

Department of the Treasury  
Internal Revenue Service

or Section 4947(a)(1) Trust Treated as Private Foundation  
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**Open to Public Inspection**

For calendar year **2017** or tax year beginning , **2017**, and ending , **20**

Name of foundation <b>PGE Foundation</b>		<b>A Employer identification number</b> 93-1138806
Number and street (or P.O. box number if mail is not delivered to street address)	Room/suite	<b>B Telephone number (see instructions)</b> 503-464-7966
121 SW Salmon Street, 1 WTC0510- Tax Department City or town, state or province, country, and ZIP or foreign postal code Portland, OR 97204		<b>C</b> If exemption application is pending, check here. . . . . <input type="checkbox"/>
<b>G</b> Check all that apply:		<b>D</b> 1. Foreign organizations, check here . . . <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation . . . . . <input type="checkbox"/>
<input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here . . . <input type="checkbox"/>
<b>H</b> Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here . . . <input type="checkbox"/>
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 25,883,225		
<b>J</b> Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)		

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<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).)				
<b>Revenue</b>				
1 Contributions, gifts, grants, etc., received (attach schedule) . . . . .	46,338			
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B. . . . .				
3 Interest on savings and temporary cash investments . . . . .	9	9		
4 Dividends and interest from securities . . . . .	327,183	336,651		
5a Gross rents . . . . .				
b Net rental income or (loss) . . . . .				
6a Net gain or (loss) from sale of assets not on line 10 . . . . .	1,996,806			
b Gross sales price for all assets on line 6a 7,433,240 . . . . .				
7 Capital gain net income (from Part IV, line 2) . . . . .		2,528,139		
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 . . . . .	2,370,336	2,864,799		
<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) . . . . .	7,176	7,176		
17 Interest . . . . .				
18 Taxes (attach schedule) (see instructions). . . . .	37,193			
19 Depreciation (attach schedule) and depletion . . . . .				
20 Occupancy . . . . .				
21 Travel, conferences, and meetings . . . . .				
22 Printing and publications . . . . .				
23 Other expenses (attach schedule) . . . . .	132,491	11,748		132,491
24 <b>Total operating and administrative expenses.</b> Add lines 13 through 23. . . . .	176,860	18,924		132,491
25 Contributions, gifts, grants paid . . . . .	1,099,324			1,189,324
26 <b>Total expenses and disbursements.</b> Add lines 24 and 25 . . . . .	1,276,184	18,924		1,321,815
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements . . . . .	1,094,152			
b <b>Net investment income</b> (if negative, enter -0-) . . . . .		2,845,875		
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 . . . . .		96,353	124,411	124,411
	2	Savings and temporary cash investments . . . . .				
	3	Accounts receivable ▶ <u>TAXES RECEIVABLE</u>				
		Less: allowance for doubtful accounts ▶		4,086	NONE	NONE
	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) . . . . .		23,372,998	25,758,814	25,758,814	
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) . . . . .		23,473,437	25,883,225	25,883,225	
<b>Liabilities</b>	17	Accounts payable and accrued expenses . . . . .		6,411	8,337	
	18	Grants payable. . . . .		157,146	60,000	
	19	Deferred revenue. . . . .				
	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> )		NONE	19,407	
23	<b>Total liabilities</b> (add lines 17 through 22) . . . . .		163,557	87,744		
<b>Net Assets or Fund Balances</b>		<b>Foundations that follow SFAS 117, check here</b> . . . . . <input type="checkbox"/>				
		<b>and complete lines 24 through 26, and lines 30 and 31.</b>				
	24	Unrestricted . . . . .		23,309,880	25,795,481	
	25	Temporarily restricted . . . . .				
	26	Permanently restricted . . . . .				
		<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input type="checkbox"/>				
		<b>and complete lines 27 through 31.</b>				
27	Capital stock, trust principal, or current funds . . . . .					
28	Paid-in or capital surplus, or land, bldg., and equipment fund . . . . .					
29	Retained earnings, accumulated income, endowment, or other funds . . . . .					
30	<b>Total net assets or fund balances</b> (see instructions). . . . .		23,309,880	25,795,481		
31	<b>Total liabilities and net assets/fund balances</b> (see instructions) . . . . .		23,473,437	25,883,225		

<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 30 (must agree with end-of-year figure reported on prior year's return). . . . .	1 23,309,880
2	Enter amount from Part I, line 27a . . . . .	2 1,094,152
3	Other increases not included in line 2 (itemize) ▶ <u>UNREALIZED CAPITAL GAINS</u>	3 1,391,449
4	Add lines 1, 2, and 3 . . . . .	4 25,795,481
5	Decreases not included in line 2 (itemize) ▶	5
6	<b>Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 . . . . .</b>	6 25,795,481



**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 PUBLICLY TRADED SECURITIES</b>		P	VAR	VAR
<b>b PARTNERSHIP K-1S</b>		p	VAR	VAR
<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))	
a 7,433,240		5,436,435	1,996,805	
b 531,334			531,334	
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.				(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(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		
a			1,996,805	
b			531,334	
c				
d				
e				
<b>2 Capital gain net income or (net capital loss)</b>		$\left\{ \begin{array}{l} \text{If gain, also enter in Part I, line 7} \\ \text{If (loss), enter -0- in Part I, line 7} \end{array} \right\}$		<b>2</b> 2,528,139
<b>3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):</b>		$\left\{ \begin{array}{l} \text{If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in} \\ \text{Part I, line 8 . . . . .} \end{array} \right\}$		<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))
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
2013	1,086,517	23,788,344	0.0457
2012	1,001,495	21,897,922	0.0457
<b>2 Total of line 1, column (d)</b>			<b>2</b> 0.2422
<b>3 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>			<b>3</b> 0.0484
<b>4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5</b>			<b>4</b> 24,495,385
<b>5 Multiply line 4 by line 3.</b>			<b>5</b> 1,185,577
<b>6 Enter 1% of net investment income (1% of Part I, line 27b).</b>			<b>6</b> 28,459
<b>7 Add lines 5 and 6.</b>			<b>7</b> 1,214,036
<b>8 Enter qualifying distributions from Part XII, line 4.</b>			<b>8</b> 1,321,815

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.

**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>1</b>	28,459
<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>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>	28,459
<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 Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0- . . . . .		<b>5</b>	28,459
<b>6 Credits/Payments:</b>			
<b>a</b> 2017 estimated tax payments and 2016 overpayment credited to 2017. . . . .	<b>6a</b>		26,593
<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>	26,593
<b>8</b> Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached . . . . .		<b>8</b>	
<b>9 Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . .		<b>9</b>	1,866
<b>10 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 2018 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 2017 or the tax year beginning in 2017? 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 ► WWW.PGEFOUNDATION.ORG	X	
14 The books are in care of ► JARDON JARAMILLO Telephone no. ► 503-464-7051 Located at ► 121 SW SALMON STREET, 1 WTC0501, PORTLAND, OR ZIP+4 ► 97204-2901		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here . . . . . and enter the amount of tax-exempt interest received or accrued during the year . . . . .		15
16 At any time during calendar year 2017, 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**

	Yes	No
<b>File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.</b>		
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? (Exception. 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 any 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 . . . . .		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 2017? . . . . .		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 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? . . . . . If "Yes," list the years ►	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b Are there any years listed in 2a for which the foundation is not 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 all years listed, answer "No" and attach statement - see instructions.) . . . . .		2b
c If the provisions of section 4942(a)(2) are being applied to any 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 2017 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 Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2017.) . . . . .		3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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 2017?		4b X

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

<b>5a</b> During the year, did the foundation pay or incur any amount to:		Yes		No
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/>		<input checked="" type="checkbox"/>	
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/>		<input checked="" type="checkbox"/>	
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/>		<input checked="" type="checkbox"/>	
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/>		<input checked="" type="checkbox"/>	
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/>		<input checked="" type="checkbox"/>	
<b>b</b> If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions				<b>5b</b>
Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>			
<b>c</b> If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53.4945-5(d).	<input type="checkbox"/>		<input type="checkbox"/>	
<b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/>		<input checked="" type="checkbox"/>	
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.				<b>6b</b>
<b>7a</b> At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/>		<input checked="" type="checkbox"/>	
<b>b</b> If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?				<b>7b</b>

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE ATTACHED "SCHEDULE 2" FOR DETAILS		0		

**2** Compensation of five highest-paid employees (other than those included on line 1 - see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

**Total** number of other employees paid over \$50,000. ▶ NONE



**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
1	
2	
3	
4	

**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
1	
2	
3 All other program-related investments. See instructions.	

**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>	24,758,796
<b>b</b>	Average of monthly cash balances . . . . .	<b>1b</b>	109,615
<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>	24,868,411
<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>	24,868,411
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	<b>4</b>	373,026
<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>	24,495,385
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5 . . . . .	<b>6</b>	1,224,769

**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>	1,224,769
<b>2a</b>	Tax on investment income for 2017 from Part VI, line 5 . . . . .	<b>2a</b>	28,459
<b>b</b>	Income tax for 2017. (This does not include the tax from Part VI.) . . . . .	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b . . . . .	<b>2c</b>	28,459
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1 . . . . .	<b>3</b>	1,196,310
<b>4</b>	Recoveries of amounts treated as qualifying distributions . . . . .	<b>4</b>	
<b>5</b>	Add lines 3 and 4. . . . .	<b>5</b>	1,196,310
<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>	1,196,310

**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>	1,321,815
<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>	1,321,815
<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>	1,321,815

**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 2016	(c) 2016	(d) 2017
1 Distributable amount for 2017 from Part XI, line 7 . . . . .				1,196,310
2 Undistributed income, if any, as of the end of 2017:				
a Enter amount for 2016 only, . . . . .				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2017:				
a From 2012 . . . . .				
b From 2013 . . . . .				
c From 2014 . . . . .			13,080	
d From 2015 . . . . .				
e From 2016 . . . . .			50,799	
f Total of lines 3a through e . . . . .	63,879			
4 Qualifying distributions for 2017 from Part XII, line 4: ▶ \$ _____ 1,321,815				
a Applied to 2016, but not more than line 2a . . . . .				
b Applied to undistributed income of prior years (Election required - see instructions) . . . . .				
c Treated as distributions out of corpus (Election required - see instructions) . . . . .				
d Applied to 2017 distributable amount . . . . .				1,196,310
e Remaining amount distributed out of corpus . . . . .	125,505			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	189,384			
b Prior years' undistributed income. Subtract line 4b from line 2b. . . . .				
c 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 . . . . .				
d Subtract line 6c from line 6b. Taxable amount - see instructions . . . . .				
e Undistributed income for 2016. Subtract line 4a from line 2a. Taxable amount - see instructions . . . . .				
f Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018. . . . .				
7 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) . . . . .				
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions) . . . . .				
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a . . . . .	189,384			
10 Analysis of line 9:				
a Excess from 2013 . . . . .				
b Excess from 2014 . . . . .			13,080	
c Excess from 2015 . . . . .				
d Excess from 2016 . . . . .			50,799	
e Excess from 2017 . . . . .			125,505	

**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 2017, 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) 2017	(b) 2016	(c) 2015	(d) 2014	
<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. 1 WTC0302, 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</b> <i>Paid during the year</i> SEE "SCHEDULE 3" FOR DETAILS				1,189,324
<b>Total</b> ..... ▶ <b>3a</b>				1,189,324
<b>b</b> <i>Approved for future payment</i> SEE "SCHEDULE 4" FOR DETAILS				25,000
<b>Total</b> ..... ▶ <b>3b</b>				25,000







# Schedule of Contributors

2017

▶ 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

501(c)( ) (enter number) organization

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

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).



<b>Name of organization</b> PGE Foundation	<b>Employer identification number</b> 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	\$ 46,338	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
----------------------------------------	----------------------------------------------

**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

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

**PGE Foundation**  
**93-1138806**  
**For the Period ended December 31, 2017**

**Schedule 1**

**2017 990-PF, Part I**

**Line 16c Other Professional Fees**

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Fund management consulting fees	2,176
Trustee fees	5,000
Other Professional Fees	7,176

**Line 18 Taxes**

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Income Taxes	37,193
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**Line 23 Other Expenses**

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Other miscellaneous administrative	132,491
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For the Period ended December 31, 2017

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 Boo	2161 SW Laurel	Portland, OR	Director, Chair & Officer	2	0		0	0
Dave Robertson	121 SW Salmon St.	Portland, OR	President		0	(1)	0	0
James J. Piro	121 SW Salmon St.	Portland, OR	Director		0	(1),(3)	0	0
Peggy Y. Fowler	11981 SW Aspen Ridge Dr.	Tigard, OR	Director		0	(1)	0	0
Carol A. Dillin	121 SW Salmon St.	Portland, OR	Director		0	(1)	0	0
David K. Carboneau	1229 SE 55th	Portland, OR	Director		0	(1),(2)	0	0
Jardon T. Jaramillo	121 SW Salmon St.	Portland, OR	Director		0	(1)	0	0
Randolph L. Miller	4100 Arthur Way	Portland, OR	Director		0	(1)	0	0
Kregg Arntson	121 SW Salmon St.	Portland, OR	Executive Director	8	0	(4)	0	0
James Lobdell	121 SW Salmon St.	Portland, OR	Treasurer		0	(1)	0	0
Barbara Parr	121 SW Salmon St.	Portland, OR	Secretary		0	(1)	0	0
					<u>0</u>		<u>0</u>	<u>0</u>

**NOTES:**

- (1) Average Hours per week devoted to position is less than 1 hour
- (2) Term expired December 31, 2017
- (3) Retired December 31, 2017
- (4) Unofficial term expired

## PGE Foundation 2017 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 2420 19th Ave. Forest Grove, OR 97116-2459	N/A	501(c)(3)	To support the build-out of a new space for Adelante Mujeres in Forest Grove, OR.	\$ 25,000	10/16/2017
2	Airway Science for Kids 3155 NW Cornell Road Hillsboro, OR 97124	N/A	501(c)(3)	To support growth of the Teen Flight program, which builds advanced STEM skills through aeronautics.	\$ 10,000	4/7/2017
3	Albertina Kerr Centers Foundation 424 NE 22nd Avenue Portland, OR 97232	N/A	501(c)(3)	To support family involvement in children's mental health services for 900 children in Oregon.	\$ 10,000	10/16/2018
4	Arts Council of Pendleton 214 N. Main Street Pendleton, OR 97801	N/A	501(c)(3)	To support arts education for 750 young people in Pendleton and outlying cities.	\$ 5,000	6/30/2017
5	Bag and Baggage Productions 350 E Main Street Hillsboro, OR 97123	N/A	501(c)(3)	To increase access to live theater for 3,500 underserved high school students in four rural counties.	\$ 5,000	6/30/2017
6	Better Together Central Oregon 2804 SW 6th Street Redmond, OR 97756	N/A	501(c)(3)	To support and expand College Access & Pathways to Construction and Manufacturing Career programs in Central Oregon.	\$ 25,000	4/7/2017
7	Black Parent Initiative 2915 NE Martin Luther King Jr. Blvd. Portland, OR 97212	N/A	501(c)(3)	To support the health and self-sufficiency of 50 young, low-income black families in Multnomah Co.	\$ 10,000	10/16/2017
8	Camp Fire USA Columbia Council 1411 SW Morrison St. #300 Portland, OR 97205	N/A	501(c)(3)	To close achievement gaps and improve graduation rates for priority youth in East Portland.	\$ 15,000	4/7/2017
9	Cascadia Behavioral Healthcare 847 NE 19th Avenue, Suite 100 Portland, OR 97232	N/A	501(c)(3)	To provide housing and services to 250 homeless individuals, families and children with mental illness.	\$ 10,000	10/16/2017
10	Central City Concern 232 NW 6th Avenue Portland, OR 97209	N/A	501(c)(3)	To support 348 new affordable housing units and a health clinic for 3,000 patients in East Portland.	\$ 100,000	10/16/2017
11	College Possible 532 SE Grand Avenue Portland, OR 97214	N/A	501(c)(3)	Oregon Foster Youth Connection addresses challenges faced by foster youth by engaging them in community-based support systems, a powerful network of youth who share the experience of time in foster care, and youth led leadership training.	\$ 15,000	4/7/2017
12	Community Transitional School 6601 N.E. Killingsworth Street Portland, OR 97218-3068	N/A	501(c)(3)	To fund the transportation program in the 2017-2018 school year, providing daily transportation to and from school for homeless youth.	\$ 10,000	4/7/2017
13	Concordia University 2811 NE Holman Street Portland, OR 97211	N/A	501(c)(3)	Final payment. 3 to PhD is a collective impact anchored by a Concordia-Faubion School partnership, addressing conditions that are obstacles to children's wellbeing and learning, while providing educational strategies that help them achieve at their highest level.	\$25,000	4/7/2017
14	Confluences 2019 Montello Avenue Hood River, OR 97031	N/A	501(c)(3)	To support Confluence in the Classroom during the 2017-2018 school year by underwriting the costs of artist honoraria, travel, materials and supplies for participating schools in Oregon.	\$ 10,000	6/30/2017
15	Constructing Hope Pre-Apprenticeship Program 405 NE Church Street Portland, OR 97211	N/A	501(c)(3)	To support construction training and career placement for 100 low-income community members.	\$ 11,000	4/7/2017
16	David Douglas Educational Foundation 11300 NE Halsey St Portland, OR 97220	N/A	501(c)(3)	To support CTE career exploration for 60 middle school students in the David Douglas School District.	\$ 5,000	4/7/2017
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.	\$ 3,750	4/7/2017
18	Elevate Oregon 4916 NE 122nd Avenue Portland, OR 97230	N/A	501(c)(3)	To support Elevates' middle school initiative which adds daily classes and mentoring support for 6th and 7th grade students, completing the first pipeline from 4th grade to college.	\$ 10,000	4/7/2017

19	Foundation for a Better Oregon 221 NW 2nd Avenue, Suite 203 Portland, OR 97209-3982	N/A	501(c)(3)	To support David Douglas and Tillamook School Districts participation in Chalkboard's equity pilot.	\$ 12,000	4/7/2017
20	Friends of Saturday Academy 5000 N. Willamette Blvd. Portland, OR 97203	N/A	501(c)(3)	To support low-income youth by providing an academic camp aimed at overcoming summer learning loss.	\$ 15,000	4/7/2017
21	Friends of the Children-Portland 44 NE Morris Street Portland, OR 97212-3015	N/A	501(c)(3)	To support college and career readiness programming for high-priority adolescents in Portland area	\$ 15,000	4/7/2017
22	Friends of Zenger Farms 11741 SE Foster Road Portland, OR 97266	N/A	501(c)(3)	To support free nutrition and food access education to 700 parents, grandparents, and guardians.	\$ 10,000	10/16/2017
23	Growing Gardens 2203 NE Oregon Street Portland, OR 97232	N/A	501(c)(3)	To support family food security and nurture parent-child relationships for 500 adults and children.	\$ 10,000	10/16/2017
24	Human Solutions 12350 SE Powell Blvd. Portland, OR 97236	N/A	501(c)(3)	To support expedited efforts to rapidly rehouse at least 160 families experiencing homelessness.	\$ 25,000	10/16/2017
25	I Have A Dream Foundation Oregon 2916 NE Alberta Street, Suite D Portland, OR 97211 Portland, OR 97220	N/A	501(c)(3)	To support STEAM programming for approximately 580 students in the Reynolds School District.	\$ 5,000	4/7/2017
26	Impact NW 10055 E. Burnside Portland, OR 97216	N/A	501(c)(3)	To provide at-risk young people with career readiness skills and connection to employment opportunities.	\$ 25,000	4/7/2017
27	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	6/30/2017
28	Japanese Garden Society of Oregon 611 SW Kingston Avenue Portland, OR 97205	N/A	501(c)(3)	Final payment. To expand facilities in order to accommodate the 1,100% growth in audience over the past 52 years: increasing educational programming, improving visitor safety and ADA access, and alleviating congestion in the original gardens.	\$30,000	6/30/2017
29	JOIN 1435 NE 81st Ave, Ste 100 Portland OR 97213	N/A	501(c)(3)	To support the remodel of the family shower and restroom in JOIN's Basic Service Center.	\$ 15,000	10/16/2017
30	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	4/7/2017
31	Kids Intervention & Diagnostic Service Center 1375 NW Kingston Avenue Bend, OR 97703	N/A	501(c)(3)	A Director's grant made in support of general operations.	\$ 10,000	10/16/2017
32	Know Your City 411 NW Flanders Street Portland, OR 97209	N/A	501(c)(3)	To support free multidisciplinary arts learning/publishing program to over 100 youth in PDX.	\$ 5,000	6/30/2017
33	Latino Network 410 NE 18th Avenue Portland, OR 97232	N/A	501(c)(3)	To support culturally-specific summer bridge program, 9th Grade Counts, for at-risk Latino students.	\$ 15,000	4/7/2017
34	Lifeworks NW 14600 NW Cornell Rd Portland, OR 97229	N/A	501(c)(3)	To support in-home support services for families with children from birth through age three.	\$ 10,000	10/16/2017
35	Literary Arts 925 SW Washington Street Portland, OR 97205	N/A	501(c)(3)	To support the activities of Literary Arts' Youth programs, including Writers in the Schools residency program	\$ 10,000	6/30/2017
36	Literary Arts 925 SW Washington Street Portland, OR 97205	N/A	501(c)(3)	Director's grant for general operating support of the Brian Booth Writers Endowment.	\$ 3,750	4/7/2017
37	Little Ballet Theatre 389 South Main Street Warrenton, OR 97146	N/A	501(c)(3)	Director's grant for general operating support of the Little Ballet Theatre.	\$ 2,500	4/7/2017
38	Marathon Education Partners, Inc. 610 SW Alder Street, #921 Portland, OR 97205	N/A	501(c)(3)	To prepare 11th graders for senior year, and help 12th graders bridge to freshman year in college.	\$ 25,000	4/7/2017
39	MECOP, Inc. 435 NW 5th Street Corvallis, OR 97330	N/A	501(c)(3)	To fully endow the Rand Sherwood Scholarship for MECOP students in memory of deceased PGE employee Rand Sherwood.	\$ 25,000	4/7/2017
40	Metropolitan Family Service 1808 SE Belmont Portland, OR 97214	N/A	501(c)(3)	To support financial capabilities services for 400 low-income people in Portland, OR metro area.	\$ 7,500	10/16/2017



41	Metropolitan Youth Symphony 4800 SW Macadam Avenue, Suite 105 Portland, OR 97239	N/A	501(c)(3)	To support MYS's Music Equity Program, breaking down barriers to music education for low-income kids	\$ 10,000	6/30/2017
42	MountainStar Family Relief Nursery 2125 NE Daggett Lane Bend, OR 97701	N/A	501(c)(3)	To support MountainStar's Family Engagement program in Prineville and Madras.	\$ 7,500	10/16/2017
43	New Avenues for Youth 314 SW 9th Avenue Portland, OR 97205	N/A	501(c)(3)	To support service expansion into East Multnomah County to reach youth experiencing homelessness.	\$ 25,000	10/16/2017
44	Northwest Housing Alternatives 13819 SE McLoughlin Blvd. Milwaukie, OR 97222	N/A	501(c)(3)	To rebuild the NHA campus in central Milwaukie, adding needed housing, shelter, and office space.	\$ 25,000	10/16/2017
45	Open Meadow Alternative Schools 7621 N Wabash Avenue Portland, OR 97217-6031	N/A	501(c)(3)	A Director's grant made in support of general operations.	\$ 1,000	4/7/2017
46	Open Meadow Alternative Schools 7621 N Wabash Avenue Portland, OR 97217-6031	N/A	501(c)(3)	Final payment. To support a new school building for 270 students in grades 7-12 in East Multnomah County, Portland.	\$25,000	4/7/2017
47	Oregon Alliance of Independent Colleges & Universities 16101 SW 72nd Avenue, Suite 100 Portland, OR 97224	N/A	501(c)(3)	This grant will provide scholarships/student aid at the Alliance. Member institutions that will benefit students from Oregon with academic promise and demonstrated financial need during the 2017-18 academic year.	\$ 39,142	4/7/2017
48	Oregon Ballet Theatre 0720 SW Bancroft Avenue Portland, OR 97239	N/A	501(c)(3)	To support OBT's 2016/17 Student Performance Series, bringing world-class ballet to K-12 students.	\$ 10,000	6/30/2017
49	Oregon Black Pioneers 117 Commercial Street, NE #210 Salem, OR 97301	N/A	501(c)(3)	To support curriculum development, marketing and programming for 10,000 students as part of Racing to Change exhibit in partnership with the Oregon Historical Society.	\$ 10,000	6/30/2017
50	Oregon Business Council Charitable Institute 1100 SW 6th Avenue, Suite 1608 Portland, OR 97204	N/A	501(c)(3)	To support state leaders in shaping strategies, policies, and investments in CTE-STEM education.	\$ 25,000	4/7/2017
51	Oregon Children's Theatre Company 1939 NE Sandy Blvd Portland, OR 97232-2894	N/A	501(c)(3)	To support Ticket to Read - an arts education initiative reaching 5,000 low-income students.	\$ 15,000	6/30/2017
52	Oregon Council for the Humanities 921 SW Washington Street, Suite 150 Portland, OR 97205	N/A	501(c)(3)	To support Humanity in Perspective course to adults living on low incomes without college degrees.	\$ 5,000	10/16/2017
53	Oregon East Symphony 345 SW 4th Street Pendleton, OR 97801	N/A	501(c)(3)	To support "Symphony Strings" an afterschool beginning strings program for 4th and 5th grade students.	\$ 5,000	6/30/2017
54	Oregon Energy Services AKA: HEAT Oregon PO Box 127 Tualatin, OR 97062-0127	N/A	501(c)(3)	A Director's grant made in support of general operations.	\$ 500	4/7/2017
55	Oregon Food Bank 7900 NE 33rd Drive Portland, OR 97211	N/A	501(c)(3)	To address the root causes of hunger by providing education for families and children.	\$ 15,000	10/16/2017
56	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	4/7/2017
57	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	4/7/2017
58	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.	\$ 29,142	4/7/2017
59	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 2017-18.	\$ 19,142	4/7/2017
60	Partners For a Hunger Free Oregon 712 SE Hawthorne Blvd. Portland, OR 97214	N/A	501(c)(3)	To increase participation in the School Breakfast Program and Summer Food Service Program in Oregon.	\$ 10,000	10/16/2017

61	Pathfinders of Oregon 2501 SW 1st Avenue, #300 Portland, OR 97201	N/A	501(c)(3)	To support mentoring for 40 children and classes for 20 parents with criminal justice involvement.	\$ 10,000	10/16/2017
62	Portland Art Museum - NW Film Center 1219 SW Park Avenue Portland OR 97205	N/A	501(c)(3)	To help 300 Title 1 7th graders meet media arts & career readiness curriculum goals in Portland, OR.	\$ 8,750	6/30/2017
63	Portland Art Museum 1219 SW Park Avenue Portland OR 97205	N/A	501(c)(3)	To support the Teacher Poster Project with eight collection-specific posters and Spanish translation.	\$ 15,000	6/30/2017
64	Portland Center Stage 128 NW 11th Ave Portland, OR 97209	N/A	501(c)(3)	To support free Playwriting and Theater Fundamentals courses for 230 teens in the Portland metro area.	\$ 15,000	6/30/2017
65	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	4/7/2017
66	Portland Community College Foundation, Inc. 12000 SW 49th Avenue, CC 234 Portland, OR 97219	N/A	501(c)(3)	To support PCC Future Connect, providing 300 academically at-risk high school youth with scholarship support and wraparound services.	\$ 25,000	4/7/2017
67	Portland Homeless Family Solutions 1221 SW Yamhill, Suite 210 Portland, OR 97205	N/A	501(c)(3)	To support activities to help 150 homeless families secure and retain their housing.	\$ 10,000	10/16/2017
68	Portland Opera Association, Inc. 211 SE Caruthers Street Portland, OR 97214	N/A	501(c)(3)	To support Portland Opera to Go's 2017 statewide educational tour to schools throughout OR and WA.	\$ 10,000	6/30/2017
69	Portland Playhouse 602 NE PRESCOTT ST PORTLAND OR 97211	N/A	501(c)(3)	To support the 10 week afterschool program, Fall Festival of Shakespeare.	\$ 10,000	6/30/2017
70	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	4/7/2017
71	Portland State University Foundation 1600 SW 4th Avenue Portland, OR 97201-5522	N/A	501(c)(3)	Fiscal sponsor to Oregon MESA - To support STEM education for 60 underserved students in East Multnomah County, in the Reynolds School District.	\$ 5,000	4/7/2017

72	Portland State University Foundation 1600 SW 4th Avenue Portland, OR 97201-5522	N/A	501(c)(3)	To fund scholarships for deserving students studying at Portland State University during the academic year 2017-18.	\$ 4,142	4/7/2017
73	Portland State University Foundation 1600 SW 4th Avenue Portland, OR 97201-5522	N/A	501(c)(3)	To support 16 high-achieving, financially-limited students in the PSU Honors College to develop Smart Cities projects.	\$ 25,000	4/7/2017
74	REAP, Inc. 1821 SE Cesar Estrada Chavez Blvd. Portland, OR 97214	N/A	501(c)(3)	To expand Solutions, a school-based leadership/civic engagement program, to serve more students.	\$ 10,000	4/7/2017
75	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 nearly 30,000 K-8 tri-county students during 2017-18.	\$ 25,000	6/30/2017
76	Salem Art Association 600 Mission Street, SE Salem, OR 97302-6203	N/A	501(c)(3)	To support free arts integrated into history education field trips for 800 4th-grade Title I students.	\$ 5,000	6/30/2017
77	Salem Harvest PO Box 483 Salem, OR 97308	N/A	501(c)(3)	To reduce food insecurity in families by harvesting and distributing produce that would go to waste.	\$ 5,000	10/16/2017
78	Sisters Folk Festival, Inc. 204 West Adams Avenue, Suite 204 Sisters, OR 97759	N/A	501(c)(3)	To support up to 100 at-risk children participating in arts-based education in Sisters.	\$ 5,000	6/30/2017
79	Sisters of the Road 133 NW 6TH Avenue Portland, OR 97209-3608	N/A	501(c)(3)	To support free meals for families experiencing homelessness and extreme poverty.	\$ 7,500	10/16/2017
80	Stand for Children Leadership Center 2121 SW Broadway, #1111 Portland, OR 97201	N/A	501(c)(3)	To support Stand's efforts to support districts around the state to improve high school graduation rates, expand CTE and career pathways.	\$ 10,000	4/7/2017
81	The August Wilson Red Door Project 6344 N. Curtie Avenue Portland, OR 97217	N/A	501(c)(3)	To support arts education, access and opportunity for Portland area high school students of color.	\$ 10,000	6/30/2017
82	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.	\$ 36,864	4/7/2017
83	The Salvation Army Cascade Division 8495 SE Monterey Avenue, #8 Happy Valley, OR 97086	N/A	501(c)(3)	To support Veterans and their families experiencing homelessness with safe and stable housing.	\$ 10,000	10/16/2017
84	Transition Projects 685 NW Hoyt Street Portland, OR 97209	N/A	501(c)(3)	To support Veterans and their families in safe and stable housing through prevention assistance.	\$ 25,000	10/16/2017
85	Trillium Family Services 3415 SE Powell Blvd. Portland, OR 97202	N/A	501(c)(3)	To support Mental Health Promotion activities at KairosPDX, for children and parents.	\$ 10,000	10/16/2017
86	University of Oregon Foundation 1720 E. 13th Avenue, Suite 410 Eugene, OR 97403	N/A	501(c)(3)	To fund scholarships for deserving students studying at the University of Oregon during the academic year 2017-18.	\$ 4,142	4/7/2017
87	White Bird PO Box 99 Portland, OR 97207	N/A	501(c)(3)	To support White Bird's 2017-18 Outreach Project with Portland Public Schools on Alvin Ailey	\$ 10,000	6/30/2017
88	World Affairs Council of Oregon 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	4/7/2017
89	Write Around Portland 133 SW 2nd Avenue, Suite 304 Portland, OR 97204	N/A	501(c)(3)	To support access to creative writing for youth through 8 ten-week creative writing workshops.	\$ 7,500	6/30/2017
<b>TOTAL GRANTS PAID IN 2017</b>					<b>\$1,189,324</b>	



**PGE Foundation 2017 Grants - Tax Filing**

**Schedule 4**

	<b>Approved for Future Payment</b>	If recipient is an individual, show any relationship to any foundation manager or subsequent contributor	<b>Foundation status of recipient</b>	<b>Purpose of grant or contribution</b>	<b>Grant Amount</b>	<b>Payment Date</b>
1	Portland State University Foundation 1600 SW 4th Avenue Portland, OR 97201-5522	N/A	501(c)(3)	To support 16 high-achieving, financially-limited students in the PSU Honors College to develop Smart Cities projects.	\$ 25,000	4/12/2018
	<b>TOTAL FUTURE PAYMENTS</b>				<b>\$25,000</b>	