



Work Session Meeting Agenda
2 Park Drive South, Great Falls, MT
Gibson Room, Civic Center
January 20, 2026
5:30 PM

The agenda packet material is available on the City's website: <https://greatfallsmt.net/meetings>. The Public may view and listen to the meeting on government access channel City-190, cable channel 190; or online at <https://greatfallsmt.net/livestream>.

Public participation is welcome in the following ways:

- Attend in person.
- Provide public comments in writing by 12:00 PM the day of the meeting: Mail to City Clerk, PO Box 5021, Great Falls, MT 59403, or via email to: commission@greatfallsmt.net. Include the agenda item or agenda item number in the subject line, and include the name of the commenter and either an address or whether the commenter is a city resident. Written communication received by that time will be shared with the City Commission and appropriate City staff for consideration during the agenda item, and, will be so noted in the official record of the meeting.

CALL TO ORDER

PUBLIC COMMENT

(Public comment on agenda items or any matter that is within the jurisdiction of the City Commission. Please keep your remarks to a maximum of five (5) minutes. Speak into the microphone, and state your name and either your address or whether you are a city resident for the record.)

WORK SESSION ITEMS

1. Montana Land Use Planning Act (MLUPA) Compliance - Variances and Appeals - Presented by Brock Cherry (estimated 10 minutes)
2. Resilience and Compatibility Study - Malmstrom AFB MIRR Project - Presented by Nate Weisenburger (estimated 30 minutes)
3. Strategic Capital Investment Reserve (SCIR) Update - Presented by Christoff Gaub (estimated 30 minutes)

DISCUSSION POTENTIAL UPCOMING WORK SESSION TOPICS

ADJOURNMENT

City Commission Work Sessions are televised on cable channel 190 and streamed live at <https://greatfallsmt.net>. Work Session meetings are re-aired on cable channel 190 the following Thursday morning at 10 a.m. and the following Tuesday evening at 5:30 p.m.

Wi-Fi is available during the meetings for viewing of the online meeting documents.

UPCOMING MEETING SCHEDULE

City Commission Retreat - Wednesday January 28, 2026 8:30-4:00 p.m.

City Commission Work Session - Tuesday February 3, 2026 5:30 p.m.

City Commission Meeting - Tuesday February 3, 2026 7:00 p.m.



Montana Land Use Planning Act Code Compliance

Variances & Appeals

January 20th 2026

What's Changing Per MCA

- Planning Advisory Board + Zoning Commission will be consolidated into a single Planning Commission.
- Variance (Land/Development Appeals Process)

MLUPA Variance Process Variances decided by the:

- Planning Administrator (PCD Director) ->
- Appeal to Planning Commission ->
- Appeal to City Commission ->
- Appeal to the District Court.

***Key Impact:** Removes the **Board of Adjustment/Appeals** from zoning and land-use variances.



Why This Matters?

Review of last 5 years of Board cases

- ~95% were land-use variances now governed by MLUPA
- ~5% were general City code appeals
- Ongoing difficulty maintaining full Board membership.
- Infrequent meetings create a recurring learning curve.

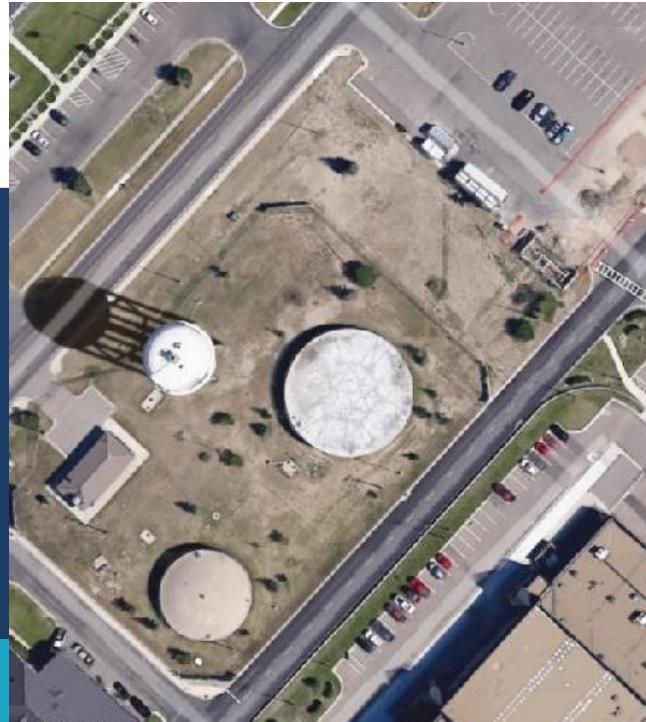
Policy Direction Needed: Retain Board of Appeals for non-land-use appeals only, or eliminate the Board and route all general appeals directly to the City Commission





Resilience and Compatibility Study

Malmstrom AFB MIRR Project

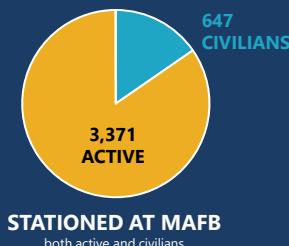


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INTRODUCTION

PRIMARY OBJECTIVE

Assess City infrastructure and overall system resilience to identify and prioritize capital improvements that support the mission of MAFB.



2,817
FAMILY MEMBERS
live and work in Great Falls



6,000
RETired VETERANS
live and work in Great Falls

=\$444M Economic Impact

2

6

1

MILESTONE EVENTS



3

3

FOCUS AREAS

Water Utility



- Replace aging pumps at treatment plant.
- Upgrade electrical gear and assess backup power.
- Add east zone storage and pumping capacity.
- Increase connection size or add third connection for redundancy.

Wastewater Utility



- Develop concept plan for second sanitary sewer interceptor for capacity and redundancy.
- Evaluate equalization storage and companion facility to improve peak flow reliability.

Storm Water Utility



- Implement Storm Water Master Plan improvements considering planned and industrial development.
- Focus on intersection improvements and erosion control north of key areas.

Franchise Utilities



- Continue coordination with electric, gas, and communications providers to meet Sentinel project demands.

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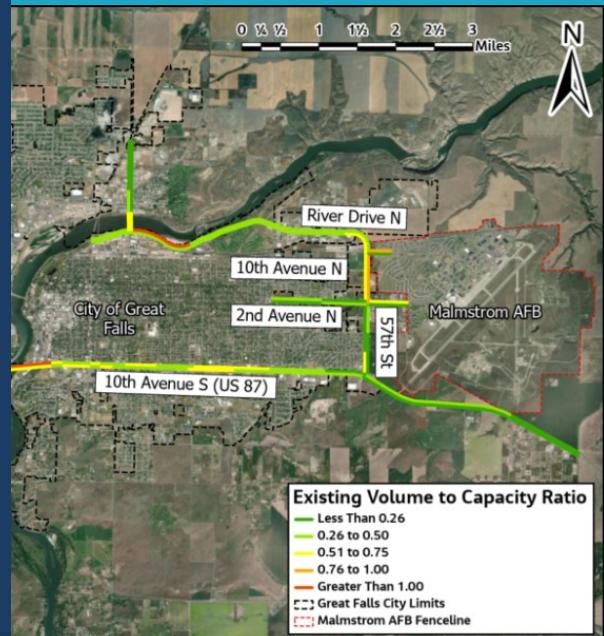
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TRANSPORTATION

Recommendations

- Perform study along various segments for improvements
- Study signal upgrades for convoy priority (Blue Light Lane)
- Assess feasibility of northern route connection via coordination w/ MDT



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TABLETOP EXERCISE

Emergency Management Tabletop Exercise (TTX)

Infrastructure

- Water: Add redundancy; explore temporary treatment
- Sewer: Increase capacity; add lift station; emergency plans
- Power: Backup power at critical sites
- Stormwater: Expand capacity; shared retention
- Roads: Improve access; consider landfill alternatives
- Comms: Emergency system update
 - Current backup 911 is at MAFB

Overall

- Regular multi-agency drills
- Formal communication protocols
- Update SOPs
- Improve CIP and mutual aid coordination



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CAPITAL IMPROVEMENT

- 1 Additional east zone water system storage and pumping capacity.
- 2 Provide redundant lift station, force main crossing, and parallel sewer interceptor.
- 3 Upgrade high-service pump and electrical systems at WTP.
- 4 Assess backup power for critical water facilities; improve power reliability.
- 5 Add standby power to critical lift stations.
- 6 Implement stormwater plans for added impervious and industrial development.
- 7 Perform CCTV inspection of 30-inch sanitary sewer serving MAFB.
- 8 Increase 8-inch water service to MAFB or add third service for 12-inch equivalent.
- 9 Study backup water source/treatment (e.g., groundwater).
- 10 Evaluate north route bypass MAFB transportation connection.
- 11 Develop improved backup 911 dispatch center and communications system

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ACTION PLAN

Compatible Development, Land Use, Zoning, And Environmental Permitting

Ensure MAFB is able to participate on City boards to provide input, align land use, and coordinate resilience efforts.



Negotiate and Implement a Cost Share Strategy for Transportation And Utility Infrastructure Projects

Align regional efforts via partnerships reflected in formal agreements to pursue funding for the design and construction of prioritized infrastructure.

Housing And Local Workforce Development To Support Recruitment And Retention

Coordinate housing and workforce development to support military families and defense workers.

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QUESTIONS?



STRATEGIC CAPITAL INVESTMENT RESERVE (SCIR) FOR PUBLIC WATER, SEWER, AND STORMWATER INFRASTRUCTURE

JANUARY 20, 2026

INTRODUCTION

Main Themes or Objectives

- Overview of proposed SCIR program
- Request Commission approval to begin public comment period
- Posture for adoption of SCIR program on April 7th

INTRODUCTION

Recent Commission Development Discussions

- April 2025 - Utility Rates Work Session
- April 2025 - City Manager Development Memo
- June 2025 - Resolution 10574 - Rate Increase
- September 2025 - City Manager Development Update
- Today - SCIR Recommendation



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INTRODUCTION

Typical Development Hurdles



- Cost of public infrastructure
- Deficiencies in existing infrastructure system
- Lack of local capital
- Geographical constraints (prevailing land slopes, MAFB, etc.)
- Challenging soils
- Ability to provide public safety

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INTRODUCTION

What options do we have, and what about our peers?

- TIF
- Unscheduled Development Funds
- SID? Not used for ~20 years
- Impact Fees? Not enough growth/slow growth



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INTRODUCTION



June 3rd, 2025: RES 10574 adopted

- Goal: establish \$2m reserve in each utility fund (water, sewer, storm)
 - Revenue of ~\$6m total in SCIR per year
- Assist City and Developers with meeting public infrastructure needs
- Investment to both:
 - Improve existing infrastructure
 - Support development

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INTRODUCTION

Typical Utility Budget Process

1. Project revenue
2. Project O&M requirements
3. Designate CIP investment
4. Commission Approval
5. Contingent on Utilization/Revenue

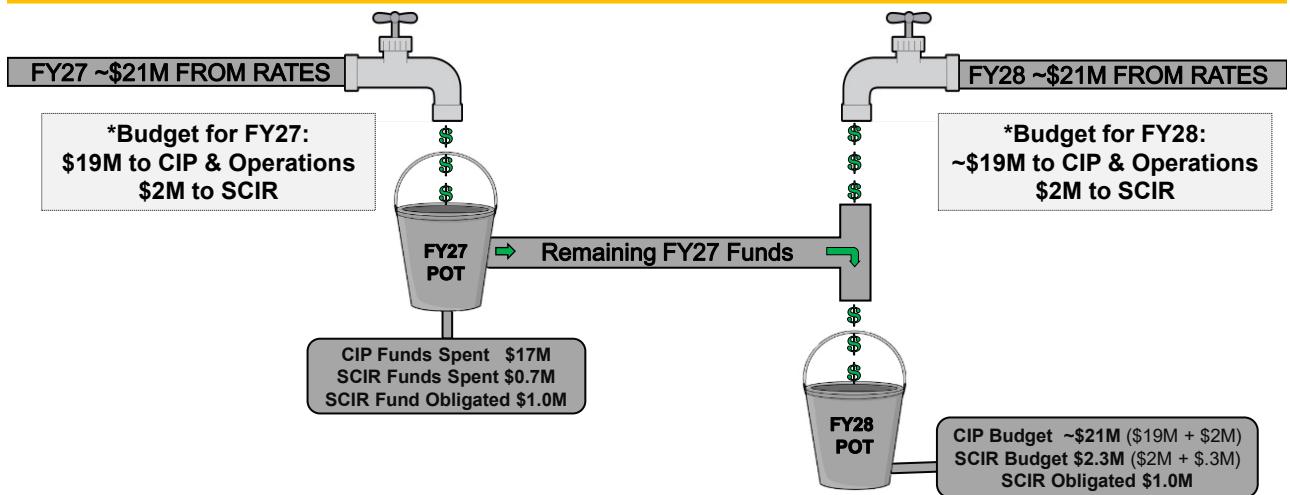
Revised Utility Budget Process

1. Project revenue
2. **Designate SCIR \$6m/\$2m each fund**
3. Project O&M requirements
4. Designate CIP investment
5. Commission Approval/**SCIR Award**
6. Contingent on Utilization/Revenue

Blue = Change

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WATER FUND SCIR CARRYOVER ILLUSTRATION



*FY budgets based on no rate increases with the same usage.

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INTRODUCTION

SCIR Balances

- SCIR balances reviewed at budget time
- \$6m cap per utility of non-obligated funds

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POLICY SUMMARY

Policy Highlights

- Interdepartmental collaboration - working group
- Public outreach is next step
- Pilot principle - implementation phase of a year or more
 - Regular review and assessments to make changes as needed
 - Bi-annual reviews with budget cycle
 - Commission approves all major changes post-pilot
- **Transparency - Commission awards are mandatory**



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POLICY SUMMARY

Funding Structure

- Maximum award - \$1.75m per year per utility (water, sewer storm)
- Awards must occur prior to solicitation of bids or re-bid
- Awards must follow city purchasing policies (public bid/wage rates)
- Disbursement - after completion of public infrastructure with mandatory timelines
- Small project reserve - Up to \$250k per utility per year for eligible projects on first come first served basis

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POLICY SUMMARY

Eligible Activities

- Public water, sewer or storm infrastructure & associated costs
 - Must benefit existing public infrastructure system
 - Must support potential development
- Exclusions: Private utilities, roadways, projects outside city limits
- Incorporated city areas only - **prior or concurrent land use entitlement approvals are required**



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POLICY SUMMARY

Application Process

- Eligible Applicants: Developers, NGOs, City Public Works Department
- Deadlines:
 - $\geq \$250k$: Bi-Annual (Apr 15, Oct 15), awards in July or January
 - $< \$250k$: Year-round, first-come basis
- Requirements: Pre-application meeting, complete application, scoring rubric, land use entitlement approvals.
- **Failure to apply before bidding = ineligibility or re-bid**

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POLICY SUMMARY

Review and Scoring Criteria

- Benefit to existing public infrastructure
- Enablement of future development
- Economic Impact
 - Tax base, jobs, infrastructure, lifecycle analysis
- Growth Policy alignment, infill, high-density or mixed use
- Project readiness, leveraging non-city funds, developer experience
- Geographic distribution across Neighborhood Council districts



Match Requirements

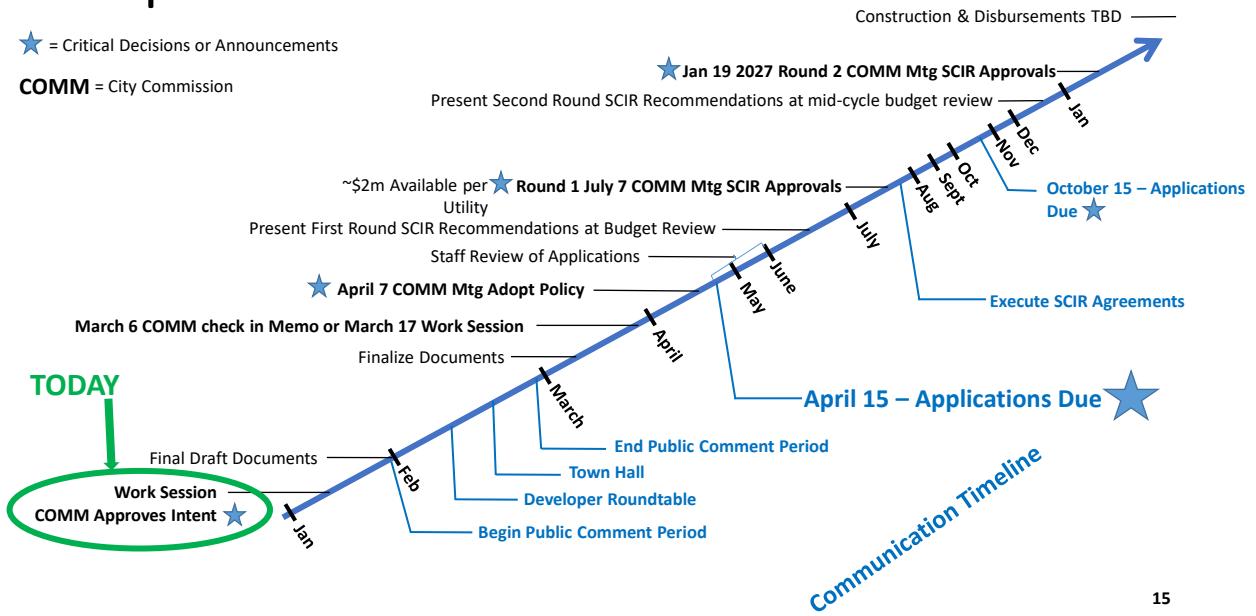
- Not required but may increase score

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Proposed SCIR Timeline

★ = Critical Decisions or Announcements

COMM = City Commission



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QUESTIONS

Key Questions to Answer

1. Is this ready for public outreach?
 - To target FY27 awards in July, recommendation is 'yes'
2. Can the Public Works Department apply for this fund?
Recommendation is 'yes,' why:
 - Strategic focus versus single developer focus
 - Regional knowledge to facilitate projects that address infrastructure issues that can benefit multiple developments



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90% DRAFT SCIR POLICY SUMMARY

FOR CITY OF GREAT FALLS

PILOT OF STRATEGIC CAPITAL INVESTMENT RESERVE (SCIR) PROGRAM

I. INTRODUCTION

The Strategic Capital Investment Reserve (SCIR) program is undergoing a Pilot period as it is implemented to ensure it functions as intended. The SCIR is a funding mechanism established by the City of Great Falls to expand and improve system-wide public water, sewer, and stormwater utility infrastructure and support strategic development that aligns with adopted community plans. The SCIR is funded through a dedicated portion of utility rates and is administered by the Strategic Development Officer (SDO) in coordination with Planning & Community Development, Public Works, and Finance Departments.

Important: SCIR funding must be approved by the City Commission prior to solicitation of bids for Public Works infrastructure or a re-bid is required. Retroactive reimbursements are not permitted. Additionally, land use entitlement approvals must be approved by the City Commission prior to or concurrent with SCIR awards. Necessary land use entitlement approvals may include, but are not limited to, annexation, zoning, and preliminary plat.

II. PROGRAM OBJECTIVES

The SCIR Program is intended to:

1. Improve performance and resiliency of existing City public water, sewer, and stormwater utility systems while supporting development that aligns with adopted plans.
2. Support broad community benefit and long-term fiscal responsibility.
3. Ensure transparency through City Commission approved funding decisions.

III. FUNDING STRUCTURE

- **Match Commitments:** Match commitments are not required but may increase score of proposal.
- **Maximum Award:** Up to \$1.75 million per year per utility (water, sewer, or storm) per project. Amounts will be based on utility revenues and availability. SCIR may not be used for debt service or future phases of projects.
- **Awards:** The City Commission shall vote to award all SCIR funding proposals in accordance with the timelines and procedures indicated herein.
- **Administrative Awards:** Small proposals less than \$250,000 per utility per year per project may be recommended for Commission award based on administrative approval on a first come first serve basis. This small project reserve will maintain an estimated maximum amount of \$250,000 per utility per year based on utility revenues. The fiscal year starts on July 1 and ends on June 30.
- **Disbursement of SCIR funds:** The SCIR comes as a reimbursement issued after infrastructure completion, acceptance, and ownership transfer to Public Works.
- **Fiscal Purchasing Policy:** Expenditure of SCIR funds shall meet city financial policy requirements including, but not limited to, competitive public bidding process, Montana prevailing wage rates, certified payroll, and other items as required by MCA or the City Finance Department.
- **Latecomer's Fees:** Use of SCIR for latecomer's fees is not allowed. Public Infrastructure built with SCIR funding is not entitled to future latecomer's fees. Match funds are not eligible for latecomer's fees.
- **Maximum Reserve Amount:** The SCIR shall accrue a maximum of 6 million of non-obligated funds per each utility. Any non-obligated accruals over \$6 million may be re-invested in the capital improvements program or be applied to necessary rate increases for normal utility operations.

- **Other City Funding Sources:** Other city funds, such as TIF funding, may be used in conjunction with SCIR funds; however, this may impact scoring.
- **Funding Timeline:** Successful applicants shall have two (2) years from Commission Approval to accomplish substantial commencement of work and three (3) years to achieve substantial completion of the public infrastructure. SCIR funds are not eligible for extensions.
- **Annual Reports:** SCIR funding shall be incorporated into the City's annual budget report and semi-annual budget update.
- **Debt service:** Use of SCIR for debt service will not be permitted.
- **Public Competitive Bidding:** Failure to receive approval of a completed SCIR application before soliciting bids for Public Works infrastructure negates eligibility for SCIR assistance or a re-bid is required.

IV. ELIGIBLE ACTIVITIES

SCIR funds may be used for projects that both provide a benefit to the existing City public infrastructure system and enable future development:

- **Public Water Infrastructure:** Oversizing/extending mains, pump stations, storage towers, treatment plant upgrades, and associated incidental surface improvements.
- **Public Sewer Infrastructure:** Oversizing/extending mains, lift stations, wastewater treatment improvements, and associated incidental surface improvements.
- **Public Stormwater Infrastructure:** Regional detention ponds, oversizing/extending storm mains, lift stations, and associated incidental surface improvements.
- **Other Costs:** Other costs associated with public water, sewer, or stormwater infrastructure are eligible including engineering design, permitting costs, easement acquisition costs, inspection, mobilization, bonding, and other eligible costs as approved by the SDO.
- **Exclusions:** Infrastructure operation and maintenance costs, service lines, fire service lines, contingencies, debt service, other private or enterprise utilities such as gas, power, or communication lines, road surface improvements including sidewalks, landscaping, change orders.

Ineligible Uses Include:

- Non-development related capital improvements projects.
- Infrastructure benefiting only a single development.
- Roadway infrastructure including, asphalt, curbing, valley gutters, and sidewalks.
- Debt service or unrelated capital costs.
- Funding of public infrastructure outside of the incorporated City limits.

V. APPLICATION PROCESS

1. **Eligible Applicants:** Developers, non-governmental organizations, and the City Public Works Department. One application per entity per application cycle. If projects are associated with new development that require land use entitlement, application requests must be concurrent with the land use entitlement applications or after the entitlement has been approved. **Failure to receive approval of a completed application before soliciting competitive bids for Public Works infrastructure negates the applicants eligibility for SCIR assistance or a re-bid is required.**
2. **Initial Contact:** Contact the Planning & Community Development Department to discuss project eligibility for SCIR funding.
3. **Pre-Application Meeting:** After initial contact, before the preparation of the application, a pre-application meeting will be held with the SDO, in coordination with the Planning & Community Development, Public Works, and Finance Departments. Pre-application meetings may be held in conjunction with land use entitlement meetings.
4. **Application Preparation and Submission:** Prepare and submit a complete SCIR application with supporting documentation attached. The applicant shall use the rubric to self-score the proposal. **All SCIR applications shall be submitted concurrently with a land use entitlement application or after a previously approved land use entitlement application.**
5. **Application Deadlines:** Applications shall be submitted in accordance with the following:
 - **SCIR Requests under \$250,000 per year per utility fund:** Applications may be submitted year-round and may be recommended for award on a first come, first served basis until the yearly cap is met. The fiscal year

starts on July 1 and ends on June 30 and the estimated cap is \$250,000 per utility per year depending on utility revenues. Staff shall determine if the project is eligible. Requires commission award via a public hearing.

- **SCIR Requests over \$250,000 per year per utility fund:** Staff will review, rank, and make recommendation for Commission Approvals on a bi-annual basis.
 1. Bi-Annual Application Deadlines: April 15, October 15
 2. Estimated timeframe of award: July or January in conjunction with budget cycle approvals, requires commission award via a public hearing.
- 6. **Staff Review:** Applications will be reviewed by City staff and the SDO and scored based on the adopted policy and rubric. Staff may request additional information, request modified application documents, and may provide written comments.
- 7. **Draft SCIR Agreement:** Pending successful review, Staff will prepare a SCIR agreement in conjunction with the applicant which will accompany the application and recommendation of award.
- 8. **Recommendation:** Staff will rank applications based on the adopted policy and rubric and prepare a recommendation for the City Commission.
- 9. **Commission Approval:** The SDO will present the application to the City Commission. The City Commission must vote to approve funded applications.
- 10. **Execute SCIR Agreement:** Awarded projects must fully execute the SCIR Agreement defining terms, obligations, timelines, and other items as deemed necessary.

VI. REVIEW CRITERIA

Applications will be ranked and scored using the ranking matrix and the criteria below. See the application and scoring rubric for more information.

- **Benefit to Existing System and Infrastructure**
- **Enablement of Future Development and Growth**
- **Economic Impact (Tax Base, Jobs, and Infrastructure Lifecycle Analysis)**
- **High Density or Mixed-Use Housing**

- **Infill Development and Growth Policy Plan Alignment**
- **Project Readiness & Timeline**
- **Leveraging of Non-City Funds**
- **Developer's Experience**
- **SCIR Geographic Distribution by Neighborhood Council District**
- **New vs. Frequent Users**

VII. GOVERNANCE & ADMINISTRATION

- **Strategic Development Officer (SDO):** The SDO is the primary position charged with SCIR application review, applicant coordination, and preparing recommendation for the Commission.
- **Working Group:** The working group is the primary administrative advisory body of the SCIR. In absence of the SDO, the working group shall act as the SDO. The working group consists of the Public Works Director, City Engineer, Development Review Coordinator, Planning and Community Development Director & Deputy Director, Finance Director, and the City Attorney.
- **City Commission:** The City Commission acts as the primary governing body and votes to award or not award all eligible SCIR proposals.

VIII. POLICY REVIEW

- **Pilot Period Principle:** The first year or more of implementation of the SCIR program is intended to be considered a pilot period. It is anticipated that regular reviews and assessments during the pilot period will be conducted to work through issues and recommend adjustments to the process as needed.
- **Periodic Reviews:** Bi-annual SCIR reports and reviews will be conducted concurrent with City budget approval and mid-fiscal year budget review.
- **Financial Accruals:** If funds continue to accumulate in the SCIR without expenditure or obligation, the working group may recommend policy changes.
- **Legal Review and Compliance:** Legal reviews may occur on an as needed basis and may include internal legal review and external legal counsel to review and advise changes.

- **Changes:** During the pilot period, language change requests to any component of the SCIR policy or application documents may be submitted to City staff on an as needed basis. All change requests must be recommended by City staff and approved by the City Commission. After the pilot period, it is intended to separate and define substantial changes requiring commission approval versus minor administrative changes which do not require commission approval.

IX. APPEALS

- **Process:** If an individual is aggrieved by a decision of staff or wishes to appeal the terms of the SCIR program, the applicant may appeal to the City Commission within thirty (30) calendar days. All Commission decisions are final.

X. GLOSSARY OF TERMS

- **Adopted Plans** - Official planning documents approved by the City of Great Falls, such as the Growth Policy, Neighborhood Plans, and Utility Master Plans. SCIR projects must align with these plans to be considered eligible and score favorably.
- **Administrative Award** - A SCIR funding mechanism for small-scale infrastructure projects (less than \$250,000 per utility per year) that may be recommended for Commission approval administratively on a first-come, first-served basis.
- **Annexed Land** - Land that has been formally incorporated into the City of Great Falls through annexation. SCIR funds may only be used for infrastructure improvements within annexed areas.
- **Benefit to Existing System and Infrastructure** - A scoring criterion evaluating how a proposed project improves the performance, capacity, or resiliency of existing public utility systems. Examples include looping water mains, relieving bottlenecks, or upgrading aging infrastructure.
- **Critical Facilities** - Essential public services such as hospitals, schools, fire stations, and emergency response centers. Projects that benefit these facilities may receive higher SCIR scores due to their community importance.
- **Commission Approval** - Formal authorization by the City Commission required for all SCIR funding awards, major policy changes, and entitlement approvals. Must be obtained before soliciting bids or a re-bid is required.

- **Developable Land** - Land that is suitable and available for future development, typically within the City's designated growth areas and served or serviceable by public infrastructure.
- **Development** - The process of constructing new buildings or infrastructure, or redeveloping existing properties, typically involving land use approvals, utility connections, and compliance with City plans.
- **Development Feasibility** - A measure of whether a proposed development is financially and practically viable. In the SCIR context, feasibility is determined by the applicant's demonstration of market demand, supported by a detailed pro forma, financing commitments, and alignment with City plans. Strong feasibility indicates that the project is likely to proceed successfully and deliver intended public benefits.
- **Developer's Experience** – A qualitative assessment of the applicant's past performance on similar infrastructure or development projects. Thresholds:
 - High: Multiple successful projects with timely delivery and compliance.
 - Medium: Some relevant experience with moderate success.
 - Low: Limited or no prior experience with comparable projects.
- **Equivalent Dwelling Unit (EDU)** - A standardized metric used to quantify the demand a single-family residence places on public utility systems (water, sewer, stormwater). EDUs allow the City to compare infrastructure impacts across different types of development and are used in SCIR scoring to assess system benefit and capacity needs.
- **Eligible Applicants** - Entities permitted to apply for SCIR funding, including private developers, non-governmental organizations (NGOs), and the City Public Works Department. Each entity may submit one application per funding cycle.
- **Enablement of Future Development and Growth** - A scoring criterion assessing how a project unlocks new development potential, such as increasing utility capacity to serve additional EDUs or opening access to developable land.
- **Extension of Services Plan** - A City Planning document outlining how City services (water, sewer, and stormwater) will be extended to support future growth. SCIR projects should align with this plan.
- **Fiscal Purchasing Policy** - City of Great Falls financial policies governing the use of public funds, including competitive bidding, prevailing wage compliance, and certified payroll. SCIR expenditures must adhere to these policies.
- **Growth Policy Plan Alignment** - A measure of how well a proposed project supports the City's long-range planning goals, including land use, housing, and infrastructure priorities. Projects aligned with the Growth Policy score higher.

- **High Density or Mixed Use Housing** - Residential development that includes multi-family units (e.g., apartments, townhomes) or combines residential with commercial uses. SCIR scoring favors projects that promote compact, efficient land use.
- **Incorporated Land** - Land located within the official boundaries of the City of Great Falls. Only incorporated land is eligible for SCIR-funded infrastructure improvements.
- **Infill Development** – Development or redevelopment within the incorporated City limits that is served by existing public infrastructure (water, sanitary sewer, stormwater, and roadway access), aligns with the City's Growth Policy and land use plans, and promotes efficient land use by utilizing vacant or underused parcels.
- **Infrastructure completion and acceptance** - The point at which public infrastructure funded by SCIR is fully constructed, inspected, and formally accepted by the City's Public Works Department.
- **Infrastructure lifecycle analysis** - An evaluation of the maintenance, operation, and replacement costs compared to revenues over the useful life of the infrastructure. Required for SCIR scoring.
- **Land Use Application** - A formal request submitted to the City for approval of zoning, annexation, subdivision, or other development-related actions. Must accompany or precede SCIR applications.
- **Land Use Approval** - Official authorization granted by the City Commission or Planning Department for land use changes. Required before or concurrently with SCIR fund awards.
- **Land Use Entitlement** - The legal approval granted by the City for a specific use of land, including annexation, zoning, and subdivision. Entitlement is a prerequisite for SCIR funding and must be secured before or concurrently with SCIR application submission.
- **Latecomer's Fee** - A reimbursement mechanism allowing initial infrastructure investors to recover costs from future users. SCIR funded infrastructure is not eligible for latecomer's fees.
- **Long-term fiscal responsibility** - A guiding principle of the SCIR program that ensures infrastructure investments are financially sustainable over time. This includes minimizing future maintenance costs, maximizing public benefit, and aligning with lifecycle analysis outcomes.
- **Match Funds** - The portion of project costs contributed by the applicant or other non-City funds. SCIR scoring favors projects with higher match ratios.

- **New vs. Frequent Users** - A scoring metric that prioritizes applicants who have not received SCIR funding in the past five years. Frequent users (those with one or more awards in that period) may receive lower scores to promote access.
- **Non-City Funds** - Any financial contributions toward SCIR eligible infrastructure that do not originate from City sources. These may include private investment, state or federal grants, or other public-private partnerships.
- **Owner Transfer** - The formal handoff of completed public infrastructure from the applicant to the City of Great Falls. SCIR reimbursement is contingent upon this transfer and acceptance by Public Works.
- **Pilot Period** - The initial implementation phase of the SCIR program, during which policies, procedures, and scoring criteria may be refined based on feedback and performance. Intended to ensure the program functions as intended before full adoption.
- **Project Readiness** - A composite measure of how prepared a project is to begin construction. Includes entitlement approvals, design completion, and anticipated construction timeline. Projects with higher readiness may receive higher scores.
- **Public Infrastructure** – City owned utility systems such as water, sewer, and stormwater facilities. SCIR funds may only be used for public infrastructure that is transferred to City ownership upon completion.
- **SCIR (Strategic Capital Investment Reserve)** - A City of Great Falls funding mechanism supported by utility rates, designed to enable development and improve existing public utility infrastructure in alignment with adopted plans.
- **SCIR Agreement** - A formal Agreement between the City and the applicant outlining the scope of work, reimbursement terms, timelines, and other obligations related to SCIR funded infrastructure.
- **SCIR Geographic Distribution by Neighborhood Council District** - A scoring factor that promotes allocation of SCIR funds across the City's Neighborhood Council districts. Projects in underrepresented districts may receive higher scores.
- **Strategic Development Officer (SDO)** – The City staff member responsible for administering the SCIR program, coordinating application reviews, and making funding recommendations. In the absence of an SDO, the designated working group assumes these duties.
- **Substantial Commencement** - The point at which physical construction of SCIR-funded infrastructure must begin to maintain eligibility. Defined by the City of Great Falls as occurring within two years of City Commission approval. Failure to meet this milestone may result in forfeiture of SCIR funding.
- **Substantial Completion** - The point at which SCIR-funded infrastructure is fully constructed and ready for use, pending final inspection and acceptance by the

City. Must occur within three years of Commission award. Failure to meet this milestone may result in forfeiture of SCIR funding.

- **TIF (Tax Increment Financing)** - A public financing tool that uses future increases in property tax revenue within a designated area to fund current infrastructure improvements. TIF may be used alongside SCIR but may affect scoring.
- **Utility** - A public service system, such as water, sewer, or stormwater, owned and operated by the City of Great Falls. SCIR funds are allocated by utility type and capped annually.
- **Working Group** - An administrative advisory body that supports SCIR program implementation. Includes representatives from Public Works, Planning & Community Development, Finance, Legal, and other relevant departments. Acts in place of the SDO when necessary.



90% DRAFT APPLICATION & SCORING RUBRIC

FOR CITY OF GREAT FALLS

STRATEGIC CAPITAL INVESTMENT RESERVE (SCIR)

IMPORTANT

This application initiates a request for funding through the Strategic Capital Investment Reserve (SCIR) program, a public infrastructure investment initiative administered by the City of Great Falls to support public infrastructure utility improvements and strategic development aligned with adopted community plans. The Strategic Development Officer (SDO), in coordination with the Planning & Community Development, Public Works, and Finance Departments, is charged with processing all applications and accomplishing the policy established with the creation of the SCIR program.

Projects requesting SCIR financial assistance will be evaluated by City staff and approved by the City Commission. Designated City Staff will prepare a recommendation to the City Commission based on grading criteria as found within the SCIR policy. Please review the SCIR Policy Summary and this information carefully before submitting an application.

Failure to receive approval of a completed application before soliciting bids for public works infrastructure negates the Applicant's eligibility for SCIR assistance or require a re-bid. Retroactive reimbursements are not an eligible use of the SCIR.

Applicant must have obtained prior land use entitlement approvals or obtain concurrent land use entitlement approvals to be eligible for SCIR awards. Failure to obtain land use entitlement approvals negates the Applicant's eligibility for SCIR assistance.

CITY OF GREAT FALLS - STRATEGIC CAPITAL INVESTMENT RESERVE (SCIR) APPLICATION FOR FUNDS

Project Name:

Date Submitted:

Utility System(s) Impacted, Check Applicable Boxes: Water Sewer Stormwater

APPLICANT INFORMATION

1. **Applicant Name:**

2. **Address:**

3. **Telephone:**

4. **Email:**

5. **Applicant Type:** Developer Non-Governmental Organization City Public Works Department
Other _____

DEVELOPMENT INFORMATION

1. **Project Address / Location:**

2. **Legal Description:**

3. **Owner Name:**

4. **Owner Address:**

5. **Architectural/Engineering**

Firm: _____

a. **Address:**

—

b. **Representative Name:**

6. **Please Provide a Description of the Total Project Development (Attach Narrative)**

7. **Estimated Project Start Date:** _____ **Completion:**

SCIR FUNDED PUBLIC INFRASTRUCTURE - FUNDING INFORMATION

1. **Please describe the Public Infrastructure funding needs and attach a detailed itemized engineer's estimate describing all funding needs :**

- a. Detailed Engineers Cost Estimate Attached: Yes
- b. Total Water Infrastructure \$ _____
- c. SCIR funded Water Infrastructure \$ _____
- d. Non-City fund match Water Infrastructure \$ _____
- e. Total Sanitary Sewer Infrastructure \$ _____
- f. SCIR funded Sanitary Sewer Infrastructure \$ _____
- g. Non-City fund match Sanitary Sewer Infrastructure \$ _____
- h. Total Stormwater Infrastructure \$ _____
- i. SCIR funded Stormwater Infrastructure \$ _____
- j. Non-City fund match Stormwater Infrastructure \$ _____
- k. Other Eligible Costs (See Policy): \$ _____

I. SCIR funded other Eligible Costs (See Policy): \$ _____

m. Non-City fund match Other Eligible Costs (See Policy) \$ _____

2. Please indicate whether any other sources of City funds are proposed to fund the Public Infrastructure such as TIF funds: _____

3. Please describe the anticipated timing schedule for your identified Eligible SCIR funds, be advised SCIR funds are reimbursed after owner transfer of the public infrastructure to the City:

a. Anticipated Month/Year of Infrastructure Substantial Commencement:

b. Anticipated Month/Year of Infrastructure Substantial Completion:

4. Applicant acknowledgment that public infrastructure funded by SCIR funds is not eligible for future latecomer's fees. Match funds are not eligible for future latecomer's fees and the right to latecomer's fees is waived (check box below):
 Yes, I acknowledge. Initials: _____

5. Applicant acknowledgement that public infrastructure funded by SCIR must be spent in accordance with the City's financial policies and relevant portions of MCA:
 Yes, I acknowledge. Initials: _____

6. Applicant acknowledgement that public SCIR must be spent within 3 years of Commission award or the remaining balance is forfeited:
 Yes, I acknowledge. Initials: _____

SCORING CRITERIA

A. Benefit to Existing System & Infrastructure:

- a. Number of Existing EDU's Benefitted: _____
- b. Acres of Existing Incorporated Land Benefitted: _____
- c. Existing Critical Facilities Benefitted: _____

B. Enablement of Future Development & Growth:

- a. Number of new EDU's Unlocked: _____
- b. Acres of Developable Land Unlocked: _____

C. Economic Impact (Tax Base, Jobs, and Infrastructure Lifecycle Analysis):

- a. \$ Taxable Value Added: _____
- b. New Permanent Jobs Added: _____
- c. Estimated Infrastructure Payback Period (years): _____

D. High Density or Mixed Use Housing:

- a. Units/net acre: _____
- b. Contains Mixed Residential Uses: Yes No Other _____

- c. Contains Commercial Uses: Yes No Other _____

E. Infill Development and Growth Policy Plan Alignment:

- a. Infill or Redevelopment Project: Yes No Other _____
- b. Project Located in Growth Policy Area: Yes No Other _____

F. Project Readiness & Timeline:

- a. Annexation Approved or Existing: Yes No N/A Concurrent
- b. Zoning Entitlement Approved: Yes No N/A Concurrent
- c. Preliminary Plat Approved: Yes No N/A Concurrent
- d. Improvements Agreement Approved: Yes No N/A Concurrent
- e. Infrastructure Drawings Approved: Yes No N/A Concurrent
- f. Infrastructure Completion Within: 0-12 Months 13-24 Months ≥ 25 months

G. Leveraging of Non-City Funds:

a. % Match of SCIR Funds with Non-City Funds: _____

H. Developer's Experience:

a. Developer's Experience per Glossary of Terms: High Medium Low

I. SCIR Geographic Distribution by Neighborhood Council (NC) District:

a. Number of SCIR Projects in same NC in the last 5 years (City Staff to Determine or Verify): _____

J. New vs. Frequent Users:

a. Number of Applicant Successful SCIR Project Awards in the last 5 years (City Staff to Determine or Verify): _____

SELF SCORING

1. Applicant has self completed the scoring rubric where possible and included it with the application:

Yes, I acknowledge. Initials: _____

CERTIFICATION

I (we), _____

(please

e print), certify that the statements and estimates in this application, as well as all attachments, are true and correct to the best of my (our) knowledge.

Signature: _____ Date: _____

Title: _____

Signature: _____ Date: _____

Title: _____

SCIR Scoring Rubric – 100 Point System

This rubric is designed to make scoring transparent and easy to follow. Applicants provide data in the SCIR Application; they enter those inputs, and points are awarded according to the thresholds below. Staff will verify every score, if staff has determined a different score then reasoning will be provided to clarify the discrepancy. The point system is used to prioritize and inform suitability of projects. The rubric does not directly award projects. Staff will recommend denial, approval, and priority of approved projects. Staff reserves the right to deny any project, regardless of the rubric score.

How to Use This Rubric

1. Review the SCIR Application and confirm all required data fields are complete.
2. For each criterion below, compare the applicant's data to the thresholds provided.
3. Award the number of points based on the designated point allocation.
4. Record the total score out of 100.
5. Use the total score to place the project into one of four categories:
 - 81-100 = Excellent
 - 61-80 = Good
 - 41-60 = Satisfactory
 - 0-40 = Low Correlation

Criterion	Title	Points	Point Allocation
A	Benefit to Existing System & Infrastructure	Max 15 Score	<ul style="list-style-type: none"> • 15 pts = Benefits \geq500 EDUs of existing users or \geq50 acres of existing incorporated land or \geq2 critical existing facilities (schools, hospitals, fire stations). • Scale proportionally of whichever is higher always rounding up (e.g., 250 EDUs = 8 pts). • 5 point minimum if project benefits existing infrastructure system (e.g. utility oversizing, filling gap, or looping)

B	Enablement of Future Development & Growth	Max 15 Score	<ul style="list-style-type: none"> 15 pts = Unlocks ≥ 500 new EDUs or ≥ 20 acres of developable land. Scale proportionally of whichever is higher always rounding up (e.g., 250 EDUs = 8 pts).
C	Tax Base	Max 5 Score	<ul style="list-style-type: none"> 5 pts = Adds $\geq \\$20M$ taxable value Scale proportionally between these levels. (e.g., $\\$10M = 3$ pts).
C	Jobs	Max 5 Score	<ul style="list-style-type: none"> 5 pts = 100 new permanent jobs Scale proportionally always rounding up (e.g. 50 jobs is 3 points)
C	Infrastructure Lifecycle Analysis – City Staff will Score	Max 5 Score	<ul style="list-style-type: none"> 5 pts = infrastructure payback period is half of the lifecycle. 3 pts = infrastructure lifecycle analysis breaks even.
D	High Density or Mixed Use Housing	Max 10 Score	<ul style="list-style-type: none"> 10 pts = 10 units/net acre or a mix of residential and commercial uses 5 pts = 5 units/net acre or a mix of residential uses Scale proportionally always rounding up (e.g. 2 jobs is 3 points)
E	Infill Development & Growth Policy Plan Alignment	Max 10 Score	<ul style="list-style-type: none"> 10 pts = Project located in infill/redevelopment area designated in Growth Policy. 5 pts = Project located in Growth Policy area but not infill. 0 pts = Project outside growth areas.
F	Project Readiness & Timeline	Max 10 Score	<ul style="list-style-type: none"> Approvals: All secured=4, Pending=2, None/concurrent=0. Design %: $\geq 90 = 4$, $30-89 = 2$, $< 30 = 0$. Infrastructure Completion within: ≤ 12 months=2, $13-24$ months=1, ≥ 25 months=0.
G	Leveraging of Non-City Funds	Max 10 Score	<ul style="list-style-type: none"> 10 pts = Applicant provides $\geq 67\%$ of total SCIR eligible infrastructure cost with non-city funds. 8 pts = 50–66% match. 4 pts = 20–49% match. 1 pt = 10–19% match. 0 pts = $< 10\%$ match.

H	Developer's Experience	Max 5 Score	<ul style="list-style-type: none"> • 5 pts = High • 3 pts = Medium • 0 pts = Low
I	SCIR Geographic Distribution by Neighborhood Council (NC) District	Max 5 Score	<ul style="list-style-type: none"> • 5pts = No SCIR projects in same NC in last 5 years. • 3 pt = One SCIR same NC in last 5 years. • 0 pts = Two or more SCIR projects same NC in last 5 years.
J	New vs. Frequent Users	Max 5 Score	<ul style="list-style-type: none"> • 5 pts = Applicant has not received SCIR funds in last 5 years. • 3 pts = Applicant received one SCIR award in last 5 years. • 0 pts = Applicant received 2+ SCIR awards in last 5 years.

Total Score: _____ Maximum Points: 100

Example Projects by Score Category

The following examples illustrate how different types of projects would likely score under the SCIR rubric. These are hypothetical scenarios designed to demonstrate the scoring system in practice.

Example 1: Excellent (81-100 pts)

- Project: Regional water main looping that serves 600 existing EDUs, fixes low pressure for a hospital and two schools, and opens 400 new EDUs of capacity.
- Housing Impact: Enables 350 new housing units across multiple subdivisions including multi-use and high density.
- Economic Impact: Estimated \$25M taxable value added; 120 jobs tied to new industrial park, infrastructure lifecycle analysis is net positive.
- Readiness: All approvals in place, design 95% complete, reimbursement in 10 months.
- Match: 60% private contribution.
- Likely Score: 95/100 – Excellent.

Example 2: Good (61-80 pts)

- Project: Sewer trunk extension oversizing that serves 120 existing EDUs and enables 200 more.
- Housing Impact: Supports 150 housing units with some high density apartments.
- Economic Impact: \$10M taxable value; 40 new jobs projected, infrastructure lifecycle cost breaks even.

- Readiness: Zoning approved, design 70% complete, reimbursement in 18 months.
- Match: 50% private contribution.
- Likely Score: 61/100 – Strong.

Example 3: Satisfactory (41-60 pts)

- Project: Stormwater detention pond serving 40 existing EDUs and unlocking 60 new ones.
- Housing Impact: Supports 40 new single family housing units and 20 high density units.
- Economic Impact: \$4M taxable value; minimal job creation.
- Readiness: Preliminary plat submitted; design at 30%; reimbursement expected in 3 years.
- Match: 20% private contribution.
- Likely Score: 41/100 – Satisfactory.

Example 4: Low Correlation (0-40 pts)

- Project: Water main extension to serve one commercial parcel (30 EDUs) outside designated growth area.
- Housing Impact: No housing enabled.
- Economic Impact: \$2M taxable value; 10 jobs.
- Readiness: No approvals; design not started; reimbursement in 4 years.
- Match: 15% private contribution.
- Likely Score: 14/100 – Low Correlation.