

Department of the Treasury  
Internal Revenue Service

or Section 4947(a)(1) Trust Treated as Private Foundation  
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 Go to [www.irs.gov/Form990PF](http://www.irs.gov/Form990PF) for instructions and the latest information.

**2019**

**Open to Public Inspection**

For calendar year 2019 or tax year beginning , 2019, and ending , 20

Name of foundation  
PGE Foundation

Number and street (or P.O. box number if mail is not delivered to street address) Room/suite  
121 SW Salmon Street, 1 WTC0510- Tax Department

City or town, state or province, country, and ZIP or foreign postal code  
Portland, OR 97204

**A** Employer identification number  
93-1138806

**B** Telephone number (see instructions)  
503-464-7966

**C** If exemption application is pending, check here

**D** 1. Foreign organizations, check here   
2. Foreign organizations meeting the 85% test, check here and attach computation

**E** If private foundation status was terminated under section 507(b)(1)(A), check here

**F** If the foundation is in a 60-month termination under section 507(b)(1)(B), check here

**G** Check all that apply:  Initial return  Initial return of a former public charity  
 Final return  Amended return  
 Address change  Name change

**H** Check type of organization:  Section 501(c)(3) exempt private foundation  
 Section 4947(a)(1) nonexempt charitable trust  Other taxable private foundation

**I** Fair market value of all assets at end of year (from Part II, col. (c), line 16) **\$** 25,944,789

**J** Accounting method:  Cash  Accrual  
 Other (specify) \_\_\_\_\_ (Part I, column (d), must be on cash basis.)

<b>Part I Analysis of Revenue and Expenses</b> (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>	1 Contributions, gifts, grants, etc., received (attach schedule)	108,183			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B. . . . .				
	3 Interest on savings and temporary cash investments	444	444		
	4 Dividends and interest from securities . . . . .	220,842	220,842		
	5a Gross rents . . . . .				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	218,686			
	b Gross sales price for all assets on line 6a <u>1,418,193</u>				
	7 Capital gain net income (from Part IV, line 2)		218,686		
	8 Net short-term capital gain. . . . .				
	9 Income modifications . . . . .				
	10a Gross sales less returns and allowances . . . . .				
b Less: Cost of goods sold . . . . .					
c Gross profit or (loss) (attach schedule) . . . . .					
11 Other income (attach schedule) . . . . .					
12 <b>Total.</b> Add lines 1 through 11 . . . . .	548,155	439,972			
<b>Operating and Administrative Expenses</b>	13 Compensation of officers, directors, trustees, etc. . . . .				
	14 Other employee salaries and wages . . . . .				
	15 Pension plans, employee benefits . . . . .				
	16a Legal fees (attach schedule) . . . . .				
	b Accounting fees (attach schedule) . . . . .				
	c Other professional fees (attach schedule) . . . . .	19,452	19,452		
	17 Interest . . . . .				
	18 Taxes (attach schedule) (see instructions). . . . .	8,989			
	19 Depreciation (attach schedule) and depletion . . . . .				
	20 Occupancy . . . . .				
	21 Travel, conferences, and meetings . . . . .				
	22 Printing and publications . . . . .				
	23 Other expenses (attach schedule) . . . . .	113,816			113,816
	24 <b>Total operating and administrative expenses.</b> Add lines 13 through 23. . . . .	142,257	19,452		113,816
	25 Contributions, gifts, grants paid . . . . .	1,171,102			1,176,102
26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	1,313,359	19,452		1,289,918	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-765,204				
b <b>Net investment income</b> (if negative, enter -0-)		420,520			
c <b>Adjusted net income</b> (if negative, enter -0-)					

<b>Part II Balance Sheets</b> Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing . . . . .	123,233	190,453	190,453
	2 Savings and temporary cash investments . . . . .			
	3 Accounts receivable ▶ Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶ Less: allowance for doubtful accounts ▶			
	5 Grants receivable. . . . .			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	7 Other notes and loans receivable (attach schedule) ▶ Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use. . . . .			
	9 Prepaid expenses and deferred charges . . . . .			
	10a Investments - U.S. and state government obligations (attach schedule). . . . .			
	b Investments - corporate stock (attach schedule) . . . . .			
	c Investments - corporate bonds (attach schedule). . . . .			
	11 Investments - land, buildings, and equipment: basis Less: accumulated depreciation (attach schedule) ▶			
	12 Investments - mortgage loans. . . . .			
	13 Investments - other (attach schedule) . . . . .	22,834,846	25,754,336	25,754,336
	14 Land, buildings, and equipment: basis Less: accumulated depreciation (attach schedule) ▶			
15 Other assets (describe ▶ )				
16 <b>Total assets</b> (to be completed by all filers - see the instructions. Also, see page 1, item I) . . . . .	22,958,079	25,944,789	25,944,789	
<b>Liabilities</b>	17 Accounts payable and accrued expenses . . . . .	12,808	15,832	
	18 Grants payable . . . . .	180,000	175,000	
	19 Deferred revenue. . . . .	17,727	0	
	20 Loans from officers, directors, trustees, and other disqualified persons. . . . .			
	21 Mortgages and other notes payable (attach schedule) . . . . .			
	22 Other liabilities (describe ▶ <u>TAXES PAYABLE</u> )	1,000	2,689	
	23 <b>Total liabilities</b> (add lines 17 through 22) . . . . .	211,535	193,521	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow FASB ASC 958, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 24, 25, 29, and 30.</b>			
	24 Net assets without donor restrictions . . . . .	22,746,544	25,751,268	
	25 Net assets with donor restrictions . . . . .			
	<b>Foundations that do not follow FASB ASC 958, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 26 through 30.</b>			
	26 Capital stock, trust principal, or current funds . . . . .			
	27 Paid-in or capital surplus, or land, bldg., and equipment fund. . . . .			
	28 Retained earnings, accumulated income, endowment, or other funds . . . . .			
29 <b>Total net assets or fund balances</b> (see instructions). . . . .	22,746,544	25,751,268		
30 <b>Total liabilities and net assets/fund balances</b> (see instructions) . . . . .	22,958,079	25,944,789		

<b>Part III Analysis of Changes in Net Assets or Fund Balances</b>		
1 Total net assets or fund balances at beginning of year - Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return) . . . . .	1	22,746,544
2 Enter amount from Part I, line 27a . . . . .	2	-765,204
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3 . . . . .	4	21,981,340
5 Decreases not included in line 2 (itemize) ▶ <u>UNREALIZED CAPITAL GAINS</u>	5	-3,769,928
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29 . . . . .	6	25,751,268

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)				(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1 a</b> PUBLICLY TRADED SECURITIES				P	VAR	VAR
<b>b</b>						
<b>c</b>						
<b>d</b>						
<b>e</b>						
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)			
<b>a</b> 1,418,193		1,199,507	218,686			
<b>b</b>						
<b>c</b>						
<b>d</b>						
<b>e</b>						
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.						
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))			
<b>a</b>			218,686			
<b>b</b>						
<b>c</b>						
<b>d</b>						
<b>e</b>						
<b>2</b> Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			<b>2</b>	218,686	
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8 . . . . .	{ If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8 . . . . . }			<b>3</b>		

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?  Yes  No  
 If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

**1** Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2018	1,270,848	24,889,403	0.0511
2017	1,321,815	24,495,385	0.0540
2016	1,184,717	22,778,226	0.0520
2015	1,137,698	23,997,335	0.0474
2014	1,287,364	25,069,687	0.0514
<b>2</b> Total of line 1, column (d) . . . . .			<b>2</b> 0.2559
<b>3</b> Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years . . . . .			<b>3</b> 0.0512
<b>4</b> Enter the net value of noncharitable-use assets for 2019 from Part X, line 5 . . . . .			<b>4</b> 24,481,758
<b>5</b> Multiply line 4 by line 3. . . . .			<b>5</b> 1,253,466
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b). . . . .			<b>6</b> 4,205
<b>7</b> Add lines 5 and 6. . . . .			<b>7</b> 1,257,671
<b>8</b> Enter qualifying distributions from Part XII, line 4. . . . . If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.			<b>8</b> 1,289,918

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)**

<b>1a</b>	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. . . . . Date of ruling or determination letter: _____ (attach copy of letter if necessary - see instructions)		
<b>b</b>	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b. . . . .	<b>1</b>	4,205
<b>c</b>	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b). . . . .		
<b>2</b>	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	<b>2</b>	
<b>3</b>	Add lines 1 and 2. . . . .	<b>3</b>	4,205
<b>4</b>	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	<b>4</b>	
<b>5</b>	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0- . . . . .	<b>5</b>	4,205
<b>6</b>	Credits/Payments:		
<b>a</b>	2019 estimated tax payments and 2018 overpayment credited to 2019. . . . .	<b>6a</b>	1,811
<b>b</b>	Exempt foreign organizations - tax withheld at source. . . . .	<b>6b</b>	
<b>c</b>	Tax paid with application for extension of time to file (Form 8868). . . . .	<b>6c</b>	
<b>d</b>	Backup withholding erroneously withheld. . . . .	<b>6d</b>	
<b>7</b>	Total credits and payments. Add lines 6a through 6d. . . . .	<b>7</b>	1,811
<b>8</b>	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached. . . . .	<b>8</b>	
<b>9</b>	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . .	<b>9</b>	2,394
<b>10</b>	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . .	<b>10</b>	
<b>11</b>	Enter the amount of line 10 to be: <b>Credited to 2020 estimated tax</b> <input type="checkbox"/> <b>Refunded</b> <input type="checkbox"/>	<b>11</b>	

**Part VII-A Statements Regarding Activities**

	Yes	No
<b>1a</b> During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? . . . . .		X
<b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition . . . . . If the answer is "Yes" to <b>1a</b> or <b>1b</b> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year? . . . . .		X
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ _____ (2) On foundation managers. <input type="checkbox"/> \$ _____		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ _____		
<b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . . If "Yes," attach a detailed description of the activities.		X
<b>3</b> Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes . . . . .		X
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .		X
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? . . . . .		
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . If "Yes," attach the statement required by <i>General Instruction T</i> .		X
<b>6</b> Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? . . . . .	X	
<b>7</b> Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered. See instructions. <input type="checkbox"/>		
<b>b</b> If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? If "No," attach explanation . . . . .	X	
<b>9</b> Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV. . . . .		X
<b>10</b> Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses . . . . .		X

**Part VII-A Statements Regarding Activities (continued)**

		Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions. . . . .		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions. . . . .		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>WWW.PGEFOUNDATION.ORG</u>	X	
14	The books are in care of ▶ <u>CHRISTOPHER LIDDLE</u> Telephone no. ▶ <u>503-464-7458</u> Located at ▶ <u>121 SW SALMON STREET, 1WTC0510, PORTLAND, OR</u> ZIP+4 ▶ <u>97204-2901</u>		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here . . . . . ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year . . . . . ▶ <b>15</b>		
16	At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? . . . . . See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶		X

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**

**File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

		Yes	No
1a	During the year, did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? ( <b>Exception.</b> Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)-(6), did <b>any</b> of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions . . . . . Organizations relying on a current notice regarding disaster assistance, check here . . . . . ▶ <input type="checkbox"/>	1b	X
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019? . . . . .	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ _____, _____, _____, _____		
b	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to <b>all</b> years listed, answer "No" and attach statement - see instructions.) . . . . .	2b	
c	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. ▶ _____, _____, _____, _____		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2019 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.) . . . . .	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?	4b	X



**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** *(continued)*

**3 Five highest-paid independent contractors for professional services. See instructions. If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

**Total** number of others receiving over \$50,000 for professional services . . . . . **NONE**

**Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
<b>1</b> _____	
_____	
<b>2</b> _____	
_____	
<b>3</b> _____	
_____	
<b>4</b> _____	
_____	

**Part IX-B Summary of Program-Related Investments** (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
<b>1</b> _____	
_____	
<b>2</b> _____	
_____	
All other program-related investments. See instructions.	
<b>3</b> _____	
_____	

**Total.** Add lines 1 through 3 . . . . .

**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities . . . . .	<b>1a</b>	24,706,641
<b>b</b>	Average of monthly cash balances . . . . .	<b>1b</b>	147,936
<b>c</b>	Fair market value of all other assets (see instructions). . . . .	<b>1c</b>	
<b>d</b>	<b>Total</b> (add lines 1a, b, and c) . . . . .	<b>1d</b>	24,854,577
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) . . . . .	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets . . . . .	<b>2</b>	
<b>3</b>	Subtract line 2 from line 1d. . . . .	<b>3</b>	24,854,577
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	<b>4</b>	372,819
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4 . . . . .	<b>5</b>	24,481,758
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5 . . . . .	<b>6</b>	1,224,088

**Part XI Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here  and do not complete this part.)

<b>1</b>	Minimum investment return from Part X, line 6 . . . . .	<b>1</b>	1,224,088
<b>2a</b>	Tax on investment income for 2019 from Part VI, line 5 . . . . .	<b>2a</b>	4,205
<b>b</b>	Income tax for 2019. (This does not include the tax from Part VI.) . . . . .	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b. . . . .	<b>2c</b>	4,205
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1. . . . .	<b>3</b>	1,219,883
<b>4</b>	Recoveries of amounts treated as qualifying distributions. . . . .	<b>4</b>	
<b>5</b>	Add lines 3 and 4 . . . . .	<b>5</b>	1,219,883
<b>6</b>	Deduction from distributable amount (see instructions). . . . .	<b>6</b>	
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1. . . . .	<b>7</b>	1,219,883

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26. . . . .	<b>1a</b>	1,289,918
<b>b</b>	Program-related investments - total from Part IX-B. . . . .	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes. . . . .	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required) . . . . .	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule) . . . . .	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4 . . . . .	<b>4</b>	1,289,918
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions. . . . .	<b>5</b>	
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4 . . . . .	<b>6</b>	1,289,918

**Note:** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.



**Part XIII Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
<b>1</b> Distributable amount for 2019 from Part XI, line 7 . . . . .				1,219,883
<b>2</b> Undistributed income, if any, as of the end of 2019:				
<b>a</b> Enter amount for 2018 only. . . . .				
<b>b</b> Total for prior years: 20____, 20____, 20____				
<b>3</b> Excess distributions carryover, if any, to 2019:				
<b>a</b> From 2014 . . . . .				13,080
<b>b</b> From 2015 . . . . .				
<b>c</b> From 2016 . . . . .				50,799
<b>d</b> From 2017 . . . . .				125,505
<b>e</b> From 2018 . . . . .				32,587
<b>f</b> <b>Total</b> of lines 3a through e . . . . .	221,971			
<b>4</b> Qualifying distributions for 2019 from Part XII, line 4: ► \$ <u>1,289,918</u>				
<b>a</b> Applied to 2018, but not more than line 2a . . .				
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions). . . . .				
<b>c</b> Treated as distributions out of corpus (Election required - see instructions) . . . . .				
<b>d</b> Applied to 2019 distributable amount. . . . .				1,219,883
<b>e</b> Remaining amount distributed out of corpus. . .	70,035			
<b>5</b> Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a).) . . . . .				
<b>6</b> <b>Enter the net total of each column as indicated below:</b>				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	292,006			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b. . . . .				
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed . . . . .				
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions. . . . .				
<b>e</b> Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount - see instructions . . . . .				
<b>f</b> Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020. . . . .				
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions) . . . . .				
<b>8</b> Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions) . . .	13,080			
<b>9</b> <b>Excess distributions carryover to 2020.</b> Subtract lines 7 and 8 from line 6a . . . . .	278,926			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2015 . . .				
<b>b</b> Excess from 2016 . . .				50,799
<b>c</b> Excess from 2017 . . .				125,505
<b>d</b> Excess from 2018 . . .				32,587
<b>e</b> Excess from 2019 . . .				70,035

**Part XIV Private Operating Foundations** (see instructions and Part VII-A, question 9)

- 1 a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2019, enter the date of the ruling . . . . .  **1 a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2019, enter the date of the ruling . . . . .
- b** Check box to indicate whether the foundation is a private operating foundation described in section  4942(j)(3) or  4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	
<b>2 a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .					
<b>b</b> 85% of line 2a . . . . .					
<b>c</b> Qualifying distributions from Part XII, line 4, for each year listed . . . . .					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon: . . .					
<b>a</b> "Assets" alternative test - enter:					
<b>(1)</b> Value of all assets. . . . .					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i) . . . . .					
<b>b</b> "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed . . . . .					
<b>c</b> "Support" alternative test - enter:					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) . . . . .					
<b>(3)</b> Largest amount of support from an exempt organization . . . . .					
<b>(4)</b> Gross investment income . . . . .					

**Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year - see instructions.)**

- 1 Information Regarding Foundation Managers:**
- a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

NONE

- b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

- 2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**
- Check here  if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions.

**a** The name, address, and telephone number or email address of the person to whom applications should be addressed:  
 KREGG ARNSTON, PGE FOUNDATION, 121 SW SALMON ST. 1WWTC0302, PORTLAND, OR 97204-2901

- b** The form in which applications should be submitted and information and materials they should include:

WRITTEN DESCRIPTION OF FUNDING REQUEST AND PROOF OF SEC. 501(C)(3) OR OTHER TAX EXEMPT STATUS

- c** Any submission deadlines:

NONE

- d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

ORGANIZATION MUST BE QUALIFIED AS A SEC. 501(C)(3) PUBLIC EDUCATION ORGANIZATION OR UNIT OF GOVERNMENT

**Part XV** **Supplementary Information** *(continued)*

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b> SEE "SCHEDULE 3" FOR DETAILS				1,176,102
<b>Total</b> ..... ▶ <b>3a</b>				1,176,102
<b>b Approved for future payment</b> SEE "SCHEDULE 4" FOR DETAILS				100,000
<b>Total</b> ..... ▶ <b>3b</b>				100,000





**Schedule of Contributors**

**2019**

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.  
 ▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

Name of the organization  PGE Foundation	Employer identification number  93-1138806
--	--

**Organization type** (check one):

**Filers of:**

**Section:**

- |                    |                                     |  |
|--------------------|-------------------------------------|--|
| Form 990 or 990-EZ | <input type="checkbox"/>            | 501(c)( ) (enter number) organization  |
|                    | <input type="checkbox"/>            | 4947(a)(1) nonexempt charitable trust <b>not</b> treated as a private foundation |
|                    | <input type="checkbox"/>            | 527 political organization   |
| Form 990-PF        | <input checked="" type="checkbox"/> | 501(c)(3) exempt private foundation  |
|                    | <input type="checkbox"/>            | 4947(a)(1) nonexempt charitable trust treated as a private foundation            |
|                    | <input type="checkbox"/>            | 501(c)(3) taxable private foundation   |

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year . . . . . ▶ \$ \_\_\_\_\_

**Caution:** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization PGE Foundation	Employer identification number 93-1138806
--	--

**Part I** **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	PORTLAND GENERAL ELECTRIC  121 SW SALMON STREET  PORTLAND, OR 97204	\$ 108,183	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
_____	_____  _____  _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
_____	_____  _____  _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
_____	_____  _____  _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
_____	_____  _____  _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
_____	_____  _____  _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
_____	_____  _____  _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization PGE Foundation	Employer identification number 93-1138806
--	--

**Part II** **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____



Name of organization PGE Foundation	Employer identification number 93-1138806
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**Part III** *Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor.* Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) ▶ \$ \_\_\_\_\_  
 Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____ _____ _____	_____ _____ _____	_____ _____ _____
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
_____ _____ _____		_____ _____ _____	
_____	_____ _____ _____	_____ _____ _____	_____ _____ _____
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
_____ _____ _____		_____ _____ _____	
_____	_____ _____ _____	_____ _____ _____	_____ _____ _____
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
_____ _____ _____		_____ _____ _____	
_____	_____ _____ _____	_____ _____ _____	_____ _____ _____
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
_____ _____ _____		_____ _____ _____	
_____	_____ _____ _____	_____ _____ _____	_____ _____ _____
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
_____ _____ _____		_____ _____ _____	

**PGE Foundation**  
**93-1138806**  
**For the Period ended December 31, 2019**

**Schedule 1**

**2019 990-PF, Part I**

**Line 16c Other Professional Fees**

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Fund management consulting fees	4,713
Trustee fees	14,739
Other Professional Fees	19,452

**Line 18 Taxes**

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Income Taxes	8,989
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**Line 23 Other Expenses**

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Other miscellaneous administrative	113,816
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*PGE Foundation*

93-1138806

**Schedule 2**

For the Period ended December 31, 2019

Supporting Schedule for  
Form 990-PF, Page 6, Part VIII, Line 1

Information About Officers, Directors, Trustees, Foundation Managers  
Highly Paid Employees, and Contractors

**1 List all officers, directors, trustees, foundation managers and their compensation**

(a) Name and address			(b) Title, and average hours per week devoted to position		(c) Compensation	NOTES BELOW	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Name	Street	City, State	Title	Avg Hours				
Gwyneth Gamble Booth	2161 SW Laurel	Portland, OR	Director, Chair & Officer	2	0		0	0
Dave Robertson	121 SW Salmon St.	Portland, OR	Vice Chair		0	(1)	0	0
Peggy Y. Fowler	11981 SW Aspen Ridge Dr.	Tigard, OR	Director		0	(1)	0	0
Jardon T. Jaramillo	121 SW Salmon St.	Portland, OR	Treasurer		0	(1)	0	0
Randolph L. Miller	4100 Arthur Way	Portland, OR	Director		0	(1)	0	0
Loretta Mabinton	121 SW Salmon St.	Portland, OR	Director		0	(1)	0	0
Kregg Arntson	121 SW Salmon St.	Portland, OR	Executive Director	8	0		0	0
James Lobdell	121 SW Salmon St.	Portland, OR	Director		0	(1)	0	0
Nicolle Prehn	121 SW Salmon St.	Portland, OR	Secretary		0	(1)	0	0
Kristin Stathis	121 SW Salmon St.	Portland, OR	Director		0	(1)	0	0
Maria Pope	121 SW Salmon St.	Portland, OR	Director		0	(1)	0	0
					<u>0</u>		<u>0</u>	<u>0</u>
					<u>0</u>		<u>0</u>	<u>0</u>

**NOTES:**

(1) Average Hours per week devoted to position is less than 1 hour

PGE Foundation 2019 Grants - Tax Filing						
	Organization Name & Address	If recipient is an individual, show any relationship to any foundation manager or subsequent contributor	Foundation status of recipient	Purpose of grant or contribution	Grant Amount	Payment Date
1	Adelante Mujeres 2030 Main Street, Suite A Forest Grove, OR 97116	N/A	501(c)(3)	To provide a safe and stable space for low-income Latino families to engage in educational services. Adelante Mujeres is continuing to raise funds to renovate the existing building to provide participants with a safe and stable home where they can thrive in their educational and entrepreneurial goals, while creating a place of cultural exchange for the entire community. This new space will not only create greater sustainability for Adelante Mujeres, but it will allow parents and children a place to learn side by side, engaging the entire family in the learning process.	\$ 25,000	10/4/2019
2	All Hands Raised 2069 NE Hoyt Street Portland, OR 97232	N/A	501(c)(3)	To support improvement of student outcomes for 220,000 children and young adults in Multnomah County.	\$ 25,000	4/22/2019
3	Artichoke Community Music 2007 SE Powell Blvd. Portland, OR 97202	N/A	501(c)(3)	To support integration of American roots music into the regular curriculum of public schools	\$ 5,000	7/8/2019
4	Bag & Baggage Productions 350 East Main Street Hillsboro, OR 97123	N/A	501(c)(3)	To support educational training for emerging theatre professionals and their show for young people	\$ 7,500	7/8/2019
5	Beaverton Arts Foundation 12725 SW Millikan Way, #300 Beaverton, OR 97005	N/A	501(c)(3)	To support construction of a Beaverton Center for the Arts that will serve all of Washington County.	\$ 25,000	7/8/2019
6	Better Together Central Oregon 2804 SW 6th Street Redmond, OR 97756	N/A	501(c)(3)	To support student pathways beyond high school through internships and post-secondary access.	\$ 25,000	4/22/2019
7	Bienestar 448 S. First Avenue, Suite 100 Hillsboro, OR 97123	N/A	501(c)(3)	To build leadership and expand service delivery for 250 low-income Washington County residents. Bienestar's Promotores Program is a long-standing, successful program providing on-site information and referral services to residents of Bienestar's 12 affordable housing properties.	\$ 25,000	10/4/2019
8	Boys & Girls Club of Salem, Marion & Polk Counties 1395 Summer Street NE Salem, OR 97301	N/A	501(c)(3)	For the Training Teens for Tomorrow (T3) program which prepares youth with skills needed to succeed.	\$ 10,000	4/22/2019
9	Caldera 224 NW 13th Avenue, Suite 304 Portland, OR 97209	N/A	501(c)(3)	To support operations and capacity building for our arts and mentorship-based youth development work	\$ 15,000	7/8/2019
10	Cascade School of Music 510 NE 3rd Street Bend, OR 97701	N/A	501(c)(3)	To support free public outreach music programs for students with limited access to arts education	\$ 5,000	7/8/2019
11	Centro Cultural de Washington County 1110 N. Adair Street Cornelius, OR 97113	N/A	501(c)(3)	Expand STEM and robotics program in order to create a K-12 pipeline for 300 West Washington Youth.	\$ 7,500	4/22/2019
12	College Possible 532 SE Grand Avenue Portland, OR 97214	N/A	501(c)(3)	To support low-income graduating high school seniors as they work to enroll in college.	\$ 20,000	4/22/2019
13	Community Transitional School 6601 N.E. Killingsworth Street Portland, OR 97218-3068	N/A	501(c)(3)	Director's grant for general operating support of the Community Transitional School	\$ 1,000	4/22/2019
14	Concordia University 2811 NE Holman Street Portland, OR 97211	N/A	501(c)(3)	To support planning and early implementation of a systems approach to school improvement in NE PDX. (3toPhD)	\$ 10,000	4/22/2019
15	Confluences 1109 E 5th Street Vancouver, WA 98661	N/A	501(c)(3)	To support our arts-infused educational programming for 1,230 K-12 students and teachers	\$ 10,000	7/8/2019
16	Constructing Hope Pre-Apprenticeship Program 405 NE Church Street Portland, OR 97211	N/A	501(c)(3)	Support career readiness and job search through computers and furnishings for new classroom.	\$ 10,000	4/22/2019
17	Dougy Center, Inc. 3909 SE 52nd Avenue Portland, OR 97206	N/A	501(c)(3)	Director's grant for general operating support of the Dougy Center.	\$ 7,500	4/22/2019
18	Dress for Success of Oregon 1532 NE 37th Avenue Portland, OR 97232	N/A	501(c)(3)	To support a new program teaching adult women to code, leading to full-time tech industry employment	\$ 10,000	4/22/2019
19	Elevate Oregon 12215 NE Marx Street Portland, OR 97230	N/A	501(c)(3)	To bridge the gap to college and/or career for 400 at-risk youth in Parkrose.	\$ 15,000	4/22/2019
20	Ethos, Inc. 2 North Killingsworth Street Portland, OR 97217	N/A	501(c)(3)	To support free music education for 450 underserved youth in Portland schools	\$ 7,500	7/8/2019

21	Family Building Blocks 2425 Lancaster Drive, NE Salem, OR 97305	N/A	501(c)(3)	Family Building Blocks' goal is to prevent child abuse and neglect by providing supportive home visitation for families living in Marion and Polk counties. As a Relief Nursery, the home visiting program is designed to meet the social and emotional needs of young children, and help parents form a positive and nurturing bond and attachment with their children.	\$ 5,000	10/4/2019
22	Farmworker Housing Development Corporation 1274 5th St # 1A Woodburn, OR 97071	N/A	501(c)(3)	To support capital improvements to FHDC's education center serving hundreds of individuals daily by providing a gathering space for residents to access social, educational and economic opportunities.	\$ 25,000	10/4/2019
23	Friends of the Children-Portland 44 NE Morris Street Portland, OR 97212-3015	N/A	501(c)(3)	To support pre-apprenticeship training and apprenticeship activities for 100 high-priority youth.	\$ 25,000	4/22/2019
24	Friends of Zenger Farms 11741 SE Foster Road Portland, OR 97266	N/A	501(c)(3)	Zenger Farm provides access to nourishing foods and educational programming in order to promote wellbeing and economic stability for families experiencing food insecurity. Zenger Farm's innovative Community Chef program provides culturally relevant food education, while creating economic opportunity, by employing women of color to lead workshops and community meals at Zenger Farm and community partner sites.	\$ 5,000	10/4/2019
25	Girls Build 2303 N Randolph Portland OR 97227	N/A	501(c)(3)	To support building trades education for girls 8-14 years old living the Portland metro area.	\$ 7,500	4/22/2019
26	Girls Inc. of the Pacific Northwest 4800 SW Macadam Avenue, #309 Portland, OR 97239	N/A	501(c)(3)	To support the Eureka! STEM education programming in the Portland metro area.	\$ 10,000	4/22/2019
27	Growing Gardens 3114 SE 50th Avenue Portland, OR 97206	N/A	501(c)(3)	To support family food security for 40 low-income families in Gresham, OR. Growing Gardens uses the experience of growing food in schools, backyards and correctional facilities to cultivate healthy, equitable, communities. The Home Gardens program partners with diverse and multi-generational families to build and sustain food-producing gardens, which reduce hunger and food insecurity, and strengthen the health of families, communities, and the environment.	\$ 10,000	10/4/2019
28	Human Solutions 12350 SE Powell Blvd. Portland, OR 97236	N/A	501(c)(3)	To provide critical funding to power Human Solutions' work with people and communities to overcome the impacts of poverty and homelessness. Human Solutions works to break the cycle of intergenerational poverty for families living in East Portland and East Multnomah County.	\$ 25,000	10/4/2019
29	Impact NW 10055 E Burnside Portland OR 97216	N/A	501(c)(3)	To support low-income youth through direct STEM activities and educator professional development.	\$ 25,000	4/22/2019
30	Japanese Garden Society of Oregon 611 SW Kingston Avenue Portland, OR 97205	N/A	501(c)(3)	Director's grant for general operating support of the Japanese Garden.	\$ 7,500	4/22/2019
31	JOIN 1435 NE 81st Ave, Ste 100 Portland OR 97213	N/A	501(c)(3)	To support families seeking housing assistance in JOIN's Day Center. JOIN has a dedicated team of full-time employees who engage individuals and families experiencing homelessness where they are - under bridges, on sidewalks, in parks, and in cars in the City of Portland and throughout Multnomah County. JOIN's effective outreach model helped approximately 390 households (representing 1,377 individuals) transition out of homelessness in 2018.	\$ 10,000	10/4/2019
32	JOIN 1435 NE 81st Ave, Ste 100 Portland OR 97213	N/A	501(c)(3)	A Director's grant made in support of general operations.	\$ 1,000	4/22/2019

33	Kids Intervention & Diagnostic Service Center 1375 NW Kingston Avenue Bend, OR 97703	N/A	501(c)(3)	This project will expand long-term therapy services onsite at KIDS Center and in rural areas (Crook and Jefferson Counties) to children and families healing from child abuse. The tri-county service area has a shortage of low-barrier, trauma-focused, mental health services. Through increased staffing of KIDS Center therapists, we will be able to respond to the current unmet need for this vulnerable population.	\$ 10,000	10/4/2019
34	Latino Network 410 NE 18th Avenue Portland, OR 97232	N/A	501(c)(3)	To support culturally-specific summer bridge program for incoming 9th grade Latinx students.	\$ 10,000	4/22/2019
35	Literary Arts 925 SW Washington Street Portland, OR 97205	N/A	501(c)(3)	To support semester-long creative writing residencies and supplemental activities during Fall 2019.	\$ 10,000	7/8/2019
36	Marathon Scholars 610 SW Alder Street, Suite 921 Portland OR 97205	N/A	501(c)(3)	To support high school completion, college enrollment and completion for Marathon Scholar students.	\$ 15,000	4/22/2019
37	Metropolitan Family Service 1808 SE Belmont Portland OR 97214	N/A	501(c)(3)	To support Hunger Relief via school-based food pantries serving 10,000 people in Multnomah County. The funds would help transform the Hunger Relief program. Since 2011, MFS Hunger Relief has offered fresh, healthy food and grocery staples to low-income communities in east Multnomah County through free food distributions based at public schools, as well as family/youth cooking/nutrition workshops. They offer food distributions at 8 schools. Each family takes home an average of 30 pounds of groceries weekly, including non-perishable staples, fresh produce, milk, and meat.	\$ 10,000	10/4/2019
38	Metropolitan Youth Symphony 4800 SW Macadam Avenue, Suite 105 Portland, OR 97239	N/A	501(c)(3)	To support MYS' Music Access and Equity Program reaching low-income youth with instrumental music.	\$ 10,000	7/8/2019
39	Minds Matter of Portland PO Box 12089 Portland OR 97212	N/A	501(c)(3)	To support 50 opportunity students obtain admission to a four-year college.	\$ 10,000	4/22/2019
40	Miracle Theatre Group 525 SE Stark Street Portland, OR 97214	N/A	501(c)(3)	To support a free bilingual arts-integrated theatre residency for Valor Middle School in Woodburn.	\$ 5,000	7/8/2019
41	MountainStar Family Relief Nursery 2125 NE Daggett Lane Bend, OR 97701	N/A	501(c)(3)	To support the Parent Engagement Program at MountainStar campuses in Prineville and Madras. This program provides parenting classes on topics such as nutrition, dental health and screenings, mental health, parenting issues, the importance of reading to children, and more.	\$ 5,000	10/4/2019
42	NAMI Multnomah 524 NE 52nd Avenue Portland, OR 97213	N/A	501(c)(3)	This project will support families of children with significant mental health conditions to overcome barriers in achieving housing stability, food security, and personal/family safety. It will allow trusted Family Partners (existing staff) to not only offer information, but take steps to support parents in applying for and accessing much-needed resources.	\$ 7,500	10/4/2019
43	OHSU/Doernbecher Foundation 1121 SW Salmon Street, Suite 100 Portland, OR 97205	N/A	501(c)(3)	A Director's grant made in support of general operations.	\$ 1,000	4/22/2019
44	Open School 16570 SE Oak Street Portland OR 97233	N/A	501(c)(3)	To support improved and expanded education services to more students experiencing disparities.	\$ 25,000	4/22/2019
45	Oregon Alliance of Independent Colleges & Universities 15573 Bangy Road, Suite 320 Lake Oswego, OR 97035	N/A	501(c)(3)	To support PGE Foundation scholars.	\$ 38,100	4/22/2019
46	Oregon Ballet Theatre 0720 SW Bancroft Avenue Portland, OR 97239	N/A	501(c)(3)	To support free OBT L.A.B. dance residencies in three Title 1 schools and inclusive SPS programming.	\$ 10,000	7/8/2019
47	Oregon Business Council Charitable Institute 1100 SW 6th Avenue, Suite 1608 Portland, OR 97204	N/A	501(c)(3)	To advocate for CTE-STEM education policy and investments, and cultivate more employer engagement.	\$ 25,000	4/22/2019

48	Oregon Children's Theatre Company 1939 NE Sandy Blvd Portland, OR 97232-2894	N/A	501(c)(3)	Support Theater for All arts education program expansion to 11,000 low-income youth in 2019-2020	\$ 10,000	7/8/2019
49	Oregon East Symphony 345 SW 4th Street Pendleton, OR 97801	N/A	501(c)(3)	To support 4th and 5th grade beginner level string classes in the Pendleton School District	\$ 5,000	7/8/2019
50	Oregon Energy Fund (RM) 1020 SW Taylor Street, #620 Portland, OR 97205	N/A	501(c)(3)	A Director's grant made in support of general operations.	\$ 500	4/22/2019
51	Oregon Food Bank 7900 NE 33rd Drive Portland, OR 97211	N/A	501(c)(3)	To address the root causes of hunger by providing garden and nutrition education to the community through their Garden and Nutrition Education Programs. These programs improve household nutrition, help maximize resources on a limited budget, and create positive community connections through cooking and nutrition education and skills development in home-scale food production.	\$ 15,000	10/4/2019
52	Oregon Harbor of Hope 422 NW 13th Avenue Portland, OR 97209	N/A	501(c)(3)	To support construction of Harbor of Hope homeless navigation center.	\$ 25,000	4/22/2019
53	Oregon Health & Sciences University Foundation 1121 SW Salmon Street, Suite 100 Portland, OR 97205	N/A	501(c)(3)	To support science education for 3,500+ students in Clatskanie, Portland, Woodburn, and Warm Springs.	\$ 25,000	4/22/2019
54	Oregon MESA (Fiscal: Portland State University) 1600 SW 4th Avenue Portland, OR 97201-5522	N/A	501(c)(3)	To expand MESA's STEM education from 650 to 800 underrepresented and underserved Oregon students.	\$ 20,000	4/22/2019
55	Oregon Museum of Science and Industry 1945 SE Water Avenue Portland, OR 97214-3356	N/A	501(c)(3)	A Director's grant made in support of general operations.	\$ 1,000	4/22/2019
56	Oregon Public Broadcasting 7140 SW Macadam Avenue Portland, OR 97219-3013	N/A	501(c)(3)	A Director's grant made in support of general operations.	\$ 1,000	4/22/2019
57	Oregon State University Foundation 850 SW 35th Street Corvallis, OR 97333	N/A	501(c)(3)	To continue the PGE Scholars program at OSU, including PGE employee mentoring for OSU College of Engineering students.	\$ 28,100	4/22/2019
58	Oregon Student Voice (fiscal sponsor Foundation for a Better Oregon) 221 NW 2nd Ave Suite 210E Portland OR 97209-3982	N/A	501(c)(3)	To support youth in transforming how students are included in K-12 education decision-making.	\$ 10,000	4/22/2019
59	Oregon Symphony Association 921 SW Washington, Suite 200 Portland, OR 97205	N/A	501(c)(3)	To support the Link Up music education curriculum serving 9,000 3-5 grade students	\$ 10,000	7/8/2019
60	Oregon Tech Foundation 3201 Campus Drive Klamath Falls, OR 97601	N/A	501(c)(3)	To fund scholarships for deserving students studying at Oregon Tech during the academic year 2018-19.	\$ 18,100	4/22/2019
61	Outside In 1132 SW 13th Avenue Portland, OR 97205	N/A	501(c)(3)	To support youth experiencing homelessness through free job training and educational opportunities.	\$ 10,000	4/22/2019
62	Outside the Frame 800 NW 6th Avenue Union Station, Suite 335 Portland, OR 97209	N/A	501(c)(3)	To support free film making workshops for 100 homeless and marginalized youth in Portland.	\$ 5,000	7/8/2019
63	Partners For a Hunger Free Oregon 712 SE Hawthorne Blvd. Portland, OR 97214	N/A	501(c)(3)	To support implementation of historic Hunger-Free Schools provisions to feed more kids in school. Hunger-Free Oregon will work with families and schools to ensure the Student Success Act is implemented equitably for all students. With one in five children experiencing hunger, and kids of color disproportionately impacted, Hunger-Free Oregon will prioritize investments in high-poverty schools and schools with diverse populations.	\$ 10,000	10/4/2019
64	Portland Art Museum - NW Film Center 1219 SW Park Avenue Portland OR 97205	N/A	501(c)(3)	To help 350 Title 1 7th graders meet media arts and career readiness curriculum goals in Portland	\$ 5,000	7/8/2019
65	Portland Art Museum 1219 SW Park Avenue Portland OR 97205	N/A	501(c)(3)	For the Poster Project to create 6-8 new posters and support Teacher Leadership Initiative programs	\$ 10,000	7/8/2019
66	Portland Center Stage 128 NW 11th Ave Portland, OR 97209	N/A	501(c)(3)	To support free in-school playwrighting residencies for 150+ teens in the greater Portland metro area	\$ 10,000	7/8/2019
67	Portland Community College Foundation 12000 SW 49th Avenue, CC 234 Portland, OR 97219	N/A	501(c)(3)	Provide 345 academically at-risk high school youth with scholarship support and wraparound services.	\$ 25,000	4/22/2019

68	Portland Community College Foundation, Inc. 12000 SW 49th Avenue, CC 234 Portland, OR 97219	N/A	501(c)(3)	A Director's grant made in support of general operations of the Future Connect Program.	\$ 1,000	4/22/2019
69	Portland Homeless Family Solutions 1221 SW Yamhill, Suite 210 Portland, OR 97205	N/A	501(c)(3)	To support renovating PHFS's new Lents Family Shelter, tripling service capacity for homeless families.	\$ 25,000	10/4/2019
70	Portland Opera Association, Inc. 211 SE Caruthers Street Portland, OR 97214	N/A	501(c)(3)	To support a statewide K-12 in-school arts education program serving approximately 14,000 students.	\$ 10,000	7/8/2019
71	Portland Playhouse 602 NE Prescott Street Portland, OR 97211	N/A	501(c)(3)	To support an after-school performing arts program serving 150+ students in the Portland area.	\$ 10,000	7/8/2019
72	Portland State University Foundation 1600 SW 4th Avenue Portland, OR 97201-5522	N/A	501(c)(3)	A Director's grant in support of general operations.	\$ 1,000	4/22/2019
73	Portland State University Foundation 1600 SW 4th Avenue Portland, OR 97201-5522	N/A	501(c)(3)	To support PGE Foundation scholars.	\$ 3,100	4/22/2019
74	Portland Youth Builders 4816 SE 92nd Avenue Portland, OR 97266	N/A	501(c)(3)	To support high school completion and job training for 100 at-risk youth in Portland metro region.	\$ 7,500	4/22/2019
75	Proud Ground 5288 N. Interstate Avenue Portland, OR 97217	N/A	501(c)(3)	To increase access for first-time homebuyers to purchase permanently affordable homes across Oregon. Proud Ground provides permanent affordability through its Community Land Trust (CLT) model, which provides services to other non-profits working to build affordable housing, including Humanity (HfH) affiliates. Proud Ground is able to expand the number of permanently affordable homes in the state, which results in more first-time homebuyers who have access to affordable homes today and into the future, as these homes continue to resell to other income-qualified homebuyers.	\$ 5,000	10/4/2019
76	PSU Foundation Sustainability Scholarships 1600 SW 4th Avenue Portland, OR 97201-5522	N/A	501(c)(3)	Support achieving underserved honors students over two years on urban challenge focused projects.	\$ 25,000	4/22/2019
77	Regional Arts & Culture Council 411 NW Park Avenue, Suite 101 Portland, OR 97209	N/A	501(c)(3)	To support the Right Brain Initiative, arts integrated learning for 32,500 K-8 tri-county students during 2019-20.	\$ 25,000	7/8/2019
78	Ride Connection 9955 NE Glisan Street Portland, OR 97220	N/A	501(c)(3)	The migration of lower income households to the suburbs due to rising costs of central city housing equates to individuals traveling longer distances to access essential needs. Ride Connection is seeking funding to provide essential services to vulnerable individuals who are in need of transportation to access medical care, healthy food, and relief from social isolation.	\$ 25,000	10/4/2019
79	Rose Haven 627 NW 18th Avenue Portland, OR 97209	N/A	501(c)(3)	Rose Haven is the only drop in center for women and children experiencing homelessness in Portland. They break the cycle of poverty and adverse health by providing meals, clothing, first aid, mailing addresses, hygiene, restrooms, showers as well as educational programs and guidance through medical and social services. By meeting basic needs and building trust, they empower women and children to achieve long-term, improved wellness.	\$ 7,500	10/4/2019
80	Salem Art Association 600 Mission Street, SE Salem OR 97302-6203	N/A	501(c)(3)	To deliver diverse, equitable arts education to K-5 students in Marion, Polk, and Yamhill counties.	\$ 10,000	7/8/2019
81	Salem Harvest PO Box 483 Salem, OR 97308-0483	N/A	501(c)(3)	To reduce hunger for families in the Mid-Willamette Valley by expanding collaborations and capacity. Salem Harvest seeks support for its core program of harvesting food that would otherwise go to waste on local farms and backyards. Harvest leaders bring together volunteers to responsibly harvest excess fruits and vegetables for donation to Marion-Polk Food Share (MPFS) and other local food distribution agencies.	\$ 10,000	10/4/2019



82	Self Enhancement, Inc. 3920 N. Kerby Avenue Portland, OR 97227	N/A	501(c)(3)	This project will build on the referral processes and relationships established through a 2018-19 PGE Foundation grant toward the goal of assisting African American families in accessing culturally specific mental health services. At least 15 families will benefit, by capitalizing on partnerships with area schools and community-based providers, and on continued work to strengthen and align SEI Community + Family Programs and Youth Services communication and referral mechanisms.	\$ 10,000	10/4/2019
83	South Metro Salem STEM Partnership (Fiscal sponsor: Oregon Tech Foundation) 5201 Campus Drive Klamath Falls, OR 97601	N/A	501(c)(3)	To support implementation of Oregon Connections throughout the Portland and Salem metro areas.	\$ 15,000	4/22/2019
84	The Oregon Community Foundation 1221 SW Yamhill Street, Suite 100 Portland, OR 97205-2108	N/A	501(c)(3)	Funds are used by Community 101 students for grantmaking. Also for PGE employees to sponsor two Community 101 classes at Southridge and Riverside High Schools.	\$ 35,602	4/22/2019
85	Trillium Family Services 3415 SE Powell Blvd, Portland, OR 97202	N/A	501(c)(3)	To support the third year of an innovative partnership with KairosPDX. Through this partnership, Trillium and KairosPDX combine educational and mental promotion activities so more children and families receive culturally-specific services in one location. The program also results in the opportunity for mutual benefit with KairosPDX, in that Trillium is embedded in a cultural community that helps to increase its understanding of the needs of diverse populations.	\$ 10,000	10/4/2019
86	University of Oregon Foundation 1720 E. 13th Avenue, Suite 410 Eugene, OR 97403	N/A	501(c)(3)	To support PGE Foundation scholars	\$ 13,100	4/22/2019
87	Volunteers of America of Oregon 3910 SE Stark Street Portland, OR 97214	N/A	501(c)(3)	To prevent the devastating effects of child abuse and neglect for 100 at-risk families. The Family Relief Nursery prevents the devastating long-term effects of child abuse and neglect. It aligns with VOA's mission of building strong communities by breaking the intergenerational cycle of abuse and tailoring services to families through culturally-responsive and trauma-informed programming.	\$ 10,000	10/4/2019
88	Wallace Medical Concern 124 NE 181st Avenuw, Unit 103 Portland, OR 97230	N/A	501(c)(3)	"Housing for Family Health" provides permanent, affordable housing and wrap-around supportive services to secure and maintain housing for families with multiple medical, behavioral, mental health and addiction needs, and who are homeless or at high risk of homelessness. This grant will support 50 homeless and at-risk families with housing and supportive services for lasting stability.	\$ 7,500	10/4/2019
89	World Stage Theatre PO Box 782 Troutdale, OR 97060-1085	N/A	501(c)(3)	To support access to arts education for 150 students in Multnomah and East Multnomah County	\$ 5,000	7/8/2019
90	WorldOregon 1200 SW Park Avenue, 3rd Floor Portland, OR 97205	N/A	501(c)(3)	A Director's grant in support of general operations.	\$ 1,000	4/22/2019
91	WorldOregon 1200 SW Park Avenue, 3rd Floor Portland, OR 97205	N/A	501(c)(3)	To support the K-12 Culture Box Program at WorldOregon	\$ 7,500	7/8/2019
92	Write Around Portland 133 SW 2nd Avenue, Suite 304 Portland, OR 97204	N/A	501(c)(3)	To support a free creative and writing and publishing program for youth on the margins.	\$ 7,500	7/8/2019
93	Yamhill Community Action Partnership 1317 NE Dustin Court McMinnville, OR 97128	N/A	501(c)(3)	To support the weekly collection and distribution of fresh produce to 744 families in Yamhill County. The desired outcome of Harvest2Home (H2H) is to provide high quality, nutritious food and healthy recipes in both English and Spanish to low-income families that will improve their food security and health, while enabling their children to grow and thrive.	\$ 7,500	10/4/2019

94	Yamhill Enrichment Society 638 NE 5th Street McMinnville, OR 97128	N/A	501(c)(3)	To support instrument instruction for 230 students, K through 2nd grade, in a pilot project.	\$ 6,500	7/8/2019
95	Young Audiences of Oregon 1220 SW Morrison Street, #1000 Portland, OR 97205	N/A	501(c)(3)	To support STEM learning in technical art of sound engineering for 50 diverse high-school youth.	\$ 10,000	7/8/2019
96	YWCA of Greater Portland PO Box 4587 Portland, OR 97206	N/A	501(c)(3)	To support children of incarcerated mothers through a holistic, family centered approach. This request will support their work with mothers who are incarcerated at Coffee Creek Correctional Facility (Oregon's only women's prison), their children and their children's caregivers through the Family Preservation Project (FPP). FPP reaches incarcerated women at Coffee Creek Correctional Facility (CCCF) and their families throughout Oregon to address and mitigate the unintended consequences of incarceration on Oregon's children and families.	\$ 7,500	10/4/2019
<b>TOTAL GRANTS PAID IN 2019</b>					<b>\$1,176,102</b>	

**PGE Foundation 2019 Grants - Tax Filing**

**Schedule 4**

	<b>Approved for Future Payment</b>	<b>If recipient is an individual, show any relationship to any foundation manager or subsequent contributor</b>	<b>Foundation status of recipient</b>	<b>Purpose of grant or contribution</b>	<b>Grant Amount</b>	<b>Payment Date</b>
<b>1</b>	PSU Foundation Sustainability Scholarships 1600 SW 4th Avenue Portland, OR 97201-5522	N/A	501(c)(3)	Support achieving underserved honors students over two years on urban challenge focused projects	\$ 25,000	4/1/2021
<b>2</b>	Regional Arts & Culture Council 411 NW Park Avenue, Suite 101 Portland, OR 97209	N/A	501(c)(3)	To support the Right Brain Initiative, arts integrated learning for 32,500 K-8 tri-county students during 2020-2021	\$ 75,000	7/1/2021
	<b>TOTAL FUTURE PAYMENTS</b>				<b>\$100,000</b>	