

Burlington Water District Local Option Levy 2026-27 Tax Hearing Minutes

Thursday, May 7, 2026

5:30 p.m.

Virtual Hearing via GoToMeeting

Present:

TSCC:

Chair Matt Donahue,
Vice Chair Dr. Rita Moore,
Commissioner Tod Burton,
Commissioner Dr. Will Terry,
Commissioner Erik Kvarsten,
Executive Director Allegra Willhite,
Budget Analyst Brittanie Abayare

Absent: None

Burlington Water District Board of Commissioners:

Ricardo Lovitt, Chair
Gail Curtis, Board Member
Tami Ege, Board Member
Dan Zimmerman, Board Member
Anne Squier, Board Member

Opening Remarks and Introductions

Chair Matt Donahue opened the hearing and welcomed attendees to the public hearing for the Burlington Water District Local Option Levy Tax Measure. He stated that the TSCC is a community oversight commission that conducts budget reviews and holds public hearings to give the public an opportunity to learn about proposed tax measures. Chair Donahue clarified that the TSCC does not take any action or advocate for a position on the measure, and that the hearing is strictly for information sharing.

The commissioners and board staff then introduced themselves, confirming that none had any conflicts of interest regarding the district.

Public Comment

No members of the public signed up for public comment.

Commissioner Questions and District Responses

Question 1: Asked by Chair Matt Donahue: Tell us more about the services provided by the City of Portland – in an average service year, roughly how many of your calls are medical/EMT vs. fire calls? Do you have any other types of calls?

- **Ricardo Lovitt** answered that based on a three-year average, the district typically experiences 7 fire-related trips and 35 medical/EMT trips during that specific timeframe. He stated that he does not know of any other types of emergency calls that the district has ever received from the City of Portland, noting these are the only call types he has heard of during his tenure.
 - **Gail Curtis** added that the district receives an annual record from the City of Portland documenting the number and nature of the calls. She clarified that this is a very brief graphic report that lacks detail, categorizing entries as either a medical or fire report. She emphasized that the three-year average figures are quite modest because the district is small, made up of about 400 residents.

Chair Matt Donahue asked a follow-up question regarding how the local community feels about the overall quality of service provided by the city to the district, and whether the board receives any operational complaints.

- **Ricardo Lovitt** responded that he has personally used the city's ambulance service and found it to be very effective and good. Other than his personal experience, he has heard no complaints from anyone in the community.
- **Tami Ege** stated that she has been told the district is located too far out, resulting in a standard 25-minute emergency response wait time, which causes problems.
- **Gail Curtis** stated that the board members have expressed shared concerns to one another regarding the St. Johns Bridge, because the primary fire response services originate from downtown St. Johns. She explained that they have met with Scappoose in the past, whose emergency response transit times are very likely shorter because their vehicles do not have to contend with the obstacle of a bridge. She noted that the district has pursued alternative service providers due to this issue.

Vice Chair Dr. Rita Moore asked a follow-up question inquiring if the district residents have access to the Multnomah County Ambulance Services, or if they could potentially establish access.

- **Ricardo Lovitt** answered that they do not have access to his knowledge.
- **Tami Ege** added that she believes they are too far out, noting that the district is situated on the very outlying westside of Multnomah County. She explained that based on her understanding from regional police and fire agencies, most of their practical services must come either from police in Troutdale or from fire crews crossing over from St. Johns.
- **Gail Curtis** clarified that the district may technically receive emergency services through Multnomah County if those responses are explicitly coordinated through the City of Portland. She explained that their formal service agreement is directly with the City of Portland, and while the city might maintain a sub-agreement with Multnomah County, she does not know if that is the case.

Question 2: Asked by Commissioner Dr. Will Terry: What communication efforts have you made

with district voters about the proposed local option levy? What kind of feedback have you received?

- **Ricardo Lovitt** answered that the district has printed and mailed out two separate informational fliers directly to voters, with one distributed just last week and one sent out earlier in April. He emphasized that to his direct knowledge, the board has received no feedback or public response whatsoever from the community regarding those mailings.
 - **Commissioner Dr. Will Terry** noted that with only 400 residents, the district presumably manages fewer tax accounts than individual people.
 - **Gail Curtis** noted that there are a few local businesses included within the district boundary lines as well.

Question 3: Asked by Vice Chair Dr. Rita Moore: What other options have you explored for paying for fire services before deciding on the local option levy? Follow up, if not addressed: Have you explored working with other jurisdictions that might provide fire services at a cheaper rate?

- **Gail Curtis** fielded the combined question, noting that the district previously met directly with the City of Scappoose because they represent the most obvious provider in closest geographic proximity. She described it as a very positive initial meeting where they learned about the nature of Scappoose's services and how they coordinate with other fire providers through mutual aid agreements. She explained that under a mutual aid network, if Scappoose crews can reach a fire scene sooner than the City of Portland, they will respond and do so. However, she noted that at the time of that meeting, which occurred approximately three years ago, they discovered that Scappoose and Portland did not share a formal, mutual aid agreement. When the district followed up to ask for a formal agreement, the fire chief at Scappoose stated it was an administrative milestone they were actively working towards, though she suspects it has still not been fully achieved. She stated that while a lack of a formal agreement does not completely prevent emergency service from occurring, Scappoose also faces challenges because their emergency radio frequencies do not match up with Portland's systems. Additionally, Scappoose officials stated that they are operating at full capacity. She noted that Scappoose does own a physical facility known as the Holbrook station located inside the Burlington Water District, but it is unmanned, volunteer-operated out of Holbrook, and used primarily for equipment storage.

Commissioner Dr. Will Terry asked a follow-up question, inquiring if the commission should conclude from this background that the City of Portland is the district's only viable option.

- **Gail Curtis** confirmed that this was correct. She noted that the board also touched base with Sauvie Island's fire operations but learned it is a volunteer operation with only one single paid employee—the fire chief—meaning they do not have wherewithal to service Burlington.

Vice Chair Dr. Rita Moore asked a follow-up question to verify if the last time the board formally spoke with Scappoose was indeed three years ago.

- **Gail Curtis** answered yes

Vice Chair Dr. Rita Moore stated that she had attended a City of Portland budget hearing a couple of days prior, where there was public discussion and testimony from several active firefighters regarding the St. Johns Fire Station and its proposed budget cuts. She noted that the testifying firefighters specifically mentioned Scappoose as an active member of their operational mutual aid network, suggesting that the city and Scappoose may have formalized their relationship in the interim years since the district's last query.

- **Gail Curtis** noted that the historic relationship between the two departments always seemed very positive, to the practical extent that Portland had previously supplied Scappoose with significant heavy equipment, including one and possibly two full fire trucks; they share a good relationship.

Question 4: Asked by Commissioner Erik Kvarsten: What is the current status of contract negotiations with the City? When is the current contract up for negotiation?"

- **Gail Curtis** answered that the board reviews and signs an agreement on an annual basis because they must sign off on understanding the city's incremental cost increases, which have been significant. She noted these jumps have regularly amounted to consecutive 10% and 12% increases. However, she clarified that the overarching master agreement itself does not terminate until it expires on June 30, 2030.

Commissioner Erik Kvarsten asked a follow-up question inquiring what the contract's financial fee structure is based on, such as district assessed property values or a specific calculation formula.

- **Gail Curtis** answered that while she would need to get back to him with the exact text for specifics, the charge does factor in some elements of assessed value, but the primary drivers of the cost are the PERS retirement fund obligations for the city's firefighters and escalating healthcare costs.

Vice Chair Dr. Rita Moore asked a follow-up question inquiring if the board had been talking to the city regarding the proposed cuts to the St. Johns Fire Station, and what specific impacts those cutbacks might have on emergency service delivery to Burlington .

- **Gail Curtis** answered no. She explained that the board has historically had very little direct communication with the City of Portland. She noted they were recently put in a difficult position because the city was extremely late in providing the annual agreement, causing the process to drag on. When the board finally received the document and experienced "sticker shock," they met with city representatives to explain that the district simply did not have the funds to pay the rate, attempting to negotiate a lower fee. However, they discovered that the city's internal charging formula is strictly binding. She noted that during that initial meeting, the city staff themselves were not fully aware of how legally binding the underlying agreement format was but subsequently informed the district of its rigidity. To change the pricing, they would have to successfully request an alteration to a city ordinance, which is difficult but not impossible. She stated that because of the historic lack of ongoing communication, both parties agreed at that time that they should begin

meeting annually. She and Ricardo have been discussing that it is time to schedule that annual meeting.

Vice Chair Dr. Rita Moore offered a summary of what she heard at the city budget hearing, noting that under the mayor's current proposal, the city is planning to completely remove the fire engine from Station 22 in St. Johns. She clarified that the engine is the truck that houses the primary water pumping capacity. She reported that roughly 80% of all public testimony at the hearing came from firefighters arguing that removing this engine would have severe impacts on their physical ability to service neighboring jurisdictions as part of their mutual aid network, resulting in a significant decrease in firefighting capacity coming out of St. Johns.

- **Gail Curtis** thanked her for the update. She reminded the commission of a broader regional threat: the critical protection of Forest Park and the neighboring Critical Energy Infrastructure (CEI) hub, which contains over 600 industrial storage tanks.

Gail Curtis paused the questioning sequence to formally introduce board commissioner Anne Squier, who had successfully logged onto the meeting. She noted that she and Anne were the specific board members who originally went out to meet with Scappoose and follow up on the mutual aid agreements.

Commissioner Dr. Will Terry commented that the district appears to be caught in a tough position, being essentially stuck with Portland as its sole provider while facing 12% annual cost increases for an agency that is simultaneously axing its localized St. Johns infrastructure.

Vice Chair Dr. Rita Moore noted that the budget cuts are not a done deal yet, and she expects significant city council discussions.

Question 5: Asked by Commissioner Dr. Will Terry: What contingency plans have you discussed if the levy does not pass? How will you fund the gap between fire service costs and property tax revenue?

- **Ricardo Lovitt** answered that the board has not actually discussed that scenario very much. He noted that while the topic has briefly come up, they have not deeply looked into what alternative possibilities exist or how they could fund it.
- **Gail Curtis** added that they have had some discussion regarding what alternative funds are available in their coffers, but confirmed that property taxes are legally restricted and specific to funding this exact service. She explained that while the district does generate separate revenue from water ratepayers, the board is not interested in mingling those funds, nor would it be administratively appropriate. She noted they have pushed the question to see if there is a specific law that strictly prohibits mingling, but they know enough to realize it would not be a responsible use. However, she observed that since the district is physically using water to fight fires, there might be some underlying operational logic to help bridge a financial gap using those resources. She stated their secondary contingency would be to go back out to district voters and ask for a levy approval a second time, noting they ultimately have only two real options: either the city charges less or the voters pay more. She reiterated that securing service from an

alternative geographic location simply is not in the cards unless they attempted a long-range plan to get Columbia County/Scappoose to legally take over a portion of their physical service area, which carries geographic logic.

- **Gail Curtis** then turned the question back to the TSCC, asking if the commission has any practical experience or guidance regarding the process of moving boundaries between Multnomah County and Columbia County.
 - **Chair Matt Donahue** answered that the commission does not have experience with that process, noting it would certainly represent a very heavy lift.
 - **Commissioner Dr. Will Terry** made a follow-up comment, stating that since Scappoose is already at full capacity, it would be incredibly difficult for them to acquire the incremental staff, full-time equivalents (FTEs), or engines necessary to absorb an entirely new service district, meaning Scappoose does not seem like a real option.
 - **Gail Curtis** agreed with his point, qualifying that she was thinking purely about long-range planning (such as the year 2040) rather than the immediate 2030 contract deadline. She explained that because they are a small volunteer group, they lack the wherewithal to continuously maintain these massive political boundary change discussions. She noted that the district is accustomed to talking to the city of Portland but never speaks with Multnomah County, stating that if the TSCC could provide county-level assistance, the board would be interested.
 - **Chair Matt Donahue** observed that at the end of the day, the issue comes down to basic dollars and cents. He noted that if an alternative service provider viewed the district as a net positive contract that brought in reliable revenue, they might choose to be more price-competitive than what the city is currently charging.
 - **Gail Curtis** noted that this is an interesting question because the actual number of physical trips crews make into the district is very modest.
 - **Commissioner Erik Kvarsten** shared from his professional city manager experience that most jurisdictional fire contracts are based on a multitude of factors, incorporating assessed values, and calls for service. He recommended that the board request a clearer breakdown from the City of Portland to understand what their base cost allocation formula is, forcing the city to take them through the exact factors driving the overarching charge. He noted that from his perception of the contract's total cost, the district has a fairly modest call load.
 - **Gail Curtis** responded that while she would need to double-check the exact language, she does not believe their contract charge is based on call volumes at all.
 - **Executive Director Allegra Willhite** confirmed that her memory of the contract text matches Gail's recollection. She explained that the contract charges a flat cost per capita based on what it costs the city to provide fire service to Portland residents per person, which is then directly multiplied by the number of residents living in Burlington.

- **Tami Ege** asked a follow-up question, inquiring what the exact legal discrepancy is that makes crossing county lines to deal with Scappoose so difficult. She noted that she personally moved to Multnomah County from Scappoose, and during her time there, Scappoose's fire department won a national award for the fastest emergency response rate for a volunteer fire department in the United States. She explained that Scappoose operates a physical fire station on Morgan Road that sits only two miles from her house, and even their main station is only nine miles away from Linnton. She contrasted this with Portland crews attempting to cross the St. Johns Bridge during high traffic hours.. She asked for someone to explain the county discrepancy barrier given that Scappoose could prevent houses from burning down.
 - **Chair Matt Donahue** answered that he is not an expert in this area, but he knows of no legal or statutory rule that would prevent the district from signing a brand new contract with Scappoose once the Portland agreement expires. He noted that a wholesale shift into Columbia County's jurisdiction would be a different question, as it might open the district up to county-wide services as an actual part of that county, rather than just executing a single contract with an outside city.
 - **Commissioner Erik Kvarsten** agreed with Chair Donahue, stating that he is not aware of any statutory or legal limitation that bars fire services from responding across county lines. He cited Tualatin Valley Fire & Rescue (TVF&R) and Clackamas Fire District as prominent examples of agencies that regularly respond to fires outside their primary county boundaries via mutual aid agreements. He clarified that the cross-border contract itself is not the problem, but a wholesale change of county boundaries would be a massive political lift.
 - **Gail Curtis** concluded that at the end of the day, it is a taxing issue. If they shifted boundaries, it would require the legal collection of property taxes in Columbia County, impacting how property values are calculated and distributed.

Vice Chair Dr. Rita Moore asked if it would be possible for the district to establish a standalone mutual aid agreement directly with Scappoose.

- **Anne Squier** chimed in to remind the board that she and Gail had previously met face-to-face with the Scappoose fire officials, and the Scappoose representatives were explicitly not open to finding a way to sweep Burlington into their service.
- **Gail Curtis** added that they learned Burlington Water District cannot be a direct party to a mutual aid agreement because the district does not provide any actual emergency services of its own to trade. Scappoose officials informed them that the regulatory purview is completely different, meaning a mutual aid agreement with a water district is entirely outside of their scope.

Question 6: Asked by Chair Matt Donahue: Burlington Water District is managed by a volunteer board that has regular turnover as terms end. How do you plan for leadership continuity given the cyclical nature of the leadership positions?

- **Ricardo Lovitt** answered that he has been on the board for about a year and a half. He explained that during this time, they have tried to recruit new members continuously through word of mouth and by mailing out fliers, but they receive no response or feedback from the public, leaving them unsure of how to proceed.
- **Gail Curtis** added that the district contracts its field operations out to an entity named Northwest Natural Water Services, which is a direct subsidiary of Northwest Natural Gas. She noted that this field operator role was formerly held by a local family-owned company called Highland, but Northwest Natural Water Services is actively in the business of buying up small water utilities and privatizing them. She reported that in their last correspondence to district residents, the board stated flat out that they are looking at the potential privatization of the water service. She explained that according to their corporate attorney, Northwest Natural's explicit business plan is to target small districts where infrastructure is lacking, make the capital investments, and privatize the operations. She warned that their water rates will already skyrocket independently due to the City of Portland's mandate to construct a new water filtration plant, and privatization would make those costs even harder to swallow.

Commissioner Dr. Will Terry asked a follow-up question to clarify whether this privatization threat applies strictly to their water utility operations, and not to their emergency fire and ambulance services.

- **Gail Curtis** confirmed that was true, noting that the board's policy discussions focus almost entirely on water. She explained that fire emergency service is something completely provided by the City of Portland that they simply rely upon, meaning it is seldom an active part of their internal policy debates.
- **Ricardo Lovitt** added that the district operates essentially as a pass-through entity for fire services. The county collects the property taxes, delivers those funds to the district, and the board writes a check out to the Portland Fire Department, noting that is about the extent of what they do.
- **Gail Curtis** noted there is potential for the board to become more active given the Critical Energy Infrastructure (CEI) hub and Forest Park. She shared that she personally sought out active members of the local community who care passionately about fire protection and work closely with the City of Portland on CEI emergency education, asking them if they would step up to serve on the board to manage this role. Every person she approached was not interested.

Question 7: Asked by Commissioner Dr. Will Terry: You are levying a rate sufficient to cover the projected cost increases as well as to build a buffer in the event the levy is not renewed in five years. How will you determine what amount is a sufficient fund balance that would allow you to levy less than the approved amount?

- **Dan Zimmerman** answered that Executive Director Allegra Willhite assisted the district in determining what their levy rate should be. He stated that while he does not know the exact target balance number required for a five-year non-renewal buffer, the City of Portland has indicated that their contract rate increases are not going away. He explained that he

conducted a historical audit going back over 20 years into the district's records. He discovered that over the last six years, the contract cost increased at an average rate of roughly 10% per year, whereas the prior 15 years before that averaged an annual increase of only 3.7%. He emphasized that because their incoming property tax revenues are legally limited to growing at an average rate of around 3% per year under Oregon law, a contract with a 10% compounding annual increase quickly became completely unsustainable. He noted that while the district originally maintained a healthy financial surplus and has been operating under those reserves, the Portland contract has run at a net deficit relative to the actual taxes collected for the past four years, which eroded their surplus. He stated that without this new local option levy passing and being in active effect for the upcoming fiscal year, the district would be unable to pay the city's contract cost next year. He explained that the financial modeling sheet Allegra calculated for them at a rate of \$1.70 per thousand builds a surplus over time. Because of this, it was indicated to the board that they would not be required to levy the entire approved \$1.70 rate for all five years if they notice the trend is building a massive surplus. However, if the levy passes and then fails to renew in five years, projecting the city's 10% compounding increases out to that deadline means the board must intentionally build a surplus to allow time to determine next steps. He added that an idea was thrown out regarding how the City of Gresham previously instituted a localized service fee as opposed to a property tax to build up dedicated revenues to pay for fire contracts. Lastly, he pointed out: there is a discrepancy between the boundaries of the taxing district for fire and emergency services and the boundaries of the physical water district. This creates an issue of inequity with a service fee model, as some residents reside within the taxing district and pay for the fire contract but do not actually live within the water service area.

Commissioner Dr. Will Terry asked a question for clarification, checking if a water utility fee system could be confined to match up perfectly with the residents actually receiving the water service.

- **Dan Zimmerman** and **Will Terry** discussed that some taxed properties do not have water lines, meaning they would not receive a water utility bill to add a fire fee onto, which represents a question for legal counsel.
- **Gail Curtis** added that the board has given thought to this boundary conundrum. She confirmed that there are people paying into the fire tax district who receive no water service. She explained that for an outlying property to legally come into the water district, the owners are required to bring their private infrastructure up to modern standard, which is prohibitive. She shared that they currently have one local family that wants to bring their property into the district, but the physical water line expansion costs \$100,000 to be brought up to code, a cost that would have to be split across only three local properties. She noted that while the board likes the idea of replacing antiquated pipes and serving out-of-district areas, it represents a catch-22 because the district's low population density makes it hard to spread those costs across a large base of ratepayers. She noted they receive state funding to replace lines inside the district but cannot legally apply those funds outside the boundary.

Chair Matt Donahue asked Executive Director Allegra Willhite if there is another member district that intentionally levies a rate to keep a full extra year of operating revenue on hand as a safety cushion.

- **Allegra Willhite** answered that the Riverdale Fire District maintains a very large balance. She clarified that Riverdale's buffer is actually so large that it covers the entirety of all their property tax revenue, extending well beyond just their local option levy. She explained that under the \$1.70 rate modeled for Burlington, the accumulation would not be nearly that large, but it would buy the board enough time to run multiple elections or find an alternative funding solution.

Question 8: Asked by Commissioner Erik Kvarsten: What do you wish the public knew about the work made possible by this levy?

- **Ricardo Lovitt** answered that he wants the public to know that this levy explicitly provides them with their core emergency services, encompassing both ambulance responses and fire protection, which is of paramount importance. He stated they may need to hold a dedicated public meeting so residents become aware that this situation could quickly turn into a full-blown emergency safety crisis if it does not receive their attention, potentially resulting in a loss of fire service or forced water privatization that would spike their household costs.
- **Executive Director Allegra Willhite** shared a suggestion, noting that the Alto Park Water District is similarly quite small and successfully manages public outreach by hosting an annual community potluck picnic. They invite all neighborhood residents, and the board provides updates on what is happening with the district.
- **Ricardo Lovitt** responded that this was an excellent suggestion that the board needs to look at.
- **Gail Curtis** expressed her deep appreciation to the commission for the extensive brainpower, tax expertise, and fees they brought to the table. She offered special thanks to Allegra Willhite, noting she has been a tremendous asset who remains incredibly patient and consistently brings helpful information to the board. She stated that looking forward, she does not see a clear path for the district, but believes the fact that they are being charged a flat per capita rate rather than a fee based on their actual call volume is an issue worth pursuing. She summarized that Burlington is currently paying directly for city retirement pension funds rather than their actual physical emergency service load.
- **Commissioner Erik Kvarsten** responded that incorporating multi-factor contract models—balancing assessed value with population and actual calls for service—is a much more typical framework across the state of Oregon. He suggested that researching other jurisdictional contract models across the state would provide the board with strong leverage and comparative data to guide their upcoming discussions with Portland regarding what a reasonable charge should be.
- **Gail Curtis** noted that the district is an active member of the Special Districts Association of Oregon (SDAO). She said the SDAO would represent an excellent resource to provide them

with model ordinances. She stated that the board needs to roll up its sleeves, take this data, and prepare to go to the City. She argued that if city staff are stuck with the ordinance they currently have, the district needs to focus its advocacy on changing the city ordinance itself.

- **Commissioner Erik Kvarsten** agreed that utilizing SDAO was a fine, highly recommended organization.
- **Chair Matt Donahue** concluded by emphasizing that executing public outreach and developing competing service options will provide the board with critical leverage during contract negotiations. He noted that sometimes a community simply needs to be told what the dire consequences are; while it is not fun to deliver messages about a crisis, laying out that stark reality is often what shakes citizens out of complacency.

Closing Remarks

Chair Matt Donahue thanked the Burlington Water District board members for the excellent discussion, commended them for sharing their comprehensive financial information, and wished them the best of luck on the upcoming ballot levy. Commissioner Erik Kvarsten and Commissioner Dr. Will Terry echoed these wishes and thanked them for their public service.

Gail Curtis emphasized that posting these detailed public minutes would serve as documentation for local residents, proving to the community that their volunteer board actively reviews, cares about, and protects the public interest. Executive Director Allegra Willhite confirmed that as soon as the digital recording is processed, the TSCC will post the link directly on the commission's public website so that any searching community members can easily access the information.

There being no other business, Chair Donahue closed the meeting.