



## Stay connected

Changes here, changes there, changes everywhere. Sydney Harris, an American journalist, once said, “Our dilemma is that we hate change and love it at the same time; that what we really want is for things to remain the same but get better.” Well. No amount of effort will take us back to the way things were. Therefore, your PGE Retirees Inc. 501(c)4 organization has decided to embrace the change and become a self-managed and self-reliant membership group in 2020. PGE has agreed to fully fund our request for financial help to help us in this transformation.

This means that PGE Retirees Inc. needs to transform from a past where PGE did a lot of things for us to a modern “membership” association where we decide to **JOIN/OPT IN** to stay connected with activities and issues facing retirees. More of us will need to step up and take on more work than we have in the past as we create, build and manage a new membership database, a new email management system, a new newsletter, a new website, a new ...

To do all this, we need your help!

1. **Get on the PGE Retirees mailing list.** This is where it starts. PGE no longer maintains contact information for retirees, so if you want to continue to get information from us — your PGE Retirees organization — we need your addresses and whether you prefer to receive communications via email or in print. Send your contact information to:

[PGERetirees@gmail.com](mailto:PGERetirees@gmail.com)

or

PGE Retirees, Inc.

PO Box 2371

Gresham OR 97030-3000

2. **Join the PGE Retiree Facebook Group. See page 7 for step-by-step instructions.** We have 265 members and counting; how many can we get?
3. **Join a committee!** We need volunteers for our transitional transformational committees to get us organized so we can implement the PGE Retirees Inc. Transition Plan in 2020 (see the **Transition**

**Plan Summary** on pages 8 and 9) and build or rebuild these important functions. Meetings will probably be in PGE’s service area, but you can review materials and make suggestions from anywhere!


- a. **Membership database:** We need one. Help us build one that serves as a master membership list that includes contact information, delivery preferences for the newsletter, invitations and specific lists for committees, retiree events and get-togethers.
- b. **Website:** We need a new one. Help us build it.
- c. **Social media:** We need help to research the use of social media (e.g., Facebook, Twitter, Instagram, etc.) and write and present a recommendation on utilizing social media on a regular basis to the PGE Retirees board of directors.

**To volunteer, send an email to [PGERetirees@gmail.com](mailto:PGERetirees@gmail.com)** with the subject “Membership Database,” “Website” or “Social Media Committee Volunteer,” and include your contact information.

4. **Attend a board meeting.** The next one is Monday, Feb. 10, from 9:30–11:00 a.m. at the PGE Oregon City Service Center on 209 Warner Milne Road in Oregon City.
5. **Read the PGE Retirees Inc. Transition Plan Summary** enclosed in this mailing and approved by the PGE Retirees Inc. board of directors and Anne Mersereau, PGE Vice President of Human Resources, Diversity, Equity & Inclusion.
6. **Save the Retiree Quick Reference on pages 10–12!** If you have a question on a particular topic — including healthcare, pension, reimbursements, life insurance, 401(k), beneficiaries, volunteering, and more — the contact information is available on the PGE website: <https://portlandgeneral.com/careers/life-after-your-career-at-pge>.

**Stay connected with friends and colleagues. JOIN US NOW: OPT IN! OPT IN! OPT IN!**

# Welcome to 2020!

What did the gingerbread man put on his bed? Think you know? Find this  to see if you're right!

## 2020 retiree board meetings

The next meetings are **Mondays, Feb. 10** and **April 13**, from 9:30–11:00 a.m. at the **Oregon City Service Center**, Conference Room, 209 Warner Milne Rd, Oregon City.

All retirees, spouses and significant others are welcome to attend. We meet on the second Monday of every even month — February, April, June, August, October and December. We need you! Come to a meeting! There's a lot going on!

## President's corner

*By Stan Chiotti*

**OPT IN! OPT IN!** This is the key phrase for PGE retirees in 2020. This is the final issue of the PGE Retirees Newsletter to be formatted, printed and mailed from PGE. From now on, we will be responsible for all aspects of the newsletter — writing, formatting, printing and distributing. **OPT IN** because if you don't provide us with your email or mailing address, we cannot communicate with you at all about anything.



In December the retiree board met in the 1WTC17 PGE boardroom with CEO Maria Pope and the VP of HR, Diversity, Equity and Inclusion, Anne Mersereau. They provided us with some very encouraging and interesting information regarding the company and the retirees. They expressed how much they appreciate what we have done to make the company what it is today. They have also stepped up big time to help us financially, not only in 2020, but also in the future as we go through the transition phase of creating a communication system and becoming a self-managed organization.

I hope you all had a Merry Christmas and will have a Happy New Year.

## Bowling

Date	Location/Cost	Contact
Wednesdays at <b>noon</b> <i>(and every first and third Wednesday through May)</i>	Kellogg Bowl, 10306 SE Main St, Milwaukie \$7 per bowler for three games with free shoe rental, and you get a chance to win a \$5 prize!	<b>Al Richardson,</b> <a href="mailto:alrbjr@bctonline.com">alrbjr@bctonline.com</a> , 503-518-8600

## Blood drive

Date	Location	Contact
Wednesdays: Feb. 12, June 3, Aug. 26 and Nov. 4 8:00 a.m.–1:30 p.m.	2WTC Plaza Conference Room 121 SW Salmon St, Portland	<b>Sumandhi.Fox@pgn.com,</b> 503-464-7207

## Volunteering

Do you make an impact? Yes! In 2019 retirees volunteered 7,632 hours and earned 93 Cause Cards. You donated \$146,495, which PGE matched with \$74,606 for a donation total of \$221,102! Thank you for your community spirit!

## Retiree get-togethers

These groups meet at various places to enjoy each other's company. They will be even more important as we try to stay connected with each other. If you go, take a photo! Post it on the retiree Facebook page and/or send it to [SmilinJudyFrancis@gmail.com](mailto:SmilinJudyFrancis@gmail.com) to include in the newsletter. Remember to include when and where the photo was taken and the names of the people having a good time!



*PGE retirees and spouses Lynn and Stan Chiotti, Tom Berquam, Fonda and Tom Lawson and Monty Hughes gather at the St. Helens Village Inn on Dec. 4.*

Location of retiree get-togethers	Time	Date
Retired union employees: Union Hall 17200 SE Sacramento (off 182nd Avenue)	11:30 a.m.	Fourth Monday of every month; <b>potluck</b>
Elmer's 9660 SE Stark Street <b>NEW LOCATION!</b>	8:30 a.m.	First Tuesday of even-numbered months
<b>PGE Retiree Travel Group</b> Shore Side East Clubhouse 1400 SE Lava Drive, Milwaukie	10:00 a.m.–noon	<b>Tuesday, Jan. 14</b> Contact: <b>Deb Schallert, 503-706-0745</b>
Black Bear Diner 237 SW 4th Street, Madras	8:30 a.m.	First Wednesday of each month; contact <b>Dave Gibson, 503-708-8364</b> , for information
Village Inn Columbia River Hwy, St. Helens	9:00 a.m.	First Wednesday of each month
Elmer's Restaurant 390 SW Adams Street, Hillsboro	9:00 a.m.	Every Wednesday
Retired Customer Service employees: Wichita Bar and Grill 19140 Molalla Avenue, Oregon City	9:00 a.m.	First Thursday of each month
Maplewood Coffee & Tea 5206 SW Custer Street, Portland	9:00 a.m.	Fourth Thursday of every month; contact <b>Terry Clelen at 503-853-3861</b> or <b>Roger Gibson at 503-330-3213</b>
Guest House 4850 Portland Road NE, Salem	7:30 a.m.	Every Thursday
McDonald's <b>17555 SW Farmington Road at the Farmington Mall, Aloha</b>	9:30 a.m.	Every Thursday
J's Restaurant 2017 Portland Road, Newberg	11:30 a.m.	Second Friday of every month



*PGE retirees gather at Maplewood Coffee & Tea in Portland on Dec. 19.  
Back row: Charlie Allcock, Julie Wandell, Terry Clelen and Gayle Aman  
Front row: Barb and Mike Schwartz, Russ Hickman and Roger Gibson*

# Annual holiday luncheon

There was food. There was laughter. There was a lot of talking!

Dave Robertson, VP of Public Policy, gave a fun talk about PGE. He gave us three numbers to remember:

- 5,670: The number of days before he gets to retire and look as happy and rested as all of the PGE retirees in the room!
- 98: The number of seconds it took for 100 MW of the new PGE Green Future Impact system-balanced green power product to sell; 160 MW sold in 3 minutes and 14 seconds, and 16 customers made commitments (10 of which are local governments, including Portland, Salem and Hillsboro and Multnomah and Clackamas counties).
- 6: The number of new PGE Electric Avenue Charging Stations opened in 2019 and will be opened in early 2020 in Hillsboro, Milwaukie, SE Portland, Wilsonville, Beaverton and in Salem at the State Capitol.

He said retirees should go out and help PGE by buying an electric car! Why? Because transportation electrification is a great win-win for the company and customers. It's clean, efficient low-carbon transportation and grows load and electricity use for PGE, which in turn helps all of us!

Dave thanked us for our commitment to the community and told us how much of a difference we make. He also reaffirmed PGE's commitment to staying connected with retirees and will continue to work to make it better. To help with that effort, he presented the PGE Retirees organization with a check which will help us through the adventurous year of 2020!

Then we all went back to food and laughing and talking while enjoying the music of the Two-Bit Brothers.



*Dave Robertson was a great speaker. He should be, since he is the VP of Public Policy!*



*We all had a great time!*



*L-R: Dawn Baker, Linda Peerenboom, Anna Lee-Craig and Barbara Navarra share stories of their combined 115 years of service.*



*Barb and Mike Schwartz dance to "The Streets of London" played by the Two-Bit Brothers, otherwise known as PGE retirees Bill Valach and Dwayne Wisthoff.*



## Fly fishing adventures!

Evidently traveling, golfing, bowling, luncheons and other get-togethers are not enough for PGE retirees! There is a growing interest in forming a group to organize fly fishing trips for all who aspire to catch fish with a **fly** instead of all that messy bait and heavy metal. It doesn't matter if you are already an avid fly fisherman, want to improve your skills, haven't done it in years or always wanted to but never did! Join the group and enjoy the outdoors, have fun with old friends and make new ones. As with all PGE retiree events, friends and family are welcome.

Interested? Send an email to [PGERetirees@gmail.com](mailto:PGERetirees@gmail.com) asking to be added to the Fly Fishing Adventures email list or leave a message at **503-799-2527**.

## Golf

*By John McLain*

Several ideas have been suggested for 2020 golf trips, including two golf courses in the Portland area and two in Central and Eastern Oregon.

- NW Portland area: Wildwood
- Wilsonville, just south of Portland: Charbonneau
- Bend area: Lost Tracks (Bend) and Quail Run (La Pine)
- Pendleton area: Wildhorse Golf Course

If you would like to host a golf event at your home course, contact me soon.

Couples have been a growing part of our golfing events, and they compete in a category all their own. Family, friends and active employees are all welcome.

Dates, times and other information will be sent to those of you on the **golf email/phone list**. Add your info to this list to stay informed of golf plans for 2020! Just send an email with your name, phone number and the subject line "**Golf List Please**" to [john@mclainco.com](mailto:john@mclainco.com) or call me at 503-799-2527.

Not a golfer? You are welcome to join our excursions to just ride along — golf courses are in some beautiful spots — or join us at the end of the event for some food, beverages and good company with old friends.

## Retirements

- |                     |                  |                    |                    |
|---------------------|------------------|--------------------|--------------------|
| • David Alcorn      | • Robert Green   | • Kimberly Metcalf | • Steve Smith      |
| • Linda Ansen       | • Jeffrey Grey   | • Floyd Mullett    | • Don Solso        |
| • Denise Baldwin    | • Walt Hanauska  | • Bill Nicholson   | • Scott Surface    |
| • Joseph Barra      | • Launa Harmon   | • Mike Niman       | • Lee Taylor       |
| • Margo Bryant      | • Gary Kaplan    | • Barbara Norman   | • Cassie Vistaunet |
| • Juliane Byrne     | • Gary Kent      | • Daniel Oman      | • Inge Winters     |
| • Jennifer Callahan | • Doug Lind      | • Don Omeg         | • Elaine Wong      |
| • Barbara Croas     | • Gary Lytle     | • Roger Payne      | • Joann Woods      |
| • Curtis Eadler     | • Bradley Marsh  | • Robert Peterson  | • Yuli Wu          |
| • Kathleen Eckert   | • Jay Martinez   | • Leontine Rawson  |                    |
| • Doug Elliott      | • Sandra Masters | • Dale Ritter      |                    |
| • Mary Gravelle     | • Salome Mendoza | • Kathy Setle      |                    |

## Remembering colleagues

- Doral Bray
- Carl Bell
- N. Yvonne Comins
- Gene Glasner
- Jack Kramer Jr.
- Robert (Bob) Lee
- Kay J. Powell
- Gary Roberts
- Joseph Sticka
- Elizabeth Vilhauer
- John Waldron
- Ray Welch
- Harold Widman Jr. and
- Ruby Short (surviving spouse of Bob Short, former President and CEO)

## Judy's Jottings



A new year and a new decade. A new PGE retiree organization and a new newsletter. Oh my!.

This issue of the PGE Retiree Newsletter is the last one accomplished with the exceptional, extraordinary and flabbergastingly wonderful support of PGE Human Resources Communications Support (HRCS), better known as **Cherie Hull** and **Inge Winters**. Newsletter editors **Barbara Bergmans**, **Sylvia Handris** and I collected information and drafted it, but Cherie and Inge took all that info, made it look the wonderful way it does and then coordinated the printing and mailing. At this point I have no idea what the next newsletter will look like or how and when you will receive it. However, if you are interested in seeing what we come up with, be sure to let us know how to reach you! Send your contact info to

[pgeretirees@gmail.com](mailto:pgeretirees@gmail.com)  
or  
PGE Retirees Inc  
PO Box 2371  
Gresham OR 97030-3000



It's going to be an interesting and creative year! What else can I say except "ho, ho, ho" and **OPT IN, OPT IN, OPT IN!** And welcome to 2020!

*Answer to riddle on page 2: A cookie sheet.*

## Things to remember

### PGE's Retiree Matching Gift Program

Now available year-round, this program includes a 50% match for your contributions up to \$2,000 annually. Contribute directly to eligible nonprofits, and then request a match online at [www.portlandgeneral.com/myCommunity](http://www.portlandgeneral.com/myCommunity) by credit or debit card and submit a match request when you submit your online payment. You can also donate directly to an eligible nonprofit by check or with a credit or debit card, and when you get your

confirmation receipt, upload it into myCommunity and request a match. Record 20 hours of volunteering, and you can earn a \$200 Cause Card for your favorite eligible nonprofit!

For information, contact [Whitney Welsh@pgn.com](mailto:Whitney.Welsh@pgn.com), 503-464-2916; call YourCause at 866-751-6031; or email [mypgecommunity-support@yourcause.com](mailto:mypgecommunity-support@yourcause.com).

## Things to remember, con't.

### PGE's Retiree Facebook Group

If you haven't joined the PGE Retiree Facebook Group, now is the time! This is the best way to stay connected — especially as we create our own retiree database. It's a closed group, so even though anyone can see the group and who runs it, only members can see who's in it and what they post. (Those posting will also show up on your individual Facebook account, if you have one.)

To join:

1. **Go to your Facebook page.** If you aren't a member, go to [www.facebook.com](http://www.facebook.com), and follow the instructions to join.
2. **Click on Groups** in the menu on the left.
3. Enter **PGE Retirees** in the search bar at the top.
4. **Select the group.**
5. **Click on + Join Group** below the cover photo.
6. **Wait for our Facebook administrators** Dana and Mark Lander to respond.
7. **Congratulations!** You are now a member of the Facebook PGE Retiree Group!

Have questions? Need help? **Contact Mark at [landerm@comcast.net](mailto:landerm@comcast.net).**



**PGE Retirees Inc. – Transition Plan Summary**

**November 29, 2019**

**PGE Retirees Inc. - Organization Profile**

*PGE Retirees Inc.* is a 501 c (4) non-profit approved by the IRS and incorporated as a Corporation in the state of Oregon. It’s bylaws state:

- The purpose of this organization shall be to coordinate the business and social affairs of PGE Retirees.
- Membership in this organization shall consist of all retired employees of Portland General Electric Company and their spouses.
- Dues and Fees shall be adjusted, if required, annually by the Board of Directors to maintain a level of funding consistent with the financial requirements of the organization.
- The organization is governed by a Board of a minimum of 12 Directors, elected by the organization’s members at an annual meeting.



Figure 1, Temporary Logo

**Changes to PGE HR systems have unintended consequences:**

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

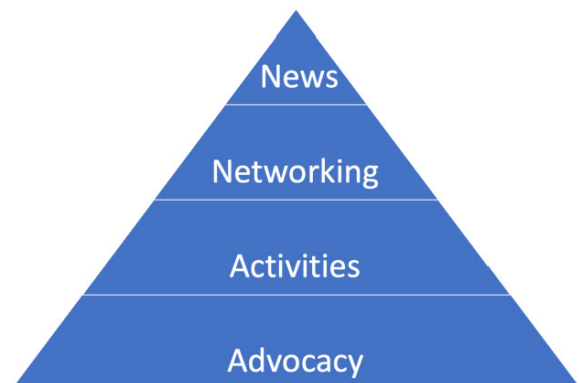
- a) outsource the administration of employee benefits to several companies that could offer expanding choices to retirees
- b) replace aging software systems (i.e. Peoplesoft) with new systems

An unanticipated consequence of these initiatives was that PGE could not support *PGE Retirees Inc* organization in the same way it had in past years (e.g. no central database of PGE retirees). A joint **Retirees Transition Committee** was formed and meetings in October and November were productive. The PGE Retirees Inc Board meeting for December will be held at PGE Corporate headquarters to finalize a transition business plan for **PGE Retirees Inc.**

**PGE Retirees Inc Transition Plan**

The goals are two:

- achieve long-term growth in membership through providing desirable news, networking, activities, and advocacy for retirees
- improve and enhance a “Relationship of Mutual Advocacy” between PGE Corporate and *PGE Retirees Inc.*





**PGE Retirees Inc. – Transition Plan Summary****November 29, 2019**

**PGE Retirees Inc.** organization will need to evolve towards a self-reliant membership-focused and professionally managed group of volunteers that can justify an investment by retirees as well as ongoing investment by PGE.

As *PGE Retirees Inc* transitions to new functions of self-reliance, it has requested support services from **PGE Corporate** such as:

- 1) provide continued financial support for a period of time
- 2) provide a designated liaison person to work with PGE Retirees Inc
- 3) provide print and mail services for newsletters
- 4) encourage employees nearing retirement to “opt-in” and join PGE Retirees Inc.
- 5) provide a location as a meeting place for PGE Retirees Inc. Board meetings
- 6) PGE HR will join the FACEBOOK Retiree Closed/Private Group and will review posts and will actively respond to questions and difficulties retirees may be having with benefits and other concerns that involve PGE and its vendors.
- 7) reimburse *PGE Retirees Inc.* for purchase or subscription of Contact Management System/Software to maintain membership lists
- 8) reimburse *PGE Retirees Inc.* for redesign and rebuild of PGERetirees.org website to transition to a membership focused services, calendar and networking
- 9) host one *PGE Retirees Inc.* Board Meeting each year 1WTC, for a short update from a PGE executive on initiatives of mutual interest and advocacy.

**PGE Retirees Inc.** will revise its structure and functions to be a more self-reliant and member services organization:

- 10) *PGE Retirees Inc* will develop a Membership Committee of volunteers to build a membership database of contact information and preferences for email or print
- 11) *PGE Retirees Inc* will develop a Communication Committee of volunteers to prepare newsletters, and publish through digital channels such as website, email, and social media (e.g. Facebook, Rebuild PGERetirees.org) – and offer print and US Mail for retirees without digital means.
- 12) *PGE Retirees Inc* will establish an Advocacy Committee of volunteers to monitor PGE internal news and initiatives affecting PGE Corporate as well as retirees.

**In summary**, change is coming quickly and unexpectedly. PGE Retirees Inc needs transition support from PGE Corporate, and several retiree volunteers to help build a self-sustaining organization dedicated to providing useful NEWS, NETWORKING, ACTIVITIES, and ADVOCACY services.



## Medical plans

Non-represented (including Coyote Springs, Port Westward and Carty)

### Health plans, under age 65:

[Via Benefits](#)

866-228-2033

<https://marketplace.viabenefits.com/pge>

### Health plans, 65 and over:

[Via Benefits](#)

866-228-2046

<https://my.viabenefits.com/pge>

Represented (excluding Coyote Springs, Port Westward and Carty retirees)

### Under age 65

Trust office – BeneSys administrators (medical, dental and vision):

[IBEW Local 125 – PGE Health & Welfare Trust](#)

503-224-5906

877-545-9471

Fax: 503-228-0149

P.O. Box 1929

Portland, OR 97207

<https://ourbenefitoffice.com/IBEW125PGE/Benefits/>

### 65 and over

UnitedHealthcare Medicare Solutions:

[UnitedHealthcare](#)

855-322-8949

<https://myuhcplans.com/ibewpge>

Sav-Rx secondary prescription plan:

[Sav-Rx](#)

866-233-4239

<https://savrx.com>

Trust office – BeneSys administrators (dental and vision):

[IBEW Local 125 – PGE Health & Welfare Trust](#)

877-545-9471

503-224-5906

<https://ourbenefitoffice.com/IBEW125PGE/Benefits/>



## Reimbursements

Non-represented (including Coyote Springs, Port Westward and Carty retirees)

Company Contribution Accounts (CCA) & Health Reimbursement Accounts (HRA)

### Health plans, under age 65:

[Via Benefits](#)

866-228-2033

<https://marketplace.viabenefits.com/pge>

### Health plans, 65 and over:

[Via Benefits](#)

866-228-2046

<https://my.viabenefits.com/pge>

Health Savings Account (HSA)

[Optum Bank](#)

844-326-7967

<https://optumbank.com>

Represented (excluding Coyote Springs, Port Westward and Carty retirees)

Retirement Reimbursement Account (RRA) & Health Reimbursement Arrangement (HRA)

[Optum Bank](#)

877-298-2322

<https://optumbank.com>

### Health Savings Account (HSA)

[HealthEquity](#)

866-960-8055

<https://healthequity.com>

Life insurance (all retirees)

[MetLife – MyBenefits](#)

866-492-6983

<https://mybenefits.metlife.com>

401(k) – Voya

[Voya – Portland General Electric Company 401\(k\) Plan](#)

844-746-4015

<https://portlandgeneral401k.voya.com>



## Pension (all retirees)

Aon – PGE Pension Service Center:

833-778-6363

Fax: 847-554-1133

P.O. Box 6300

Newport Beach, CA 92658

## Retiree group

PGE Retirees Inc.

P.O. Box 2371

Gresham, OR 97030

[pgeretirees@gmail.com](mailto:pgeretirees@gmail.com)

<http://www.pgeretirees.org>

[PGE Retirees Facebook page](#)

<https://www.facebook.com/groups/1183382985086522/>

## Miscellaneous

Employment verification

PGE HR Connect

503-464-7250

[Advantis Credit Union](#)

800-547-5532

<https://advantiscu.org>

PGE HR Connect

503-464-7250 (option 0)

[hr.connect@pgn.com](mailto:hr.connect@pgn.com)

[Social Security](#)

800-772-1213

<https://ssa.gov/planners/retire/>

[Medicare](#)

800-633-4227

<https://medicare.gov>

[myCommunity](#)

Community impact programs: Giving, matching and volunteering

<https://mypgecommunity.yourcause.com/basic>