

Fred Abadi, PhD, PE, Director fabadi@waukesha-wi.gov



MEMORANDUM OF CONTRACT

Amended [Date]

To: [Address Block]

Changes highlighted

DRAFT

Subject: Water Softener Salt Optimization Program

The City of Waukesha (referred to herein as the City) has been required by DNR to implement measures to reduce chloride output from the Clean Water Plant. The most significant source of chloride is salt from water softening. The objective of this Softener Salt Optimization Program is to reduce softener salt use to no more than necessary to provide soft water, thereby reducing chloride output. You will assist the City in this effort by performing salt optimizations on softeners which discharge to the City's sanitary sewer system. This includes commercial, industrial, public, multi-family, and residential sewer users.

Phase I of the Program began in 2018 and will continue through 2023 or other end date as designated by the City. You will perform and provide all optimization services as specified in the Scope of Work in Schedule A. You will provide only technicians who have successfully completed certification training for this Program, including overview training by the Water Quality Association (WQA) on the Optimization Report form, and detailed training by one or more softener manufacturers.

You will receive an appropriation from the City of \$30.00 for each optimization completed in compliance with the Optimization Report form and the terms and conditions of this Contract. Reports that are incomplete, inaccurate or unclear, or adjustments which fall short of Program goals will not be considered as completed optimizations. Your technicians will be expected to perform all adjustments listed on the WQA optimization report form, or as many adjustments that can be made on a particular softener. Each separate softener controller that is optimized will be considered a separate optimization. The City may adjust the pace of the Program to stay within the limits of designated funds. When optimizing equipment for a softener owner designated a "high-volume water User" by this Department in accordance with section 29.08(i)(2)(C) of the Municipal Code, you may assess a co-payment by the softener owner to your company of not less than \$10 and not more than your normal service call rate minus the City's \$30 appropriation for each optimization. Your invoices to the high-volume water Users shall reflect the deduction of the \$30 appropriation from the itemized total. For all other Users, you may assess a co-payment by the softener owner to your company of \$10 for each optimization.

You are solely responsible for the performance of optimization services and the supervision and direction of employees who perform the work. The City's only obligations under this Contract are to make payment after the requirements for payment are satisfied.

You agree to indemnify and hold harmless the City of Waukesha, its officers, employees, successors, assigns and agents from and against all claims, suits, costs, losses, debts, actions, demands, liabilities, expenses, and /or damages to persons or property in any manner arising out of or connected with you and

□ ENGINEERING DIVISION Alex Damien, PE City Engineer 130 Delafield St Waukesha, WI 53188 262-524-3600 Fax – 262-524-3898 MUNICIPAL PARKING SERVICES Fred Ripley
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Waukesha Looking Back - Reaching Forward

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your employees' and agents' actions and participation in this Water Softener Salt Optimization Program. You must maintain a public liability insurance policy, naming the City as an additional insured and loss payee, with limits of not less than \$1,000,000 per occurrence and \$2,000,000, aggregate, and provide the City with a copy of the certificate of insurance.

This Memorandum of Contract and its Schedule A and Exhibits constitute the entire agreement between the parties, and any change, amendment or modification must be made in writing and signed by both parties. If any provisions are held to be invalid and unenforceable, the remaining provisions shall be valid and binding on the parties. One or more waivers by either party of any provisions of the agreement shall not be construed as a waiver of a subsequent breach by the other party. This agreement is governed and construed in accordance with the laws of the State of Wisconsin.

Successful and timely completion of this important Program will be in the best interest of both the City and the water conditioning companies. Achieving significant chloride reduction through salt optimization will help avoid the need for escalated control measures. Please feel free to contact Tim Young with any questions or concerns, (262) 524-3628.

[Optimizer Company]

[Signatory] Date:

City of Waukesha

Shawn N. Reilly, Mayor Date:

Gina L. Kozlik, City Clerk Date:

To certify that funds are provided for payment:

Bridget M. Souffrant, Director of Finance Date:

Cc: Kevin Lahner, Fred Abadi, Jeff Harenda, Miles Eastman, Julie Weigl

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Schedule A Scope of Work

- 1. You will perform softener salt optimizations and continue making steady progress toward the Program goal of optimizing all softeners connected to the City's sewer system by late 2023.
- 2. You will schedule and perform optimizations in conjunction with all routine service calls and new or replacement installations for customers whose softeners discharge to the City's sanitary sewer system.
- 3. You will schedule and perform optimizations for all your customers with rental softeners that discharge to the City's sanitary sewer system.
- 4. The City will mail a letter (Exhibit A) to the highest water users first, then will continue mailing letters in descending order of water usage. The letter will direct each softener owner or user to contact one of the listed companies which is certified to service their particular brand of softener. You will then schedule and perform the optimizations. You will provide to the City monthly a list of addresses where the property owner or contact indicated there is no softener.
- 5. Only softeners which discharge to the City's sanitary sewer system are to be included in this Program. Softeners which discharge to a septic or holding tank, or to the ground surface are not to be included.
- 6. You will provide all personnel and materials needed to perform the optimizations. The City is not responsible for mobilization charges or any additional services, parts, or repairs.
- 7. You will conduct a criminal background check on all your technicians. All technicians must pass the background check to the satisfaction of the City prior to performing any optimizations.
- 8. You will submit to the City a list of all your technicians who will be performing optimizations, including their Program certification date (WQA training date) and a copy of their background check report, if not submitted prior to the date of this Memorandum of Contract. You will submit an updated list as changes occur.
- 9. All technicians must display proper identification upon arrival for each optimization. Technicians must comply with the City's guidelines and direction, including COVID restrictions (Exhibit C), when scheduling and performing optimizations. The technicians shall only perform optimizations after obtaining written consent using the City's Salt Optimization Consent Checklist, or pursuant to a special inspection warrant. You will submit to the City an original signed Checklist for each property. After obtaining signed consent and providing the City's optimization Fact Sheet to the softener owner or site contact, technicians shall then inspect the water softener(s) on the property, perform optimization adjustments as needed, and complete the Optimization Report form.
- 10. As each optimization is being performed, your technician will complete a detailed report using the online tool designated by the City, which incorporates the WQA Optimization Report form (Exhibit B). You will provide the mobile data access and hardware needed by your technicians in the field to accomplish this task, including GPS tracking and taking one or more photos of each softener.
- 11. You will address complaints in a timely and professional manner.
- 12. Once per month, you will submit an invoice for the amount of \$30.00 per optimization completed, along with a corresponding list of completed optimizations, to:

Accounts Payable City of Waukesha Clean Water Plant 600 Sentry Dr. Waukesha, WI 53186 jweigl@waukesha-wi.gov

Each invoice shall contain the following signed certification: "I certify that this invoice and all attachments were prepared under my direction or supervision, and that the amount charged to each high-volume water user has been reduced by the City's \$30 appropriation in accordance with this Memorandum of Contract. Signed, ______."

The City is tax exempt, CES #047443, and will pay invoices monthly, net 30 days.

Exhibit A High-Volume Water User Letter



Fred Abadi, PhD, PE, Director fabadi@waukesha-wi.gov



[Date]

[Address Block]

DRAFT

NOTICE: Water Softener Salt Optimization Required

The City is required by the State of Wisconsin to reduce chlorides, which can be harmful to fish and other aquatic life. The City of Waukesha Clean Water Plant is continuing efforts to reduce chlorides from entering the sewer system to meet stricter standards in its new WPDES permit. The largest source of chloride loadings (75%) is salt used in the regeneration of water softeners. In an effort to avoid a future ban on softeners, the City has instituted a softener optimization program. Softener salt optimization adjustments can typically result in salt reductions of 38%, without any change in softened water quality. All softeners that discharge to the City's sewer system are required to be optimized per City Code §29.08(2)(B).

As a high-volume water user, you are required to schedule and complete a softener salt optimization within 60 days of receipt of this letter. If you do not have a softener, please sign and submit the enclosed Certification Form within 30 days.

You must schedule a service call (provider service call rates will apply) with one of the water conditioning companies on the enclosed list who is approved to service your particular brand of softener. You may have to contact more than one company if you have more than one brand of softener. If you do not see your brand of softener listed, please call 262-524-3628. The City is contributing \$30 toward the cost of the service call directly to the optimizer company for each completed optimization. The optimizer's itemized invoice should reflect this deduction from the total cost.

A trained technician will evaluate your softener(s) and make adjustments if needed to optimize salt efficiency. The City is working with local water conditioning companies and the Water Quality Association (www.wqa.org) in a cooperative effort to reduce salt use. Although all softeners connected to the City sewer system must be optimized, high-volume water users are being prioritized because they are likely to contribute higher volumes of salt. Optimizing salt use will ensure your softener uses only the salt needed, which reduces your salt costs and handling while still providing softened water and reducing chlorides.

How to select a company for softener optimization service:

- If you are currently using a service company for your water treatment equipment, check if they are on the list of approved optimizers. Approved optimizers have completed training by the City of Waukesha, the Water Quality Association, and their respective equipment manufacturers to ensure that your system's optimization meets the City's chloride reduction goals. Approved optimizers are also listed at http://www.wqa.org/waukesha_optimizers. You may wish to have your service company present when the approved optimizer is evaluating your system.
- If you are not using a service company, match the brand name on your water softener(s) and/or control valve to the brands on the list of approved optimizers.

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Prior to the optimization:

- Talk with your service company and optimization technician to determine the required level of conservativeness for your application.
- Notify the optimization company of the size of your softening system, whether it is metered or time-clock, and if it consists of a single softener tank or multiple tanks.

If your service company is not on the approved optimizers list, consider asking them to contact the Water Quality Association's Professional Certification & Training department at (630) 505-0160 (education@wqa.org) to arrange for training.

Please schedule your appointment with one of the approved water conditioning companies as soon as possible. Feel free to contact me if you have any questions or would like further information. Thank you for very much for your cooperation. Working together we can resolve this important issue without more drastic regulatory measures.

Sincerely,

Tim Moung

Tim Young Pretreatment Coordinator City of Waukesha Clean Water Plant 262-524-3628

Enclosures

<u>Water Conditioning Companies Approved By the Water Quality Association</u> <u>to Perform Softener Salt Optimizations</u>

For the current list, please visit:

http://www.wqa.org/waukesha_optimizers

List of Approved Optimizers as of 1/18/21:

Approved optimizers have completed training by the City of Waukesha, the Water Quality Association, and their equipment manufacturers to ensure they can help optimize water softeners currently in the field to meet the City's chloride reduction goals.

Manufacturer/Model	Approved Optimizer Company	Address	Phone Number
Culligan/Mermaid - Residential/Commercial/Industrial	Culligan Water of Waukesha	1801 Pewaukee Rd., Waukesha	262-547-1862
Culligan/Mermaid - Commercial/Industrial Pentair/Fleck control valves 5600, 5600 SXT, ProFlo SXT, 2510, 5800, 5810, 5812, 7000, 9000, 9100, 255, 268	Total Water Treatment Systems, Inc.	W137 N5427 Williams Pl., Menomonee Falls	800-929-2236
Evoqua Pentair/Fleck control valves 5600, 5600 SXT, ProFlo SXT, 2510, 5800, 5810, 5812, 7000, 9000,9100, 255, 268	Evoqua Water Technologies	N29W23825 Woodgate Ct, Ste 400, Pewaukee	866-926-8420
Guthrie & Frey	Guthrie & Frey Water Conditioning	1125 Richards Rd., Hartland	262-367-1960
Kinetico Models	Water Doctors	901 N. Grandview Blvd., Waukesha	262-549-7733
Water-Right/WaterCare Aqua Gem, CS Series Elan, Evolve, Hostess, Farm Fleet, FS Series, Impressions, Pentair/Fleck control valves 5600, 5600 SXT, ProFlo SXT, 2510, 5800, 5810, 5812, 7000, 9000, 9100, 255, 268	Soft Water, Inc.	202 Travis Lane, Waukesha	262-547-3866
Water-Right/WaterCare Aqua Gem, CS Series Elan, Evolve, Hostess, Farm Fleet, FS Series, Impression	Aqua Care Services, Inc.	39785 W Wisconsin Ave., Oconomowoc	262-567-8362

Softener Salt Optimization Questions & Answers

Why is this Program necessary?

The City of Waukesha Clean Water Plant has been mandated by DNR to reduce the chloride loading in its treated wastewater discharge. The chloride from softener salt discharges to the sanitary sewer and ends up at our wastewater treatment plant. Treatment plants are designed to remove solids and break down organic wastes, but chloride cannot be removed by cost-effective treatment processes.

What if I don't get my softener(s) optimized?

Failure to complete the optimization within 30 days may result in receiving a Notice of Violation and/or issuance of a monetary penalty (Citation).

Why am I being considered a high water user?

For the purposes of this Program, any water user who exceeds the upper range of typical residential usage (6,000 gallons per month) is considered a high water user.

Is there a cost for the optimization?

You will be charged for each service call needed to complete the optimization(s), minus the City's \$30 appropriation paid to the optimizer company. The technician may also make recommendations for optional work that is not covered by the Optimization Program such as replacing components, performing other maintenance, or replacing aging softeners.

Who will perform the optimization?

Certified technicians from local water conditioning companies that have received special training specifically for this Optimization Program.

How long will the optimization take?

About an hour per water softener or controller. This will vary based on the size and complexity of your water conditioning system. A representative for your facility will need to be present at the beginning of the optimization.

What adjustments may be made to my softener?

The technician may reduce the quantity of salt used per regeneration and input the resulting resin capacity, adjust the source water hardness setting to more accurately reflect actual source water hardness, reduce reserve capacity if manually controlled, and turn off timer overrides. The technician may also change the salt injector size as needed for proper operation at the lower regeneration salt dose. A resin cleaner may be added to restore lost capacity.

Will this affect my water quality?

Salt usage can be reduced by as much as 50% through softener optimization without any change in softened water quality. Although softened water quality should be unchanged, the frequency of regeneration is anticipated to increase if the salt dose is reduced.

What are the benefits to my facility and the City?

Reduced salt use benefits your facility by reducing costs of salt and handling, and benefits the City by reducing the concentrated chlorides discharged to sewers. If you repair water leaks, this will also reduce your demand for softened water.

(continued on next page)

What if we have a brine reclamation system?

Optimization of the water softener can reduce total salt consumption even on systems with brine reclamation. However, an elution study must be performed and reclamation settings adjusted immediately after the optimization. The City offers a \$250 incentive to the optimizer company for performing an elution study.

What about Lake Michigan water?

After Waukesha makes the transition to Lake Michigan water in 2023, for continued use, softeners will have to be adjusted to the reduced lake water hardness. This will further reduce the amount of salt used.

Are there any alternatives?

One alternative would be to ban softeners. However, the salt optimization approach (if successful) allows softener users to continue enjoying the benefits of soft water while helping the City achieve chloride compliance.

What if we are going to be replacing our softener?

City Code requires that all new or replacement softeners meet a minimum salt efficiency rating of at least 4,000 grains of hardness exchange per pound of salt. At the time of installation, your new softener must also be optimized by one of the Program's technicians who is certified for your brand of softener, since factory settings may not meet our optimization criteria.

Are there additional ways I can reduce my salt costs and chloride impact?

Yes – salt costs for pavement ice control on commercial properties can be significantly reduced by using the correct application rates. This also helps reduce the amount of salt entering the sewer system through infiltration and inflow. Wisconsin Salt Wise has an excellent website with rate calculators and training resources for salt applicators: <u>www.wisaltwise.com</u>



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'NO SOFTENER' CERTIFICATION FORM

Submit Form to:

City of Waukesha Clean Water Plant 600 Sentry Dr. Waukesha, WI 53186

As the owner, corporate officer, or site manager of the properties listed below, I hereby certify under penalty of law that no ion-exchange water softener which is designed to discharge a salt brine solution exists at any of these properties. I am aware that there may be penalties including citations and fines for knowingly submitting false information. I further certify that if any such softener is installed at a future date, it shall meet the requirements of Waukesha Municipal Code §29.08(i)(2) including minimum performance standards and optimization for salt usage.

FACILITY NAME

PROPERTY ADDRESS(ES)*

*List the address of each separate City water or sewer account.

Print Name & Title

Signature

Date

Rev. 03-21

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Exhibit B Optimization Report Form (Data to be entered electronically in app)

Water Softener Optimization Form

Date:	Site Address:			Site Contact (first name):		
Optimization conducted by (company):						
Technician: Training Certification Number:						
Optimization Scheduling Basis: Dealer-initiated optimization Customer-initiated optimization (received letter) Is Unit a Rental? Yes No Optimization Type: Existing unit New unit – new construction New unit – existing building no previous softener New unit – replaced old functioning unit New unit – Replaced a unit not functioning for less than a year New unit – replaced a unit not functioning for more than a yea						
1. Family Size? (leave blank if not residential)						
 Are there any special medical needs necessitating soft water? Yes No (If Yes use slightly more conservative settings) Brine Reclamation unit? Yes No 						
4. Plumbing Other? (e	Configuration? F explain)	lot Soft only_	Hot and Cold Soft	t, except for outside hose bibs & kitchen sink		
 Are there other treatment devices? Point of Entry "POE"/ Whole-house Systems: Iron Filter Other: Point of Use "POU" Systems: RO UV Filter Other: Before or after water softener? 						
 6. Water Softener Information: Serial number: Approx. Year Manufactured: If resin was replaced, state the year: Make: Culligan Kinetico Water-Right Soft Water Mermaid Hanson Guthrie & Frey Hellenbrand Ecowater Kenmore Electrolux Morton G.E North Star Ecopure Abendroth Final Barrier Water Hauge AO Smith Vantage Other: Specific Model: Downflow Brining Upflow Brining Time Clock If time clock, state initial regeneration frequency everyDays, Optimized regeneration frequency everyDays DIR Demand Initiated Regeneration (flow) DIR Demand Initiated Regeneration (sensor) Cu. ft. resin Ontimization: 						
Parameter		Initial	Optimized	Target/Instructions		
Hardness Ser (Grains/Galle	tting on)			Based on site specific value in app (or test kit for private wells only)		
Salt Dosage	(Lbs.)			For example, if optimized to 5 lbs. per cu. ft. of resin and if actual resin volume is 1.5 cu. ft., then enter 7.5 lbs. Use lowest salt dose recommended by manufacturer based on valve, salt curve, injector size, etc. Max. target of 5 lbs. per cu. ft. resin.		
Injector Ven	turi Type or Size			Based on manufacturer recommendation		
Capacity (Gr Adjustment	ains) Without Age			Initial: Value before any adjustments. Optimized: Per manufacturer based on resin volume and type, salt dose, valve, injector, etc.		
Capacity (Gr Adjustment	ains) With Age	N/A		Resin age adjustment factor of 1% per year, calculate:		

Parameter	Initia	l Optimize	d Target/Instructions		
			(1- (resin age x 0.01)) x Capacity in grains without resin age adjustment.		
Salt Efficiency (Grains/	Lb. Salt)	Without age	4000 grains of hardness removed per Ib. of salt, or		
,		factor:	higher <u>without</u> age factor.		
		With age facto	pr:		
Capacity (Gallons)			Calculate: (optimized age adjusted capacity in		
Posonio Canacity type			grains) / (new naroness setting in grains per gallon)		
Reserve Capacity type	-		Fixed of Valiable		
Reserve Capacity Gal.	-		30 gallons per person		
			Hot & cold soft – set to 60 gallons per person		
			For commercial or industrial systems, base on daily		
			water usage or 10% of capacity.		
			For multi-tank systems, a setting of 0 should be		
			sufficient (max of 5% of capacity). Sensor systems		
			dependent on sensor location.		
Add Resin Cleaner	N/A		Add resin cleaner to all systems where resin is		
			greater than 1 year old.		
Time Clock Override	On or	Off	If there is a time clock override for a DIR system,		
	or No	ne	record initial settings then <u>turn off</u> override and set		
			basis for regeneration to be demand		
Notes					
For time clock systems	s, fill in the table al	pove the same as de	emand based system. Calculate regeneration timer		
settings based on actu	al water usage rat	e if recent water bil	Is are readily available and provided by customer. If		
not, base on: Hot soft only - set to 30 gallons per person or Hot & cold soft – set to 60 gallons per person.					
8. What time is the so	ftener set to reger	ierate at?	(Enter Immediate if not delayed)		
 Is the time shown on the softener the same as the actual time? Fix if not. If not adjustable, note the time shown on the softener and actual time 					
10. Does the current softener appear to be working?					
11 If renairs are neede	d to the system: (I	ist and describe rec	ommendations)		
11. In repairs are needed to the system: (list and describe recommendations)					
Estimated cost of re	epairs:				
12. Are there any other recommendations or comments?					
Valve					
Resin (e.g., replace)					
Tank					
Other					
It is recommended that a softener 15 years old <u>and</u> not meeting 3,000 grains/Ib with age adjustment should be replaced with an optimized DIR softener or the resin replaced.					
It is recommended that time clock systems should be replaced with optimized DIR systems					
,					

13. Applied Sticker Yes____ No____ 14. Took a picture of softener with sticker? Yes___ No____

Exhibit C COVID-19 Safety Procedures for Optimizers



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Coronavirus (COVID-19) Safety Procedures for Softener Optimizers

All optimizer employees should monitor their health and follow guidelines set forth by the Wisconsin Department of Health Services and the Waukesha County Public Health Division.

Prior to the optimization, determine the wellness of all persons who will be present during the optimization. If anyone is ill, do not perform the optimization.

All optimizer employees should implement good hygiene and infection control practices including:

- Frequent and thorough hand washing. If soap and running water are not immediately available, use alcohol-based hand rubs containing at least 60% alcohol.
- Wearing a mask, safety glasses and disposable gloves at all times when on the premises for optimizations.
- Respiratory etiquette, including covering coughs and sneezes.
- Avoiding use of other workers' phones, desks, offices, or other work tools and equipment, when possible.
- Maintaining regular housekeeping practices, including routine cleaning and disinfecting of surfaces contacted during optimizations, as well as equipment and other elements of the work environment. Follow the manufacturer's instructions for use of all cleaning and disinfection products (e.g., concentration, application method and contact time, PPE).
- Maintain social distancing from others present during the optimization.

Rev. 6-12-20

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