



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

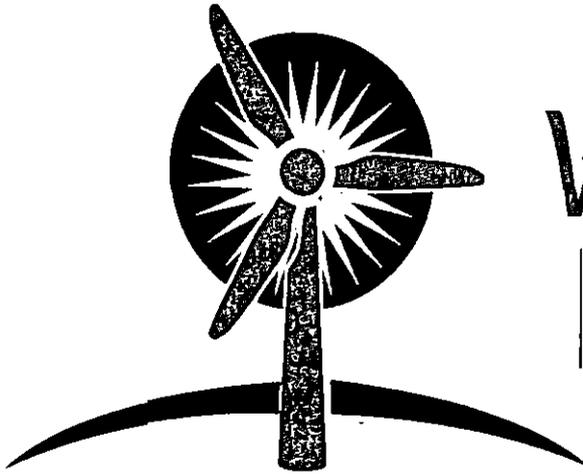
Cc:

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 2019 Annual Report of the
West Penn Power Sustainable Energy Fund
(January 1, 2019 - December 31, 2019)**

Prepared By

JOEL L. MORRISON
WPPSEF FUND ADMINISTRATOR
THE PENNSYLVANIA STATE UNIVERSITY
EMS ENERGY INSTITUTE
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, 2019.

APPROVALS

The WPPSEF Board approved \$964,031 to support eighteen (18) funding requests in 2019.

DISBURSEMENTS

The WPPSEF disbursed \$860,813 to support twenty-five (25) projects in 2019.

YEAR END BALANCE

The WPPSEF had a net asset value of \$28,315,459 as of December 31, 2019.

ADMINISTRATIVE EXPENSES

WPPSEF's administrative expenses were \$439,881 in 2019. The core administrative expense/ net asset value was 1.56%.

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 nineteenth year of operations in 2019. WPPSEF continually strives to increase its visibility in the WPP service region and to provide technical and financial 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 2019 while providing guidance and oversight to its portfolio of existing projects. Selected highlights and accomplishments are provided below.

2019 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 September 4, 2018 and closed on January 16, 2019. A total of twenty-two (22) proposals were submitted for funding consideration.

Selected 2019 Project Highlights

Greater Washington County Food Bank. The Greater Washington County Food Bank worked with the WPPSEF in 2019 to conduct a comprehensive energy audit on its Food Bank located at 909 National Pike West near Brownsville, PA. The Food Bank wanted to develop a better understanding of their electric use and identify cost-effective energy efficiency upgrades that could be installed to reduce their operating costs. The audit produced a series of recommendations that WPPSEF and the Food Bank started to implement in 2019. The audit recommended upgrading the building lighting to LED, installing a heat pump hot water heater, and to install surge protection in the building to address some power quality related issues.

SolarSense PA II PSU. The WPPSEF committed to provide a \$1,500,000 loan to support the construction of a 2.0 MW solar ground mounted PV farm between Orchard Road and next to Mount Nittany Medical Center in State College. WPPSEF worked with the Alternative Energy Development Group, Sustainable Energy Fund, and Penn State to develop the solar project. Penn State's Office of the Physical Plant celebrated the completion of the solar farm on October 18, 2019

63 Fraley Street, LLC. WPPSEF has funded the construction of new buildings and the renovation of existing buildings to high performance building standards such as ENERGY STAR, DOE Zero Energy Ready, Leadership in Energy and Environmental Design (LEED), Living Building Challenge, and Passive House standards. WPPSEF had a growing desire to purchase and renovate its own building to gain additional experience in the development, construction, operations, and community impact of a high-performance building. In 2019, WPPSEF purchased a nominal 18,000 square foot vacant building located at 63 North Fraley Street in Kane, PA. WPPSEF established a wholly owned subsidiary, 63 Fraley Street, LLC for the purpose of renovating the building.

The building was constructed during the 1897-1898 timeframe as a multi-use two-story brick building. A third floor was added in the 1920's. At the time of WPPSEF purchase in June 2019, the vacant building needed urgent repair. Building renovations began in July 2019. In October 2019, the WPPEF board approved to rebuild the building to Passive House EnerPHit standards. By the end of 2019, the building interior demolition was completed, and a portion of the building rear exterior was removed. Moshier Studio in Pittsburgh was selected to lead the Passive House EnerPHit design team and Envinity in State College was selected to lead the rebuild in the field. The project renovation is expected to take 24-30 months to complete.

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 February 7, 2019. The presentation reviewed WPPSEF's activities in 2018 and upcoming activities in 2019.

FINANCIAL APPROVALS

The WPPSEF Board approved \$964,031 to support eighteen (18) funding requests in 2019.

An itemized listing of these projects is provided in Table 1.

FINANCIAL DISBURSEMENTS

The WPPSEF disbursed \$860,813 to support twenty-five (25) projects in 2019.

A summary of these financial disbursements is provided in Table 2.

WPPSEF 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: securing power purchase agreements if needed, executing agreements with contractors, receiving and installing project equipment and building materials, 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 2019 annual audit. The WPPSEF fiscal year is based on the calendar year. As of December 31, 2019, the WPPSEF had a net asset value of \$28,315,459. WPPSEF's core administrative expense for the 2019 calendar year was \$439,881. 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. The core administrative expense/ net asset value percentage was 1.56%.

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 the board members serve on a volunteer basis.

WPPSEF Board of Directors

- Alan Neuner, *Chairperson*
 - Geisinger Health System

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

- John Kline, *Treasurer*
 - Standard Bank

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

- Rob Hosken,
 - Building Performance Architecture

- Ed Miller
 - West Penn Power

- Michele Ponchione
 - Corelle 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 Greg Daigle (Business Development Officer) and George App (Accounting).

WPPSEF Board Meetings

The WPPSEF board meetings and conference calls are scheduled at the beginning of each calendar year. The Board calendar may be adjusted on an as-needed basis. A summary of the 2019 WPPSEF Board meetings are presented below.

- | | |
|---------------------|---------------------------------|
| ✓ January 3, 2019 | Board Meeting (Conference call) |
| ✓ February 22, 2019 | Board Meeting (Conference call) |
| ✓ March 1, 2019 | Board Meeting (Conference call) |
| ✓ April 1, 2019 | Board Meeting (Conference call) |
| ✓ April 10, 2019 | Board Meeting (Electronic vote) |
| ✓ April 25, 2019 | Board Meeting (State College) |
| ✓ June 7, 2019 | Board Meeting (Electronic vote) |
| ✓ June 20, 2019 | Board Meeting (New Kensington) |
| ✓ August 22, 2019 | Board Meeting (York, PA) |
| ✓ October 17, 2019 | Board Meeting (Benezette, PA) |
| ✓ December 19, 2019 | Board Meeting (Charleroi, PA) |

TABLE 1. Project Related Financial Approvals - 2019

| Organization | Grant | Loan | Comments |
|--------------------------------------|------------------|------------------|--|
| Leg Up Farm | \$140,000 | \$0 | Grant. Leg Up Farm construction to provide therapy to children with special needs |
| Tree Pittsburgh | \$15,000 | \$0 | Grant. Funding for 8.5 DC KW roof mounted solar system on Tree Pittsburg office |
| Delmont Public Library | \$40,000 | \$0 | Grant. Funding for new 4,150 square foot library with 34 kW solar and LED lighting |
| Greater Washington County Food Bank | \$15,000 | \$0 | Grant. Energy & Facilities energy assessment |
| Mid-Atlantic Bioenergy Council | \$9,500 | \$0 | Grant. Sponsorship of 2019 Mid-Atlantic Bioenergy conference |
| Rostraver Public Library | \$7,500 | \$0 | Grant. Comprehensive energy audit |
| Historic Church of St. Peter | \$65,000 | \$0 | Grant. Energy components for Brownsville Community Center new construction |
| Jefferson Volunteer Fire Company | \$17,000 | \$0 | Grant. Interior LED lighting upgrades |
| PA Wilds Center for Entrepreneurship | \$131,992 | \$0 | Grant. Renovation of second floor at Laughing Owl Press for PA Wilds Media Lab |
| Geisinger System Services | \$35,180 | \$0 | Grant. Optimize air flow at Gray's Woods & Jersey Shore to reduce electricity use |
| Washington & Jefferson College | \$25,000 | \$0 | Grant. Installation of six electric vehicle charging stations |
| Keystone Energy Education Fund | \$5,000 | \$0 | Grant. Sponsorship of healthcare forum conference |
| Kane Area Community Center | \$7,500 | \$0 | Grant. Comprehensive energy audit |
| Storyshop | \$21,000 | \$0 | Grant. Video to showcase ReFarm Café at Windswept Farm construction |
| The Pennsylvania State University | \$10,000 | \$0 | Grant. Sponsorship of Drawdown conference |
| Greater Washington County Food Bank | \$21,700 | \$0 | Grant. LED lighting upgrade, heat pump hot water heater, and surge suppression |
| State College Community Land Trust | \$35,000 | \$0 | Grant. Funding to provide energy efficiency improvements to 16 housing units |
| ReFarm Café at Windswept Farm | \$0 | \$362,659 | Loan. Supplemental funding for farm-to-table restaurant built to LBCstandards |
| TOTAL | \$601,372 | \$362,659 | |
| GRAND TOTAL | \$964,031 | | |

TABLE 2. Project Related Disbursements - 2019

| Organization | Year Funding Commitment | Amount Expended | Comment |
|--|-------------------------|------------------|--|
| Audubon Society of Western Pennsylvania | 2015 | \$29,000 | Grant. Funding for 40 foot WindStax wind power system at Succop Nature Park barn |
| ReFarm Café at Windswept Farm | 2017 | \$166,382 | Loan. Farm-to-table restaurant built to Living Building Challenge standards |
| Green Building Alliance | 2017 | \$20,000 | Grant. Funding to provide technical and logistical support to PennSEF |
| SolarSense PA II PSU, LLC | 2017 | \$126,000 | Loan. Co-funding for a 2.0 solar PV farm at Orchard Road in State College |
| The Pennsylvania State University - New Kensington | 2017 | \$55,000 | Grant. Funding for New Kensington LaunchBox sustainable energy program |
| Carnegie Library of Pittsburgh | 2018 | \$25,000 | Grant. Construction of Passive House library in Carrick Neighborhood of Pittsburgh |
| Keystone Energy Efficiency Fund | 2018 | \$10,500 | Grant. Co-funding for KEEF's Moving to the Head of the Class school awards |
| Fayette County Community Action Agency | 2018 | \$15,000 | Grant. Funding for 50.7 DC KW roof solar system on Fairchance senior housing |
| West Overton Village | 2018 | \$10,000 | Grant. Energy efficiency upgrades at West Overton Village small barn distillery |
| Washington & Jefferson College | 2018 | \$11,400 | Grant. Funding for energy efficiency public outreach |
| Leg Up Farm | 2019 | \$2,500 | Grant. Leg Up Farm construction to provide therapy to children with special needs |
| Mount Pleasant Library | 2018 | \$51,170 | Grant. Co-funding for energy efficiency improvements |
| Delmont Public Library | 2018 | \$3,100 | Grant. Construction assistance for ENERGY STAR new construction design |
| Greater Washington County Food Bank | 2019 | \$15,000 | Grant. Energy & Facilities energy assessment |
| Mid-Atlantic Bioenergy Council | 2019 | \$9,500 | Grant. Sponsorship of 2019 Mid-Atlantic Bioenergy conference |
| Rostraver Public Library | 2019 | \$7,500 | Grant. Comprehensive energy audit |
| Historic Church of St. Peter | 2019 | \$10,000 | Grant. Energy components for Brownsville Community Center new construction |
| Jefferson Volunteer Fire Company | 2019 | \$14,500 | Grant. Interior LED lighting upgrades |
| PA Wilds Center for Entrepreneurship | 2019 | \$35,000 | Grant. Renovation of second floor at Laughing Owl Press for PA Wilds Media Lab |
| Keystone Energy Education Fund | 2019 | \$5,000 | Grant. Sponsorship of healthcare forum conference |
| Kane Area Community Center | 2019 | \$7,500 | Grant. Comprehensive energy audit |
| Sustainable Energy Fund | 2018 | \$7,500 | Grant. 2019 Energy Path conference sponsorship |
| Storyshop | 2019 | \$6,000 | Grant. Video to showcase ReFarm Café at Windswept Farm construction |
| The Pennsylvania State University | 2019 | \$10,000 | Grant. Sponsorship of Drawdown conference |
| ReFarm Café at Windswept Farm | 2019 | \$208,261 | Loan. Supplemental funding for farm-to-table restaurant built to LBC standards |
| GRAND TOTAL | | \$860,813 | |

TESS FIRMLY TO SEAL

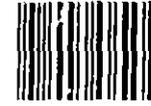


9589 0710 5270 3652 0386 02



ORI
MAIL

Retail



17120

RDC 03

U.S. POSTAGE PAID
PM
STATE COLLEGE, PA 16801
FEB 26, 2028

\$21.40

S2324K504398-23

RECEIVED

ted.

see the Domestic

ris of cover

FROM: PENNSYLVANIA PUBLIC UTILITIES BUREAU



UNITED STATES
POSTAL SERVICE®

PRIORITY®
MAIL

VISIT US AT USPS.COM®
ORDER FREE SUPPLIES ONLINE

CMPC
717-705-1952

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



To: PUC MASTER
Agency PUC
Floor
External Carrier

3/2/2028 7:46:11 AM



9589071052703652038602