



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



WPPSEF

WEST PENN POWER
SUSTAINABLE
ENERGY FUND

**The 2023 Annual Report of the
West Penn Power Sustainable Energy Fund
(January 1, 2023 - December 31, 2023)**

Prepared By

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

DATE OF DEPOSIT

FEB 26 2026

PA Public Utility Commission
Secretary's Bureau

Submitted For

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

www.wppsef.org

FORWARD

WPPSEF operates on a calendar year basis. This report summarizes the WPPSEF's activities between January 1 to December 31, 2023.

APPROVALS

The WPPSEF Board approved \$1,213,166 to co-fund twenty two (22) funding requests in 2023.

DISBURSEMENTS

The WPPSEF disbursed \$559,070 in funding to support nineteen (19) projects in 2023.

YEAR END BALANCE

The WPPSEF utilized the professional services of Horner, Wible & Terek PC to independently conduct its 2023 annual audit. As of December 31, 2023, the WPPSEF had a total net asset value of \$31,359,164.

ADMINISTRATIVE EXPENSES

WPPSEF's administrative expenses were \$516,795 in 2023. The core administrative expense/ net asset value was 1.65%.

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.

The Fund entered its twenty third (23) year of operations in 2023. WPPSEF continually strives to increase its visibility in the WPP service region and to provide support to clean energy projects that benefit the WPP ratepayer. WPPSEF 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

WPPSEF worked to identify new mission-aligned projects throughout 2023 while providing guidance and oversight to its portfolio of existing projects. Selected highlights and accomplishments are provided below.

2023 Request for Proposals

WPPSEF 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, WPPSEF solicits project proposals through a request-for-proposals (RFP) process. The RFP was released on December 19, 2022 and closed on March 31, 2023. A total of 21 proposals were submitted for funding consideration.

Selected 2023 Project Highlights

Fayette County Community Action Agency. In 2023, WPPSEF committed support to the Fayette County Community Action Agency Beeson Town Homes development located in Uniontown, PA. The project consisted of two apartment buildings (24 units total), one town home (2 units), eleven single family homes, and a community building. WPPSEF focused its funding to support the construction of the Beeson Town Homes to ENERGY STAR standards and will showcase induction cooking in the community building.

Elk County Community Recycling Center. In 2023, the Elk County Community Recycling Center completed upgrading their biomass furnace controls with the support of WPPSEF. The Center utilizes a variety of woody biomass fuels such as wood chips from sustainable forestry harvests and woody biomass reclaimed from local supplied pallets. The biomass furnace provides the entire heating need of the recycling center. The upgrade in furnace controls will lower the use of the biomass feedstocks while lower furnace emissions.

State College Community Land Trust. In 2023, WPPSEF committed support to the State College Community Land Trust efforts to renovate a residential housing duplex to Passive House standards. The renovation efforts were led by Envinity, a local contractor in State College with staff and a construction crew trained in Passive House construction.

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 April 28, 2023.

FINANCIAL APPROVALS

The WPPSEF Board approved \$1,213,166 to co-fund twenty two (22) funding requests in 2023. A summary of these funding requests is provided in Table 1.

FINANCIAL DISBURSEMENTS

The WPPSEF disbursed \$559,070 in funding to support nineteen (19) projects in 2023 years. A summary of these funding 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 WPPSEF utilized the professional services of Horner, Wible & Terek PC to independently conduct its 2023 annual audit. The WPPSEF fiscal year is based on the calendar year. As of December 31, 2023, the WPPSEF had a total net asset value of \$31,359,164. The core administrative expense/ net asset value was 1.65%. 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.

BOARD ORGANIZATION

The WPPSEF 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 of the board members serve on a volunteer basis.

WPPSEF Board of Directors

- Alan Neuner, *Chairperson*
 - Geisinger Health System, retired

- John Walliser, *Vice Chairperson*
 - Pennsylvania Environmental Council

- John Kline, *Treasurer*
 - Mid Penn Bank

- Jim Stark, *Secretary*
 - Fayette County Community Action Agency

- Rob Hosken,
 - Building Performance Architecture

- Ed Miller
 - FirstEnergy Corporation

- Michele Ponchione
 - Instant Brands

WPPSEF Administrative Staff

Joel Morrison, The Pennsylvania State University, (University Park, PA). Mr. Morrison serves as WPPSEF's Fund Administrator, which oversees the day-to-day operations of the Fund. He is assisted by Barbara Robuck (Marketing & Communications) and Elizabeth Wood (Database Design/ Maintenance).

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).

WPPSEF Board Meetings

The WPPSEF 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 2023 WPPSEF Board meetings are presented below.

- | | |
|-----------------------|-----------------------------------|
| ✓ February 16, 2023 | Board Meeting (via Zoom) |
| ✓ April 27, 2023 | Board Meeting (Kane, PA) |
| ✓ June 15, 2023 | Board Meeting (via Zoom) |
| ✓ August 24, 2023 | Board Meeting (Butler, PA) |
| ✓ October 19-20, 2023 | Board Meeting (State College, PA) |
| ✓ November 13, 2023 | Board Meeting (Latrobe, PA) |
| ✓ December 14, 2023 | Board Meeting (via Zoom) |

TABLE 1. Project Related Financial Approvals - 2023

Organization	Grant	Loan	Comments
Summit at Shiloh Condomium Association	\$53,480	\$363,420	Loan/ Grant. Co-funding for 261.9 kW DC ground mount solar array and energy audit
University Baptist & Brethren Church	\$9,000	\$0	Grant. Co-funding for a ASHRAE level 1 energy audit
Audubon Society of Western Pennsylvania	\$146,766	\$0	Grant. 40.3 DC kW roof mounted solar PV array and induction cooking system
Kane Historic Preservation Society	\$14,000	\$0	Grant. Energy audit for Kane Historic Preservation Society and Kane Chapel
Kane Lutheran Home	\$100,000	\$0	Grant. Co-funding for cloud based HVAC control system & induction cooking
Fairbrook United Methodist Church	\$39,500	\$30,000	Grant/ Loan. Co-funding for ASHRAE I audit, 42.7 DC kW ground mounted solar PV
Seton Hill University	\$43,000	\$0	Grant. Exterior LED lighting upgrade and student education
Kane Area Radio Association	\$30,000	\$0	Grant. 5.67 kW DC solar PV system and energy efficiency improvements
University Pittsburg - Bradford	\$10,000	\$0	Grant. Co-funding for solar crosswalk
Fayette County Community Action Agency	\$50,000	\$0	Grant. Construction (2 apartment buildings, 1 townhome, 11 single family homes
Elk County Community Recycling Center	\$9,000	\$0	Grant. Energy audit for Recycling Center and Elk County Conservation Center
Habitat for Humanity of Greater Centre County	\$30,000	\$0	Grant. Co-funding for incorporate 3-D printing into residential construction
Saint Vincent College	\$30,000	\$0	Grant. Installation of a SmartFlower solar PV system
Saint Paul Lutheran Church	\$9,000	\$0	Grant. ASHRAE I energy audit
Kane Area Childrens Museum	\$10,500	\$0	Grant. Existing building conditions survey for childrens museum
Unitarian Universalist Fellowship of Centre County	\$9,000	\$0	Grant. ASHRAE I energy audit
Chatham University	\$39,000	\$0	Grant. Induction Cooking teaching kitchen at Eden Hall
Green Building Alliance	\$95,000	\$0	Grant. New Kensington 2030 District
Fayette County Cultural Trust	\$14,500	\$0	Grant. ASHRAE I energy audit
American Legion Smith Pletcher Post 779	\$30,000	\$0	Grant. Co-funding for 99.8 kW ground mount solar PV system
Fayette County Community Action Agency	\$30,000	\$0	Grant. LED lighting upgrade at Republic Food Enterprise Center
ReFarm Café at Windswept Farm	\$0	\$18,000	Loan. Bridge funding for REAP solar PV system grant.
TOTAL	\$801,746	\$411,420	
GRAND TOTAL	\$1,213,166		

TABLE 2. Project Related Disbursements - 2023

Organization	Year Funding Commitment	Amount Expended	Comment
Fayette County Community Action Agency	2018	\$10,000	Grant. Co-funding Fairchance Elderly Housing (ENERGY STAR construction and solar)
Elk County Community Recycling Center	2021	\$32,800	Grant. Upgrade biomass furnace controls
Wesley Family Services	2021	\$80,720	Grant. Roof mounted 104.1 DC kW DC kW solar PV system
State College Community Land Trust	2022	\$105,000	Grant. Co-funding for renovation of residential duplexes to Passive House standards
Fulton County Medical Center	2021	\$34,000	Grant. Energy assessment and building commissioning of medical center
Uniontown Volunteer Fire Booster Association	2022	\$17,500	Grant. Interior LED lighting upgrade
Pine Valley Camp	2022	\$5,000	Grant. Co-funding for a roof mounted solar PV system with battery storage
Keystone Elk Country Alliance	2022	\$44,750	Grant. Co-funding KECA outdoor education building with 26.6 DC kW solar PV
University Mennonite Church	2022	\$25,000	Grant. 26.0 DC kW roof mounted solar PV system
Summit at Shiloh Condomium Association	2023	\$13,100	Grant. Co-funding for an energy audit
Kane Lutheran Home	2023	\$20,000	Grant. Co-funding for cloud based HVAC control system & induction cooking
Fairbrook United Methodist Church	2023	\$40,000	Grant/ Loan. Co-funding for ASHRAE 1 audit, 42.7 DC kW ground mounted solar PV
Kane Area Radio Association	2023	\$30,000	Grant. 5.67 kW DC solar PV system and energy efficiency improvements
Fayette County Community Action Agency	2023	\$10,000	Grant. Construction of 2 apartment buildings, 1 townhome, 11 single family homes
Elk County Community Recycling Center	2023	\$9,000	Grant. Energy audit for Recycling Center and Elk County Conservation Center
Kane Area Childrens Museum	2023	\$5,500	Grant. Existing building conditions survey for childrens museum
Tennis Roofing	2022	\$56,200	Loan. Funding for a 39.6 kW DC roof mounted solar PV system.
Green Building Alliance	2023	\$2,500	Grant. New Kensington 2030 District
ReFarm Café at Windswept Farm	2023	\$18,000	Loan. Bridge loan for solar REAP grant
GRAND TOTAL		\$559,070	

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