

**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:

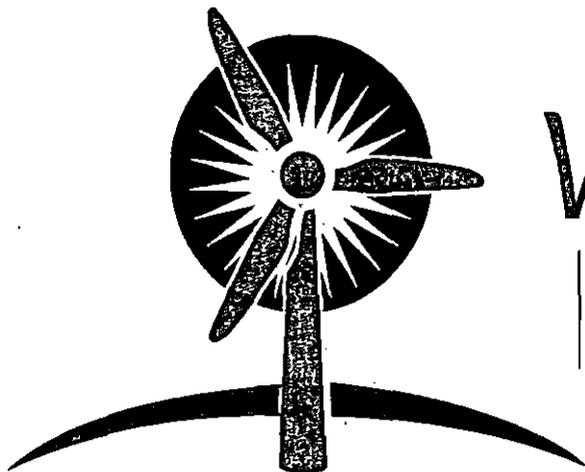
Mr. Alan Neuner, WPEF President

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

**2018 Annual Report**  
**West Penn Power Sustainable Energy Fund**  
(January 1, 2018 - December 31, 2018)

**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](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, 2018.

### **APPROVALS**

The WPPSEF Board approved \$929,316 to support eighteen (18) new funding requests in 2018.

### **DISBURSEMENTS**

The WPPSEF disbursed \$3,230,995 in funding to support thirty (30) projects in 2018.

### **YEAR END BALANCE**

The WPPSEF had a net asset value of \$25,186,448 as of December 31, 2018.

### **ADMINISTRATIVE EXPENSES**

WPPSEF's administrative expenses were \$413,829 in 2018. The core administrative expense/ net asset value was 1.64%.

## **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.

The Fund entered its eighteenth year of operations in 2018. WPPSEF continually strives to increase its visibility in the WPP service region and to provide technical and financial support to sustainable 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 2018 while providing guidance and oversight to its portfolio of existing projects. Selected highlights and accomplishments are provided below.

### **2018 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 31, 2017 and closed on February 27, 2018. A total of twenty-one (21) proposals were submitted for funding consideration.

## **Selected 2018 Project Highlights**

**State College Borough Water Authority.** The State College Borough Water Authority (SCBWA) Nixon-Kocher water treatment plant was designed to process 3.33 million-gallons/ day from seven groundwater wells. In October 2018, WPPSEF committed \$50,000 to co-fund twenty-five (25) variable speed pumps and a 60 DC kW roof mounted solar PV system. The variable speed pumps will be installed on seven (7) well field pumps and twenty (20) water treatment pumps to process the water throughout the plant. The projected electric savings from these pumps is estimated to be 40% which equates to 3,900,000 kWh/ year. The 60 DC kW roof mounted solar system, comprised of 192 modules, is projected to generate 88,975 kWh, annually.

**Carnegie Library of Pittsburgh.** In April 2018, WPPSEF committed a \$35,000 grant to co-fund Carnegie Library of Pittsburgh's (CLP) construction of Carrick Neighborhood library to Passive House high performance building standards. These standards reduce the building's ecological footprint by producing an ultra-low energy efficient that requires a fraction of the electric use for heating and cooling, while delivering superior levels of comfort. The new, 8,000 square foot two-story library building will replace the outdated one-story CLP Carrick Library. The library's vertical expansion enhances the streetscape along Pittsburgh's Brownville Road and allows the Carrick Branch to gain more visibility as the valued civic resource that it is. The street-facing facade makes use of glazing to balance daylighting with thermal performance while establishing a strong and welcoming connection between street and library interior.

**West Overton Village.** Overholt rye whiskey began its history in Pennsylvania. In 1859 a new, five-story brick structure replaced an old mill and distillery and incorporated operations under one roof. That building remains today as the whiskey museum at West Overton Village, the only intact pre-Civil War industrial village in Pennsylvania and an important site on the American Whiskey Trail. West Overton Village (WOV) is listed on the National Register of Historic Places and is notable because it is the birthplace of Henry

Clay Frick. WPPSEF has worked with WOV since 2016 by supporting their efforts to better understand and reduce their electric usage. WPPSEF provided support for an ASHRAE Level 1 energy audit that was conducted as part of the planned renovation of WOV homestead, museum, and barn distillery. In 2018, WPPSEF provided \$30,000 in funding to support the renovation of WOV small barn distillery which would house a 50-gallon still for the distillery. The small barn energy improvements included air sealing, vaulted ceiling insulation, two-stage high efficiency heat pumps, and LED lighting upgrades.

**County of Fayette.** WPPSEF committed a \$50,000 grant to the County of Fayette to support their efforts to install twenty-five (25) solar powered LED streetlights to improve the security and public safety at the Jacob's Creek public park. This project was implemented as part of the Jacob's Creek Master Plan.

### **Selected Sustainable Energy Community Outreach**

WPPSEF conducted two (2) 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:

- January 9, 2018                      Mercersburg, PA
- January 17, 2018                     Ford City, 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 8, 2018. The presentation reviewed WPPSEF's activities in 2017 and upcoming activities in 2018.

## **FINANCIAL APPROVALS**

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The WPPSEF Board approved \$929,316 to support eighteen (18) new funding requests in 2018. An itemized listing of these projects is provided in Table 1.

## **FINANCIAL DISBURSEMENTS**

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The WPPSEF disbursed \$3,230,995 in funding to support thirty (30) projects in 2018. 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**

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The WPPSEF utilized the professional services of Horner, Wible & Terek PC to independently conduct its 2018 annual audit. The WPPSEF fiscal year is based on the calendar year. As of December 31, 2018, the WPPSEF had a net asset value of \$25,186,448. WPPSEF's core administrative expense for the 2018 calendar year was \$413,829. 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 1.64%.

## **BOARD ORGANIZATION**

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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**

- 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, *Director*
  - Building Performance Architecture
  
- Ed Miller, *Director*
  - West Penn Power
  
- Michele Ponchione, *Director*
  - 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 2018 WPPSEF Board meetings are presented below.

- February 15, 2018                      Board Meeting (Greensburg, PA)
- April 19, 2018                         Board Meeting (State College, PA)
- June 14, 2018                         Board Meeting (Ohiopyle, PA)
- August 23, 2018                      Board Meeting (Latrobe, PA)
- November 1-2, 2018                 Board Meetings (State College, PA)
- December 13, 2018                 Board Meeting (Charleroi, PA)

**TABLE 1. Project Related Financial Approvals - 2018**

Organization	Grant	Loan	Comments
Carnegie Library of Pittsburgh	\$35,000	\$0	Grant. Construction of Passive House library in Carrick Neighborhood of Pittsburgh
New Sun Rising (PA Solar Center)	\$25,000	\$0	Grant. Establishment of PA Solar Center
Keystone Energy Efficiency Fund	\$15,000	\$0	Grant. Co-funding for KEEF's Moving to the Head of the Class school awards
Fayette County Community Action Agency	\$75,000	\$0	Grant. Funding for 50.7 DC kW roof solar system on Fairchance senior housing
West Overton Village	\$30,000	\$0	Grant. Energy efficiency upgrades at West Overton Village small barn distillery
Alliance for Green Heat	\$5,000	\$0	Grant. Sponsorship of 2018 Wood Stove Design Challenge in Washington D.C
County of Fayette	\$50,000	\$0	Grant. Solar security LED lights for Jacob's Creek Park public park
Washington & Jefferson College	\$13,400	\$0	Grant. Funding for energy efficiency public outreach
State College Borough Water Authority	\$50,000	\$0	Grant. Co-funding for variable speed pumps and 60.0 DC kW roof solar system
PA Wilds Center for Entrepreneurship	\$20,000	\$0	Grant. Comprehensive energy audit for PA Wild's business Incubator
Mount Pleasant Library	\$10,000	\$0	Grant. Comprehensive energy audit
Trinity Area High School	\$25,000	\$0	Grant. Co-funding for solar SmartFlower at Trinity Area High School
Saint Vincent College	\$75,000	\$0	Grant. Co-funding for Latimer Family Library Expansion/ Renovation
Energy Innovation Center	\$0	\$400,000	Loan. Building renovation of 13,200 square feet at Energy Innovation Center
Mount Pleasant Library	\$58,670	\$0	Grant. Co-funding for energy efficiency improvements
Delmont Public Library	\$9,500	\$0	Grant. Construction assistance for ENERGY STAR new construction design
Speciality Seal Group	\$0	\$25,246	Loan. Plant wide CFL removal and LED lighting upgrade
Sustainable Energy Fund	\$7,500	\$0	Grant. 2019 Energy Path conference sponsorship
<b>TOTAL</b>	<b>\$504,070</b>	<b>\$425,246</b>	
<b>GRAND TOTAL</b>	<b>\$929,316</b>		

TABLE 2. Project Related Disbursements - 2018

Organization	Year Funding Commitment	Amount Expended	Comment
Audubon Society of Western Pennsylvania	2015	\$21,000	Grant. Funding for 40 foot WindStax wind power system at Succop Nature Park barn
State College Community Land Trust	2016	\$72,500	Grant. Construction of GreenBuild duplexes to Net Zero Energy Ready standards
State College Community Land Trust	2016	\$295,457	Loan. Construction bridge loan for GreenBuild to Net Zero Energy Ready standards
Excela Health	2016	\$42,500	Grant. Co-funding for SkySpark fault software for energy efficiency improvements
The Pennsylvania State University	2016	\$10,000	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	\$10,000	Grant. Development and production of Quiet Ones video series
Pittsburgh Park Conservancy	2016	\$40,000	Grant. Construction of Frick Environmental Center to Living Building standards
Pennsylvania Society for Health Facility Engineering	2016	\$5,000	Grant. Deploy American Society of Healthcare Engineers Energy to Care program
ReFarm Café at Windswept Farm	2017	\$933,618	Loan. Farm-to-table restaurant built to Living Building Challenge standards
Saint Francis University	2017	\$3,000	Grant. Co-funding for a mobile sustainable energy education trailer
Waldorf School of Pittsburgh	2017	\$10,500	Grant. Co-funding for an energy dashboard in Waldorf's smart energy laboratory
Passive House of Western Pennsylvania	2017	\$18,000	Grant. Funding for 2018 North American Passive House conference in Pittsburgh
Green Building Alliance	2017	\$22,500	Grant. Funding to provide technical and logistical support to PennSEF
SolarSense PA II PSU, LLC	2017	\$1,374,000	Loan. Co-funding for a 2.0 solar PV farm at Orchard Road in State College
Westmoreland County Industrial Dev. Corporation	2017	\$285,000	Loan. Co-funding for New Kensington Corner LaunchBox
The Pennsylvania State University - New Kensington	2017	\$10,000	Grant. Funding for New Kensington LaunchBox sustainable energy program
The Pennsylvania State University	2017	\$5,000	Grant. Conference sponsorship for Invert Penn State Venture & IP Conference
Carnegie Library of Pittsburgh	2018	\$10,000	Grant. Construction of Passive House library in Carrick Neighborhood of Pittsburgh
Keystone Energy Efficiency Fund	2018	\$1,500	Grant. Co-funding for KEEF's Moving to the Head of the Class school awards
West Overton Village	2018	\$20,000	Grant. Energy efficiency upgrades at West Overton Village small barn distillery
Alliance for Green Heat	2018	\$4,500	Grant. Sponsorship of 2018 Wood Stove Design Challenge in Washington D.C.
Washington & Jefferson College	2018	\$2,000	Grant. Funding for energy efficiency public outreach
Mount Pleasant Library	2018	\$6,250	Grant. Comprehensive energy audit
Trinity Area High School	2018	\$2,500	Grant. Co-funding for solar SmartFlower at Trinity Area High School
Sustainable Energy Fund	2017	\$5,000	Grant. Conference sponsorship for SEF 2018 Energy Path
Mount Pleasant Library	2018	\$7,500	Grant. Co-funding for energy efficiency improvements
Delmont Public Library	2018	\$6,400	Grant. Construction assistance for ENERGY STAR new construction design
Keystone Energy Efficiency Alliance	2017	\$2,500	Grant. 2018 KEEA annual conference sponsorship
<b>GRAND TOTAL</b>		<b>\$3,230,995</b>	

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