



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

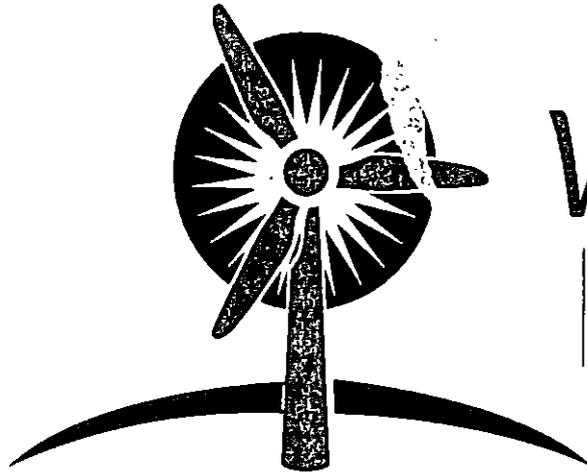
Cc:

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 2017 Annual Report of the
West Penn Power Sustainable Energy Fund
(January 1, 2017 - December 31, 2017)**

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

The West Penn Sustainable Energy Fund (WPPSEF) operates on a calendar year basis. This report summarizes the WPPSEF's activities between January 1 to December 31, 2017.

APPROVALS

The WPPSEF Board approved \$4,343,300 to support fifteen (15) funding requests in 2017.

DISBURSEMENTS

The WPPSEF disbursed \$342,160 to support twenty-five (25) projects in 2017.

YEAR END BALANCE

The WPPSEF had a net asset value of \$27,748,316 as of December 31, 2017.

ADMINISTRATIVE EXPENSES

WPPSEF's administrative expenses were \$388,058 in 2017. The core administrative expense/ net asset value was 1.40%.

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 seventeenth year of operations in 2017. 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 2017 while providing guidance and oversight to its portfolio of existing projects. Selected highlights and accomplishments are provided below.

2017 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, WPEF solicits project proposals through a request-for-proposals (RFP) process. The RFP was released on October 28, 2016 and closed on February 1, 2017. A total of 15 proposals were submitted for funding consideration.

Selected 2017 Project Highlights

RER Energy Group. The RER Energy Group collaborated with the WPPSEF install a 1.925 MW solar PV system at the Tuscarora School District in Franklin County, Pennsylvania. The solar PV system is projected to generate 2.5 million kWh annually. WPPSEF committed \$1.1M dollars to the project.

Westmoreland County Industrial Development Corporation. In September 2017, the WPPSEF committed support to the Westmoreland County Industrial Development Corporation collaborative effort with Penn State's New Kensington campus to renovate a building located at 701 Fifth Avenue, New Kensington into Penn State's Corner LaunchBox. WPPSEF committed \$310,000 to support the building's renovation and improving its energy efficiency.

Pennsylvania Environmental Council. WPPSEF provided a conference sponsorship to plan and host a conference that was designed to engage stakeholders and decision makers in a dialogue on the concept of deep decarbonization, or reducing greenhouse gas emissions by more than 80% or more by mid-century, whether this was an appropriate goal for Pennsylvania; and what strategies, if any, should be part of a deep decarbonization effort for the state. The conference "Achieving Deep Carbon Reductions: Paths for Pennsylvania's Electricity Future" was held on March 16-17, 2017 at the David Lawrence Conference Center in Pittsburgh. In June 2017, the Pennsylvania Environmental Council released a white paper on the Conference and the summary recommendations for Pennsylvania.

PA Wilds Center for Entrepreneurship. WPPSEF is working with the PA Wilds Center for Entrepreneurship and the Pennsylvania's Department of Conservation & Natural

Resources (DCNR) to showcase DCNR's high performance buildings in the PA Wilds region of Pennsylvania. The showcase will be integrated into the PA Wilds newly launched website under the Stewardship page. The project is expected to be completed in early 2018.

Selected Sustainable Energy Community Outreach

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:

- December 7, 2017 Lemont Furnace, PA
- December 12, 2017 Butler, PA
- December 14, 2017 State College, PA
- December 15, 2017 Kané, 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 23, 2017. The presentation reviewed WPPSEF's activities in 2016 and upcoming activities in 2017.

FINANCIAL APPROVALS

The WPPSEF Board approved \$4,343,300 to support fifteen (15) funding requests in 2017. A summary of these funding requests is provided in Table 1.

DISBURSEMENTS

The WPPSEF disbursed \$342,160 to support twenty-five (25) projects in 2017.

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: 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 2017 annual audit. The WPPSEF fiscal year is based on the calendar year. As of December 31, 2017, the WPPSEF had a total net asset value of \$27,748,316. WPPSEF's core administrative expenses for the 2017 calendar year were \$388,058. The core administrative expense/ net asset value was 1.40%. 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

- John Kline, *Treasurer*
 - ▶ S&T Bank

- John Walliser
 - ▶ Pennsylvania Environmental Council

- Ed Miller
 - ▶ West Penn Power

- Alan Neuner
 - ▶ Geisinger Health System

Mr. John Kline joined the WPPSEF Board of Directors in 2017 after receiving PA-PUC approval on May 18, 2017. Mr. Kline is Senior Vice President Vice President of Commercial Lending at S&T Bank. He is based in Greensburg, PA.

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 the WPPSEF's 2017 Board meetings and conference calls are presented below.

- January 11 Conference Call
- March 22 State College, PA (Board Meeting)
- April 12 Conference Call
- May 5 Email update in lieu of conference call
- June 7 Greensburg, PA (Board Meeting)
- June 20 & 21 Electronic voting
- July 12 Conference Call
- July 25 Electronic vote
- August 9 Conference Call
- September 13 Conference Call
- October 26-27 State College, PA (Board Meeting)
- November 6 & 8 Conference Calls
- December 13 Charleroi, PA (Board Meeting)

TABLE 1. Project Related Financial Approvals - 2017

Organization	Grant	Loan	Comments
ReFarm Café at Windswept Farm	\$0	\$1,100,000	Loan. Farm-to-table restaurant built to Living Building Challenge standards
Saint Francis University	\$23,000	\$0	Grant. Co-funding for a mobile sustainable energy education trailer
The Pennsylvania State University	\$75,000	\$0	Grant. Co-funding for a combined heat & power anaerobic farm digester
Waldorf School of Pittsburgh	\$25,000	\$0	Grant. Co-funding for an energy dashboard in Waldorf's smart energy laboratory
PA Wilds Center for Entrepreneurship	\$22,800	\$0	Grant. Development of sustainable energy showcase project in PA Wilds
Passive House of Western Pennsylvania	\$25,000	\$0	Grant. Funding for 2018 North American Passive House conference in Pittsburgh
RER Energy Group	\$0	\$1,100,000	Loan. Funding for a 1.925 MW solar PV farm at Tuscarora School District
Green Building Alliance	\$75,000	\$0	Grant. Funding to provide technical and logistical support to PennSEF
SolarSense PA II PSU, LLC	\$0	\$1,500,000	Loan. Co-funding for a 2.0 solar PV farm at Orchard Road in State College
Westmoreland County Industrial Dev. Corporation	\$25,000	\$0	Grant. Co-funding for New Kensington Corner LaunchBox
Westmoreland County Industrial Dev. Corporation	\$0	\$285,000	Loan. Co-funding for New Kensington Corner LaunchBox
The Pennsylvania State University - New Kensington	\$75,000	\$0	Grant. Funding for New Kensington LaunchBox sustainable energy program
The Pennsylvania State University	\$5,000	\$0	Grant. Conference sponsorship for Invent Penn State Venture & IP Conference
Sustainable Energy Fund	\$5,000	\$0	Grant. Conference sponsorship for SEF 2018 Energy Path
Keystone Energy Efficiency Alliance	\$2,500	\$0	Grant. 2018 KEEA annual conference sponsorship
TOTAL	\$358,300	\$3,985,000	
GRAND TOTAL	\$4,343,300		

TABLE 2. Project Related Disbursements - 2017

Organization	Year Funding Commitment	Amount Expended	Comment
Alliance for Green Heat	2014	\$5,600	Grant. Co-funding for wood stove change out program
PA Biomass Energy Association	2015	\$17,835	Grant. Co-funding for PBEA operational plan and state wood energy plan
PA Wilds Center for Entrepreneurship	2016	\$13,400	Grant. Develop a tour of LEED-certified buildings along PA Wilds Artisan Trail
Green Building Alliance	2016	\$2,500	Grant. Conduct workshops and workforce development trainings for Passive House
State College Community Land Trust	2016	\$27,500	Grant. Construction of GreenBuild duplexes to Net Zero Energy Ready standards
Excelsa Health	2016	\$7,500	Grant. Co-funding for SkySpark fault software for energy efficiency improvements
The Pennsylvania State University	2016	\$25,000	Grant. Shavers Creek Environmental Center energy efficiency improvements
The Pennsylvania State University	2016	\$4,770	Grant. Student sponsorship for DOE Race to Zero collegiate competition
Elliance	2016	\$51,839	Grant. Development and production of Quiet Ones video series
Pennsylvania Environmental Council	2016	\$6,500	Grant. Low impact hydro assessments of Ohiopyle, Moaraine & McConnells Mill
Pennsylvania Environmental Council	2016	\$5,000	Grant. Sponsorship for 2017 Deep Carbon Reduction conference
West Overton Village	2016	\$10,000	Grant. Comprehensive energy audit
Pittsburgh Park Conservancy	2016	\$10,000	Grant. Construction of Frick Environmental Center to Living Building standards
Boss Controls	2016	\$8,064	Grant. Conduct smart plug load reduction program
Pennsylvania Society for Health Facility Engineering	2016	\$9,750	Grant. Deploy American Society of Healthcare Engineers Energy to Care program
Mountain Watershed Association	2016	\$51,225	Grant. Energy efficiency improvements
Vandergrift Improvement Program	2016	\$4,000	Grant. Energy audit of old "J.C. Penney" building
Saint Francis University	2017	\$20,000	Grant. Co-funding for a mobile sustainable energy education trailer
Waldorf School of Pittsburgh	2017	\$14,500	Grant. Co-funding for an energy dashboard in Waldorf's smart energy laboratory
Passive House of Western Pennsylvania	2017	\$7,000	Grant. Funding for 2018 North American Passive House conference in Pittsburgh
Sustainable Energy Fund	2016	\$5,000	Grant. 2017 Energy Path conference sponsorship
Green Building Alliance	2017	\$2,500	Grant. Funding to provide technical and logistical support to PennSEF
PA Biomass Energy Association	2016	\$5,900	Grant. 2017 Mid-Atlantic Biomass Conference & Expo (MABEX)
Keystone Energy Efficiency Alliance	2016	\$2,500	Grant. 2017 KEEA annual conference sponsorship
Westmoreland County Industrial Dev. Corporation	2017	\$24,278	Grant. Co-funding for New Kensington Corner LaunchBox
GRAND TOTAL		\$342,160	

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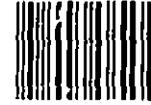


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TO:

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

CMPC

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