



**City of Waukesha**  
201 Delafield Street  
Waukesha, WI 53188  
Tel: 262.542.3700  
waukesha-wi.gov

## City of Waukesha Cover Sheet

<b>Committee:</b> Board of Public Works	<b>BPW Meeting Date:</b> 1/22/2026
<b>ID Number:</b> #26-02872	<b>Ordinance/Resolution Number (if applicable):</b> N/A
<b>Department Submitting:</b> Department of Public Works	<b>Common Council Meeting Date:</b> 2/3/2026
<b>Agenda Item Title:</b> Review and possible action on the Storm Water Management Practice Maintenance Agreement between the City of Waukesha and Carol O. Smart Survivor's Trust, by Carol O. Smart, Trustee; and Robert F. and Carol O. Smart Family Trust, by Carol O. Smart and Brian F. Smart, Co-Trustees for Lot 3 of the Lillyrose Road Senior Living Facility Development.	

<b>Issue Before the Council:</b> The property owner will be constructing storm water facilities at their development site to address storm water quantity and quality requirements. Storm Water Maintenance Agreements are required to be recorded by the City's Storm Water Management Ordinance. The Storm Water Agreement requires that the Owners regularly inspect and maintain the storm water measures installed as part of the development and report the results of the inspection to the City Engineer two times per year. If the Agreement is not approved, then the Owner may not maintain the stormwater facilities and conveyance ditches.
<b>Options &amp; Alternatives:</b> Not approving this agreement would not place a requirement of the development project to maintain new stormwater features.
<b>Additional Details:</b> See attached Stormwater Management Practice Maintenance Agreement between the City of Waukesha and Carol O. Smart Survivor's Trust, by Carol O. Smart, Trustee; and Robert F. and Carol O. Smart Family Trust, by Carol O. Smart and Brian F. Smart, Co-Trustees.

<b>What is the Strategic Plan Priority this item relates to:</b> People-Centered Development
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**What impact will this item have on the Strategic Plan Priority?**

Moving forward with the Storm Water Management Practice Maintenance Agreement will allow for the implementation and future maintenance of stormwater facilities in conjunction with the 119-unit senior living facility.

**Financial Remarks:**

There are no immediate costs to the City. This Agreement requires the property owners to arrange to complete future inspections of the storm water facility and provide a copy of the inspection report to the City, as listed in Paragraph #3. The Agreement states that the City is able to levy the costs and expenses of inspections, maintenance, or repairs back to the property owner, if the owners do not complete the inspections, as listed in paragraph #5.

**Recommended Motion:**

Recommend approval to Council of the Storm Water Management Practice Maintenance Agreement between the City of Waukesha and Carol O. Smart Survivor's Trust, by Carol O. Smart, Trustee; and Robert F. and Carol O. Smart Family Trust, by Carol O. Smart and Brian F. Smart, Co-Trustees for Lot 3 of the Lillyrose Road Senior Living Facility Development pending final review by the City Attorney.

**Reviewed By:**

<b>City Attorney</b> Brian Running	<b>Date Reviewed</b>
<b>Finance Director</b> Joseph P. Ciarro	<b>Date Reviewed</b>
<b>City Administrator</b> Anthony W. Brown <i>Anthony Brown</i>	<b>Date Reviewed</b> 1/21/2026

# Storm Water Management Practice Maintenance Agreement

Document Number

Carol O. Smart Survivor's Trust, by Carol O. Smart, Trustee; and Robert F. and Carol O. Smart Family Trust, by Carol O. Smart and Brian F. Smart, Co-Trustees, as "Owner" of the property described as Lot 3 below, in accordance with Chapter 32 City of Waukesha Storm Water Management and Erosion Control, agrees to install and maintain storm water management practice(s) on the subject property in accordance with approved plans and Storm Water Management Plan conditions. The owner further agrees to the terms stated in this document to ensure that the storm water management practice(s) continues serving the intended functions in perpetuity. This Agreement includes the following exhibits:

**Exhibit A:** Legal Description of the real estate for which this Agreement applies ("Property").

**Exhibit B:** Location Map(s) – shows an accurate location of each storm water management practice affected by this Agreement.

**Exhibit C:** Maintenance Plan – prescribes those activities that must be carried out to maintain compliance with this Agreement.

Note: After construction verification has been accepted by the City of Waukesha, for all planned storm water management practices, an addendum(s) to this agreement shall be recorded by the Owner showing design and construction details. The addendum(s) may contain several additional exhibits, including certification by City of Waukesha of Storm Water and Erosion Control Permit termination, as described below.

Through this Agreement, the Owner hereby subjects the Property to the following covenants, conditions and restrictions:

1. The Owner shall be responsible for the routine and extraordinary maintenance and repair of the storm water management practice(s) and drainage easements identified in Exhibit B until Storm Water and Erosion Control Permit termination by the City of Waukesha in accordance with Chapter 32 of the City Code of Ordinances.
2. After Storm Water and Erosion Control Permit termination under 1., the current Owner(s) shall be solely responsible for maintenance and repair of the storm water management practices and drainage easements in accordance with the maintenance plan contained in Exhibit C.
3. The Owner(s) shall, at their own cost, complete inspections of the storm water management practices at the time intervals listed in Exhibit C, and conduct the inspections by a qualified professional, file the reports with the City of Waukesha after each inspection and complete any maintenance or repair work recommended in the report. The Owner(s) shall be liable for the failure to undertake any maintenance or repairs. After the work is completed by the Contractor, the qualified professional shall verify that the work was properly completed and submit the follow-up report to the City within 30 days.
4. In addition, and independent of the requirements under paragraph 3 above, the City of Waukesha, or its designee, is authorized to access the property as necessary to conduct inspections of the storm water management practices or drainage easements to ascertain compliance with the intent of this Agreement and the activities prescribed in Exhibit C. The City of Waukesha may require work to be done which differs from the report described in paragraph 3 above, if the City of Waukesha reasonably concludes that such work is necessary and consistent with the intent of this agreement. Upon notification by the City of Waukesha of required maintenance or repairs, the Owner(s) shall complete the specified maintenance or repairs within a reasonable time frame determined by the City of Waukesha.
5. If the Owner(s) do not complete an inspection under 3. above or required maintenance or repairs under 4. above within the specified time period, the City of Waukesha is authorized, but not required, to perform the specified inspections, maintenance or repairs. In the case of an emergency situation, as determined by the City of Waukesha, no notice shall be required prior to the City of Waukesha performing emergency maintenance or repairs. The City of Waukesha may levy the costs and expenses of such inspections, maintenance or repair related actions as a special charge against the Property and collected as such in accordance with the procedures under s. 66.0627 Wis. Stats. or subch. VII of ch. 66 Wis. Stats.

Name and Return Address

City of Waukesha  
201 Delafield Street  
Waukesha, WI 53188

Parcel Identifications Number: WAKC0985999

6. This Agreement shall run with the Property and be binding upon all heirs, successors and assigns. After the Owner records the addendum noted above, the City of Waukesha shall have the sole authority to modify this agreement upon a 30-day notice to the current Owner(s).

Dated this \_\_\_\_ day of \_\_\_\_\_, 202\_.

**Owner:**

\_\_\_\_\_  
Owner's Signature

Smart Trusts, Carol O. Smart, Trustee

\_\_\_\_\_  
Owner's Typed/Printed Name

Mailing Address: c/o RF Smart Development, LLC

144 W Broadway

Waukesha, WI 53186

Phone Number: (262) 547-7755

Email Address: smartrealty@sbcglobal.net

## Acknowledgements

State of Wisconsin:  
County of Waukesha

Personally came before me this \_\_\_\_ day of \_\_\_\_\_, 202\_, the above named \_\_\_\_\_ to me known to be the person who executed the foregoing instrument and acknowledged the same.

\_\_\_\_\_  
Notary Public  
My commission expires: \_\_\_\_\_.

**This document was drafted by:**

**Matthew Bailey, P.E.  
Trio Engineering, LLC  
Brookfield, WI 53005**

City of Waukesha Common Council Approval

Dated this \_\_\_\_ day of \_\_\_\_\_, 202\_\_.

\_\_\_\_\_  
Shawn N. Reilly, Mayor

\_\_\_\_\_  
Katie Panella, City Clerk

**Acknowledgements**

State of Wisconsin:  
County of Waukesha

Personally came before me this \_\_\_\_ day of \_\_\_\_\_, 202\_\_, the above named \_\_\_\_\_ to me known to be the person who executed the foregoing instrument and acknowledged the same.

\_\_\_\_\_  
Name:  
Notary Public, Waukesha County, WI  
My commission expires:\_\_\_\_\_.

## Exhibit A – Legal Description

The following description and reduced copy map identifies the land parcel(s) affected by this Agreement as being Lot 3 of the CSM. For a larger scale view of the referenced document, contact the Waukesha County Register of Deeds office.

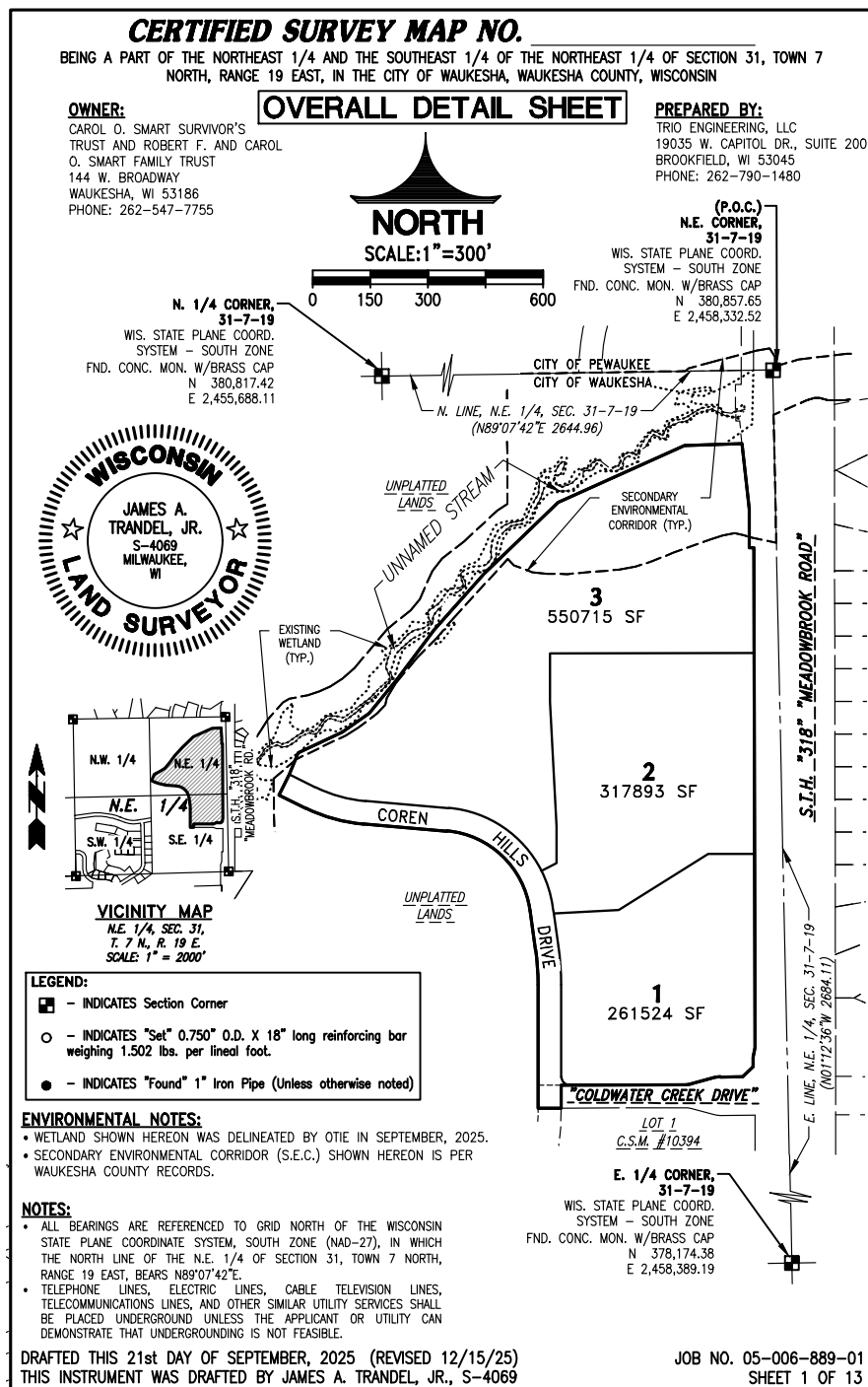
Project Identifier: **Meadowbrook Road Senior Living**

Acres: **27.77**

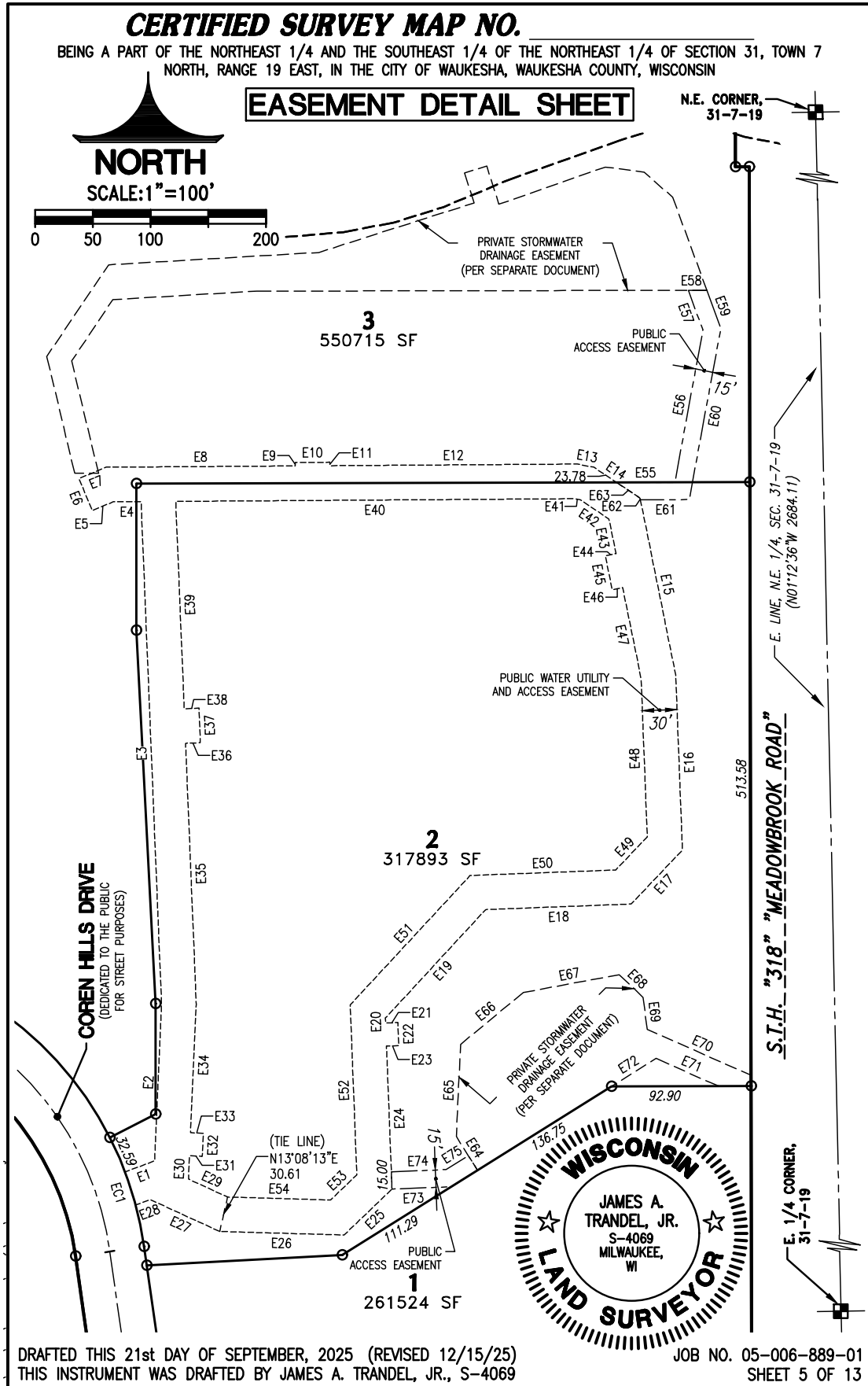
Date of Recording:

Map Produced By: **Trio Engineering**

Legal Description: **Lot 3 of Certified Survey Map No. \_\_\_\_\_ recorded in the office of the Register of Deeds for Waukesha County, Wisconsin on \_\_\_\_\_, 2025, as Document No. \_\_\_\_\_, said Certified Survey Map being part of the Northeast 1/4 and Southeast 1/4 of the Northeast 1/4 of Section 31, Township 7 North, Range 19 East, in the City of Waukesha, Waukesha County, Wisconsin.**



# Exhibit A – Legal Description (continued)



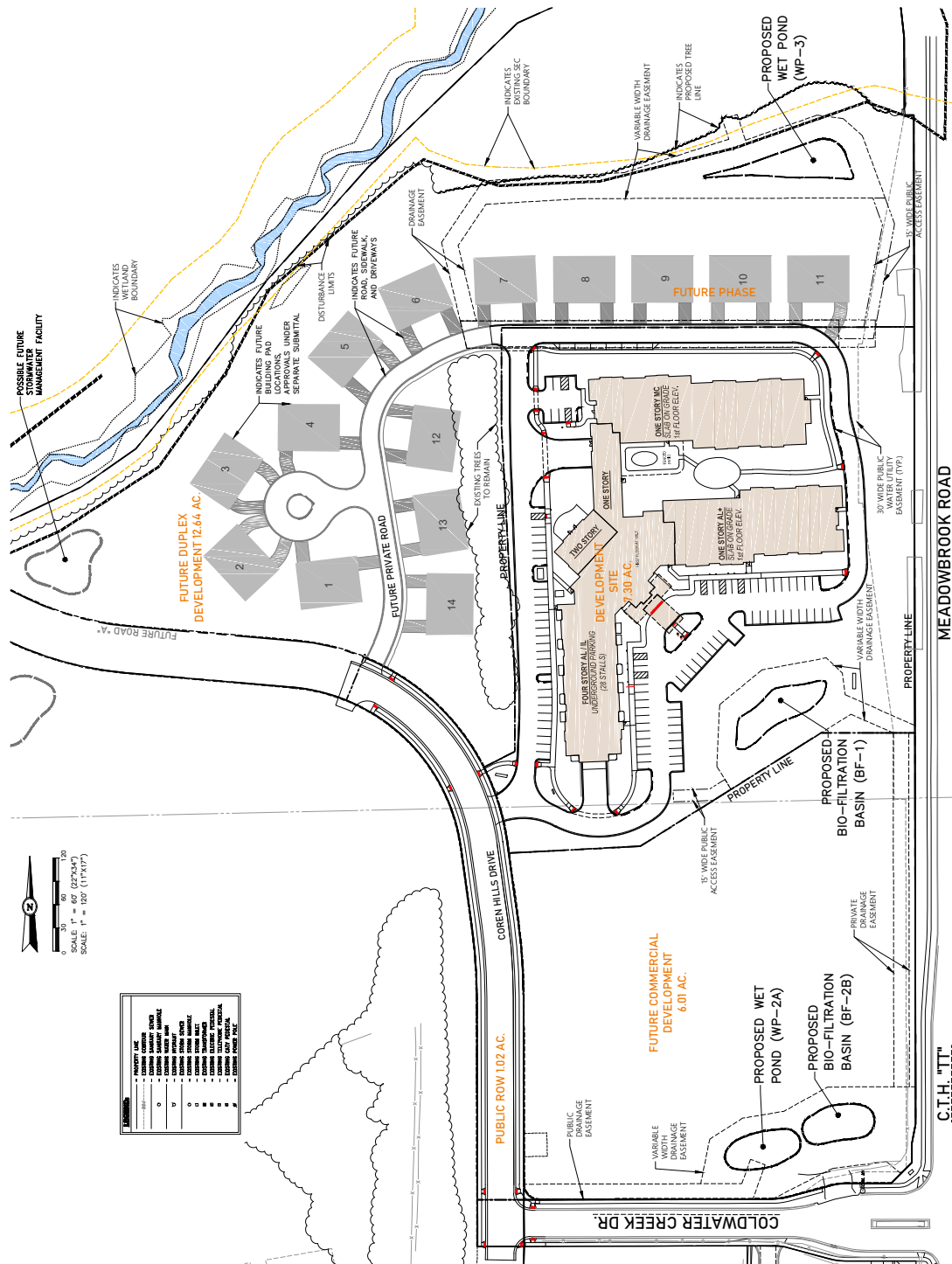
## Exhibit B - Location Map

The storm water management practices covered by this Agreement are depicted in the reduced copy of a portion of the construction plans, as shown below. The practices include one (1) wet pond, and all associated pipes, outlet control structures, grass swales, earthen berms, and other components of these practices. All the noted storm water management practices are located within the subdivision plat, as noted in Exhibit A.

**Subdivision Name:** Meadowbrook Road Senior Living

**Stormwater Practices:** One (1) Wet Pond (WP-3), conveyance swales, private culverts, and private storm sewer pipes and structures

**Location of Practices:** Practices are located within Lot 3, as identified within Exhibit A.





## **Exhibit C**

### **Storm Water Practice Maintenance Plan**

This exhibit explains the basic function of each of the storm water practices listed in Exhibit B and prescribes the minimum maintenance requirements to remain compliant with this Agreement. The maintenance activities listed below are aimed to ensure these practices continue serving their intended functions in perpetuity. The list of activities is not all inclusive, but rather indicates the minimum type of maintenance that can be expected for this particular site. Access to the storm water practices for maintenance vehicles is shown in Exhibit B. Any failure of a storm water practice that is caused by a lack of maintenance will subject the Owner(s) to enforcement of the provisions listed on page 1 of this Agreement by the City of Waukesha.

#### **System Description:**

The stormwater management system includes one (1) stormwater management facility, Wet Pond WP-3. Wet Pond WP-3 is located within Lot 3 of CSM \_\_\_\_\_ and receives runoff from the future senior living condominium area and the northern portion of the senior living development area. Discharge from the pond is offsite to the north towards an un-named stream.

“As-built” construction drawings of the stormwater management system, showing actual dimensions, elevations, outlet structures, etc. will be recorded as an addendum(s) to this agreement within 60 days after City of Waukesha accepts verification of construction from the project engineer.

The titleholder(s) or their designee must document all inspections as specified below. Documentation shall include as a minimum: (a) Inspectors Name, Address and Telephone Number, (b) Date of Inspections, (c) Condition Report of the Storm Water Management Practice, (d) Corrective Actions to be Taken and Time Frame for Completion, (e) Follow-up Documentation after Completion of the Maintenance Activities. All documentation is to be delivered to the attention of the City Engineer at the City of Waukesha Engineering Department on January 31<sup>st</sup> each year.

#### **WET DETENTION POND OPERATION AND MAINTENANCE:**

##### **I. ROUTINE MAINTENANCE**

###### **A. Mowing**

1. Side slopes, embankments, and emergency spillways that are not rock lined which have been planted with turf grasses should be mowed at least twice a year to prevent woody growth and control noxious weeds.
2. Adjacent to the residential areas, more frequent mowing, typically once a week during a normal growing season, is recommended for aesthetic and allergy control purposes.
3. Native grasses should be mowed to a height of 6" in mid to late summer or after they have achieved a height of 1-1/2 feet during the first growing season. Further mowing in subsequent growing seasons will not be required
4. If possible, the native grass area should be burned off every three to four years in the spring of the year. Check local burning regulations as permits may be required.
5. If burning of the native grass areas is not possible, a 5 to 8" mowing every 3 to 4 years may suffice as a substitute management technique. The mowed area should be raked and performed in the spring.

###### **B. Inspections**

1. Inspections of the ponds shall be completed on a quarterly basis or after significant rainfall events.
2. The inspections should be completed during wet weather conditions to determine if the ponds are functioning properly.
3. Inspection priorities shall be as follows:
  - a. Inspect the embankments for subsidence, erosion, cracking and tree growth.
  - b. Inspect the condition of the emergency spillway and overland flow path.
  - c. Inspect the pond for accumulation of sediment.
  - d. Inspect the outlet control structure for clogs, debris and material failures.
  - e. Inspect upstream and downstream channels from an erosion perspective.

- f. Inspect any modifications that may have been done to the ponds following their initial construction.
    - g. Inspect the side slopes of the pond for erosion, slumping, cracking or woody plant materials.
  - 4. As-built plans shall accompany the person responsible for the pond inspections.
  - 5. Documentation of the inspections should be completed and filed. Documentation should include at a minimum:
    - a. Inspectors name, affiliation and professional credentials if applicable.
    - b. Date, time and weather conditions.
    - c. Approximate rainfall total over a 24 hour period if applicable.
    - d. Existing embankment, outlet and inlet conveyance systems and vegetation condition.
    - e. Sediment depth at the outlet control structure and at a minimum one other location.
    - f. Identification of potential structural failures and repair needs
    - g. Other pond conditions such as vegetation growth, algae growth and emergency spillway conditions.
    - h. Repair recommendations.
- C. Debris and Litter Removal.
  - 1. Debris and litter removal from the pond surface shall be completed at least once a month.
  - 2. Particular attention should be paid to debris accumulating around the riser pipe to prevent potential clogging.
- D. Erosion Control.
  - 1. The pond side slopes, embankments and emergency spillways may suffer from periodic slumpage and erosion.
  - 2. Corrective measures shall include re-grading, filling and re-vegetation of the eroded or slumping areas.
  - 3. Rip rap at the pond outlet and emergency spillways should be inspected for displacement or undermining. Repairs shall be made upon discovery.
- E. Nuisance Control.
  - 1. Biological control of algae and mosquitoes is preferred over chemical control. Consultation with local WDNR officials is recommended prior to the introduction of any biological control.
  - 2. Maintaining the native grass perimeter will aide in the control of geese.
  - 3. Mechanical controls should be used when feasible.
  - 4. Remove any nuisance emergent vegetation (e.g. cattails, etc.) if noticed during routine inspections of the pond to ensure proper functioning of the wet detention pond.

## II. NON-ROUTINE MAINTENANCE

### A. Structural Repairs and Replacement.

- 1. The outlets of the pond have been constructed utilizing concrete material and PVC and HDPE pipe. The estimate life of these structures is 75 to 100 years. Annual inspection of the structures will disclose any potential structural problems. If structural problems appear, repair or replace the outlet.
- 2. Excessive or chronic drawdown of the ponds may cause leaks or seepage through the embankments. Excessive drawdown should be avoided and thus corrective measures for leakage and seepage can be avoided.

### B. Sediment Removal

- 1. A sediment clean out cycle of 10 to 15 years is recommended. Sediment removal may be necessary prior to 10 years if there is a substantial amount of land disturbance occurring within the contributory watershed. Annual inspections shall be made to insure that the design depth of the permanent water pool is maintained.
- 2. Sediment removed from the ponds shall be hauled to an upland area, spread and stabilized with vegetative material or disposed of in accordance with Chapter NR 528 of the Wisconsin Administrative Code.
- 3. It is recommended that the sediment be tested to determine if land filling is necessary. Contact the local DNR prior to sediment sampling and testing to insure compliance with State standards and regulations.
- 4. Surveyed depths of the sediment storage area and permanent pool elevations shall be made immediately following the construction of the ponds and recorded on the as-built plans. Annual inspections shall include measure downs to determine sediment elevations in relation to the permanent pool elevation.

## **STORM SEWER SYSTEM OPERATIONS AND MAINTENANCE:**

### **I. INSPECTION**

#### **A. Frequency**

- a. Inspect catch basins, inlets and manholes at least once per year.
- b. Inspect storm sewer end sections at least twice per year and after major rainfall events.

#### **B. Inspection**

##### **a. Catch Basins, Inlets and Manholes**

- i. Inspect for sediment deposition in the bottom of structures.
- ii. Check frames and lids for cracks and wear such as rocking lids or lids moved by traffic and for shifted frames.
- iii. Check chimneys for cracked mortar, cracked lift rings and spalling.
- iv. Check for leaks at joints.
- v. Check surrounding areas for pollutants such as leaks from dumpsters, minor spills and oil dumping.

##### **b. Storm Sewer End sections**

- i. Observe for obstructions, accumulation of sediment and trash, undermining and joint separation.
- ii. Inspect end treatment for settlement, scour and displaced armoring.

### **II. STANDARD MAINTENANCE**

#### **A. Catch Basins, Inlets and Manholes**

- a. Repair any deterioration threatening structural integrity immediately.
- b. Replace worn or cracked frames and lids. Frames that have shifted should be re-centered and re-set on the structure.
- c. Repair any spalled or cracked mortar. Cracked rings should be repaired or replaced.
- d. Repair leaking joints.
- e. Clean manhole and storm inlet inverts of deposited material. Catch basins should be cleaned before the sump is 40 percent full.
- f. Remove potential sources of contamination away from catch basins, inlets and manholes.

#### **B. Storm Sewer End sections**

- a. End sections should be free flowing; trash, debris and obstructions should be removed to prevent backups.
- b. End sections which have separated from the storm sewer pipe shall be reset on firm bedding and reconnected to the existing storm sewer pipe. Restrain joints if necessary.
- c. Scour areas shall be repaired immediately. Replace missing soil with clean fill and replace/install end treatment. Missing armoring will require additional stone, typically one class larger.
- d. Excessive material deposited at the storm sewer outfall is indicative of: a disturbed area upstream draining to the system or a potential failure of a system component. Disturbed areas draining to the system should be stabilized immediately or diverted to drain to a BMP. Potential system failures require non-standard maintenance.

### **III. NON-STANDARD MAINTENANCE**

#### **A. Non-standard maintenance includes inspection, repair or replacement of buried structures.**

- a. Televising of buried structures (pipes) should occur when excessive material is found within the system or at an outfall with no apparent source area visible at the surface, or the system experiences frequent backups.
- b. Follow the recommendations for the repair and/or replacement of system components televised by a firm specializing in this work.

## **CONVEYANCE SWALES:**

To ensure the proper long-term function of the storm water conveyance practices described above, the following activities must be completed:

1. Grass swales must be checked after heavy rains (minimum of annually) for signs of erosion. Any eroding areas must be repaired immediately to prevent premature sediment build-up in the downstream forebays or basin. Erosion matting is recommended for repairing grassed areas.
2. Grass swales shall be preserved to allow free flowing of surface runoff in accordance with approved grading plans. No buildings or other structures are allowed in these areas. No grading or filling is allowed that may interrupt flows in any way.
3. Periodic mowing of the grass swales will encourage vigorous grass cover and allow better inspections for erosion. Waiting until after August 1<sup>st</sup> will avoid disturbing nesting wildlife. Mowing around the basin may attract nuisance populations of geese to the property and is not necessary or recommended.
4. Any other repair or maintenance needed to ensure the continued function of the storm water practices or as ordered by the City of Waukesha under the provisions listing on page 1 of this Agreement.