



# STATE OF CONNECTICUT

## PUBLIC UTILITIES REGULATORY AUTHORITY

### **APPLICATION TO PROVIDE LEGAL SERVICES**

#### ***Instructions:***

The Public Utilities Regulatory Authority (Authority or PURA) will maintain a list of organizations and individuals eligible to provide services (Providers) under the Customer Legal Advocacy Services (CLAS) Program as established in Docket No. 23-11-04, PURA Implementation of the Legal Services Funding Provisions of Section 30 of Public Act 23-102.

Providers will assist public service company customers with matters related to utility bills, arrearage payments, and service terminations. Provider(s) will be eligible to be reimbursed for the following services performed on a customer's behalf:

- Reviewing customer documents;
- Negotiating on behalf of a customer as their authorized representative;
- Reviewing, drafting, and sending correspondence or otherwise communicating with a public service company on behalf of a customer;
- Conducting legal research;
- Providing advice to customers; and/or
- Other reasonable services that allow utility customers to attain participation in public service company programs.

To be considered eligible for reimbursement under the Program, prospective Providers must submit a completed Application by submitting a completed Application as an emailed PDF attachment to [PURA.RFP@ct.gov](mailto:PURA.RFP@ct.gov) no later than October 29, 2024. Selected Providers will be eligible for reimbursement for services performed between January 1, 2025, and December 31, 2025, and must submit monthly invoices, as well as an annual report that summarizes the services provided to utility customers.

Applications will be evaluated on the following criteria: (1) grasp of scope; (2) credentials for this type of engagement; (3) experience for this type of engagement; (4) applicant's approach to meeting the Program objectives; and (5) cost effectiveness.

## A. APPLICANT INFORMATION

1. Organization ( ) or individual ( )
2. Provider Name:
3. Mailing Address:
4. Contact Person (*Individual who can provide additional information about the application or who has immediate responsibility for the application*)
  - a. Name:
  - b. Title:
  - c. Mailing Address:
  - d. Phone Number:
  - e. Email Address:
5. Authorized Individual (*Individual empowered to enter into and amend contractual instruments in the name and on behalf of the prospective Provider*)
  - a. Name:
  - b. Title:
  - c. Mailing Address:
  - d. Phone Number:
  - e. Email Address:
6. Describe your organization's qualifications to provide services for utility customers under the Customer Legal Advocacy Services Program. Include a description of any experience:
  - a. advocating on behalf of customers of a public service company; and
  - b. working with or providing services to low-to-moderate income customers, or customers in disadvantaged communities.
7. How many staff would your organization dedicate to providing eligible services? Provide the title(s) and qualifications of each dedicated staff member.
8. How many hours could your organization devote monthly to providing eligible services?

9. What is your hourly billing rate associated with providing eligible services? Provide a range if dependent on the participating staff member.
  
10. Provide an estimate of the time necessary to complete the following tasks on behalf of a public service company customer:
  - a. Negotiate a reasonable amortization agreement with a public service company:
  - b. Draft and send correspondence on behalf of a customer reviewing an amortization agreement:
  - c. Providing advice to customers:
11. What language(s) can your organization provide services in?
12. What is your organization's overhead or administrative rate? What costs are included in this rate? Note that any rate above 15% cannot be covered by the CLAS Program.
  - a. Overhead rate:
  - b. Included costs:
13. Does your organization require advanced payment to start providing eligible services? If yes:
  - a. What amount is required to start providing services?
  - b. What will advance funding be used for? Provide specific estimated costs.

- c. Provide an attached annual budget of revenue and expenses for the preceding and current year for the organization; and
- d. Provide the percentage of the annual budget that the cost of the planned participation will represent.

I, \_\_\_\_\_, am an authorized representative of \_\_\_\_\_ . I have read Section 30 of Public Act 23-102,<sup>1</sup> and I swear that the information provided in this Application is true and accurate to the best of my knowledge. Further, I agree to abide by the invoicing and data reporting requirements set forth in Section B of this application.

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Date)

## **B. INVOICING AND DATA REPORTING**

The Authority will determine the annual budgets for selected Providers, subject to the overall \$1 million annual statutory cap for the CLAS Program. The Provider shall submit invoices to the relevant public service company for services provided to customers on a monthly basis, as applicable. In addition, on a quarterly basis, Providers are required

<sup>1</sup> Public Act 23-102 is available at: [AN ACT STRENGTHENING PROTECTIONS FOR CONNECTICUT'S CONSUMERS OF ENERGY.](#)

to submit a report to the Authority's Office of Education, Outreach and Enforcement indicating the following:

- The total invoiced amount for that quarter, broken out by public service company;
- The number of customers served, broken out by public service company and by town;
- The number of customers served, broken out by affordability program participation (e.g. Low Income Discount Rate, Matching Payment Program, Flexible Payment Plan, etc.);
- The total number of hours billed by public service company; and
- The total amount expected to be invoiced in the following quarter.

Providers must return all unused portions of any advance funding at the end of a Program year.

The Provider shall also submit an annual report detailing the organization's activities under this program by February 1 each year.