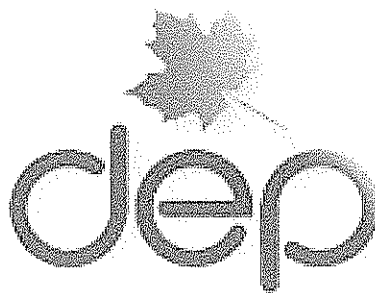




**West Virginia Energy Efficient
Appliance Rebate Program
Response for RFQ #DEP14971**

Presented to:
The West Virginia
Department of Environmental Protection



March 5, 2010

Helgeson Enterprises
4461 White Bear Parkway
White Bear Lake, MN 55110

David White
Vice President of Sales
215-766-8826
dwhite@helgesonent.com

RECEIVED

2010 MAR -9 A 10: 24

PROCUREMENT DIVISION
STATE OF WV



State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
 DEP14971

PAGE
 1

ADDRESS CORRESPONDENCE TO ATTENTION OF
 CHUCK BOWMAN
 304-558-2157

VENDOR

*928112120 215-766-8826
 HELGESON ENTERPRISES
 4461 WHITE BEAR PKWY
 WHITE BEAR LAKE MN 55110

SHIP TO

ENVIRONMENTAL PROTECTION
 DEPARTMENT OF
 OFFICE OF ADMINISTRATION
 601 57TH STREET SE
 CHARLESTON, WV
 25304 304-926-0499

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
02/10/2010				

ID OPENING DATE: 03/04/2010 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
001	1	JB		964-04	91,207.90	91,207.90
PROGRAM ADMINISTRATOR THE WEST VIRGINIA PURCHASING DIVISION, FOR THE AGENCY, THE WEST VIRGINIA DEPARTMENT OF ENVIRONMENTAL PROTECTION, IS REQUESTING QUOTATIONS FROM REBATE FULFILLMENT COMPANIES TO DEVELOP, IMPLEMENT, AND FULLY EXECUTE THE WEST VIRGINIA ENERGY EFFICIENT APPLIANCE REBATE PROGRAM PER THE ATTACHED SPECIFICATIONS, BID REQUIREMENTS, AND TERMS & CONDITIONS. QUESTIONS WILL BE ACCEPTED THROUGH THE END OF BUSINESS (5:00 PM EST.) ON FRIDAY, FEBRUARY 19, 2010. QUESTIONS ARE TO BE SUBMITTED IN WRITING TO THE ATTENTION OF THE BUYER, CHUCK BOWMAN, AND MAY BE SUBMITTED VIA THE U.S. POSTAL SERVICE TO: WEST VIRGINIA PURCHASING DIVISION 2019 WASHINGTON STREET EAST POST OFFICE BOX 50130 CHARLESTON, WV 25305-0130 BY FAX TO : 304.558.4115 BY EMAIL : CHARLES.A.BOWMANJR@WV.GOV ALL QUESTIONS WILL BE ANSWERED VIA OFFICIAL ADDENDUM ISSUED BY THE BUYER AND SAID ADDENDUM IS TO BE ACKNOWLEDGED BY THE VENDOR AS INSTRUCTED BELOW. EXHIBIT 10 ADDENDUM ACKNOWLEDGEMENT I HEREBY ACKNOWLEDGE RECEIPT OF THE FOLLOWING CHECKED						
-SEE PROPOSAL FOR DETAILS						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>David White</i>	TELEPHONE 215-766-8826	DATE 3/8/2010
FILE P, SALES	FEIN 41-1230527	ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

GENERAL TERMS & CONDITIONS
REQUEST FOR QUOTATION (RFQ) AND REQUEST FOR PROPOSAL (RFP)

1. Awards will be made in the best interest of the State of West Virginia.
2. The State may accept or reject in part, or in whole, any bid.
3. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required \$125 fee.
4. All services performed or goods delivered under State Purchase Order/Contracts are to be continued for the term of the Purchase Order/Contracts, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods this Purchase Order/Contract becomes void and of no effect after June 30.
5. Payment may only be made after the delivery and acceptance of goods or services.
6. Interest may be paid for late payment in accordance with the *West Virginia Code*.
7. Vendor preference will be granted upon written request in accordance with the *West Virginia Code*.
8. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.
9. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
10. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern the purchasing process.
11. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.
12. **BANKRUPTCY:** In the event the vendor/contractor files for bankruptcy protection, the State may deem this contract null and void, and terminate such contract without further order.
13. **HIPAA BUSINESS ASSOCIATE ADDENDUM:** The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, is available online at www.state.wv.us/admin/purchase/vrc/hipaa.htm and is hereby made part of the agreement. Provided that the Agency meets the definition of a Cover Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.
14. **CONFIDENTIALITY:** The vendor agrees that he or she will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the agency's policies, procedures, and rules. Vendor further agrees to comply with the Confidentiality Policies and Information Security Accountability Requirements, set forth in <http://www.state.wv.us/admin/purchase/privacy/noticeConfidentiality.pdf>.
15. **LICENSING:** Vendors must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, and the West Virginia Insurance Commission. The vendor must provide all necessary releases to obtain information to enable the director or spending unit to verify that the vendor is licensed and in good standing with the above entities.
16. **ANTITRUST:** In submitting a bid to any agency for the State of West Virginia, the bidder offers and agrees that if the bid is accepted the bidder will convey, sell, assign or transfer to the State of West Virginia all rights, title and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the State of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the State of West Virginia. Such assignment shall be made and become effective at the time the purchasing agency tenders the initial payment to the bidder.

I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership, or person or entity submitting a bid for the same material, supplies, equipment or services and is in all respects fair and without collusion or fraud. I further certify that I am authorized to sign the certification on behalf of the bidder or this bid.

INSTRUCTIONS TO BIDDERS

1. Use the quotation forms provided by the Purchasing Division. Complete all sections of the quotation form.
2. Items offered must be in compliance with the specifications. Any deviation from the specifications must be clearly indicated by the bidder. Alternates offered by the bidder as **EQUAL** to the specifications must be clearly defined. A bidder offering an alternate should attach complete specifications and literature to the bid. The Purchasing Division may waive minor deviations to specifications.
3. Unit prices shall prevail in case of discrepancy. All quotations are considered F.O.B. destination unless alternate shipping terms are clearly identified in the quotation.
4. All quotations must be delivered by the bidder to the office listed below prior to the date and time of the bid opening. Failure of the bidder to deliver the quotations on time will result in bid disqualifications: Department of Administration, Purchasing Division, 2019 Washington Street East, P.O. Box 50130, Charleston, WV 25305-0130
5. Communication during the solicitation, bid, evaluation or award periods, except through the Purchasing Division, is strictly prohibited (W.Va. C.S.R. §148-1-6.6).



State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

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*928112120 215-766-8826
 HELGESON ENTERPRISES
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LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
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ADDENDUM(S) AND HAVE MADE THE NECESSARY REVISIONS TO MY PROPOSAL, PLANS AND/OR SPECIFICATION, ETC.

ADDENDUM NO.'S:

- NO. 1 *David White*
- NO. 2
- NO. 3
- NO. 4
- NO. 5

I UNDERSTAND THAT FAILURE TO CONFIRM THE RECEIPT OF THE ADDENDUM(S) MAY BE CAUSE FOR REJECTION OF BIDS.

VENDOR MUST CLEARLY UNDERSTAND THAT ANY VERBAL REPRESENTATION MADE OR ASSUMED TO BE MADE DURING ANY ORAL DISCUSSION HELD BETWEEN VENDOR'S REPRESENTATIVES AND ANY STATE PERSONNEL IS NOT BINDING. ONLY THE INFORMATION ISSUED IN WRITING AND ADDED TO THE SPECIFICATIONS BY AN OFFICIAL ADDENDUM IS BINDING.

David White

 SIGNATURE
 HELGESON ENTERPRISES

 COMPANY
 3/8/2010

 DATE

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
-----------	-----------	------

FEIN	ADDRESS CHANGES TO BE NOTED ABOVE
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WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



State of West Virginia
 Department of Administration
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LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
<p>NOTE: THIS ADDENDUM ACKNOWLEDGEMENT SHOULD BE SUBMITTED WITH THE BID.</p> <p>REV. 09/21/2009</p> <p>BANKRUPTCY: IN THE EVENT THE VENDOR/CONTRACTOR FILES FOR BANKRUPTCY PROTECTION, THE STATE MAY DEEM THE CONTRACT NULL AND VOID, AND TERMINATE SUCH CONTRACT WITHOUT FURTHER ORDER.</p> <p>NOTICE</p> <p>A SIGNED BID MUST BE SUBMITTED TO:</p> <p>DEPARTMENT OF ADMINISTRATION PURCHASING DIVISION BUILDING 15 2019 WASHINGTON STREET, EAST CHARLESTON, WV 25305-0130</p> <p>THE BID SHOULD CONTAIN THIS INFORMATION ON THE FACE OF THE ENVELOPE OR THE BID MAY NOT BE CONSIDERED:</p> <p>SEALED BID</p> <p>BUYER: CB-23</p> <p>RFQ. NO.: DEP14971</p> <p>BID OPENING DATE: 03/04/2010</p> <p>BID OPENING TIME: 1:30 PM</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE

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State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
DEP14971

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4

ADDRESS CORRESPONDENCE TO ATTENTION OF
CHUCK BOWMAN 304-558-2157

PROPERTY

*928112120 215-766-8826
 HELGESON ENTERPRISES
 4461 WHITE BEAR PKWY

 WHITE BEAR LAKE MN 55110

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02/10/2010				

BID OPENING DATE: 03/04/2010 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
PLEASE PROVIDE A FAX NUMBER IN CASE IT IS NECESSARY TO CONTACT YOU REGARDING YOUR BID: ----- FAX: 651-762-9701 ----- CONTACT PERSON (PLEASE PRINT CLEARLY): ----- DAVID WHITE ----- ***** THIS IS THE END OF RFQ DEP14971 ***** TOTAL: _____						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS		
SIGNATURE	TELEPHONE	DATE
LE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

West Virginia Code §5A-3-10a states: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owed is an amount greater than one thousand dollars in the aggregate.

DEFINITIONS:

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Debtor" means any individual, corporation, partnership, association, limited liability company or any other form or business association owing a debt to the state or any of its political subdivisions. "Political subdivision" means any county commission; municipality; county board of education; any instrumentality established by a county or municipality; any separate corporation or instrumentality established by one or more counties or municipalities, as permitted by law; or any public body charged by law with the performance of a government function or whose jurisdiction is coextensive with one or more counties or municipalities. "Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceed five percent of the total contract amount.

EXCEPTION: The prohibition of this section does not apply where a vendor has contested any tax administered pursuant to chapter eleven of this code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

Under penalty of law for false swearing (*West Virginia Code* §61-5-3), it is hereby certified that the vendor affirms and acknowledges the information in this affidavit and is in compliance with the requirements as stated.

WITNESS THE FOLLOWING SIGNATURE

Vendor's Name: HELGESON ENTERPRISES

Authorized Signature: David White Date: 3/8/10

State of Pennsylvania

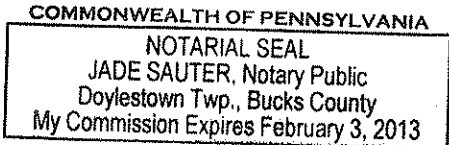
County of Bucks, to-wit:

Taken, subscribed, and sworn to before me this 8 day of March, 2010.

My Commission expires February 3, 2013.

AFFIX SEAL HERE

NOTARY PUBLIC Jade Sauter



Executive Summary

Please accept the following proposal as our recommended solution for the West Virginia Energy Efficient Appliance Rebate Program. Helgeson is able to perform all actions exactly as requested by the West Virginia Department of Environmental Protection (WVDEP) without exception.

As described throughout our response, Helgeson is uniquely qualified to create and manage West Virginia's Appliance Rebate Program. Helgeson's 38 years in the rebate and data processing business have allowed us to create the industry's best Rebate Management platform, marrying data and call center activity together in one system. Our quality is unmatched in the industry today as all rebate application validation is done electronically – NOT by human review and decision. All records are maintained digitally in a multi-level, customized database designed specifically for consumer rebate projects. Our systems and processes are already built, proven, and have been in operation for many years, managing thousands of rebate projects and millions of claims.

As a result of our experience with rebate programs, Helgeson has received 13 State Energy Efficiency Appliance Rebate Program contracts to date valued over \$88 Million:

- | | |
|---------------------------------------------------------|--------------------------------------|
| 1) Georgia for \$9.2 Million | 8) Nevada for \$2.6 Million |
| 2) Iowa for \$3 Million | 9) Texas for \$24.3 Million |
| 3) Colorado for \$18.9 Million (ARRA and State Funding) | 10) Mississippi for \$2.9 Million |
| 4) Alabama for \$4.4 Million | 11) Arizona for \$6.5 Million |
| 5) Minnesota for \$5 Million | 12) Rhode Island for \$1 Million |
| 6) Michigan for \$7 Million | 13) North Carolina for \$9.2 Million |
| 7) Kentucky for \$4 Million | |

As you will see referenced throughout our proposal, Helgeson is currently implementing these State Appliance Rebate Programs, and as such we already have systems and processes in place to provide a seamless launch for West Virginia's Appliance Rebate program. Helgeson's SEEARP solution matches WVDEP's requirement EXACTLY as listed in the RFQ. We are using this identical process for many other active State Appliance Rebate Programs.

The State Energy Efficiency Appliance Rebate Programs certainly run the risk of another "Cash for Clunkers" situation where redemptions quickly exceeded program budgets. Helgeson's proven rebate processing platform prevents over-redemption by requiring that all mail-in claims be initially reserved via web or telephone – only while funds are remaining. West Virginia residents will have the option to reserve rebate funds before or after purchasing an approved ENERGY STAR appliance. Taking these steps will ensure a positive experience for West Virginia residents and retailers.

We thank you for the opportunity to bid on West Virginia's Appliance Rebate Program, and you have my personal commitment that our team is ready to work with the State to create a seamless Rebate Program to meet your goals and objectives.

Sincerely,



Tom Helgeson
President and Owner
Helgeson Enterprises

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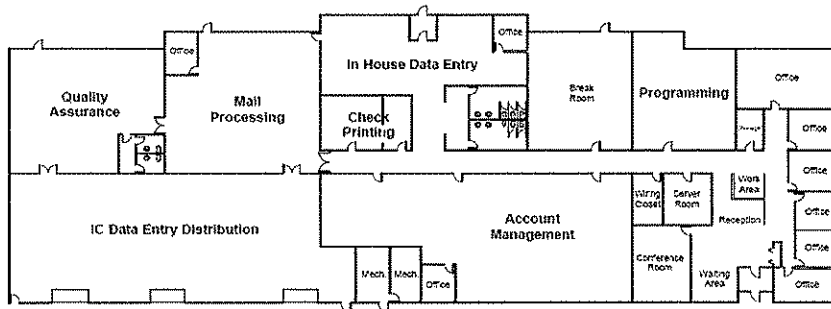
Corporate Background and Experience

Helgeson Enterprises specializes in the creation, implementation and management of high volume consumer rebate programs. Since our inception in 1972, Helgeson has evolved to be the industry expert in: high quality data entry, mail processing, document scanning, web interfaces, call center management and data processing. By leveraging each of these functions, our core business is processing rebates received via mail, fax, web and phone. We manage hundreds of clients, thousands of programs and process 20+ million transactions annually. Helgeson operates in a variety of markets including: government, automotive, technology, energy, healthcare and financial. Our clients are manufacturers, retailers, service providers and agencies, both commercial and government.

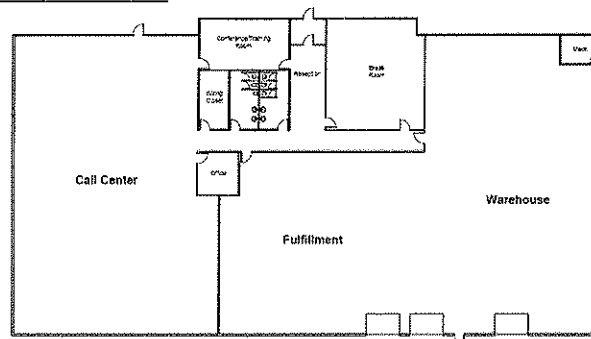
Each rebate program has unique components regarding validation rules, proof of purchase requirements, and method of submission. We structure all programs to meet the business requirements of our clients, while managing the customers' expectation throughout the process. This is done by ensuring correct participation and promoting a positive experience with the client's brand, in this case the State of West Virginia. We are experts at managing customer expectations before, during and after the rebate submission process.

Helgeson is a privately held company owned and managed by President Tom Helgeson. We employ approximately 100 full time employees and up to 250 independent contractors. Helgeson operates two state of the art rebate processing facilities on our campus in White Bear Lake, MN. The first 20,000 square foot facility houses Company Management, Information Technology, Client Services, Quality Assurance, Accounting, and Check Printing. We completed construction on the second 16,000 square foot facility in January 2008 to provide additional capacity for our onsite call center, warehouse and fulfillment operation. Helgeson will perform all work for the West Virginia Appliance Rebate Program from these US facilities. Helgeson's SEEARP solution is 100% compliant with Buy American guidelines in Sec. 1605 of ARRA Act and Sec. 5.020.

Helgeson Enterprises Bldg 1 – 20,000 SQ FT



Helgeson Enterprises Bldg 2 – 16,000 SQ FT



Target Markets

As a privately held company owned and managed by Tom Helgeson, Helgeson Enterprises is the largest US based rebate processor with all call center and data entry operations maintained in White Bear Lake, MN.

Our commitment to the highest quality and service standards combined with our diverse customer base has contributed to our continued growth. Our business is processing rebates via mail, fax, web and phone for a variety of customers including: manufacturers, retailers and service providers, operating in the following markets: automotive, technology, energy, government, healthcare, financial, etc. Listed to the right is a partial list of the clients we service:



Helgeson has received 13 SEEARP contracts awarded to date, with several other still under evaluation:

- | | |
|---------------------------------------------------------|--------------------------------------|
| 1) Georgia for \$9.2 Million | 8) Nevada for \$2.6 Million |
| 2) Iowa for \$3 Million | 9) Texas for \$24.3 Million |
| 3) Colorado for \$18.9 Million (ARRA and State Funding) | 10) Mississippi for \$2.9 Million |
| 4) Alabama for \$4.4 Million | 11) Arizona for \$6.5 Million |
| 5) Minnesota for \$5 Million | 12) Rhode Island for \$1 Million |
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| 7) Kentucky for \$4 Million | |

Helgeson's SEEARP solution was designed and built to accommodate ALL State Appliance Rebate Programs. The online Rebate Management System illustrated throughout the proposal is completely scalable and can be customized based on the unique requirements of each state. All screens illustrated are images taken from the actual Rebate Management System created specifically for the State Appliance Rebate Programs.

In addition to State Appliance Rebate Programs, Helgeson manages all residential and commercial ENERGY STAR appliance rebate programs for PPL Electric Utilities, Duquesne Light Company, santee cooper and Sharp Electronics.

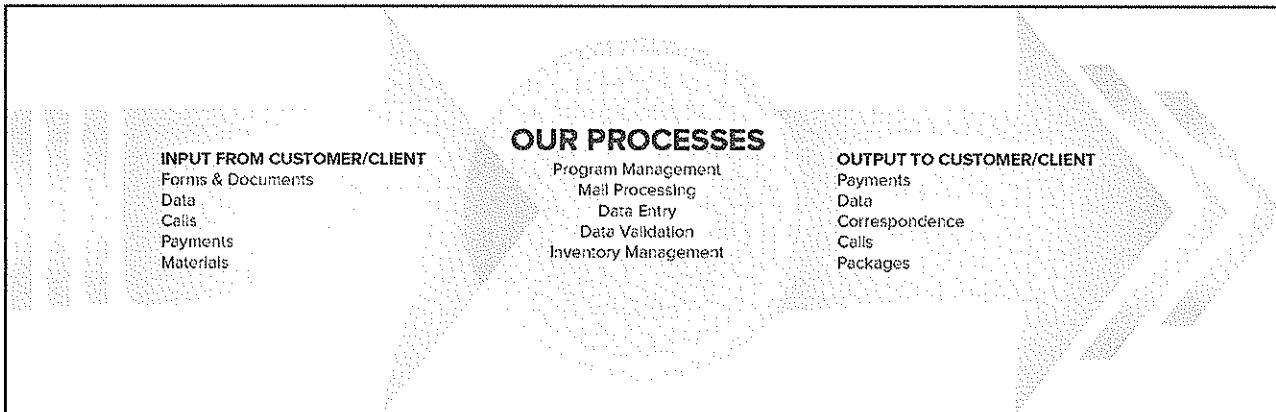
Current Services

Helgeson utilizes a proprietary operating system built and maintained in-house by a team of seasoned database managers and programming professionals. Built to accommodate all of the nuances inherent with rebate programs, our operating system is the backbone of our service offering, marrying all customer, client and employee interfaces. All customer and client data is communicated via our proprietary real-time web system available 24/7/365.

The following illustrates the common process across all of Helgeson rebate programs:

Rebate Process Flow:

- 1) Data is entered into our system
- 2) Data is validated against our client's business rules, and
- 3) The resulting information generates one or more outputs



West Virginia's Rebate Program follows this same process. Helgeson will capture and validate retailer and customer data via web, phone and mail. Once the customer's application is verified, payment or a non-compliance notice is sent to the retailer or customer. Helgeson's unique solution for all State Appliance Programs is detailed further in the following pages.

Similar Project Experience:

The following are brief descriptions of several different types of rebate programs Helgeson manages:

Helgeson's SEEARP solution:

Helgeson is responsible for implementing all aspects of the SEEARP. The same online system will be customized for West Virginia's Appliance Rebate Program.

santee cooper:

Helgeson designed and manages energy rebates for Santee Cooper in South Carolina.

Appliances Information:

Santee Cooper Account Number: _____

Property Type Check Box: Single Condominium Mobile Home Apartment Other

Specific Rebate Requester Check Box: \$35 \$40 \$35 \$110

Please use terms and codes listed for eligibility.

Now ENERGY STAR® Brand: _____ New ENERGY STAR® Model No: _____

Where purchased? _____

Purchase Price: _____ Date of Purchase: _____

Brand of recycled appliance: _____ Age of recycled appliance: _____

First & Last Name: _____ Email Address: _____

Mailing Address: _____

City: _____ State: _____ Zip Code: _____

Home Phone: _____ Work Phone: _____ Cell Phone: _____

Installation Address (if different): _____

Terms and Conditions, Read, Sign and Date Below:

I, the undersigned, hereby certify that I am the owner of the above described property and I am the owner of the above described appliance. I understand and agree to the following terms and conditions of the rebate program and I agree to the following terms and conditions of the rebate program:

1. The rebate program is limited to the following products and models.
2. The rebate program is limited to the following products and models.
3. The rebate program is limited to the following products and models.
4. The rebate program is limited to the following products and models.
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16. The rebate program is limited to the following products and models.
17. The rebate program is limited to the following products and models.
18. The rebate program is limited to the following products and models.
19. The rebate program is limited to the following products and models.
20. The rebate program is limited to the following products and models.

I certify that the information I have provided is true and correct, and that the products and/or equipment for which I am requesting a rebate meets the requirements of the ENERGY STAR® Rebate Program.

Customer Signature: _____ Name (Please Print): _____ Date: _____



PPL Electric Utilities and Duquesne Light Company:
 As an approved Conservation Service Provider for the Commonwealth of Pennsylvania and the Pennsylvania Public Utility Commission, Helgeson is the exclusive rebate provider for both PPL Electric Utility and Duquesne Light Company.

PPL Electric Utilities
 Appliance VISA® Prepaid Card Rebate Application
 Promotion Dates: 7/01/2008 – 03/31/2010
 Must be Postmarked by: 03/02/10

Dishwasher
 Range/Oven
 Dishwasher
 Refrigerator
 Coffee Maker

To receive your PPL Electric Utilities Visa Prepaid Card by mail, follow these steps:
 1) Pay any applicable 3rd Party Quantity Discounts and receive the eligible purchase on your receipt or invoice.
 2) Locate the appliance in a property with an active meter using PPL Electric Utilities services.
 3) Mail this application to the address on the right:
 a. This application, completed accurately and legibly.
 b. A copy of your receipt or invoice.
 c. A copy of the third page of your most recent PPL Electric Utilities bill.

PPL Electric Utilities Appliance Rebate
 Office # 4026015
 P.O. Box 130002
 El Paso, TX 78813-0002

First Name: _____
 Last Name: _____
 Address: _____
 City: _____ State: _____ Zip: _____
 Phone: _____

IMPORTANT: Photocopy your entire submission for your records. You could be required to mail, and/or fax these photocopies. Receipts must be submitted and submitted to the correct address. To receive the rebate, you must submit a copy of your receipt or invoice, a copy of your receipt or invoice, and a copy of the third page of your most recent PPL Electric Utilities bill. The rebate will be mailed to you within 60 days of the date of your receipt or invoice. The rebate will be mailed to you within 60 days of the date of your receipt or invoice. The rebate will be mailed to you within 60 days of the date of your receipt or invoice.

Sony Electronics:
 Helgeson manages all of Sony Electronics' trade and consumer online and mail-in rebates.

SONY Welcome to Sony's Business and Professional Promotion Support Center

Current Promotions
 Track Your Rebates
 Member Login
 Become a Member

Pre-Qualification Information
 000316A - The Sony HD Digital Monitor "Clear Choice" Offer

End User's Business Name: _____
 End User's Business Type: _____
 End User's Title: _____
 End User's First Name: _____
 End User's Last Name: _____
 End User's Address: _____
 End User's City: _____
 End User's State: _____
 End User's Zip: _____
 End User's Phone: _____
 End User's E-Mail: _____

Please ensure the following email address is not located in your spam folder. An email error or information related to your claim will be sent from this address: Sony@helgeson.com

SONY Welcome to Sony's Business and Professional Promotion Support Center

Current Promotions
 Sony Referral Program

End User's Business Name: _____
 End User's Business Type: _____
 End User's Title: _____
 End User's First Name: _____
 End User's Last Name: _____
 End User's Address: _____
 End User's City: _____
 End User's State: _____
 End User's Zip: _____
 End User's Phone: _____
 End User's E-Mail: _____

Please ensure the following email address is not located in your spam folder. An email error or information related to your claim will be sent from this address: Sony@helgeson.com

SunTrust Bank:
 Helgeson manages all consumer promotion fulfillment projects for SunTrust Bank headquartered in Atlanta, GA. SunTrust's "My Cause" program was a large campaign that ran for nearly two years through 2008 & early 2009. Helgeson created a campaign where new checking account clients would be eligible for a \$50 SunTrust Gift Card, or a \$100 donation to the charity of their choice. Customers had the option to phone in their request to the Helgeson call center, or submit it online and select the gift card or charity donation.

About SunTrust | Contact Us | Customer Service | ATM/Branch Locator

SUNTRUST Personal Finance | Business Banking | Corporate & Institutional

Home | My Cause Redemption Form | Charity Search

My Cause Redemption Form

The choice is simple. You can either donate \$100 to the charity of your choice, or get a \$50 Gift Card for your own choice.

NOTE: At the time the incentive is paid, your checking account must be open and have at least a \$1.00 or more balance. All incentives will be mailed by April 15, 2009. Only accounts opened August 6, 2007 through October 31, 2008 are eligible for this promotion.

MAKE A \$100 DONATION | RECEIVE A \$50 GIFT CARD

Requirements:
 To qualify for SunTrust to donate \$100 to the charity of your choice or to receive a \$50 Gift Card to keep for your own choice, your mail:
 • Open a new SunTrust Personal or Business Checking account from August 6, 2007 through October 31, 2008.
 • Accept and make any purchase with your new SunTrust Visa® Debit Card by February 15, 2009.
 • Complete and submit a redemption form by February 15, 2009.
 • The U.S. charity must be an IRS recognized 501(c)(3) organization. The donation will be made by SunTrust on behalf of the client.
 • Account must be open and in good standing with a \$1.00 or more balance at the time the incentive is paid. All incentives will be mailed by April 15, 2009.



Charity searches were seamlessly integrated via web service to allow both SunTrust customers and Helgeson call center employees the ability to search all 501(c)(3) approved charities in the US.

US Marines:

Helgeson manages all of the recruiting data processing requirements for the US Marines, processing millions of claims annually.

**YOU DON'T JOIN THE MARINES
YOU BECOME ONE.**

The possibilities are endless after high school. Only one offers you the chance to become a true leader - the United States Marine Corps. For more information, just fill out this card, call 1-800-MARINES, or go to MARINES.COM.

NAME (PLEASE PRINT) Debra Bell

(M) MR. (F) MRS. (MS) MISS. (M) MIDDLE INITIAL. Debra

ADDRESS 520 Boulder Park Rd. Lithia Springs GA 30122

CITY Lithia Springs STATE GA ZIP 30122

PHONE (404) 749-8778

MARINE CORPS TELEPHONE NUMBER (678) 357-0047

LAST GRADE COMPLETED 10th DATE OF BIRTH (MM/DD/YYYY) 11/16/91

NAME OF SCHOOL Lithia Springs High School

E-MAIL ADDRESS (OPTIONAL) DebraBell@yahoo.com

7L0058_01556

MARINES.COM

THE CHANGE BEGINS HERE.

Please send me the free About the Corps opportunity book, and my choice of: Dog tags Nightie Baseball cap

Complete and return this card today. Offer expires 04/30/08.

NAME LIZARDO, DORTIERREZ

ADDRESS 1805 DAYLORD RD

CITY MIAMI STATE FLORIDA ZIP 33141

PHONE NUMBER (305) 410-5145 WORK NUMBER (305) 410-5145

DATE OF BIRTH 12-18-90

NAME OF SCHOOL West Dade Academy LAST GRADE COMPLETED 10

High School Post-Secondary Other

7L0058_01556

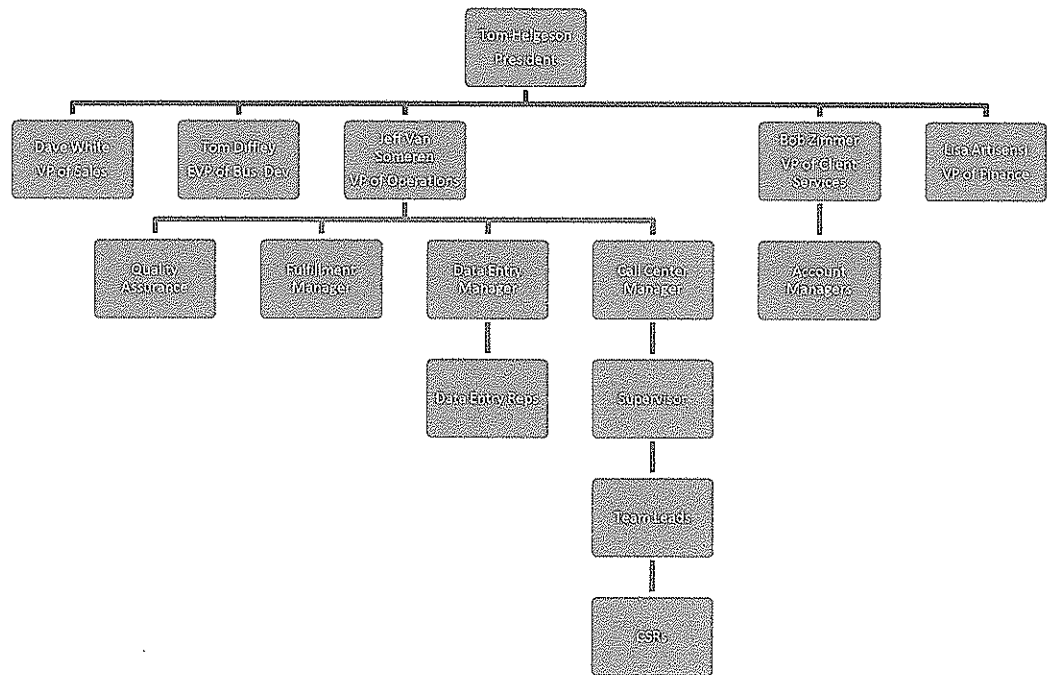
Project Staffing and Organization

David White, VP of Sales for Helgeson will be the Primary Project Administrator for West Virginia's Appliance Rebate Program. Dave designed the online and offline application process for all SEEARP programs managed by Helgeson, and is also responsible for implementing all other Utility/Appliance rebate programs for Helgeson. With a Bachelors degree in Business Administration from Temple's Fox School of Business, Dave has nearly 20 years of experience creating and managing customer facing promotions.

Bob Zimmer, VP of Client Services at Helgeson will is responsible for all Client Service activity and will serve as Secondary Project Administrator for West Virginia's SEEARP. Bob has more than 20 years of management experience in client services, call center, operations and project management. He received his Six Sigma Black Belt certification while at Honeywell, Inc., and is instrumental in driving continuous improvement and operational excellence throughout our business. Bob has responsibility for managing the seamless launch of all new client relationships, and has at his disposal a staff of seasoned account managers to handle day-to-day support and on-going customer satisfaction.

Anne London will likely serve as West Virginia's Project Manager, handling all of the daily activities for the project from start to finish. Anne is responsible for implementing many of the SEEARP and is intimately familiar with all of DOE's requirements, reporting needs, etc. With a Bachelor's degree from the University of Oregon, Anne has 8 years experience managing key rebate clients.

The following is an organization chart for Helgeson, along with brief resumes for executives and staff members who will be involved with West Virginia's Appliance Rebate Program.



Tom Helgeson
 President and Owner Helgeson Enterprises, Inc. 1991-Present
 Business: Rebate and data processing
 VP of Sales Helgeson Enterprises, Inc. 1986-1991
 Actively involved in the management of Helgeson Enterprises since 1986, Tom purchased the company in 1991 from his father. He has extensive experience in data processing and rebate processing services.
 University of Utah, English Literature
 University of Minnesota, History

David White
 Vice President, Sales Helgeson Enterprises, Inc. 2006-Present
 Business: Rebate and data processing
 Vice President, Sales Young America Corporation 2004-2006
 Business: Rebate processing Acquired GFS in 2004
 Vice President, Sales Global Fulfillment Services 2003-2004
 Business: Rebate processing
 Director of Sales Metals USA 1989-2003
 Business: Steel processing and distribution

Tom Diffley

EVP, Business Development	Helgeson Enterprises, Inc. Business: Rebate and data processing	2006-Present
Vice President, Sales	Young America Corporation Business: Rebate processing	2004-2006 Acquired GFS in 2004
Manager, National Accounts	Global Fulfillment Services Business: Rebate processing	2001-2004
Manager, National Accounts	Fulfillment Systems Incorporated Business: Rebate processing	1997-2001

Tom has 20 years of business development and consulting experience with 12 years in rebate processing and 3+ years at Helgeson. He specializes in the integration of web technology and rebate processing for various rebate sponsors including states, retailers and manufacturers.

Carleton College, Bachelor of Arts, English Literature; Concentration, Spanish Literature
University of Minnesota, Executive Development Center, Fundamentals of Project Management

Bob Zimmer

Vice President, Client Services	Helgeson Enterprises, Inc. Business: Rebate and data processing	2007-Present
Vice President, Client Services	Young America Corporation Business: Rebate processing	2004-2006
Director, Operations	Young America Corporation Business: Rebate processing	2001-2004
Director, IT	Honeywell, Inc. Business: Manufacturing	1992-2001

Education and Professional Development
University of Minnesota, Bachelor of Science, Business Management
Design of Experiments
Accounting for Leadership
Six Sigma Black Belt

Jeff Van Someren

Vice President, Operations	Helgeson Enterprises, Inc. Business: Rebate and data processing	1993-Present
----------------------------	--------------------------------------------------------------------	--------------

With a strong background in programming, systems and telecommunications Jeff brings technology to the forefront. He also focuses on solutions to increase accuracy while reducing cost and turn time. Prior to working with HEI he was involved with optical storage solutions for the banking industry.

University of Wisconsin, Bachelor of Science, Applied Technologies in Telecommunications

Lisa Artisensi		
Vice President, Finance	Helgeson Enterprises, Inc. Business: Rebate and data processing	2000-Present
Accountant	Jeff Thiess, CPA Business: Public accounting	1998-2000
Lisa holds Bachelor of Arts degrees in both Accounting and Business Administration. She has more than a decade of accounting experience and has been with the company for 8+ years.		
Jamestown College, Bachelor of Arts, Accounting Bachelor of Arts, Business Administration Certified Public Accountant		

Our call center includes 55 agents presently with all agents managed by this staff:

Leisa Haberer	Customer Service Manager lhaberer@helgesonent.com (651) 762-5312	Leisa has been with Helgeson Enterprises since 2000.
Kaye Ward	Customer Service Supervisor kward@helgesonent.com 651-762-9700 ext. 280	Kaye has been with Helgeson Enterprises since 2005.
Billy Krynsinski	Customer Service Lead bkrynsinski@helgesonent.com 651-762-9700 ext. 284	Billy has been with Helgeson Enterprises since 2003.

Capacity and Staffing

Helgeson manages hundreds of clients, thousands of programs and processes more than 20 Million transactions every year. We employ approximately 100 full time employees and 250 data entry agents. This table indicates our current monthly and annual capacity in each department with no additional shifts or staffing.

Department	Staff	Monthly Capacity	Annual Capacity
Mailroom	10	3,300,000	39,600,000
Data entry	250	4,400,000	52,800,000
Call center	80	123,200	1,478,400
Check printing	2	1,500,000	18,000,000
Quality assurance	20	208,000	2,496,000
Mgmt and other	12	n/a	n/a

In addition to large volume commercial programs, Helgeson has the unique experience of launching four SEEARP programs to date: Georgia, Michigan, Iowa and Minnesota.

Georgia and Michigan launched in time for Presidents weekend on February 10 and 12 respectively. Georgia’s program required the consumer to purchase an appliance prior to reserving their rebate, while Michigan allows



residents to reserve their rebate before or after purchase. Both programs experienced moderate volumes during the first week with lower but consistent activity in subsequent weeks. Georgia and Michigan's programs are projected to run for approximately 4 months until the budget is exhausted.

Iowa and Minnesota both launched Monday March 1 with very different results. Iowa's rebates were completely reserved within 7 hours, and Minnesota's within 24 hours. Extremely high rebate values and widespread program promotion contributed to this tremendous surge in consumer demand. For example, typical SEEARP refrigerator rebates are \$100 in most states, including West Virginia. In contrast, Iowa offered a \$500 refrigerator rebate, resulting in the potential for a FREE refrigerator after bundling manufacturer and retailer rebates. We do not anticipate this unprecedented surge for any other State Appliance Rebate program; however we now have the benefit of this experience to forecast adequate call center capacity and virtually unlimited bandwidth for all active and future programs.

Client References:

The following are six client references. Several client surveys are also provided in Attachment 1.

<p>Georgia Environmental Facilities Authority Andrea Schroer State Energy Program Manager (404) 584-1137 andrea@gefa.ga.gov Georgia's State Energy Efficiency Appliance Rebate Program (SEEARP)</p>	<p>PPL Electric Utilities Amanda Morrison Custom Program Specialist (610) 774-4275 ajmorrison@pplweb.com All residential, commercial and industrial rebates, for approximately 1.4 million customers.</p>
<p>Office of Energy Security, State of Minnesota Karen Loida Sr. Program Administrator (651) 296-5469 Karen.Loida@state.mn.us Minnesota's SEEARP</p>	<p>Bausch & Lomb, Inc Margaret Murphy US Vision Care Finance (585) 338-8263 margaret.murphy@bausch.com Consumer rebates, product returns, premium fulfillment, etc.</p>
<p>Michigan Department of Energy, Labor, & Economic Growth (DELEG) Bureau of Energy Systems John Sarver Section Manager (517) 241-6280 sarverj@michigan.gov Michigan's SEEARP</p>	<p>Sharp Electronics & Appliances Tony Titone Senior Product Marketing Manager (201) 529-8984 titonet@sharpsec.com Consumer rebates and Visa cards.</p>
<p>Iowa Office of Energy Independence Linda King Program Planner (515) 725-0082 Linda.King@iowa.gov Iowa's SEEARP</p>	<p>CITGO Petroleum Corp Denise Burke Marketing Manager (832) 486-1989 dburke@citgo.com Consumer rebates and reloadable Visa cards for CITGO's sales incentive program.</p>

Technical Approach

As illustrated throughout our proposal, Helgeson is implementing 13 State Appliance Rebate Programs. To eliminate the chance for over-redemption, our solution requires participants to “reserve” rebate funds online or via telephone, eliminating the risk of over-redemption.

Note: Screen images illustrated in the proposal were taken from other State Rebate Programs managed by Helgeson. Details may differ slightly from West Virginia program requirements, and are for illustration purposes only. In the event of an award, screens will be customized to match all West Virginia’s program requirements.

Consumer Rebate Reservation

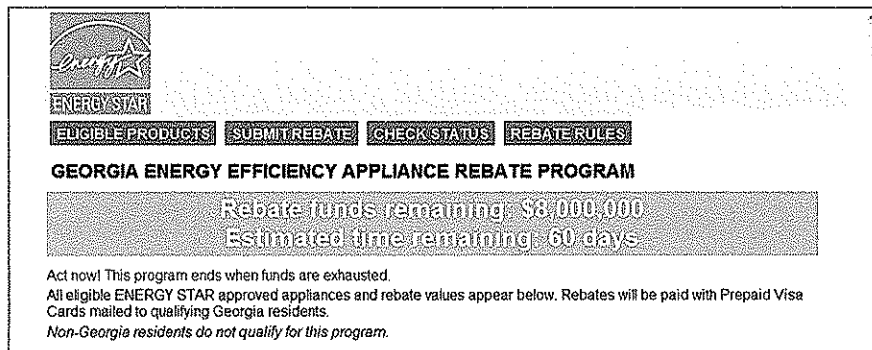
Customers have the option to reserve rebate funds before or after purchasing an ENERGY STAR appliance in one of two ways:

- 1) Website (example: www.WVApplianceRebates.com), or
- 2) Customer Service 800 number

Once the rebate funds are reserved, the completed application must be mailed to Helgeson for final verification and processing.

Communicating Available Rebate Funds Remaining

The most important function in Phase 2 of West Virginia’s Rebate Program is to accurately communicate the balance of rebate funds remaining to all residents, customers and retailers – AT ALL TIMES. This is accomplished with an online “Rebate Funds Monitor” communicating the number of rebate funds remaining and the percentage of funds reserved in real-time. This information will also be available via a recorded message greeting customers on the 800# prior to speaking to a live operator. The following screen images from the Georgia SEEARP website illustrate this:




Program Phases:

In order to exhaust all remaining rebate funds without over-redemption, Helgeson’s mail-in rebate SEEARP solution includes three phases for accepting consumer rebate applications:

Phase 1 Applications Taken	<ul style="list-style-type: none"> • Funds available • Applications debit funds automatically
Phase 2 Wait List Applications Taken	<ul style="list-style-type: none"> • Advertised funds exhausted • Phase 1 applications that expire or are incorrect fund these FIFO
Phase 3 No New Applications Taken	<ul style="list-style-type: none"> • Wait list is “full” • Processing until funds are gone

Phase 1: Funds Available – Rebate Funds Reserved, Applications Accepted

The customer, retailer or contractor can confirm the availability of remaining funds online or by calling the 800# 24 hours a day, 7 days a week.



[ELIGIBLE PRODUCTS](#)
[SUBMIT REBATE](#)
[CHECK STATUS](#)
[REBATE RULES](#)

GEORGIA ENERGY EFFICIENCY APPLIANCE REBATE PROGRAM

Rebate funds remaining: \$8,000,000
Estimated time remaining: 60 days


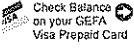
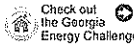
Act now! This program ends when funds are exhausted.
 All eligible ENERGY STAR approved appliances and rebate values appear below. Rebates will be paid with Prepaid Visa Cards mailed to qualifying Georgia residents.
 Non-Georgia residents do not qualify for this program.

Select a PRODUCT to see qualifying models:

Eligible ENERGY STAR Products	Prepaid Visa Card Value
Freezers	\$26.00
Room Air Conditioners	\$30.00
Refrigerators	\$60.00
Clothes Washer	\$60.00 or \$99.00
Dishwasher	\$60.00 or \$99.00
Water Heater, Gas, Storage	\$60.00 or \$99.00
Water Heater, Gas, Condensing	\$99.00
Central Air Conditioners	\$99.00
Oil Furnaces	\$99.00
Water Heater, Electric Heat Pump	\$199.00
Water Heater, Gas Tankless	\$199.00
Water Heater, Solar (electric back-up)	\$199.00
Water Heater, Solar (gas back-up)	\$199.00
Air Source Heat Pumps	\$199.00
Gas Furnaces	\$199.00
Oil Boilers	\$199.00
Gas Boilers	\$199.00

Selecting a specific model will direct the user to the [Submit Your Rebate Application Now!](#) page.

If you would like more information on ENERGY STAR products, and what products might be available for rebates, please visit [ENERGYSTAR.gov](#).

©2010 GEFA. All Rights Reserved.

Customers follow three steps to complete their rebate reservation and application.

- Step 1 of 3: Select Product
- Step 2 of 3: Enter Personal Information
- Step 3 of 3: Print and Mail Application

STEP 1 of 3: Select Product – Data fields required on this screen are driven by the user’s response to the question: Did you purchase an ENERGY STAR appliance yet (Y/N)? If the unit has been purchased, the product type, manufacturer and model # are all collected from the customer. Only ENERGY STAR products approved by West Virginia will be populated in the product tables. If the unit has not been purchased yet, rebate funds will still be reserved for the resident; however only the product type will be requested online.

Step 2 of 3: Enter Information – Once a valid product is selected, all data elements required for validation, payment mailing and state reporting are requested from the customer. Only West Virginia residents purchasing appliances from a West Virginia retailer or contractor will be permitted to proceed beyond this step. If the unit has not been purchased yet, product and retailer specific information will not be required on this page.

Step 3 of 3: Print and Mail Rebate Application – Rebate dollars are now “reserved” for 30 days; 15 days stated to the customer plus a 15 day grace period. This timeframe can be adjusted to meet West Virginia’s requirements as needed. Final approval occurs once Helgeson receives the mailed rebate application, product invoice, two types of identification and proof of recycling. All purchase and customer information are verified to ensure all program requirements have been met. If the appliance has not been purchased yet, funds will still be reserved for 30 days, however all product and purchase information not captured on previous screens will be required as handwritten information on this final page.

ENERGY STAR

ELIGIBLE PRODUCTS | SUBMIT REBATE | CHECK STATUS | REBATE RULES

Check Balance on your GEFA Visa Prepaid Card

Check out the Georgia Energy Challenge

STEP 3 of 3: Mail This Form
Program Description

Instructions:

1. Print this Online Pre-Qualification Form.
2. Attach the product UPC bar code(s), with serial number, to this form in the space provided at the right.
3. Include a copy of your invoice(s) showing eligible product(s) purchased during promotion period.
4. Place online form, UPC bar code(s) with serial number, and invoice(s) in an envelope and mail to address below.

Rebate funds remaining:	\$6,000,000
Estimated time remaining:	60 days

Mail this page, and all required materials postmarked by 5/31/2010, to:

Promotion Name
 Promo #690371A
 PO Box 000000
 White Bear Lake, MN 55110-0478

Online Pre-Qualification Code: 4461000000000000

Product: Freezers
 Manufacturer: Maytag
 Model Number: MDB6702
 Award: \$50 Visa Prepaid Card

Once all required materials are received and verified, the rebate will be mailed to:
 David White
 5678 Main St
 Atlanta, GA 12345

Terms & Conditions
 Lorem Ipsum.....

©2009 ENERGY STAR. All Rights Reserved.

Phase 2: Funds depleted – Waiting list applications accepted

Implementing a waiting list eliminates the need for West Virginia to reopen the rebate program if funds become available after all of the reserved claims are processed or expired. Wait list applications are identical to Phase 1 applications, except customer expectations are managed differently. It is made very clear that funds have been exhausted and wait list applications will only be funded if additional dollars become available. Additional funds will certainly become available when previously reserved applications are denied or expired.

A certain percentage of residents will reserve rebate dollars, but never purchase a product. Once these applications are expired after 30 days from reservation date, reserved funds will be reallocated to wait list applications. Qualified waiting list applications will be funded on a first-come, first-served basis, and will only be billed to West Virginia as they are processed for payment. Meaning, we might receive 5,000 wait list applications, but only process and bill West Virginia for 1,000 applications based on the funding available.

Creating a waiting list of approved rebate applications also allows Helgeson to bill West Virginia on actual line item expenditures without having a surplus or shortage of rebate dollars at the end of the program. As rebate dollars are added back to the budget, Helgeson will fund applications on the waiting list with remaining budget dollars ensuring that West Virginia has no surplus rebate dollars to return to DOE.

ENERGY STAR

ELIGIBLE PRODUCTS | SUBMIT REBATE | CHECK STATUS | REBATE RULES

GEORGIA ENERGY EFFICIENCY APPLIANCE REBATE PROGRAM

REBATE FUNDS HAVE BEEN USED AND ARE NO LONGER AVAILABLE
 YOU MAY STILL SUBMIT YOUR REBATE APPLICATION IN THE EVENT
 ADDITIONAL FUNDING IS PROVIDED

All eligible ENERGY STAR approved appliances and rebate values appear below. Rebates will be paid with Prepaid Visa Cards mailed to qualifying Georgia residents.
 Non-Georgia residents do not qualify for this program.



Helgeson Stage 3: Funds Depleted – Program Closed, No Claims Accepted

Once an adequate number of applications are added to the waiting list, the website and 800# will discontinue accepting applications and indicate that the program is closed. A customer service 800# will still be open for rebate status inquiries.

Applications via Telephone

Customers with no Internet access can call the 800# to submit their rebate application via a live customer service representative. The CSR will accept the application via telephone, and then mail the completed form to the customer so the customer can mail the required application and product to the proper address.

Managing Customer Expectations

Requiring retailers and customers to apply for their rebate online (or via phone) accomplishes three things critical to the successful implementation of West Virginia's rebate program:

- 1) Invalid purchases are filtered onscreen, allowing the customer to purchase the correct item or understand IMMEDIATELY they do not qualify for the rebate.
- 2) All personal, product and utility data is captured 100% accurately via the website vs. decoding poor handwriting or missing from a mail-in rebate form.
- 3) Rebate Funds are accurately tracked in real-time.

Once the mailed application is physically received and the receipt or invoice is verified, the customer's rebate is approved and payment mailed within 5 business days. Funding and payment options are discussed later in our response.

Rejected Applications

Denied applications will receive a mailed rejection notification explaining why their application was denied, and what is required to correct it. Rejected applications will still have funds reserved for an additional 30 days, allowing the customer to qualify for the rebate.

As an optional service, Helgeson can also place an outbound telephone call to work through the resubmission process personally with the customer and/or retailer. This would only apply for claims that can be corrected, and only if West Virginia selects this option.

Applications rejected for any other reason (not a West Virginia resident, etc.) will be filtered online and not accepted. Applications rejected online and applications never mailed by consumers will not be billed to West Virginia.

Rebate Application Tracking

Helgeson utilizes a proprietary rebate management system tracking all retailer and customer applications in real-time throughout the life of the claim. Customers have access to rebate status via 800# and online, as illustrated below.

The screenshot shows a web interface for tracking rebate claims. At the top left is the ENERGY STAR logo. Below it are four navigation buttons: ELIGIBLE PRODUCTS, SUBMIT REBATE, CHECK STATUS, and REBATE RULES. The main content area is titled "Track Your Claim" and features two search options: "Search by Claim" and "Or Search by Address". The "Search by Claim" section includes input fields for Claim ID, First Name, and Last Name, with a "Search" button below. The "Or Search by Address" section includes input fields for First Name, Last Name, Street Address, and Postal Code, also with a "Search" button. On the left side, there are two informational boxes: one for "Check Balance on your GEFA Visa Prepaid Card" and another for "Check out the Georgia Energy Challenge". At the bottom left, there are two summary boxes: "Rebate funds remaining: \$3000.00" and "Estimated time remaining: 60 days".

Rebate Funding

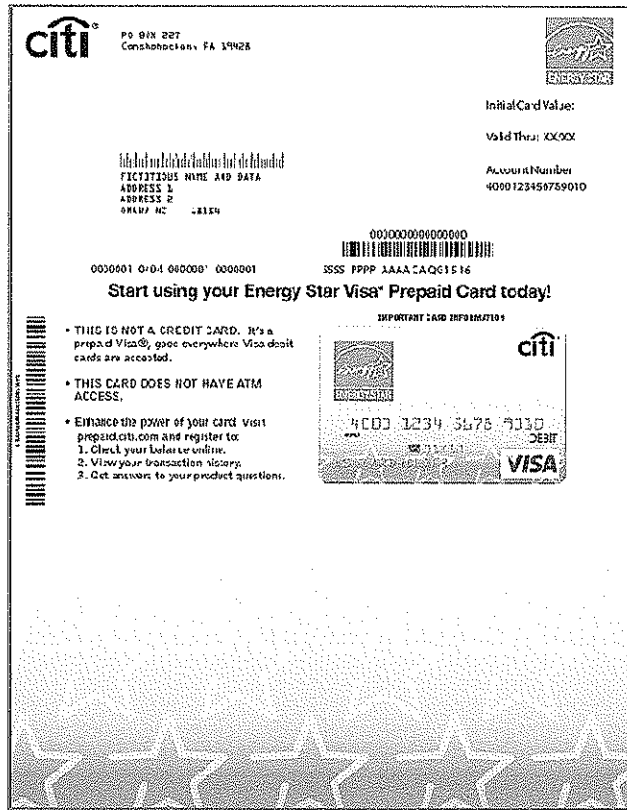
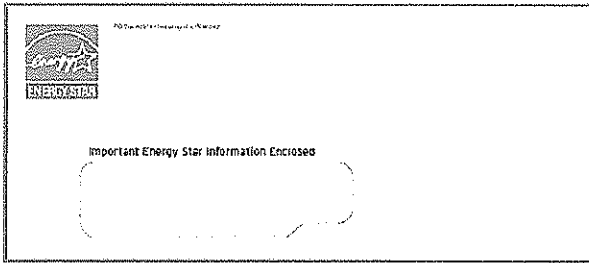
Helgeson has designed a unique funding model for the Georgia SEEARP program that West Virginia may want to duplicate. The Department of Energy has approved Georgia to pre-fund customer rebate dollars based on rebate reservation applications submitted online and by phone daily. In this model, rebate funds are already available by the time physical mailed submissions are received from the retailer and/or customer. Because of this, Georgia has the ability to pay customers immediately upon approval of a customer application, since funding is provided to Helgeson in advance of receiving the mailed application.

When using this funding model, rebate payment can be issued to customers within 5 days. Faster customer payment results in fewer customer service calls, lower administrative costs and more positive press for the West Virginia OER. This also maximizes the number of customer payments that can be issued from the fixed budget.

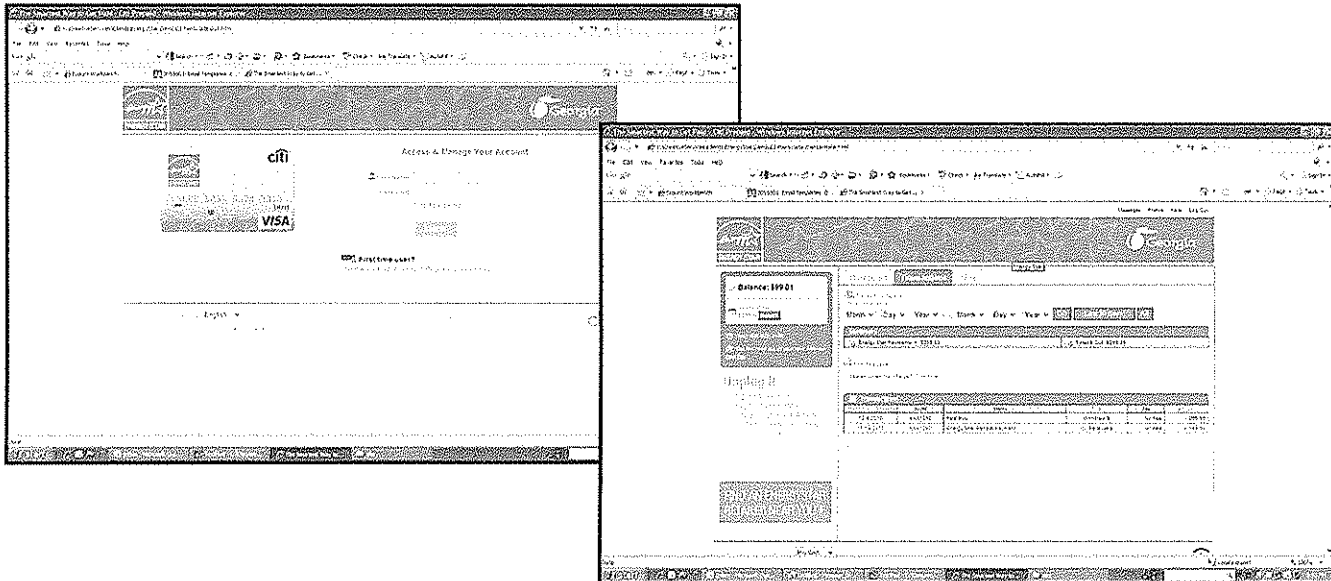
Rebate Payment

In addition to tremendous cost savings, Visa Prepaid Cards offer significant branding opportunities. Listed on the following page is the ENERGY STAR branded card, carrier and envelope Helgeson developed for the State Appliance Rebate Programs. West Virginia has the option to use this design available in stock for immediate use, or new West Virginia branded materials can be developed given certain quantity requirements.

Prepaid cards also benefit customers, as they have 12 months to spend, where checks expire after just 3 months. Prepaid Cards also benefit unbanked residents by helping them avoid check cashing fees associated with rebate checks and check cashing facilities. Unused Visa card balances remaining after the 12 month card expiration are retained by Helgeson's prepaid card partner, Citi Prepaid Services, and managed according to applicable law.



Visa Prepaid Cards also have an ENERGY STAR branded Online Customer Center available 24/7/365.



Quality Assurance

Helgeson's Quality Assurance plan ensures the accurate capture of data in the following ways:

1. Online data capture – Helgeson's custom SEEARP website filters all data entered by West Virginia retailers and residents to ensure they meet program requirements. i.e. Is the user a West Virginia resident? Is the model# entered accurate? And so on. Invalid data is flagged instantly and the user is prompted to correct it onscreen.

The screenshot shows a web browser window with the URL <http://www.rebatezone.com/georgia/rebate/CustomInfo.aspx>. The page title is "Georgia Energy Efficiency Appliance Rebate Program". There are navigation tabs for "ELIGIBLE PRODUCTS", "PROGRAM DETAILS", "APPLY FOR REBATE", and "MY REBATE STATUS". The main content area is titled "Step 2 of 3: Enter Information".

Purchase Information

- Date of Purchase: 1/19/2010
- Retailer Name: Sears
- Purchase Price: 999.99
- Retailer Address (from receipt): 123 Main St
- Retailer City: Atlanta
- Retailer State: Georgia
- Retailer Zip: 30303

By selecting this box, I certify this appliance purchase replaces an existing appliance, which will be properly recycled. Refrigerators and freezers are required to be removed and recycled, and I acknowledge I may be subject to a future audit.

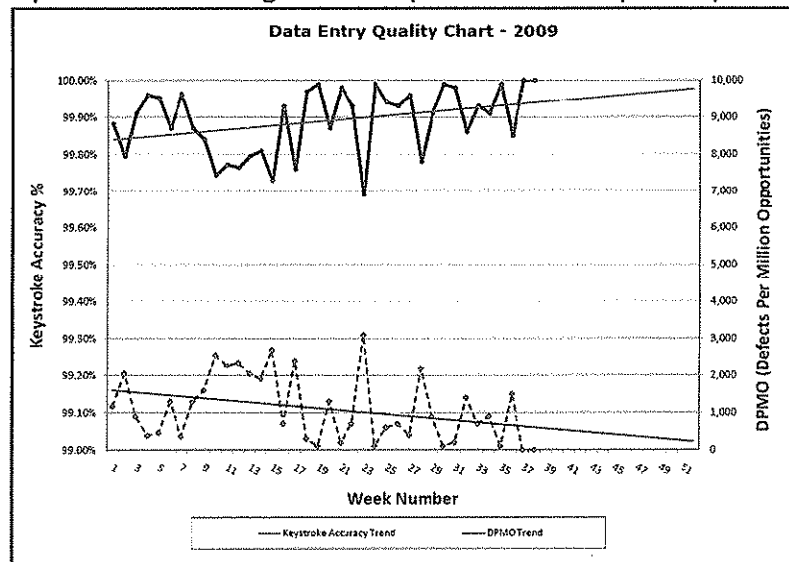
Personal Information

- First Name: [REDACTED]
- Last Name: [REDACTED]
- Address (PO box): [REDACTED]
- City: [REDACTED]
- State (Must be a Georgia resident): GA
- Zip: [REDACTED]
- Home Phone: [REDACTED]
- Email: [REDACTED]

On the right side, there are links for "Check Balance on your Visa Prepaid Card" and "Check out the Governor's Energy Challenge". A box displays "Rebate funds remaining: \$3,000,000" and "Estimated time remaining: 30 days".

2. Manual data entry - Helgeson provides all data entry services from our headquarters in White Bear Lake, MN. Our agents are data entry professionals, able to key a minimum of 10,000 keystrokes per hour corrected for errors.

3. Quality Assurance review – All rebate applications processed by Helgeson Enterprises pass through our Quality Assurance department. We govern our data entry process with the most stringent audit guidelines in the industry. Measured at the keystroke level (rather than record/field level or fatal/non-fatal), our data entry quality exceeds 99.97% accuracy. In addition, we utilize proven six sigma continuous improvement tools to drive our DPMO (defects per million opportunities) metrics on a go-forward basis. We recognize the value of eliminating all potential defects, not just the ones which "happen" to cause a negative impact. It is at this point where we manually review ENERGY STAR model# matching as required. The following is an example of a Data Entry Quality Chart YTD for 2009:



ENERGY STAR Data Exceptions

Critical to our success with appliance rebate programs is our experience working with ENERGY STAR data. Although not obvious on the surface, there are many challenges and exceptions within ENERGY STAR's data that prevent simple database comparisons when processing rebate applications. Helgeson has developed a programmatic verification process that automatically matches manufacturers and model #'s with similar data in ENERGY STAR tables. Model #'s that are not programmatically matched are manually verified by Helgeson's Quality Assurance team. We also obtain direct model # conversion data from Sears, Home Depot and other national retailers to assist with this process.

Fraud Detection and Prevention

All rebate programs face some risk of fraud and Helgeson Enterprises is experienced in the detection and prevention of all types. In general terms, these are the types of fraud West Virginia's program will face and our methods for stopping it. Our techniques work like a filtration system, with the first processes described below catching crude attempts and the latter processes catching subtle attempts.

Counterfeit Proof of Purchase Materials - We can detect this type of fraud through the physical identification of counterfeit materials. All Helgeson employees are trained and rewarded to detect: Similar handwriting and envelopes, computer labeled envelopes, self adhesive address labels, similar postmarks and dates, same and similar names, same and similar addresses, addresses with PO boxes, suite numbers, alpha codes, suspicious cash register receipts, copies of cash register receipts, undated cash register receipts, no store name on receipts, counterfeit certificates and virgin proofs.

Duplicate Addresses, receipt transaction #'s and serial #'s - We detect duplicate households or addresses by standardizing all addresses using CASS-certificated software and then programmatically identifying same or similar addresses. By authenticating purchase-related fields in combination with address data, we can control the quantity of product categories allowed per address for the program. Similarly, our fulfillment application programmatically detects duplicate appearances of other unique identifiers within data such as duplicate transaction numbers from receipts and product serial numbers.

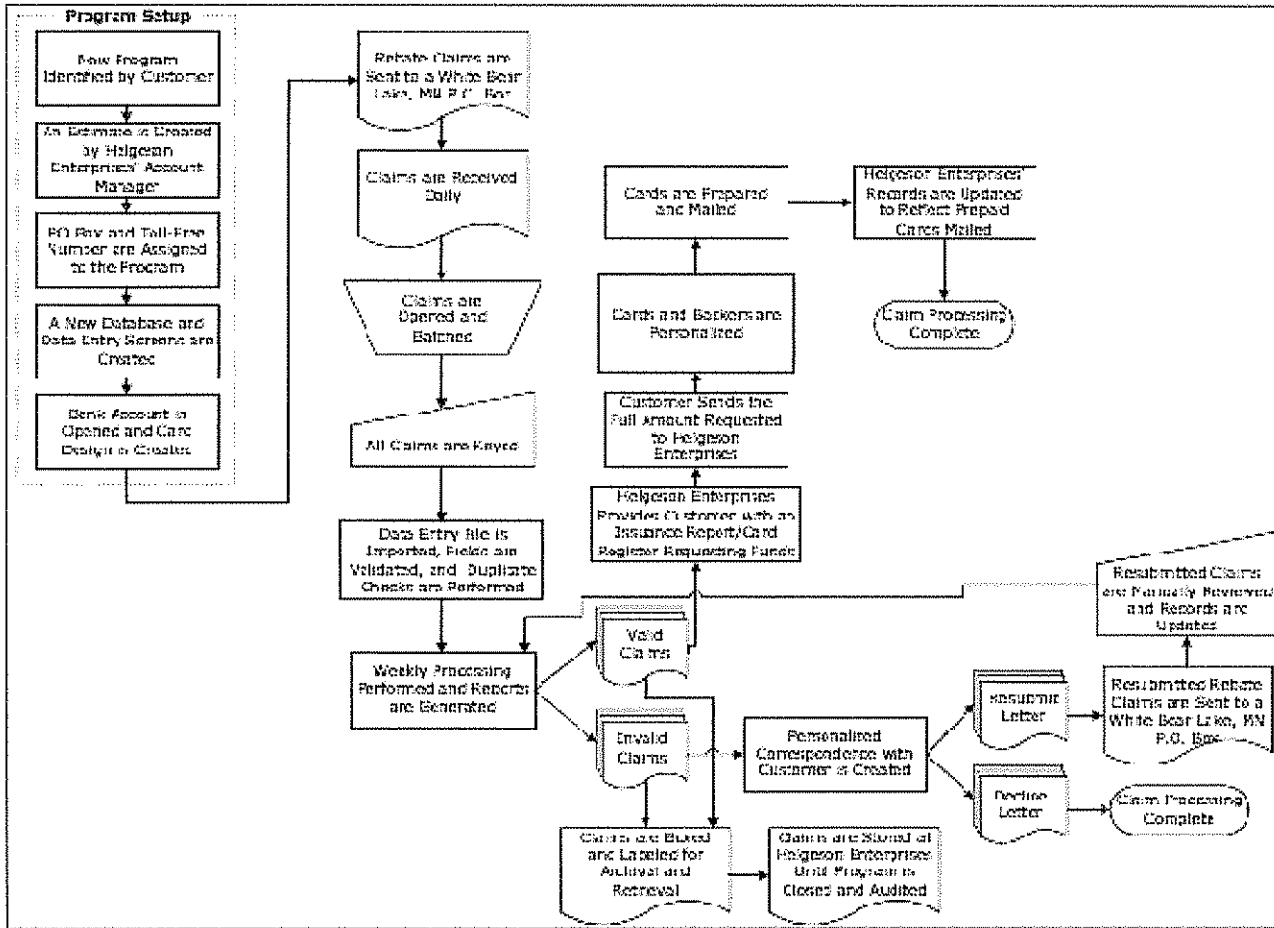
Check Security - Helgeson uses plain and custom, multi-color check stock with extensive security features to prevent several types of check fraud, including check duplication. For security purposes, check stock remains free of personalization until we print all variable information on the check, including the MICR, customer names and addresses, custom messages and the 300-600 dpi logos. To provide maximum security we print checks in a just-in-time environment minutes before mailing the checks.

Customer Check Fraud - To prevent customers from modifying checks from \$200 to \$2000, we use "positive pay" banking services for all accounts. In advance of mailing checks, we provide the bank each check number, date and amount. The bank reconciles each check against that data as it clears and gives us the opportunity to deny payment to customers presenting checks with unknown check numbers or inappropriate amounts. The result is accurate reconciliation and elimination of check fraud through the modification or reproduction of checks.

Taking Action on Fraud - All applications suspected as fraudulent are denied, and possibly reported to West Virginia and/or the US Postal Inspection Service as warranted.

Rebate Validation Flow Chart

The following details Helgeson's entire rebate validation process.



Customer Service

After a brief IVR message indicating if funds are available, all customer service calls will be handled by live US operators based at our headquarters in MN. Helgeson owns and manages an 80 seat call center in our new state of the art facility opened in January 2008 on our campus in White Bear Lake, MN. Capacity for 50+ additional seats exists if required. All call center reps are employed by Helgeson and work onsite in our facility. English, Spanish and French are supported internally. Through Language Line Services, we can support 170 additional languages. Helgeson estimates approximately 27,000 live operator minutes for West Virginia's rebate program. This falls well under our current call center capacity of 800,000 customer service minutes per month.

With Helgeson's SEEARP solution, telephone status inquiries are kept to a minimum as customer payments will be mailed within 5-10 days of receipt. Customers will also receive three email notifications: 1) when their claim is submitted online or via telephone, 2) when the mailed application is received by Helgeson, and 3) when the application is approved and payment is mailed. Each of these emails will contain a direct link to the customer's rebate status online, as illustrated on page 19.

Every interaction with every caller is logged, coded and noted in Helgeson's proprietary Rebate Management System. In addition to our extensive customer service tracking internally, our online reporting tools show West Virginia every detail about each resident's application experience including the ability to see any

previous contact the resident may have had with our call center. The tool also allows the WVDEP to take action on the resident's record in real time, such as reissuing a payment. West Virginia's action is tracked and becomes a part of the resident's record for Helgeson reps to see as well.

HELGESON ENTERPRISES HWUXYZ logout

HOME SUBMISSIONS PROMOTIONS CUSTOMERS OPERATIONS FINANCIAL CUSTOM

Customer Inquiry SEARCH RESULTS

NAME	ADDRESS	PROJECT	STATUS	RECEIVED
MABEL WARMSLEY	5529 E HOLMES AVE HICKORY, NC 28601	[ZAA] Widget Rebate	Approved for \$20.00	10/26/2006

Customer List
Call Reasons
Inquiry Ratios

Zip:
Last Name:
First Name:
Address:
City:
State:
Phone:
Email:
Claim id:

CUSTOMER	PROMOTION	PURCHASE	BATCH	SUBMISSION	LETTERS	ERRORS	SERVICE	CHECKS	ISSUANCE
DATE	ACTION		DETAIL						
11/30/2006	UPDATE		Approved, Customer sent in the original upc/barcode.						
10/28/2006	STATUS CHECK		Status Check						

Key call center performance statistics include: Average Speed of Answer, Agent Utilization, Average Handle Time, Abandon Rate and Call Quality. All reports can be viewed at any given time to provide data showing trends in call volume, ASA, levels of service, available agents, etc. Our call visualizer is a cradle-to-grave call reporting tool that provides an invaluable resource for call analysis and tracking. These reports can be based on numerous variables ensuring an accurate view of the call center activities. All reports are available for any time period including hourly, daily, weekly, monthly and yearly.

Agent reports viewable by the individual agent or group indicate the number of calls answered, shift time, average talk time, number of calls made, work time, hold and idle time. These reports are also available by any timeframe established by the user. Standard call center hours are Monday through Friday 9:00 – 8:00 ET and are adjusted as required for project requirements. We also maintain extended hours on Saturday if required.

Retailer and Consumer Education

Given the limited number of funds and the education the public is already receiving from national and regional news outlets about the State Appliance Rebate Programs, education should be limited to the West Virginia Appliance Rebate website (ex: www.WVApplianceRebates.com created and hosted by Helgeson), consumer and retailer program guides, press releases and public service announcements issued by West Virginia's communication office, and retailer training coordinated by Helgeson Enterprises and the West Virginia Retailers Association. Retailers will promote the program through various advertising methods such as: in-store communication, advertising, radio, TV, newspaper advertising, etc.

Helgeson will host a retailer webinar with the WVDEP and the West Virginia Retailers Association to ensure all retailers are familiar with the program. This step is critical to the success of the rebate program since many states are implementing different requirements, and each national retailer (Sears, Home Depot, etc.) must be familiar with the requirements for each state. We have already been in contact with Bridget Lambert, President of the West Virginia Retailer Association in the event Helgeson receives the award.

Many State Retailer Webinars have already been completed and were recorded, available for online review upon request from the WVDEP. West Virginia's Retailer Webinar will also be recorded and will be available for email distribution to retailers not able to attend on the scheduled date.

The following are examples of Program Guides Helgeson created for other State ENERGY STAR Appliance Programs. Similar materials will be created for West Virginia.

Georgia Residential Guide

Georgia State Energy Efficient Appliances Rebate Program

Guide for Appliance Retailers

The American Recovery and Reinvestment Act of 2009 appropriated funds to each state for the establishment and administration of appliance rebate programs. The amount available to Georgia residents is \$8,842,450.

A goal of the program is to stimulate the economy by encouraging consumers to replace old appliances with new ENERGY STAR certified models. The State of Georgia expects a favorable response to this program that will exhaust the rebate funds quickly.

As a retailer serving Georgia residents, your role is to communicate the details of this program to consumers accurately. Please take time to familiarize yourself with this program using this guide and the web site as resources.

By working together, we can make this program a success for Georgia retailers and residents alike.

Sincerely,
Georgia Environmental Facilities Authority

When will the rebates be available?
This program begins February 12, 2010 and ends the instant the funds run out.

How do I advertise this program?
Designed to have minimal impact on your operations, this is a consumer program, not a rebate program. Retailers are encouraged to help Georgia residents understand the process. Georgia residents are responsible for applying correctly.

Who is eligible?
A Georgia resident with a valid Georgia residential address who follows the program's rules. All payments will be mailed to this address, with no exceptions. Retail employees meeting these criteria are also eligible.

How are rebates calculated and communicated?
They are calculated and communicated in real time at www.GeorgiaRebate.com and 855-299-2109.

Are there any restrictions on where I can buy?
Georgia residents are encouraged to buy from Georgia retailers, but it is not a requirement.

Georgia State Energy Efficient Appliances Rebate Program

It is important to note the program goal: Residents must certify the new ENERGY STAR appliance replaces an existing appliance, which is a key requirement of this program. Recycling the replaced appliance is encouraged but not required.

The program is limited to one rebate per product category and one per household. The rebate per appliance is limited to \$500.

Yes, but separate applications must be completed for each product purchased.

See www.GeorgiaRebate.com to select a category at www.GeorgiaRebate.com to display all the ENERGY STAR certified product models. Another resource is www.energystar.com.

Residents must certify the new ENERGY STAR appliance replaces an existing appliance, which is a key requirement of this program. Recycling the replaced appliance is encouraged but not required.

The program is limited to one rebate per product category and one per household. The rebate per appliance is limited to \$500.

Yes, but separate applications must be completed for each product purchased.

See www.GeorgiaRebate.com to select a category at www.GeorgiaRebate.com to display all the ENERGY STAR certified product models. Another resource is www.energystar.com.

Every rebate application and the data it contains will be audited to verify the qualifying purchase and other requirements. Retailers in Georgia and neighboring states may be asked to provide occasional assistance and information as Georgia validates specific sales transactions.

Eligible ENERGY STAR Categories	ENERGY STAR Criteria	Project Visa Card Rebate Value
Refrigerators		\$25
Room Air Conditioners		\$30
Refrigerators		\$50
Over-the-Counter Washers	Modified Energy Factor (MEF) > or = 1.8 • Water Factor (WF) < or = 7.0	\$50
Over-the-Counter Washers	Modified Energy Factor (MEF) > or = 2.0 • Water Factor (WF) < or = 6.0	\$50
Dish Washers	< or = 24 kWh/year and • < or = 5.8 gallons per cycle	\$50
Dish Washers	< or = 20 kWh/year and • < or = 5.0 gallons per cycle	\$50
Water Heater Gas Storage	Energy Factor > or = 0.62	\$50
Water Heater Gas Storage	Energy Factor > or = 0.67	\$50
Water Heater Gas Conventional		\$50
Central Air Conditioners		\$50
Air Purifiers		\$50
Water Heater Electric Heat Pump		\$150
Water Heater Gas Tankless		\$150
Water Heater Solar (electric back-up)		\$150
Water Heater Solar gas back-up		\$150
Air Source Heat Pumps		\$150
Gas Furnaces		\$150
Oil Furnaces		\$150
Gas Boilers		\$150

Key ENERGY STAR product models in the specific categories listed above are eligible for Georgia rebates. To determine product model's ENERGY STAR certification, Georgia residents will use product information available to the public at www.energystar.com. Full details of product information are available to the public at 855-299-2109. You will not be contacted.

Eligibility for a rebate and subsequent rebate credit will be based on the program requirements. If applicant does not qualify for the rebate, the rebate will be forfeited and the program will continue to operate as normal.

Purchase of product will be based on bill, serial number, exchanged, new or a prior purchase of the same or similar model are not eligible.

The right to a rebate and a subsequent rebate credit is based on the date of purchase.

Rebate is only valid for the ENERGY STAR rebate.

Application is valid for the rebate only.

Appliance must be certified ENERGY STAR.

Product of the year must be in the program.

Georgia is not responsible for the Georgia Rebate program. The Georgia Rebate program is a program of the Georgia Environmental Facilities Authority.

Rebate of the program will be governed by Georgia.

Michigan Retailer Guide

Michigan Appliance Trade Up Rebate Program

CEE ENERGY STAR

Guide for Appliance Retailers

Introduction

The American Recovery and Reinvestment Act of 2009 appropriated funds to each state for the establishment and administration of appliance rebate programs. The amount available to Michigan residents for refrigerators, clothes washer and dishwasher rebates is \$6,644,000. Rebate funds are allocated across 4 eligible appliance categories: Refrigerators, Freezers, Cloths Washers and Dishwashers.

A goal of the program is to stimulate the economy by encouraging consumers to replace old appliances from an eligible appliance category with new energy efficient models. The State of Michigan expects a favorable response to the program that will exhaust the rebate funds quickly.

As a retailer serving Michigan residents, your role is to communicate the details of this program to consumers accurately. Please take time to familiarize yourself with this program using this guide and the web site as resources.

By working together, we can make this program a success for Michigan retailers and residents alike.

Sincerely,
Michigan Office of Energy Security, Labor & Economic Growth

When does the program start and end?
This program begins February 10, 2010 and ends the instant the funds run out.

How do Michigan retailers prepare?
Designed to have minimal impact on your operations, this is a consumer program, not a retailer program. Retailers are encouraged to help Michigan residents understand the process. Michigan residents are responsible for applying correctly.

Who is eligible?
A Michigan resident with a valid Michigan residential address who follows the program's rules. All payments will be mailed to this address, with no exceptions. Retail employees missing these criteria are also eligible.

How do residents apply for these rebates?
Residents should check funds availability at www.MiRebates.com or by calling 1-866-621-8782. Residents can then apply in two different ways:

Option 1

- Buy an eligible ENERGY STAR or CEE qualified product.
- Apply for a rebate at the program's website or toll free number.
- Mail the required materials within 14 days of the online or phone application.

Option 2

- Apply to receive funds at the program's website or toll free number.
- Buy an eligible ENERGY STAR or CEE qualified product.
- Complete the application and mail the required materials within 14 days of the reservation.

When must a Michigan resident buy the product?
Michigan residents are encouraged to buy from Michigan retailers, but it is not a requirement.

How do we know if a product is ENERGY STAR or CEE qualified?
All products that have earned the certification feature the familiar ENERGY STAR logo on the front of the product and on the product packaging. If you are unsure, visit www.ENERGYSTAR.gov for a complete list of ENERGY STAR qualified products and models. For complete list of CEE qualified models, visit www.CEEV.org.

Can a retailer help a customer complete a rebate application?
Yes and due to the expected response, it would be in your best interests to help residents apply immediately after the sale. The Michigan resident's name and address must be on the application, not the retailer's information.

What is the limit?
Michigan residents may apply for one rebate per appliance category per address. For example, one refrigerator rebate plus one dishwasher rebate would qualify. Applications for two dishwasher rebates would not qualify.

Michigan Appliance Trade Up Rebate Program

CEE ENERGY STAR

Why is this a mail-in program instead of a discount?
This program's fixed budget requires rebate applications processing on a first-come-first-served basis. The method we chose guarantees a good rebate experience to Michigan retailers and residents. It also protects Michigan retailers from the potential frustration of retailer-administered programs.

Is appliance recycling required to be eligible?
Residents must certify the new ENERGY STAR or CEE qualified appliance replaces an existing appliance, which is a key requirement of this program.

What product quality? (See chart below)
Select a category at www.MiRebates.com to display all the ENERGY STAR and CEE qualified product models. Other resources are www.ENERGYSTAR.gov and www.CEEV.org.

How often are available funds updated?
They are calculated and communicated in real time at www.MiRebates.com and 1-866-621-8782.

Can a customer apply for the Michigan energy rebate and the manufacturer's or retailer's rebate on the same appliance?
Yes, but remind the resident that each rebate sponsor has unique rules and application instructions. All mailed energy rebate applications and the manufacturer's or retailer's rebate on the same appliance?

How will applications be verified?
Every rebate application and the data it contains will be audited to verify the qualifying purchase and other requirements. Retailers in Michigan and neighboring states may be asked to provide occasional assistance and information to Michigan valuates specific 55% transactions.

Eligible Appliance Categories	Visa-Prepaid Rebate Value
Dishwashers - ENERGY STAR rating	\$25
Dishwashers - CEE Tier 2 rating	\$50
Clothes Washers - CEE Tier 3 rating	\$50
Refrigerators - ENERGY STAR rating	\$50
Refrigerators - CEE Tier 3 rating	\$100

*** Only ENERGY STAR and CEE product models in the specific categories listed above are eligible for Michigan rebates. To determine a product model's ENERGY STAR or CEE certification, check the program's website information available at www.ENERGYSTAR.gov or www.CEEV.org. See the list of products or product categories and retailers below at 1-866-621-8782 to get the complete list.**

**** If eligible for a rebate and successfully apply to receive the program rebate, we will grant you the right to the rebate and the rebate funds will be mailed to the address listed.**

**** Payments of product rebates are based on the retailer's best, exchange works as a price of purchase & either or the retailer is not eligible.**

**** The right to a rebate of a rebate application may not be transferred or sold.**

**** Payment may be used for Michigan's energy needs.**

**** Applications in excess of the funds will not be mailed.**

**** Applications exceeding website eligible products are not allowed.**

**** Retailer may only accept mail-in rebate proceeds under the 14 day return deadline.**

**** Michigan residents are not eligible for rebates, excepted program, rebates or participating applications.**

**** Function of any rebates will be governed by Michigan law.**

The West Virginia Appliance Rebate Program website (example: www.WVApplianceRebates.com) will serve as the main point of communication for retailers, residents and consumers, with access to:

- Remaining rebate dollars
- Estimated number of days remaining until funds are exhausted
- Retailer and Consumer Program information regarding West Virginia's SEEARP
- Rebate application status
- ENERGY STAR information
- FAQ's
- Recycling information – Links will be provided for consumers to research local recyclers in their zip code or county

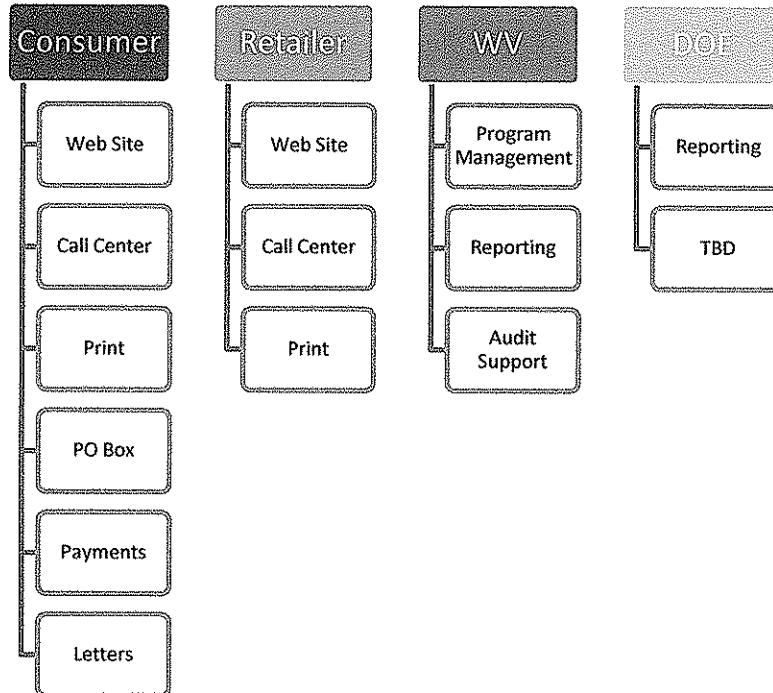
Implementation Plan

Helgeson can launch West Virginia's rebate program in as little as 4 weeks from contract award. The following is an Implementation Plan for West Virginia's Appliance Rebate Program. As a result of implementing 13 other State rebate programs scheduled to launch as early as February 10, 2010, many tasks have already been completed.

Helgeson Tasks	Timeframe			
	Week: 1	2	3	4
Assign Implementation Manager and Senior Acct Manager		COMPLETE		
Develop leniency rules and grace periods		COMPLETE		
Design online ENERGY STAR communications for customers and retailers		COMPLETE		
Script and setup custom IVR responses		COMPLETE		
Develop Customer Svc scripts and guidelines		COMPLETE		
Design Visa Prepaid Card, carrier, envelope and card balance website		COMPLETE		
Design and create West Virginia branded Online Rebate Center		TEMPLATE COMPLETE		
Conduct launch meeting with West Virginia DEP to fully define rebate program requirements		95% COMPLETE		
Outline all rebate program requirements		95% COMPLETE		
Create online submission process		COMPLETE		
Schedule and hold retailer webinar with WVDEP and WV's Retailer Association				
Setup customer service 800#				
Assign PO Box & customer service 800#				
Develop email messages				
Hire additional call center staff as needed				
Assign and train call center staff				
Define resubmission and rejection codes				
Assign usernames to WVDEP employees for online reporting access				
Define and setup reporting requirements				
Launch Website				
Helgeson and WVDEP notify retailers and utilities that program has launched				

Deliverables

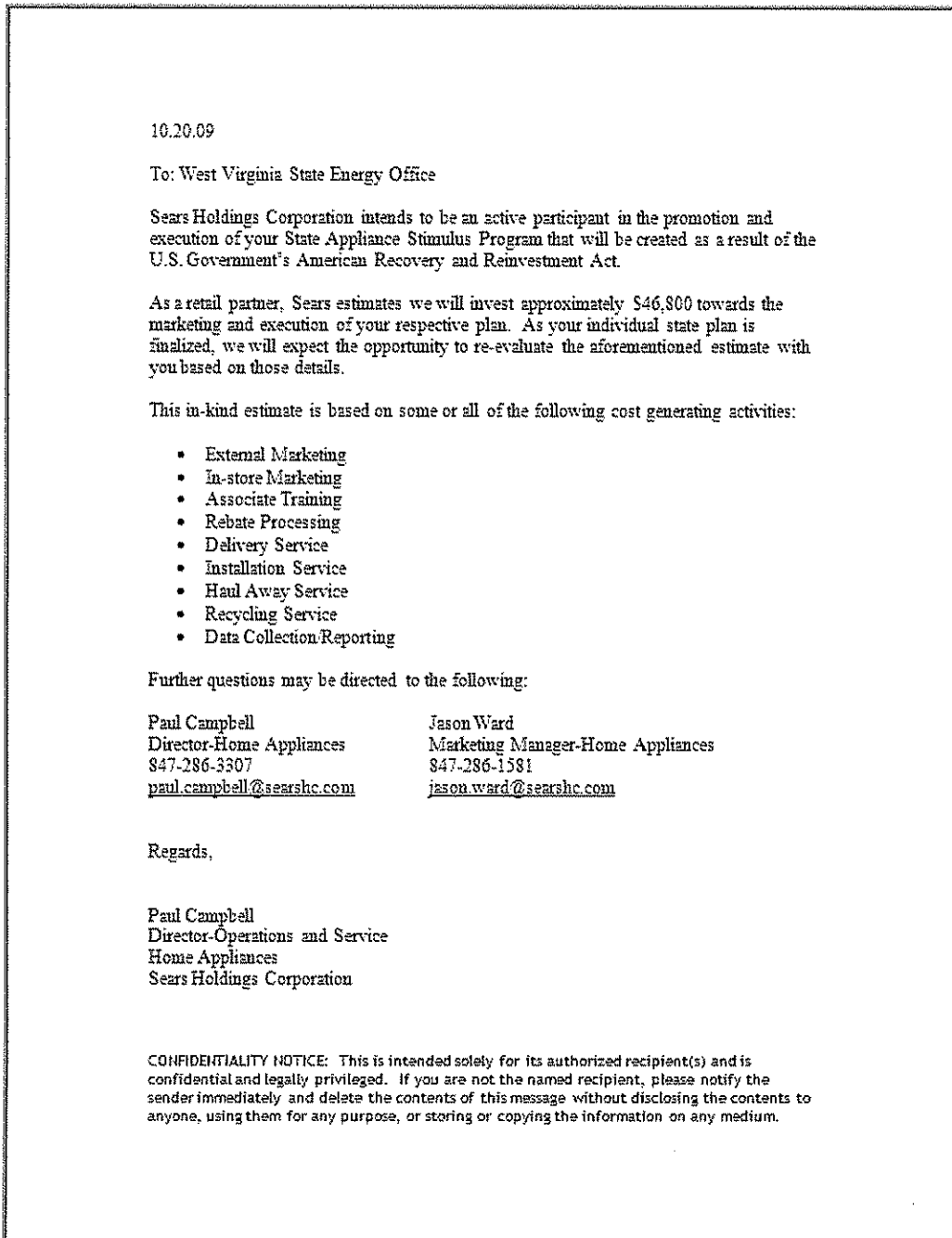
These are the deliverables Helgeson puts in place to make the process work; they fall in four categories: deliverables for consumers, retailers, West Virginia and DOE.



Web Site	Helgeson configures a web site with West Virginia's look & feel to centralize the communication of all details, instructions and tools such as real-time funds remaining, online rebate applications, real-time status updates, eligible ENERGY STAR products, rebate amounts, program rules and information, recycling resources and links to related resources such as the ENERGY STAR site. Included in this category are the email status messages we send to customers.
Statewide Retailer Webinar	Helgeson will co-host a Retailer Webinar with the West Virginia DEP and the West Virginia Retailer Association to educate retailers about program rules and requirements. The webinar is recorded for to be used as training materials for retailers and contractors.
Call Center	For consumers who lack web access or who prefer the phone, we dedicate a toll free number to WV's rebate program so consumers can access the same resources via live agents and IVR that are available on the web. We dedicate a second toll free number to West Virginia retailers to support them with their unique needs such as understanding the funds remaining, helping their customers apply and researching the qualification of ENERGY STAR appliance in the event of discrepancies within ENERGY STAR's data.
Print	Helgeson provides a branded, printable guide so consumers can have all the rules when they are appliance shopping. With West Virginia and ENERGY STAR look and feel, Helgeson provides a printable guide for retailers to understand and communicate the program rules to consumers in extreme detail.
PO Box	Helgeson provides a dedicated PO box to which West Virginia retailers and customers can mail their complete rebate applications.
Payments & Letters	With West Virginia's branding on the exterior and interior, Helgeson mails Visa cards to residents with qualifying applications. For residents with disqualified applications, Helgeson mails letters with detailed instructions for reapplication.

Matching funds

Although not required in the RFQ, Helgeson has secured initial commitments of \$46,800 in matching funds from Sears for West Virginia's Appliance Rebate Program, covering the required 50% match of Helgeson's estimated administration costs of \$91,208. Following is the letter of commitment from Sears.



If additional matching funds are required, Helgeson will work with the West Virginia Retailer Association to secure similar commitments from other West Virginia Retailers once a contract award is announced.

Outsourcing

Helgeson will perform all work for the West Virginia Appliance Rebate Program 100% in the US from our Minnesota facilities. Our solution is 100% compliant with Buy American guidelines in Sec. 1605 of ARRA Act and Sec. 5.020.

Visa Prepaid Cards are issued by Helgeson's prepaid card partner, Citi Prepaid Services, a Division of Citigroup. Citi Prepaid Services is located in Conshohocken, PA.

Reporting

The West Virginia DEP has complete access to all customer data captured through the rebate application process. Over 40 standard reports and hundreds of custom reports are available via Helgeson's online reporting system. All SEEARP reporting requests will be designed and offered to the DEP as part of our proposal. The following are several sample generic reports currently available. A complete demonstration is available upon request.

Reject Report:

The screenshot displays the Helgeson Enterprises reporting interface. The user is logged in as HVWXYZ. The main navigation menu includes HOME, SUBMISSIONS, PROMOTIONS, CUSTOMERS, OPERATIONS, FINANCIAL, and CUSTOM. The current view is 'REJECT DETAIL LIST' for the promotion '[ZAB] Widget Fulfillment'.

REJECT DETAIL LIST

PROMOTION	CURRENT STATUS	START	END	VALID	REJECTED	%	TOTAL	REBATE FUNDS
1 [ZAA] Widget Rebate	Open	07/09/2008	11/05/2008	11,082	2,314	17.27%	13,396	\$ 165,720.00
2 [ZAB] Widget Fulfillment	Open	07/22/2008	10/22/2008	11,804	2,647	18.32%	14,451	\$ 0.00

For additional details, select a promotion from the list above.

AT A GLANCE

SELECTED DATE RANGE	PROMOTION TOTAL	VALID	REJECTED	%	TOTAL	REBATE FUNDS
1/1/2008 to 12/31/2008						
	SUBMISSIONS	COUNT		%		
	Valid	11,082		82.73%		
	Rejected	2,314		17.27%		
		13,396		100.00%		

ERROR CODE

ERROR CODE	ERROR DESCRIPTION	ERROR COUNT	%
MD	Missing Date of Purchase	2,154	91.74%
NI	No Invoice	52	2.21%
UD	Unauthorized Dealer	42	1.79%
BC	Missing UPC/barcode	24	1.45%
II	Invalid Invoice	20	0.85%
IM	Invalid Model	19	0.81%
ID	Invalid Purchase Date	10	0.43%
DH	Duplicate Household	7	0.30%
XD	Invalid Invoice, Postmark or Received Date	2	0.09%
AI		1	0.04%
IS		1	0.04%
PO	Address Contains PO Box	1	0.04%
IP	Invalid UPC or barcode	1	0.04%
PI	Invalid Postmark Date	1	0.04%
US	United States Only	1	0.04%
PU	Photocopy of UPC	1	0.04%
ZZ	Transfer to Helgeson	1	0.04%
		2,348	100.00%

Check Reconciliation Report:

HELGESON ENTERPRISES		HWUXYZ		logout - change password - legacy system									
HOME SUBMISSIONS PROMOTIONS CUSTOMERS OPERATIONS FINANCIAL CUSTOM		CHECK RECONCILIATION											
Invoice Summary	Unpaid Invoices	ISSUED	PAYMENT RECEIVED	INVOICE NUMBER	AMOUNT INVOICED	CHECKS MAILED	CHECKS CASHED	CHECKS PENDING	CHECKS PENDING %	AMOUNT PAID	AMOUNT CASHED	AMOUNT PENDING	AMOUNT PENDING %
Check Values	08/26/2008	09/02/2008	9-000001	4,950.00	327	314	13	3.98%	4,950.00	4,740.00	210.00	4.24%	
Estimated Liability	09/25/2008	10/02/2008	9-000002	540.00	36	35	1	2.78%	540.00	530.00	10.00	1.85%	
Budget Status	10/05/2008	10/12/2008	9-000003	11,880.00	805	784	21	2.61%	11,880.00	11,580.00	300.00	2.53%	
Invoices Issued from	11/26/2008	11/26/2008	9-000004	20.00	2	0	2	100.00%	20.00	-10.00	30.00	150.00%	
				\$	1,170	1,133	37	3.16%	\$	\$	\$	550.00	3.16%
1/1/2008 to 12/31/2008				17,390.00					17,390.00	16,840.00			

Validation Report:

HELGESON ENTERPRISES		HWUXYZ		logout - change password - legacy system						
HOME SUBMISSIONS PROMOTIONS CUSTOMERS OPERATIONS FINANCIAL CUSTOM		PROMOTION LIST								
Validation Analysis	Reject Analysis	PROMOTION	CURRENT STATUS	START	END	VALID	REJECTED	%	TOTAL	REBATE FUNDS
Monthly Totals at a Glance	1 [ZAA] Widget Rebate	Open	07/05/2008	11/05/2008	11,082	2,314	17.27%	13,396	\$ 165,720.00	
Monthly Promotion Detail	2 [ZAB] Widget Fulfillment	Open	07/22/2008	10/22/2008	11,804	2,647	18.32%	14,451	\$ 0.00	
Fraud Detection	* For additional detail, select a promotion from the list above									
Submissions processed from	AT A GLANCE				VALID	REJECTED	%	TOTAL	REBATE FUNDS	
08/26/2008 to 12/31/2008	PROMOTION TOTALS FOR SELECTED RANGE 1/1/2008 TO 12/31/2008				22,886	4,961	17.82%	27,847	\$ 165,720.00	
Specific promotion	Results 1 - 2 of 2 promotions									

Query Based Report Generator:

HELGESON ENTERPRISES HWUXYZ

HOME SUBMISSIONS PROMOTIONS CUSTOMERS OPERATIONS FINANCIAL

TEMPLATES

- approved claims
- claim count by program
- Claim status
- Claims by State
- Claims By UPC
- Claims From Specified Zip Code
- count of rejected
- CSR phone
- Curt's Sample Report
- customer info
- dealers
- Paul data dump 2006
- Quantity
- Rebate amount list
- Rebate Amounts by UPC
- Record count
- rejected best buy claims
- rptTest
- Test
- z99 approved claims by dealer

HELGESON ENTERPRISES HWUXYZ

HOME SUBMISSIONS PROMOTIONS CUSTOMERS OPERATIONS FINANCIAL CUSTOM

EDIT TEMPLATE - CLAIMS BY STATE

REPORT NAME: Claims by State

DATA SOURCE: Claims

DESCRIPTION: Number of Claims by State

SELECT COLUMNS: Letter Code, Project Description, PO Number, PO Box, CSR Phone, Start Date, End Date, Last Postmark Date, Days After Invoice Date, Project Dept Number, Client Ref Number, Retailer Number, Retailer Name

AVAILABLE COLUMNS: State, Record Count

VIEW TEMPLATE: CLAIMS BY STATE

Description: Number of Claims by State

Report Format: Excel

Excel

Web archive

AGBA (PDF)

TIFF file

CSV (comma delimited)

XML file with report data

VIEW EDIT COPY DELETE

kWh Savings Report:

Validation Analysis		KWH SAVINGS									
	RESIDENTIAL MEASURE	CURRENT STATUS	START	END	VALID	KWH SAVINGS PER	KWH SAVINGS TOTAL	KWH SAVINGS GOAL	%		
Reject Analysis	2010 Air Source Heat Pump--14 SEER	Open	01/01/2010	12/31/2010	1,702	801	1,363,302	1,500,000	90.87%		
Monthly Totals at a Glance	2010 Air Source Heat Pump--15 SEER	Open	01/01/2010	12/31/2010	345	1,045	360,525	400,000	90.13%		
Monthly Promotion Detail	2010 Central A/C--14 SEER	Open	01/01/2010	12/31/2010	762	296	225,552	500,000	45.11%		
Fraud Detection	2010 Central A/C--15 SEER	Open	01/01/2010	12/31/2010	354	381	134,874	200,000	67.44%		
KWh Savings	2010 Central A/C--16 SEER	Open	01/01/2010	12/31/2010	35	536	18,760	20,000	93.80%		
	2010 Clothes Washers--Electric	Open	01/01/2010	12/31/2010	9,700	250	2,502,600	3,000,000	83.42%		
	2010 Dishwasher--1.25	Open	01/01/2010	12/31/2010	762	233	177,846	200,000	88.77%		
	2010 Dishwashers--Gas Water Heater	Open	01/01/2010	12/31/2010	355	137	48,635	50,000	97.27%		
	2010 Freezers	Open	01/01/2010	12/31/2010	217	57	12,369	15,000	82.46%		
	2010 Furnace Fan Motor	Open	01/01/2010	12/31/2010	216	266	57,456	60,000	95.76%		
	2010 Geothermal	Open	01/01/2010	12/31/2010	16	1,531	24,496	25,000	97.98%		
	2010 LED--99	Open	01/01/2010	12/31/2010	98,344	52	5,113,888	5,500,000	92.98%		
	2010 Light Fixtures	Open	01/01/2010	12/31/2010	4,438	44	195,272	200,000	97.64%		
	2010 Refrigerators	Open	01/01/2010	12/31/2010	1,583	86	170,538	200,000	85.27%		
	2010 Room A/C	Open	01/01/2010	12/31/2010	344	98	33,712	35,000	96.32%		
	2010 Air Source Heat Pump--16 SEER	Closed	01/01/2010	09/18/2010	269	2,670	599,830	599,830	100.00%		
	2010 CFLs	Closed	01/01/2010	10/17/2010	81,632	-49	3,999,968	3,999,968	100.00%		
					VALID		KWH SAVINGS TOTAL	KWH SAVINGS GOAL	%		
					119,573		10,439,525	11,905,000	87.69%		

Cost Proposal

Based on WVDEP's estimate of 27,138 rebate applications issued in the values listed in the RFP, Helgeson's expected administrative cost total is \$91,207.90 to perform all of the services EXACTLY as requested in the RFQ.

All administrative costs will be billed on actual quantities received at the rates listed below, at a total not to exceed West Virginia's maximum allowable administrative cost of \$217,625. Unit costs will remain constant for the duration of the contract. Please note any change in requirements, and Helgeson will be glad to offer revised pricing.

Budget Item	Unit Cost		Est. Qty	Total
Average Rebate Value	\$56.13	Average Payment	27,138	\$1,523,375.00
Reporting	\$125.00	Per Hour	80	\$10,000.00
Claim Processing (Valid Claims)	\$2.75	Per Claim	27,138	\$74,629.50
Claim Processing (Invalid Claims)	\$2.75	Per Claim	1,357	\$3,731.48
Claim Processing (manual verification)	\$0.95	Per Minute	5,428	\$5,156.22
Claim Processing (Visa discount)	See Table	Per Claim		(\$40,411.05)
Postage (Valid claims)	\$0.44	Per Claim	27,138	\$11,940.72
Postage (Invalid claims)	\$0.28	Per Claim	1,357	\$379.93
Customer Service	\$0.95	Per Connected Minute	27,138	\$25,781.10
Administrative Total				\$91,207.90
Total Cost				\$1,614,582.90

Card Face Value	Discount
\$20 - \$29	(0.50)
\$30 - \$39	(1.10)
\$40 - \$49	(1.45)
\$50 - \$74	(2.10)
\$75 - \$99	(1.85)
\$100 +	(1.35)

ATTACHMENT 1: Client Reference Letters

State of Michigan Department of Energy, Labor and Economic Growth – Reference Letter



JENNIFER M. GRANHOLM
GOVERNOR

STATE OF MICHIGAN
DEPARTMENT OF ENERGY, LABOR & ECONOMIC GROWTH
LANSING

STANLEY "SKIP" PRUSS
DIRECTOR

RFP # 1848 REFERENCE QUESTIONNAIRE

FOR:

Part A: Helgeson Enterprises, Inc
(Name of company requesting reference)

- As Primary Vendor
 As Subcontractor of _____
Name of Primary Vendor

Part B:

This form is being submitted to your company for completion as a business reference for the company listed above.

CONFIDENTIAL INFORMATION WHEN COMPLETED

Company providing reference:	Michigan Department of Energy, Labor, & Economic Growth (DELEG) Bureau of Energy Systems
Contact name and title/position	John Sarver Section Manager
Contact telephone number	(517) 241-6280
Contact e-mail address	sarverj@michigan.gov

QUESTIONS:

1. In what capacity have you worked with this vendor in the past?
COMMENTS:

Helgeson Enterprises will be facilitating the State of Michigan's appliance rebate program for 2010.

2. How would you rate this firm's knowledge and expertise?
3 (3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)
COMMENTS:

Helgeson Enterprises has demonstrated a keen knowledge of the appliance rebate industry, their expertise has been quite valuable with our decision making and program development.

DELEG is an equal opportunity employer/program.
Auxiliary aids, services and other reasonable accommodations are available upon request to individuals with disabilities.

611 W. Ottawa • P.O. BOX 30024 • LANSING, MICHIGAN 48909
www.michigan.gov • (517) 373-1820



3. How would you rate the vendor's flexibility relative to changes in the project scope and timelines?

3 (3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)

COMMENTS:

Helgeson Enterprises has met every deadline set by the State of Michigan and has be extremely flexible and accommodating to requests made by our office.

4. What is your level of satisfaction with hard-copy materials produced by the vendor?

3 (3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)

COMMENTS:

The State of Michigan has primarily dealt with Helgeson Enterprises via electronic media; however, their initial proposal was well constructed and detailed.

5. How would you rate the dynamics/interaction between the vendor and your staff?

3 (3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)

COMMENTS:

Helgeson Enterprises has maintained an open line of communication with the State of Michigan. Our program contact has been very helpful and they've met every request.

6. Who were the vendor's principal representatives involved in your project and how would you rate them individually? Would you comment on the skills, knowledge, behaviors or other factors on which you based the rating?

(3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)

Name: David White Rating: 3

Name: Anne London Rating: 3

Name: _____ Rating: _____

Name: _____ Rating: _____

COMMENTS:

Our program is relatively new, so the amount and range of work is not that extensive. However, in the short time we've been working with Helgeson they've showed great communication skills and flexibility with our office. Dave has been an invaluable resource with his knowledge of rebates and ability to navigate around obstacles. Anne has also been a pleasure to work with, she's great with keeping communication open and provides expedited responses to all of our inquiries.

7. How satisfied are you with the products developed by the vendor?

3 (3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)

COMMENTS:

8. With which aspect(s) of this vendor's services are you most satisfied?

COMMENTS:

Helgeson Enterprises has an immense amount of knowledge and experience our office has found to be invaluable. In addition, they're always available and willing to discuss any matter that may arise.

9. With which aspect(s) of this vendor's services are you least satisfied?

COMMENTS:

At this moment we do not have anything to report being dissatisfied with.

10. Would you recommend this vendor's services to your organization again?

COMMENTS:

Yes, if we continue the appliance rebate program I would recommend their services again.

SHARP

Sharp Imaging and Information Company of America

RFP # 1848 REFERENCE QUESTIONNAIRE

FOR:

Part A: Helgeson Enterprises, Inc
(Name of company requesting reference)

- As Primary Vendor
 As Subcontractor of _____
Name of Primary Vendor

CONFIDENTIAL INFORMATION WHEN COMPLETED

Company providing reference:	Sharp Electronics Corporation
CONTACT NAME AND TITLE/POSITION	Tony Titone, Senior Product Marketing Manager
CONTACT TELEPHONE NUMBER	(201) 529-8984
CONTACT E-MAIL ADDRESS	titonet@sharpsec.com

QUESTIONS:

- In what capacity have you worked with this vendor in the past?
 COMMENTS: rebate fulfillment and customer service to rebate customers

- How would you rate this firm's knowledge and expertise?
3 (3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)
 COMMENTS: Quick response times and excellent follow-up on open issues (best of all my vendors)

- How would you rate the vendor's flexibility relative to changes in the project scope and timelines?
3 (3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)
 COMMENTS: I often ask for 1 or 2 day setup of programs and is completed within my timeline with NO complaints

4. What is your level of satisfaction with hard-copy materials produced by the vendor?

N/A (3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)

COMMENTS: I don't use them for this service

5. How would you rate the dynamics/interaction between the vendor and your staff?

3 (3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)

COMMENTS: I have three main contacts and all are friendly & 95% of the time answers their phone on the first call

6. Who were the vendor's principal representatives involved in your project and how would you rate them individually? Would you comment on the skills, knowledge, behaviors or other factors on which you based the rating?

(3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)

Name: David White Rating: 3

Name: Anne London Rating: 2

Name: Mary Jo Bruce Rating: 3

Name: _____ Rating: _____

COMMENTS: The entire team works together & it's a vendor that I only have to check on rarely because they handle our customers in an excellent manner.

7. How satisfied are you with the products developed by the vendor?

2 (3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)

COMMENTS: provides exactly what I require

8. With which aspect(s) of this vendor's services are you most satisfied?

COMMENTS: follow-up with customers that have issues or unique requirements.

9. With which aspect(s) of this vendor's services are you least satisfied?

COMMENTS: 3 years ago we had a few billing problems but these issues were resolved with a new system of checks and balances that was developed by the vendor

10. Would you recommend this vendor's services to your organization again?

COMMENTS: Yes, they have proven a valuable and trusted partner.



GEORGIA ENVIRONMENTAL FACILITIES AUTHORITY
 Georgia Environmental Facilities Authority (GEFA)
 233 Peachtree Street, NE
 Harris Tower, Suite 900
 Atlanta, Georgia 30303-1506
 Telephone no.: 404.584.1000

Part A: _____ **Helgeson Enterprises, Inc** _____
 (Name of company requesting reference)

- As Primary Vendor
 As Subcontractor of _____
Name of Primary Vendor

CONFIDENTIAL INFORMATION WHEN COMPLETED

Company providing reference:	Georgia Environmental Facilities Authority
CONTACT NAME AND TITLE/POSITION	Andrea Schroer, State Energy Program Manager
CONTACT TELEPHONE NUMBER	(404) 584-1137
CONTACT E-MAIL ADDRESS	andrea@gefa.ga.gov

QUESTIONS:

- In what capacity have you worked with this vendor in the past?**
COMMENTS: This will be GEFA's first experience working with Helgeson.
- How would you rate this firm's knowledge and expertise?**
3 (3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)
COMMENTS: GEFA was impressed with the 38 years Helgeson has been in business. GEFA is not in the rebate business so we have relied heavily on Helgeson for guidance and professional advice and are happy with both.
- How would you rate the vendor's flexibility relative to changes in the project scope and timelines?**
3 (3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)
COMMENTS: Helgeson did a nice job responding to the RFP so we have not had many changes to the project scope and have not had to adjust our timelines.
- What is your level of satisfaction with hard-copy materials produced by the vendor?**
3 (3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)
COMMENTS:
- How would you rate the dynamics/interaction between the vendor and your staff?**
3 (3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)
COMMENTS: The entire Helgeson staff is great to work with.



6. Who were the vendor's principal representatives involved in your project and how would you rate them individually? Would you comment on the skills, knowledge, behaviors or other factors on which you based the rating?

(3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)

Name: David White Rating: 3

Name: Ann London Rating: 3

Name: _____ Rating: _____

Name: _____ Rating: _____

COMMENTS: They have been excellent to work with and are very responsive to GEFA's needs.

7. How satisfied are you with the products developed by the vendor?

3 (3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)

COMMENTS: We don't launch our project until February 12th but we have been very happy with our progress and service thus far.

8. With which aspect(s) of this vendor's services are you most satisfied?

COMMENTS: Their competence and knowledge surrounding their core business, rebates.

9. With which aspect(s) of this vendor's services are you least satisfied?

COMMENTS: None yet as we are still in the planning and implementation phases of this project, you are welcome to contact us after our launch on 2/12/2010 for status.

10. Would you recommend this vendor's services to your organization again?

COMMENTS: Yes I would.