



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

## DATE OF DEPOSIT

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FEB 26 2026

February 26, 2026

PA Public Utility Commission  
Secretary's Bureau

Secretary  
Pennsylvania PUC  
Commonwealth Keystone Building – 2<sup>nd</sup> 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

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# WPPSEF

WEST PENN POWER  
SUSTAINABLE  
ENERGY FUND

**The 2016 Annual Report of the  
West Penn Power Sustainable Energy Fund  
(January 1, 2016 - December 31, 2016)**

**Prepared By**

JOEL L. MORRISON  
WPPSEF FUND ADMINISTRATOR  
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](http://www.wppsef.org)

## **FORWARD**

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WPPSEF operates on a calendar year basis. This report summarizes the WPPSEF's activities between January 1 to December 31, 2016.

### **APPROVALS**

The WPPSEF Board approved \$910,451 to support twenty-one (21) new funding requests in 2016.

### **DISBURSEMENTS**

The WPPSEF disbursed \$1,392,493 to twenty-four (24) in funding in 2016.

### **YEAR END BALANCE**

The WPPSEF had a net asset value of \$25,225,038 as of December 31, 2016.

### **ADMINISTRATIVE EXPENSES**

WPPSEF's administrative expenses were \$376,966 in 2016. The core administrative expense/ net asset value was 1.49%.

## **INTRODUCTION**

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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 2016, the Fund entered its sixteenth year of operations. 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**

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WPPSEF worked to identify new mission-aligned projects throughout 2016 while providing guidance and oversight to its portfolio of existing projects. Selected highlights and accomplishments are provided below.

### **2016 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 closed January 21, 2016. A total of twenty (20) proposals were submitted for funding consideration.

## **Selected 2016 Project Highlights**

**State College Community Land Trust.** In 2016, the WPPSEF worked with the State College Community Land Trust (SCCLT) to approve funding for their efforts to construct two homes to U.S. Department of Energy Net Zero energy ready standards. The project was named GreenBuild. The GreenBuild homes were designed through a collaborative effort between SCCLT and Penn State's Hamer Center for Community Design as part of the 2015 U.S. Department of Energy (DOE) Race to Zero Student Design competition. This collegiate competition challenges the next generation of building science professionals to design an affordable home that meets DOE's Zero Energy Ready Home guidelines. By definition, these high-performance homes are so energy-efficient that renewable power can offset most or all of the homeowner's annual energy consumption. WPPSEF provided \$450,000 in co-funding to support the construction of two 1,400 square foot homes. SCCLT selected Envinity of State College to finalize the GreenBuild design and construct the homes. A portion of the WPPSEF grant support was used to install a 6.6 kW solar photovoltaic (PV) systems on each home. The solar PV was designed to generate approximately 8,053 kWh, annually.

**Pennsylvania Society for Healthcare Facility Engineers.** The Pennsylvania Society for Healthcare Facility Engineers (PSHFE) requested assistance to enroll a group of their members into the American Society of Healthcare Engineers "Energy to Care" program and equipping them with training to work towards a 10% energy reduction. Two PSHFE members has received the national Energy to Care recognition. In 2016, WPPSEF committed to PSHFE efforts to expand the Energy to Care program to ten hospitals in Pennsylvania.

**Pittsburgh Parks Conservancy.** The Pittsburgh Parks Conservancy (PPC) worked with WPPSEF to support their efforts to construct the Frick Environmental Center to Living Building Challenge (LBC) standards. In 2016, WPPSEF committed \$100,000 to support the emerging LBC high performance building standards and workforce in Pennsylvania.

## **Selected Sustainable Energy Outreach Events**

**Community Workshops.** WPPSEF conducted four (4) community workshops to provide attendees a better understanding of the WPPSEF brand and how the fund may be able to invest in their clean energy project that benefits the West Penn Power ratepayer.

The following workshops were held in 2016:

- |                     |                   |
|---------------------|-------------------|
| ❖ June 14, 2016     | Pittsburgh, PA    |
| ❖ November 29, 2016 | Monroeville, PA   |
| ❖ November 10, 2016 | Scottsdale, PA    |
| ❖ December 2, 2016  | State College, PA |

## **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 11, 2016. The presentation reviewed WPPSEF's activities in 2015 and upcoming activities in 2016.

## **FINANCIAL APPROVALS**

The WPPSEF Board approved \$910,451 to support twenty-one (21) new funding requests in 2016. A summary of these funding requests is provided in Table 1.

## **FINANCIAL DISBURSEMENTS**

The WPPSEF disbursed \$1,392,493 to twenty-four (24) in funding in 2016. A summary of these funding 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: executing agreements with contractors material supply vendors, submitting project reports and photographs, and organizing site visits and meetings with project leaders for WPPSEF.

## **FINANCIAL REPORT**

In 2016, the WPPSEF retained the services of Horner, Wible & Terek PC to conduct its annual audit. The WPPSEF fiscal year is based on the calendar year. As of December 31, 2016, the total asset value of the WPPSEF is reported as \$25,225,038. WPPSEF's core administrative expenses for the 2016 calendar year were \$376,966. This represents a core administrative expense/ total asset value percentage of 1.49%. 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 board members serve on a volunteer basis.

### **WPPSEF Board of Directors**

- Rob Hosken, *President*
  - ▶ Building Performance Architecture
  
- Michele Ponchione, *Vice President*
  - ▶ World Kitchen
  
- Jim Stark, *Secretary*
  - ▶ Fayette County Community Action Agency
  
- Pat O'Brien, *Treasurer*
  - ▶ Community Bank

- John Walliser
  - ▶ Pennsylvania Environmental Council
- Ed Miller
  - ▶ West Penn Power
- Alan Neuner
  - ▶ Geisinger Health System

**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 Mike Strong (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 WPPSEF’s 2016 Board meetings and conference calls are presented below:

- February 10            (Conference Call)
- February 17            (Grantmaking Review)
- March 9                State College, PA (Board meeting)
- April 13                (Conference Call)
- May 11                 (Conference Call)
- June 8                 Greensburg, PA (Board meeting)
- July 13                 (Conference Call)
- August 10              (Conference Call)
- September 14         (Conference Call)
- October 21             Danville, PA (Board meeting)
- December 14         Charleroi, PA (Board meeting)

**TABLE 1. Project Related Financial Approvals - 2016**

Organization	Grant	Loan	Comments
PA Wilds Center for Entrepreneurship	\$23,800	\$0	Grant. Develop a tour of LEED-certified buildings along PA Wilds Artisan Trail
County of Elk	\$15,000	\$0	Grant. Elk County Recycling Center engineering design of biomass furnace
Green Building Alliance	\$25,000	\$0	Grant. Conduct workshops & workforce development trainings for Passive House
Mountain Watershed Association	\$2,000	\$0	Grant. Comprehensive energy audit
State College Community Land Trust	\$100,000	\$0	Grant. Construction of GreenBuild duplexes to Net Zero Energy Ready standards
State College Community Land Trust	\$0	\$350,000	Loan. Construction bridge loan for GreenBuild to Net Zero Energy Ready standards
Excelsa Health	\$50,000	\$0	Grant. Co-funding for SkySpark fault software for energy efficiency improvements
The Pennsylvania State University	\$35,000	\$0	Grant. Shavers Creek Environmental Center energy efficiency improvements
The Pennsylvania State University	\$9,540	\$0	Grant. Student sponsorship for DOE Race to Zero collegiate competition
Eliance	\$62,636	\$0	Grant. Development and production of Quiet Ones video series
Pennsylvania Environmental Council	\$20,000	\$0	Grant. Low impact hydro assessments of Ohiopyle, Moraine & McConnells Mill
Pennsylvania Environmental Council	\$7,500	\$0	Grant. Sponsorship for 2017 Deep Carbon Reduction conference
West Overton Village	\$10,000	\$0	Grant. Comprehensive energy audit
Pittsburgh Park Conservancy	\$100,000	\$0	Grant. Construction of Frick Environmental Center to Living Building standards
Boss Controls	\$15,000	\$0	Grant. Conduct smart plug load reduction program
Pennsylvania Society for Health Facility Engineering	\$14,750	\$0	Grant. Deploy American Society of Healthcare Engineers Energy to Care program
Mountain Watershed Association	\$51,225	\$0	Grant. Energy efficiency improvements
Vandergrift Improvement Program	\$4,000	\$0	Grant. Energy audit of old "J.C. Penney" building
Sustainable Energy Fund	\$5,000	\$0	Grant. 2017 Energy Path conference sponsorship
PA Biomass Energy Association	\$7,500	\$0	Grant. 2017 Mid-Atlantic Biomass Conference & Expo (MABEX)
Keystone Energy Efficiency Alliance	\$2,500	\$0	Grant. 2017 KEEA annual conference sponsorship
<b>TOTAL</b>	<b>\$560,451</b>	<b>\$350,000</b>	
<b>GRAND TOTAL</b>	<b>\$910,451</b>		

TABLE 2. Project Related Disbursements - 2016

Organization	Year Funding Commitment	Amount Expended	Comment
U.S. Endowment for Forestry & Communities	2013	\$25,000	Grant. Development of boiler thermal efficiency protocol
Alliance for Green Heat	2014	\$10,000	Grant. Co-funding for wood stove change out program
Gregg Township	2015	\$3,500	Grant. Co-funding for solar hot water system at Old Gregg school
Windber Area Authority	2014	\$2,500	Grant. Field testing for Kress Motors new motor design
Republic Food Enterprise Center	2014	\$25,000	Grant. Funding for food storage cooler using hybrid cooling technology
Pittsburgh Gateway Corporation	2015	\$996,000	Loan. Co-funding for two combined cooling and heating Capstones microturbines
Keystone Elk Country Alliance	2014	\$1,000	Grant. Funding for LEED-certification of KECA Outdoor Educational Classroom
Women in Need	2014	\$15,000	Grant. Funding for Variable Refrigeration Volume (VRV) heating/ cooling
Eastern Westmoreland Career & Technology Center	2015	\$7,318	Grant. Funding 1 kW solar PV system with energy storage & 24 exterior LED lights
Vandergrift Improvement Program	2015	\$15,000	Grant. Funding for 14 LED parking area lights and energy education outreach
Saint Vincent College	2015	\$14,000	Grant. LED lighting upgrade for Latimer Family Library & Performing Arts Center
PA Biomass Energy Association	2015	\$22,165	Grant. Co-funding for PBEA operational plan and state wood energy plan
Wilson College	2015	\$22,500	Grant. LED lighting upgrade for John Stewart Memorial Library expansion
Westmoreland Community Action	2015	\$12,312	Grant. Funding for 25 DayStar natural lighting systems at WCA Shop Demo Depot
Sustainable Energy Fund	2015	\$20,000	Grant. 2016 Energy Path conference sponsorship
Sustainable Energy Fund	2015	\$80,500	Grant. Energy Sprout sponsorship
PA Wilds Center for Entrepreneurship	2016	\$10,400	Grant. Develop a tour of LEED-certified buildings along PA Wilds Artisan Trail
County of Elk	2016	\$15,000	Grant. Elk County Recycling Center engineering design of biomass furnace
Green Building Alliance	2016	\$22,500	Grant. Conduct workshops and workforce development trainings for Passive House
Mountain Watershed Association	2016	\$2,000	Grant. Comprehensive energy audit
Elliance	2016	\$798	Grant. Development and production of Quiet Ones video series
Pennsylvania Environmental Council	2016	\$13,500	Grant. Low impact hydro assessments of Ohiopyle, Moraine & McConnells Mill
Pennsylvania Environmental Council	2016	\$2,500	Grant. Sponsorship for 2017 Deep Carbon Reduction conference
Pittsburgh Park Conservancy	2016	\$50,000	Grant. Construction of Frick Environmental Center to Living Building standards
KEEA Energy Education Fund	2015	\$4,000	Grant. 2016 KEEA annual conference sponsorship
<b>GRAND TOTAL</b>		<b>\$1,392,493</b>	

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