



Organization Profile

PGE Retirees Inc. is a non-profit 501 (c)(4) non-profit organization incorporated in the state of Oregon.



Purpose: Provide programs and support services for retirees including news, social networking, recreation, special interests and advocacy initiatives.

Membership: 950 members including current and future PGE retired employees, spouses and significant others. There is no cost to become a member, but this can be adjusted annually if necessary.

Board of Directors: Elected by members at an annual meeting in May of each year; directors serve terms of three years.

The **Executive Board** consists of five officers (President, Vice President, Recording Secretary, Treasurer and Corresponding Secretary) elected by the Board of Directors. Physical year is from June 1 through May 30. The Board elects officers annually at the April Board Meeting; newly elected officers terms begin the following June 1. Officers for the past physical and future years are:

Officers term starts June 1	2020-2021 term	2021-2022 term
President	Stan Chiotti	John McLain
Vice President	Terry Judkins	Greg Rife
Treasurer	Norby Chartrey	Norby Chartrey
Recording Secretary	Darlene Judkins	Darlene Judkins
Corresponding Secretary	Kimberly Hamling	Kimberly Hamling

All of the Board of Directors, committees' chairs, and much more are listed on the organization's website at www.pgeretirees.org

This website is a hub for retirees and their spouses (and active employees too) to stay connected, stay informed, and stay active.



The Transition Plan

In the fall of 2019, PGE was nearing the end of several initiatives that would:

- Outsource the administration of employee benefits to several companies that could offer expanded choices to retirees, and
- Replace aging and unsupported software systems with new systems

Following the announcement of these initiatives, a group of PGE officers, management and members of *PGE Retirees Inc.* met to review and adopt a **Transition Plan** with the goals of:

1. Achieving long-term growth in membership in *PGE Retirees Inc.* by providing desirable news, networking, activities and advocacy for retirees
and
2. Improving and enhancing a “Relationship of Mutual Advocacy” between *PGE Retirees Inc.* and PGE Corporate.

Achieving these goals required *PGE Retirees Inc.* to evolve toward a self-reliant membership-focused and professionally managed group of volunteers to justify an investment of time and money by retirees and PGE Corporate.

PGE provided the following to help reach these goals:

- Financial Support
- Liaison to PGE Human Resources and Corporate Communications
- Informational brochures in Retiree Exit Packets and employee communications channels to encourage “opting-in” and registering with *PGE Retirees Inc.*
- Encouragement and support from Officers Maria Pope and Anne Mersereau
- Locations for PGE Retiree Board Meetings, mainly Oregon City.

***PGE Retirees Inc.* did the following:**

- **Recruited volunteers** to develop new functions of a self-reliant member services organization.
- **Revised the Bylaws** to encompass new scope and services.
- **Established a corporate email address** (PGERetirees@gmail.com) and US mail PO Box address.
- **Established a Communications Committee** of volunteer retirees.



- **Subscribed to an online contact and email management system** (MailChimp) to maintain a membership list of retirees and their contact information and to send emails to members.
- **Published newsletters** and other communications through digital channels of email and social media, such as the PGE Retiree Private Facebook Group.
- **Established printing and US Mailing options** for retirees who do not have access to digital services.
- **Subscribed to ZOOM services** to support digital meetings, including an additional subscription to enable large “webinar” format meetings with members throughout the year, such as educational webinars on topics of interest (e.g., volunteering, benefits).
- **Built and Launched a new *PGE Retirees Inc.* website:** www.PGERetirees.org
 - ✓ **Hired a Website Design firm** to help build the website.
 - ✓ **Subscribed to Web-Hosting and WordPress** services for editing and useful plug-ins.
 - ✓ **Launched the new website with services** including a calendar of events, social networking, special interest groups, activities, advocacy opportunities and a member search function.
 - ✓ **Established Volunteer Retiree Monitors** assigned to specific website pages to ensure content is up-to-date.

Summary

The *PGE Retirees Inc.* organization has accomplished the initial goals of the Transition Plan while effectively dealing with the additional challenges of a pandemic, fires, smoke and ice storms.

- On January 1, 2020, membership database was at zero and there were 150 members in the Facebook Group.
- By May 30, 2021, membership was about 950 and there were about 450 members in the Facebook Group. Both are growing.
- Additional retiree volunteers and leadership have been recruited.
- Newsletters and member services are established and operate on a regular schedule.



Financial Report for Fiscal Year 2020-2021

Many events and initiatives were cancelled due to Covid in this budget period.

	BUDGET	ACTUAL
BEGINNING BALANCE June 1, 2020		\$ 5,485.28
INCOME		
Donations from P.G.E.	\$ 6,000.00	
Dividends	\$ 100.00	
Other Income: Dues/Contrib.	\$ 500.00	
Onetime contribution PGE	\$ 13,000.00	\$ 13,000.00
(+)TOTAL ANNUAL INCOME		\$ 18,485.28
EXPENSES		
Annual Luncheon	\$ 4,000.00	
Christmas Luncheon	\$ 4,000.00	
Picnic	\$ 500.00	
Golf	\$ 1,000.00	
Bowling	\$ 350.00	
Tours & Trips	\$ 1,000.00	
Retiree Assistance	\$ 1,000.00	
Board Meetings	\$ 250.00	\$ 247.33
Insurance	\$ 425.00	\$ 439.00
Supplies & Misc.	\$ 250.00	\$ 236.00
Corp. Fees	\$ 50.00	\$ 50.00
Web Site annual fee	\$ 200.00	
Communication:		
Six Mailings	\$ 2,400.00	\$ 988.75
Mail Chimps	\$ 600.00	\$ 821.15
Web Site Design	\$ 3,200.00	\$ 2,520.50
Zoom	\$ -	\$ 225.80
(-)TOTAL ANNUAL EXPENSES	\$ 7,375.00	\$ 5,478.53
ENDING BALANCE May 31, 2021	\$ 11,110.28	\$ 13,006.75



An Optimistic but Uncertain Future

We have learned a lot through the past year about executing “transition and start-up” projects in the midst of several world and local disasters (pandemic, fires, ice storms).

- Retirees want to stay connected, stay informed and stay active; 90% of retirees choose digital channels to stay connected and get the news (and Zoom too of course).
- Many will volunteer their time and their talent.
- Feedback from members is positive and optimistic as shown by the growth in membership in the Facebook group, email lists, and volunteers to work on committees.
- The support of PGE Corporate in both time and money was critical to the successful completion of the Transition Plan.

Based on a search and review of other utilities, *PGE Retirees Inc.* is unique. Since there is no blueprint for us to follow, the future is not assured by following a model formula based on past successes of similar organizations. However, PGE has recently reviewed and approved our draft budget and short-term objectives for the next few years. Their support is appreciated and allows us to continue to offer free membership. We will monitor membership feedback and suggestions that will help us understand what services and initiatives to add, expand, or terminate in the years ahead.

Areas of Mutual Advocacy

There are many areas where retirees often show up in force to advocate for PGE sponsored initiatives and events. Retirees also contribute time and money to non-profit causes through channels promoted by PGE. In year 2020, PGE Retirees contributed a **total of \$462,101** to non-profit causes:

Donated: \$317,547 PGE Match: \$124,454 Cause Cards: \$ 20,100

PGE Retirees Inc will continue to be a valued advocate group of almost 1,000 retirees with past experiences as officer, directors, managers, union and non-union.



Key Initiatives: 2021 through 2024

The Board of Directors of *PGE Retirees Inc.* has drafted the following set of key initiatives for the next year (June 2021 to May 2022):

- **Activities:** Increase the number of recreational and interest groups and participation to “exercise the body” within a social group setting. For example, golf, bowling, biking, fishing, tennis, gardening, running and skiing.
- **Making New Memories:** Increase the number of special interest groups and participation in “social interaction” activities concerning a specific theme or craft. For example, travel, book clubs, sewing, knitting and neighborhood coffee-shop gatherings (in person or via Zoom).
- **Advocacy:** Increase the number of advocacy events and participation in PGE-supported “causes” and initiatives that benefit community health and welfare. For example, blood drives, the food bank, SMART and the beach clean-up.
- **Education:** Create educational and informational webinars and seminars on topics such as changes in health care options and how to use technology (smart phones, laptops, desktops, navigating web browsers and online services).
- **Listen:** Solicit and record verbal histories and member stories through video, photos and text.
- **Adapt:** Monitor member feedback and adjust initiatives and services as needed to maintain a high level of satisfaction and level of membership.
- **Sharpen the Focus:** Explore the advantages of changing the non-profit status of *PGE Retirees Inc.* from a 501 c(4) to a 501 c(3) in order to reduce costs and sharpen the focus on the education and social welfare of retirees.
- **Expand Geographic Scope:** Provide financial support for activities and events (such as summer picnics and holiday celebrations), can be held at locations beyond the Portland metro area where retirees are located (such as St. Helens, Salem and Vancouver).
- **Keep Costs Stable:** At the expected levels of membership and growth, the current monthly software subscription fees and other administrative costs would not likely increase over the next several years. The goal of these initiatives above is to increase participation in programs without significantly increasing the cost of services.



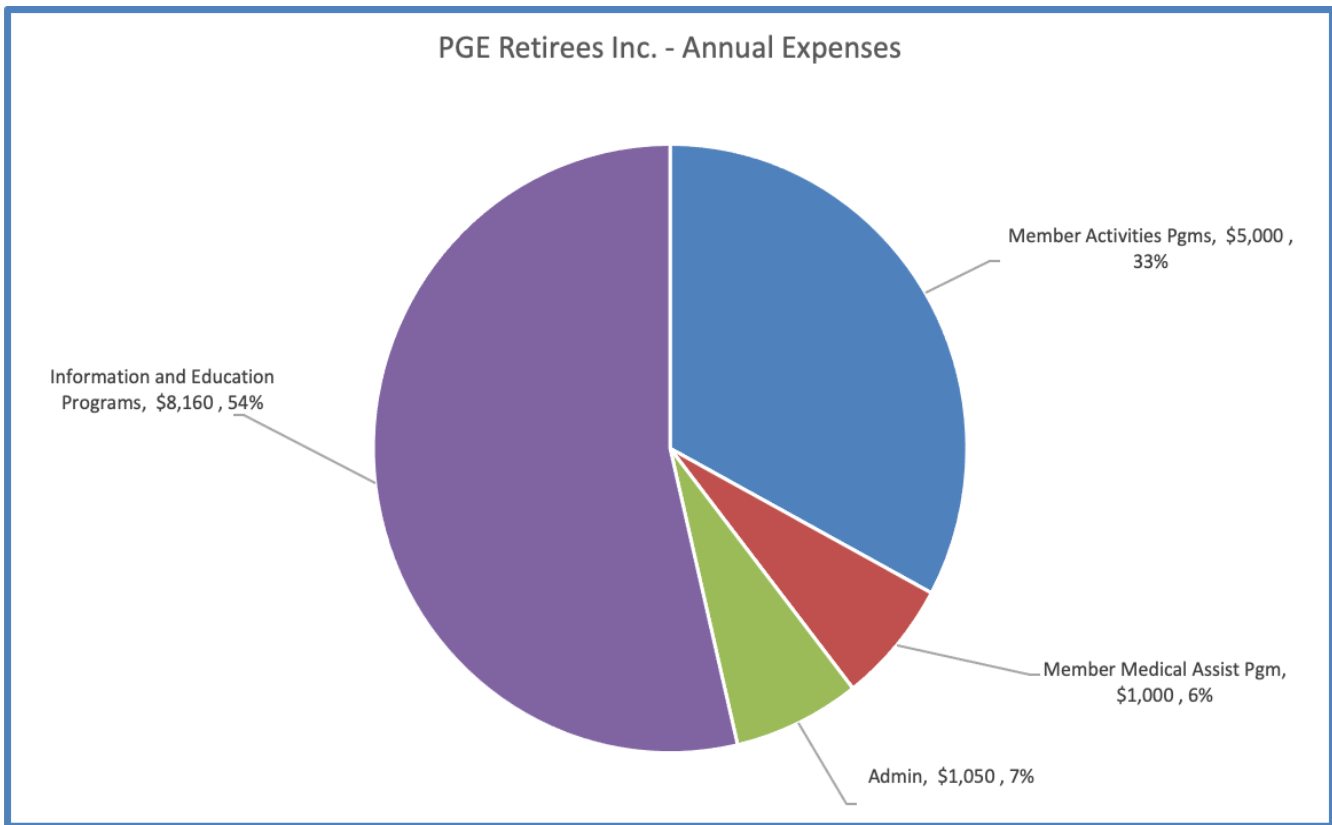
Request for PGE Funding: 2021 through 2024

A commitment to a strong relationship between PGE Corporate and *PGE Retirees Inc.* is important to our members. Continued funding by PGE ensures that we are able to:

1. Offer **free membership**
2. Be **free of advertising**, and
3. Keep **Administrative Costs low** (currently 7% of funding) allowing the leadership group to solely focus on programs and services (currently 93% of funding) for retirees and avoids soliciting revenues from advertising, dues, or other endeavors.

Budget for 2021-2022

Expenses Summary:





Budget Details:

PGE RETIREES BUDGET/FORECAST			
Physical Year June 1, 2019 to May 31	2021-2022	2022-2023	2023-2024
BEGINNING BALANCE June 1	\$ 11,000	\$ 8,390	\$ 5,560
INCOME			
Donations from PGE	\$ 12,000	\$ 11,000	\$ 10,000
Donations/Dues from Members	\$ -	\$ -	\$ -
Advantis Dividends/Interest	\$ 100	\$ 100	\$ 100
Other Income: Dues/Contrib.	\$ 500	\$ 500	\$ 500
(+)TOTAL ANNUAL INCOME	\$ 12,600	\$ 11,600	\$ 10,600
EXPENSES			
Member Activities Programs (excludes food or beverage costs):			
Annual Meeting of Members	\$ 1,000	\$ 1,000	\$ 1,000
Holiday Season Get-Together of Members	\$ 1,000	\$ 1,000	\$ 1,000
Summer Get-Together of Members	\$ 1,000	\$ 1,000	\$ 1,000
Activities: Golf, Bowling, Biking, Travel Club, Book Club, Garden Club, and several more)	\$ 2,000	\$ 2,000	\$ 2,000
Retiree Advocacy & Medical Assistance Pgm	\$ 1,000	\$ 1,000	\$ 1,000
Administration:			
Insurance	\$ 500	\$ 500	\$ 500
Supplies & Misc.	\$ 500	\$ 500	\$ 500
Corp. Fees	\$ 50	\$ 50	\$ 50
Member Information & Education Pgms:			
Six Mailings	\$ 1,200	\$ 1,200	\$ 1,200
MailChimp Subscription	\$ 1,800	\$ 1,800	\$ 1,800
Web Site Hosting & Support	\$ 3,360	\$ 2,580	\$ 2,190
Zoom Subscription	\$ 1,800	\$ 1,800	\$ 1,800
(-)TOTAL ANNUAL EXPENSES	\$ 15,210	\$ 14,430	\$ 14,040
ENDING BALANCE May 31	\$ 8,390	\$ 5,560	\$ 2,120