieved	Approved
T&D-45.7d	Evaluate and assess the remaining issues for (Findings #100-107) identified per the 2022 (3rd Party Consultant) Assessment. This may include identifying additional budget needs, standards, and scope in coordination with LIPA.	09/30/23	Achieved	Approved

T&D-45	Physical Security			
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-45.7e	Where applicable, complete mitigation of miscellaneous security issues/items scheduled for 2023 from item T&D-45.7c.	12/31/23	Achieved	Approved

Summary

A third-party consultant for LIPA conducted a 2022 Assessment of Physical Security and provided six findings that were identified as areas for improvement. The Assessment also included several findings (numbered 100-107) that were grouped together as miscellaneous items and are shown below in number 7. All of the findings related to substations, operating yards, and security command centers. These are listed in the below summary of deliverables:

PSEG Long Island and LIPA created a PIP to address these findings. In addition to the recommendations from the Assessment, PSEG Long Island also agreed to include two additional items that were not officially contained in the 2023 T&D-45 metric and were not part of the evaluation for successful completion. These two items related to porous facility security and changing to hardened locks on the “No Load” taps on substation transformers.

All of the deliverables were completed by the deadline and artifacts were provided for reference. There were six exceptions that were all submitted via the exception tracker and approved by LIPA (two ministerial exceptions – 4.2a and 6i, two exemptions – 6i and 6j, and two scope changes – 4.2a and 5.1c).

1. Current Intrusion Detection Systems (IDS) is poor, outdated, or non-existent
 - a. Security system design was reviewed and implemented in the design and construction of the current security upgrades to NERC Low substations. This included the utilization of higher quality cameras. The physical security design specification was also updated.
 - b. Security system design was reviewed and implemented in the design and construction of the current security upgrades to NERC Low substations. This included the utilization of motion detectors and perimeter IDS systems on a site specific basis. Designs for Control House IDS was updated based on NERC PSP perimeter(s) for each site.
 - c. Evaluated the opportunity to implement/create a SharePoint camera system for multiple internal and/or external users, including National Grid. During the evaluation, it was deemed that it was not feasible to integrate the National Grid and PSEG Long Island camera system as the two systems are separate and distinct and attempting to integrate would cause a number of problems.
 - d. Completed three substation security upgrades (4H, 4HG, 8Z) as per the Assessment to enhance current Intrusion Detection System (IDS). The deliverable called for the upgrade of two substations.
2. Vegetation has grown invasive of exterior sites
 1. Substations
 - a. All 7 items identified to be completed in 2023 Q1 were completed on schedule.
 - b. All 3 items identified to be completed in 2023 Q2 were completed on schedule.
 - c. Further evaluation of remaining substations in the 2022 Assessment was completed. For five of the items, the specification was modified and agreed upon and one additional item was completed.
 2. Operating Yards
 - a. The Hicksville operating yard’s existing conditions were evaluated and assessed using the 2022 Assessment to determine applicable issues. This evaluation was then used as a pilot for remaining operating yards to be completed in the future.
 - b. Using the evaluation in 2.2a, vegetation-related guidelines, policies, and procedures were updated to fully incorporate Physical Security specific issues into overall plans.
 - c. Issued findings, including budget, involving vegetation issues for materials placed close to fence line in all operating yards.
3. Conduit leading into the Control Houses are uncovered and exposed, which creates a safety concern for employees and contractors
 - a. PSEG Long Island and LIPA reviewed the finding and the standards and mutually agreed that the conduit issues were satisfactorily addressed.
4. Inventory and high-value materials are placed and stored close to fence lines

1. Substations
 - a. The storage of material close to the fence line at the 9A Riverhead substation was moved more than the recommended three feet from fence line.
 - b. The current inventory storage-related guidelines, policies, and procedures were evaluated and updated accordingly to fully incorporate Physical Security specific issues into overall plans.
 - c. Completed assessment involving inventory storage-related issues for materials placed close to fence line in the remaining substations not reviewed under the 2022 Assessment.
 - d. Remaining substations were evaluated for storage of materials close to the fence line and any issues were remedied.
2. Operating Yards
 - a. The Hewlett, Brentwood, and Riverhead operating yards were evaluated and assessed for storage related issues identified in the 2022 Assessment and the security/facility site findings were submitted.
 - b. The remaining operating yards were evaluated and assessed for storage related issues identified in the 2022 Assessment using the findings from the three operating yards in 4.2a.
 - c. Issued findings, including budget, involving inventory storage-related issues for materials placed close to fence line in all operating yards.
5. Exterior fencing is loose, rusted or broken, leading to potential intrusion points
 1. Substations
 - a. Completed mitigation of ten items related to fencing issues identified to be completed in 2023 Q1.
 - b. Completed mitigation of additional three items related to fencing issues identified to be completed in 2023 Q2.
 - c. The fencing issues of remaining substations not identified in the 2022 Assessment were evaluated and assessed.
 - d. Completed mitigation of final item related to fencing issues identified to be completed in 2023 Q4.
 2. Operating Yards
 - a. The Hicksville operating yard was evaluated and assessed for fencing issues identified in the 2022 Assessment and the security/facility site findings were submitted.
 - b. Using the evaluation in 5.2a, fencing-related guidelines, policies, and procedures were updated to fully incorporate Physical Security specific issues into overall plans.
 - c. Issued findings, including budget, involving fencing issues for all operating yards as per deliverables 5.2a and 5.2b.
6. Challenges associated with Technology Implementation
 - a. Conducted Q2 quarterly meeting including IT updates.
 - b. Conducted Q3 quarterly meeting including IT updates.
 - c. Conducted Q4 quarterly meeting including IT updates.
 - d. Business lead and IT point of contact for each of the 6 findings identified in 2022 Assessment.
 - e. LAN switch was installed for EF Barrett.
 - f. Video wall monitors were installed at Garden City.
 - g. The network was connected for EF Barrett.
 - h. Received CSRC approval for the Garden City video wall monitors.
 - i. The intercoms at 5M, 4G, and Shoreham were fixed to become operational and successfully communicated back to the Command Centers in Garden City and Melville.
 - j. Received CSRC approval for the implementation of the Hewlett cameras.
 - k. Switch installed and router installed at the Hauppauge warehouse.
 - l. The AMAG system was successfully cutover from v7.0.1 to the v9.3.
7. Miscellaneous Security Issues (Findings 100 – 107)

The following miscellaneous security issues were identified in the 2022 Assessment and the deliverables are shown in items a-e below.

100 - Poor lighting throughout the site

101 - Single authentication for entrance access

102 - The chain and lock on the ingress/egress point was old or rusted

103 - Loose wiring was not properly secured to poles and support structures

104 - Windows on the Control House show signs of cracks, breaks, and/or damage

105 - Site includes small shared access area (AT&T and T-Mobile cellular towers)

106 - The site is located in a known high-crime area

107 - Contractor and Employee parking area is unsecured

- a. Finding 102 from above was completed. One item in finding 104 that was scheduled for Q1 2023 was addressed. Two items in finding 101 that was scheduled for Q1 was addressed. The other two substation items from finding 101 was completed as per tracker.
- b. Miscellaneous items from #100-107 that were scheduled for Q3 were completed.
- c. PSEG Long Island and LIPA mutually agreed upon a final determination regarding 2023 applicability for the remaining issues identified in the Assessment (100-107).
- d. Remaining issues identified per the 2022 Assessment were evaluated and assessed and updated in the tracker.
- e. All remaining miscellaneous issues identified for completion in 2023 were completed.

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

Metric Type	Qualitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$210,807.21		

T&D-46 Root Cause Analysis (RCA) Execution and Compliance				
Metric #	Deliverable	Due Date	PSEG LI Performance	LIPA Performance (Per Smartsheet)
T&D-46.1	Submit a PIP that receives LIPA approval that meets Root Cause Analysis recommendations adopted by LIPA Board. Update the Metric deliverables in Smartsheet to include the LIPA-approved PIP deliverables and dates in 2023.	01/31/23	Achieved	Approved
T&D-46.2	Q1 report delivered to LIPA and DPS to be reviewed at quarterly meeting between the three Parties	04/30/23	Achieved	Approved
T&D-46.3	Q2 report delivered to LIPA and DPS to be reviewed at quarterly meeting between the three Parties	07/14/23	Achieved	Approved
T&D-46.4	Q3 report delivered to LIPA and DPS to be reviewed at quarterly meeting between the three Parties	10/13/23	Achieved	Approved
T&D-46.5	Q4 report delivered to LIPA and DPS to be reviewed at quarterly meeting between the three Parties	01/12/24	Achieved	Approved

Summary

- PSEG LI submitted a PIP that that meets Root Cause Analysis for Outage Determination recommendation adopted by LIPA Board of Trustees
- 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”) process and practices of PSEG Long Island related to outage cause determination (“OCD”).
 - Analyze current outage cause determination process and coding Enhance and improve coding fidelity and analysis
 - Define root cause analysis (RCA) thresholds and/or triggers
 - Standardize tracking and recording of root cause investigations
 - Identify and implement training
 - Standardize reporting and incident review
- PSEG LI completed identified project scope and provided updates via quarterly reports.

T&D-48 - Program Effectiveness - Storm Hardening

Metric Type	Quantitative	Metric Performance	↑ Achieved
Incentive Compensation Claim	\$210,807.21		

J F M A M J J A S O N D
T&D-48 Program Effectiveness - Storm Hardening
OSA Incentive: \$194,997



Metric Definition
Realize tangible performance improvements on parts of the system that have completed storm hardening upgrades; specifically, the circuits completed under 2022 Metric T&D-30.

Net reduction in Substation Breaker Trips of >= 50%
Baseline for each circuit will be set using 12 months immediately prior to 2022 work/upgrades being completed.

Calculation
Count of improved system design for the eleven circuits identified and operationalized in 2022 as part of Storm Hardening Program (circuits completed under the 2022 Metric T&D-30).

Exclusion
Exclusions only for NYS DPS 72-hour storm events

YTD

2023	0
------	---

Month

2023	0
------	---

YTD Result	OSA YE Target	OSA YE Forecast
0	8	↑

OSA YE Target: 8

YTD Result: 0

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

Circuit	ACRV	ACRV Implementation Date	Year Before ACRV Implementation (BREAKER TRIPS)	12 Mths after Breaker Trips Due to Fault Downstream of ACRV	Breaker Trips Due to Fault Downstream of ACRV (YTD 2023)
2G5N7	ACRV-265	April 5, 2022	0	0	0
3MG042	ACRV-135	April 5, 2022	1	0	0
3R052	ACRV-470	March 22, 2022	0	0	0
4AH138	ACRV-2387	April 20, 2022	0	0	0
4AH363	ACRV-2388	April 20, 2022	3	0	0
6D636	ACRV-1204	April 25, 2022	2	0	0
7XM944	ACRV-3733	April 22, 2022	2	0	0
8ED3H7	ACRV-1499	April 13, 2022	1	0	0
8RX741	ACRV-4298	April 5, 2022	5	0	0
8W5N5	ACRV-4247	April 13, 2022	1	0	0
9A763	ACRV-4545	March 23, 2022	2	0	0
Total			17	0	0

Summary

- PSEG Long Island YE Program Effectiveness – Storm hardening result was 0 breaker trips downstream from the ACRV implementation. The targeted performance level was to be below 8 break trips downstream which was a net reduction of 50% from prior to installation.