



Joel L. Morrison
West Penn Energy Fund
The Vallamont Building, Suite 2
1001 University Drive
State College, PA 16801

DATE OF DEPOSIT

FEB 26 2026

February 26, 2026

PA Public Utility Commission
Secretary's Bureau

Secretary
Pennsylvania PUC
Commonwealth Keystone Building – 2nd Floor
400 North Street
Harrisburg, PA 17120

Docket Number: M-2023-3041569

Dear Matthew Homsher,

On behalf of the West Penn Energy Fund (WPEF), please accept the Fund's enclosed annual reports for 2015 to 2024. A total of ten (10) annual reports are being submitted to ensure our respective files are complete. I would like to thank the PUC Commissioners and staff for the guidance and assistance that they have provided to the Fund.

Respectfully Submitted,

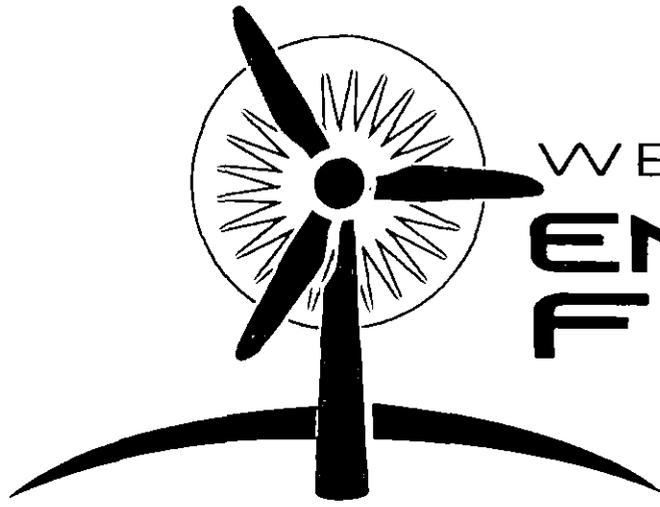
Joel L. Morrison

Joel Morrison

Fund Administrator, WPEF

Cc:

Mr. Alan Neuner, WPEF President
Mr. James Smith, Economic Growth Connection of Westmoreland
Mr. David Edinger, PA Public Utility Commission
file



WEST PENN
**ENERGY
FUND**

DATE OF DEPOSIT

FEB 26 2026

PA Public Utility Commission
Secretary's Bureau

**The 2024 Annual Report of the
West Penn Energy Fund
(January 1, 2024 - December 31, 2024)**

Prepared By

JOEL L. MORRISON
BARBARA J. ROBUCK
THE PENNSYLVANIA STATE UNIVERSITY
EMS ENERGY INSTITUTE
C-211 CUL
UNIVERSITY PARK, PA 16870-2323

Submitted For

WEST PENN ENERGY FUND
40 NORTH PENNSYLVANIA AVENUE, SUITE 510
GREENSBURG, PA 15601

www.westpennenergyfund.org

FORWARD

The West Penn Energy Fund (WPEF) operates on a calendar year basis. This report summarizes the WPEF's activities between January 1 to December 31, 2024.

APPROVALS

The WPEF Board approved \$2,739,806 to co-fund twenty one (21) funding requests in 2024.

DISBURSEMENTS

The WPEF disbursed \$703,526 in funding to support twenty two (22) projects in 2024.

YEAR END BALANCE

The WPEF had a net asset value of \$33,023,852 as of December 31, 2024.

ADMINISTRATIVE EXPENSES

WPEF's administrative expenses were \$487,936 in 2024. The core administrative expense/ net asset value was 1.48%. The administrative expenses included the costs associated with its Fund Administrator (Penn State) and the financial services provided by the Economic Growth Connection of Westmoreland.

INTRODUCTION

The West Penn Power Sustainable Energy Fund (WPPSEF) was established through the West Penn Power (WPP) Company restructuring plan approved by the Pennsylvania Public Utilities Commission (PA-PUC) on November 3, 1998. WPPSEF was incorporated on May 3, 2000 and received its 501(c)(3) non-profit status on July 19, 2000. In 2024, the West Penn Power Sustainable Energy Fund changed its name to the West Penn Energy Fund. The name change was approved by the Pennsylvania Public Utilities Commission on July 11, 2024.

The Fund entered its twenty fourth (24) year of operations in 2024. WPEF continually strives to increase its visibility in the WPP service region and to provide support to clean energy projects that benefit the WPP ratepayer. WPEF funding is focused on:

- ❖ Promoting the use of renewable and clean energy;
- ❖ Promoting energy conservation and energy efficiency; and
- ❖ Promoting the start-up, attraction, expansion, and retention of sustainable energy businesses.

HIGHLIGHTS AND ACCOMPLISHMENTS

WPEF worked to identify new mission-aligned projects throughout 2024 while providing guidance and oversight to its portfolio of existing projects. Selected 2024 project highlights and accomplishments are provided below.

2024 Request for Proposals

WPEF is constantly seeking to identify and support projects that are aligned with its mission and provide benefit to the WPP ratepayer. As part of this process, WPEF solicits project proposals through a request-for-proposals (RFP) process. The RFP was released

on October 24, 2023 and closed on January 23, 2024. A total of 15 proposals were submitted for funding consideration.

Selected 2024 Project Highlights

Wesley Family Services (WFS). WPEF has been working support WFS efforts in New Kensington to install a 104.1 DC kW roof mounted solar PV array on their newly constructed Pioneer Building. The Pioneer Building was constructed to Passive House standards. The solar array was completed in 2024.

Elk Country Visitor Center (ECVC) Expansion. WPEF has been supporting the Keystone Elk Country Alliance (KECA) efforts to expand the ECVC since 2010. In 2022, WPEF worked with KECA to support the construction of a new outdoor education building. WPEF supported the installation of a 26.6 DC kW roof mounted solar PV array and solar innovations architectural folding glass walls.

Six&Kane. In 2019, WPEF purchased and began the renovation of a vacant building on 63 North Fraley Street in Kane, PA. WPEF renovated the building to Passive House EnerPHit Plus standards and installed a 35.2 DC kW solar PV array with microinverters to produce a portion of its electric use. The five principles of Passive House are: thermal insulation, Passive House certified windows, adequate ventilation, airtightness, and thermal bridge reduction. WPEF received its Certificate of Occupancy on September 30, 2022. Since its opening, Six&Kane has been a flagship high performance building project of the WPEF. In 2024, Six&Kane completed its second year of operations which includes providing office and retail space, and outreach space that is made available to the public. WPEF organizes and hosts workshops and meeting that are aligned with WPEF vision and mission.

Slippery Rock University. In 2024, WPEF committed support for Slippery Rock's Macoskey Center for Sustainability Education and Research. Supported will be focused on kitchen energy efficiency improvements and expanded outreach efforts.

Audubon Society of Western Pennsylvania. In 2024, WPEF worked with the Audubon Society of Western Pennsylvania to assist them to begin the process on decarbonizing their Succop Nature Park. WPEF provided funding to support a 40.3 DC kW roof top mounted solar array, induction cooking at Succop's Marcraig House, and portable tabletop induction cooking units for their outreach efforts.

Annual PA Public Utilities Commission Presentation

Pennsylvania sustainable energy funds delivered their annual presentation to the Pennsylvania Public Utilities Commission and the Pennsylvania Sustainable Energy Board on March 28, 2024.

FINANCIAL APPROVALS

The WPEF Board approved \$2,739,806 to co-fund twenty one (21) funding requests in 2024. A summary of these funding requests are provided in Table 1.

FINANCIAL DISBURSEMENTS

The WPEF disbursed \$703,526 in funding to support twenty two (22) projects in 2024. A summary of these disbursements is provided in Table 2.

WPEF disbursements are made using performance milestones for each project. These milestones are unique to each project. Performance milestones may include, but are not limited to the following: executing agreements with contractors, receiving and installing building materials for the project, and the submission of project reports and photographs.

FINANCIAL REPORT

The WPEF utilized the professional services of Horner, Wible & Terek PC to independently conduct its 2024 annual audit. The WPEF fiscal year is based on the calendar year. As of December 31, 2024, the WPEF had a total net asset value of \$33,023,852. WPEF's core administrative expenses for the 2024 calendar year were \$487,936. The core administrative expense/ net asset value was 1.48%.

BOARD ORGANIZATION

The WPEF administration consists of a seven-member board of directors that provides oversight to the Fund and an administrative staff that oversees the day-to-day operations. All board members serve on a volunteer basis.

WPEF Board of Directors

- Alan Neuner, *Chairperson*
 - Geisinger Health System, retired
- John Walliser, *Vice Chairperson*
 - Pennsylvania Environmental Council
- John Kline, *Treasurer*
 - 1st Summit Bank
- Brandy Schimp, *Secretary*
 - Borough of Kane
- Rob Hosken
 - Building Performance Architecture
- Ed Miller
 - FirstEnergy Corporation
- Mike Pauly
 - Ventana USA

Brandy Schimp and Mike Pauly joined the WPEF board in 2024. Both were approved by the PA-PUC Commission at their February 1, 2024 public meeting.

WPEF Administrative Staff

Joel Morrison, The Pennsylvania State University, (University Park, PA). Mr. Morrison serves as WPEF’s Fund Administrator, which oversees the day-to-day operations of the Fund. He is assisted by Barbara Robuck (Marketing & Communications).

James Smith, Economic Growth Connection of Westmoreland (Greensburg, PA). Mr. Smith is the President & Chief Executive Officer of the Economic Growth Connection (EGC) of Westmoreland. He is assisted by George App (Accounting).

WPEF Board Meetings

The WPEF board meetings are scheduled at the beginning of each calendar year. The Board calendar may be adjusted on an as-needed basis. A summary of the 2024 WPEF Board meetings are presented below.

- ✓ February 1, 2024 Board Meeting (via Zoom)
- ✓ February 9, 2024 Board Meeting (via Zoom)
- ✓ February 29, 2024 Board Meeting (via Zoom)
- ✓ March 18, 2024 Board Meeting (via Zoom)
- ✓ April 18, 2024 Board Meeting (Export, PA)
- ✓ June 20, 2024 Board Meeting (via Zoom)
- ✓ August 22, 2024 Board Meeting (Gibsonia, PA)
- ✓ October 17-18, 2024 Board Meeting (State College, PA)
- ✓ December 12, 2024 Board Meeting (via Zoom)

TABLE 1. Project Related Financial Approvals - 2024

Organization	Grant	Loan	Comments
ClearWater Community Conservation Center (solar)	\$34,000	\$0	Co-funding for a roof mounted solar PV system
Keystone Elk Country Alliance	\$150,000	\$0	Co-funding for educational outreach program at Keystone Elk Country Visitor Center
Saint Paul Lutheran Church	\$39,860	\$0	Funding for energy efficiency improvements
Saint Vincent College	\$25,000	\$0	Co-funding for installation of 21 induction cooktops
Centre County Recycling & Refuse Authority	\$75,000	\$0	Co-funding for a three-roof 791 DC kW rooftop mounted solar PV system
Geisinger Grays Woods Healthplex	\$75,000	\$0	Co-funding for a 326 DC kW rooftop mounted solar PV system
Kane Historic Preservation Society	\$25,000	\$0	Funding for energy efficiency improvements
Kane Chamber of Commerce	\$25,000	\$0	Funding for Strategic Thinking Workshop
Nonprofit Development Corporation	\$30,000	\$0	Improving design and construction of micro homes using a veteran workforce
Chatham University	\$300,000	\$0	Green building retrofit initiative
Fayette County Community Action Agency	\$15,000	\$0	Exterior LED lighting upgrades on FCCAA campus
Metal Powder Products	\$0	\$1,000,000	Co-Funding for Energy Efficiency Improvements Using Robotic Systems
Patrick DiCesare Assets Family Partnership	\$0	\$295,000	Co-Funding for 134.1 DC kW Roof Mounted Solar PV System
Food Helpers	\$154,000	\$79,946	Co-Funding for 77.6 DC kW Ground Mounted Solar PV Farm Expansion
Pine Valley Camp Dining Hall	\$120,000	\$0	Co-Funding for solar PV, LED lighting, Building Envelop
ClearWater Community Conservation Center (envelope)	\$66,000	\$0	Co-funding for building envelope
Citizens Against Physical, Sexual, and Emotional Abuse	\$150,000	\$0	Co-funding for Collective Kitchen and Adjacent Lounge Area
Slippery Rock University Foundation	\$500	\$0	2024 Harmony Harvest Celebration sponsorship
Slippery Rock University Foundation	\$22,500	\$0	Macoskey center energy audit, kitchen efficiency upgrades, earth month celebrations
MYNDDSET Building Futures	\$50,000	\$0	Building Futures with Systems Thinking for Rural Communities
Slippery Rock University Foundation	\$8,000	\$0	2025 Harmony Harvest Celebration sponsorship
TOTAL	\$1,364,860	\$1,374,946	
GRAND TOTAL	\$2,739,806		

TABLE 2. Project Related Disbursements - 2024

Organization	Year Funding Commitment	Amount Expended	Comment
Wesley Family Services	2022	\$90,000	Grant. 104.1 DC kW roof mounted solar PV array
State College Community Land Trust	2022	\$20,000	Grant. Renovation of residential duplex to Passive House standards
Pine Valley Camp (solar)	2022	\$5,000	Grant. Construction of student dining hall with solar PV
Energy Efficiency Alliance	2022	\$15,000	Grant. Energy efficiency outreach and Six&Kane case study
Keystone Elk County Alliance	2022	\$30,760	Grant. Co-funding KECA outdoor education building with 26.6 DC kW solar PV
University Baptist & Brethren Church	2023	\$9,000	Grant. ASHRAE I energy audit
Audubon Society of Western Pennsylvania	2023	\$146,766	Grant. 40.3 DC KW roof mounted solar PV array and induction cooking system
Kane Historic Preservation Society	2023	\$14,000	Grant. Energy audit for Kane Historic Preservation Society and Kane Chapel
Kane Lutheran Home	2023	\$80,000	Grant. Co-funding for cloud based HVAC control system & induction cooking
Fairbrook United Methodist Church	2023	\$29,500	Grant/ Loan. Co-funding for ASHRAE I audit, 42.7 DC kW ground mounted solar PV
Seton Hill University	2023	\$43,000	Grant. Exterior LED lighting upgrade and student education
Fayette County Community Action Agency	2023	\$20,000	Grant. Construction of 2 apartment buildings, 1 townhome, 11 single family homes
Saint Vincent College	2023	\$30,000	Grant. Installation of a SmartFlower solar PV system
Saint Paul Lutheran Church	2023	\$9,000	Grant. ASHRAE I energy audit
Kane Area Childrens Museum	2023	\$5,000	Grant. Existing building conditions survey for childrens museum
Unitarian Universalist Fellowship of Centre County	2023	\$9,000	Grant. ASHRAE I energy audit
Chatham University	2023	\$15,000	Grant. Induction Cooking teaching kitchen at Eden Hall
Green Building Alliance	2023	\$37,500	Grant. New Kensington 2030 District
Fayette County Cultural Trust	2023	\$14,500	Grant. ASHRAE I energy audit
Keystone Elk Country Alliance	2024	\$25,000	Grant. Energy conservation outreach
Kane Chamber of Commerce	2024	\$25,000	Grant. Funding for Strategic Thinking Workshop
Fayette County Community Action Agency	2023	\$30,000	Grant. LED lighting upgrade at Republic Food Enterprise Center
Slippery Rock University Foundation	2024	\$500	Grant. 2024 Harmony Harvest Celebration sponsorship
GRAND TOTAL		\$703,526	

SEAL FIRMLY TO SEAL

9589 0710 5270 3652 0386 02



MAIL

POSTAL SERVICE 17120

RDC 03

S2324K504388-23

RECEIVED

MAR 2 2026

FROM: PA PUBLIC UTILITY COMMISSION
SECRETARY'S BUREAU



UNITED STATES
POSTAL SERVICE®

PRIORITY®
MAIL

VISIT US AT USPS.COM®
ORDER FREE SUPPLIES ONLINE

FROM:

WEST PENN ENERGY FUND
JOEL MORRISON
THE VALLAMONT BLDG. - SUITE 2
1001 UNIVERSITY DRIVE
STATE COLLEGE, PA 16801

TO:

SECRETARY
- PENNSYLVANIA PUC
Commonwealth Keystone Bldg. 2ND FLOOR
400 NORTH STREET
HARRISBURG, PA 17120

ed.
see the Domestic
ns of coverage.

CMPC
717-705-1952



To: PUC MASTER

Agency: PUC

Floor:

External Carrier:

3/2/2026 7:46:11 AM



9589071052703652038602

Label 228, December 2023

FOR DOMESTIC AND INTERNATIONAL USE