



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,

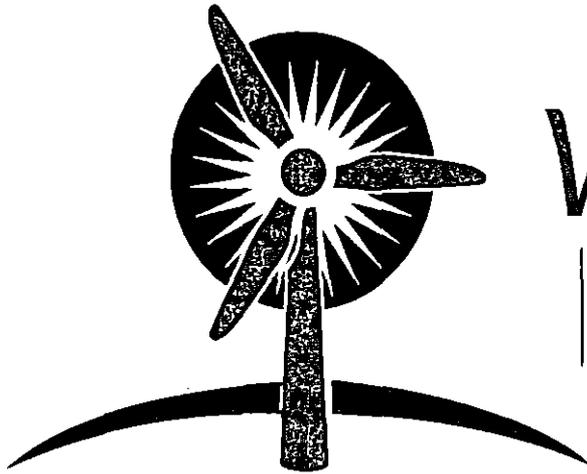
Joel L. Morrison

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 2021 Annual Report of the
West Penn Power Sustainable Energy Fund
(January 1, 2021 - December 31, 2021)**

Prepared By

JOEL L. MORRISON
BARBARA J. ROBUCK
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, 2021.

APPROVALS

The WPPSEF Board approved \$356,250 to support five (5) new funding requests in 2021.

DISBURSEMENTS

The WPPSEF disbursed \$283,222 to support thirteen (13) projects in 2021.

YEAR END BALANCE

The WPPSEF had a net asset value of \$34,559,740 as of December 31, 2021.

ADMINISTRATIVE EXPENSES

WPPSEF's administrative expenses were \$474,774 in 2021. The core administrative expense/ net asset value was 1.37%.

IMPACT OF COVID-19 IN 2021

Although the statewide shutdown due to COVID-19 was lifted in 2020, the resiliency of supply chain and contractors for sustainable energy projects in Pennsylvania and the construction activities at 63 Fraley Street in Kane has not improved from 2020.

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-first year of operations in 2021. 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 2021 while providing guidance and oversight to its portfolio of existing projects. Selected highlights and accomplishments are provided below.

2021 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 June 21, 2021 and closed on September 9, 2021. A total of eleven (11) proposals were submitted for funding consideration.

Selected 2021 Project Highlights

Wesley Family Services. WPPSEF committed \$170,720 in November 2021 to install a 104-kW roof-mounted solar PV system on Wesley Family Services (WFS) Pioneer building in New Kensington. Pioneer was designed as a mixed-use building which incorporated 36 affordable housing apartments and commercial office space for WFS staff. The Pioneer building is LEED Gold certified, meets Passive House Plus standards, and was built to be solar ready.

Washington & Jefferson College. The Center for Energy Policy and Management (CEPM) at Washington & Jefferson College worked with the WPPSEF to install six (6) Electric Vehicle (EV) charging stations at Washington & Jefferson College in Washington, PA. The EV charging stations installation began on June 6, 2021 and was completed on August 8, 2021.

63 Fraley Street, LLC. The renovation of WPPSEF's 63 Fraley Street building continued throughout 2021. Although supply chain challenges were encountered throughout 2021, the design and construction teams adjusted the rebuild logistics to continually make progress throughout the year. The rebuild of the basement was completed in 2021. The basement ceiling serves as the lower building envelope. The installation of the front exterior RAICO Therm+ timber curtainwall started on October 19, 2021. The installation of the Ventana Select windows in the exterior rear was completed and the installation of a thermally broken metal cladding was started. A 44.37 DC kW grid-tied, roof mounted solar system with Enphase microinverters was installed and energized on November 22, 2021. The floors (first, second, and third) were at various stages of completion.

Annual PA Public Utilities Commission Presentation

Pennsylvania sustainable energy funds delivered their annual presentation to the Pennsylvania Public Utilities Commission via a live event on April 29, 2021. The presentation reviewed WPPSEF's activities in 2020 and upcoming activities in 2021.

FINANCIAL APPROVALS

The WPPSEF Board approved \$356,250 to support five (5) new funding requests in 2021. A summary of these funding requests is provided in Table 1.

FINANCIAL DISBURSEMENTS

The WPPSEF disbursed \$283,222 to support thirteen (13) projects in 2021. 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, 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 2021 annual audit. The WPPSEF fiscal year is based on the calendar year. The WPPSEF had a net asset value of \$34,559,740 as of December 31, 2021.

WPPSEF's administrative expenses were \$474,774 in 2021. The core administrative expense/ net asset value was 1.37%. 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

- 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
 - 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 2021 WPPSEF Board meetings are presented below.

- | | |
|---------------------|---------------------------------|
| ✓ February 18, 2021 | Board Meeting (Conference call) |
| ✓ March 5, 2021 | Board Meeting (Electronic vote) |
| ✓ April 15, 2021 | Board Meeting (Conference call) |
| ✓ June 17, 2021 | Board Meeting (Conference call) |
| ✓ August 4, 2021 | Board Meeting (Conference call) |
| ✓ August 26, 2021 | Board Meeting (Conference call) |
| ✓ October 13, 2021 | Board Meeting (Conference call) |
| ✓ November 12, 2021 | Board Meeting (Kane, PA) |
| ✓ December 16, 2021 | Board Meeting (Conference Call) |

TABLE 1. Project Related Financial Approvals - 2021

Organization	Grant	Loan	Comments
ReFarm Café at Windswept Farm	\$0	\$61,230	Loan. Funding for a 36.0 DC kW ground mount solar PV system
Menno Haven, Inc	\$25,000	\$0	Grant. Co-funding of a 16 DC kW roof mounted solar system
County of Elk Community Recycling Center	\$37,800	\$0	Grant. Upgrade of biomass furnace controls to improve furnace operations
Wesley Family Services	\$170,720	\$0	Grant. Roof mounted 104.1 DC kW DC kW solar PV system
Fulton County Medical Center	\$61,500	\$0	Grant. Energy assessment and building commissioning of medical center
TOTAL	\$295,020	\$61,230	
GRAND TOTAL	\$356,250		

TABLE 2. Project Related Disbursements - 2021

Organization	Year Funding Commitment	Amount Expended	Comment
Fayette County Community Action Agency	2018	\$15,000	Grant. Funding for 50.7 DC kW roof solar system on Fairchance senior housing
State College Borough Water Authority	2018	\$32,500	Grant. Co-funding for variable speed pumps and 60.0 DC kW roof solar system
PA Wilds Center for Entrepreneurship	2019	\$24,492	Grant. Renovation of second floor at Laughing Owl Press for PA Wilds Media Lab
ReFarm Café at Windswept Farm	2021	\$61,230	Loan. Funding for a 36.0 DC kW ground mount solar PV system
Washington & Jefferson College	2019	\$2,000	Grant. Installation of six electric vehicle charging stations
Rostraver Public Library	2020	\$35,000	Grant. Energy efficiency improvements
Kane Area Community Center	2020	\$11,000	Grant. LED lighting upgrade and heat pump hot water heater
The Pennsylvania State University (PennTap)	2020	\$10,000	Grant. Workforce & education development through alternative energy technology
County of Elk Community Recycling Center	2020	\$26,500	Grant. Woody biomass furnace handling system modifications
Slippery Rock University	2020	\$17,500	Grant. Campus wide energy infrastructure study to achieve carbon neutrality
Frank Sarris Public Library	2020	\$22,000	Grant. LED lighting upgrade at Frank Sarris Library
Kane Area Industry Development Corporation	2020	\$18,500	Grant. Public outreach for Six&Kane Passive House Technology
Brownsville Area Revitalization Corporation	2020	\$7,500	Grant. Comprehensive energy audit and electrical upgrades
GRAND TOTAL		\$283,222	



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

CMPC
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