

PROPOSAL

Gurnee SD56 - BAS Service Agreement 2025

PREPARED BY

Siemens Industry, Inc. ("Siemens")

PREPARED FOR

GURNEE SCHOOL DISTRICT 56

DELIVERED ON

June 03, 2025

SMART BUILDINGS

Transforming the Everyday



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Contact Information

| | |
|-------------|---------------|
| Proposal #: | 9807319 |
| Date: | June 03, 2025 |

| | |
|------------------|--|
| Sales Executive: | AJ DeGeorge |
| Branch Address: | 1701 Golf Rd. Bldg 3, Suite 500 Rolling Meadows, IL 60008 |
| Telephone: | 224-342-3448 |
| Email Address: | anthony.degeorge@siemens.com |

| | |
|--------------------------------|---|
| Customer Contact: | Sean Smith |
| Customer: | GURNEE SCHOOL DISTRICT 56 |
| Address: | 3706 FLORIDA AVE GURNEE IL 60031 |
| Services shall be provided at: | River Trail, Spaulding, Prairie Trail, & Viking Schools |

Executive Summary

Customer Needs

The Services proposed in this agreement are specifically designed for GURNEE SCHOOL DISTRICT 56, and the services provided herein will help you in achieving your facility goals.

Services Included

Siemens will provide the following services.

Service Description

- Onsite Equipment Inspection
- Software Maintenance
- Preventive Maintenance - Automation
- Software Subscription Service - Desigo CC
- Firmware Updates

Siemens Capabilities & Customer Commitment

Siemens Industry, Inc. is a leading single-source provider of cost-effective facility performance solutions for the comfort, life safety, security, energy efficiency and operation of some of the most technically advanced buildings in the world. For more than 150 years, Siemens has built a culture of long-term commitment to customers through innovation and technology. Siemens is a financially strong global organization with a Branch network that delivers personalized service and support to customers in multiple industries and locations.

References are available upon request.

Building Services – Automation

Services that deliver the outcomes you want to achieve

Services delivered by Siemens have been developed to help you achieve the outcomes you expect.

BMS Health

Optimize the health of the building management system by automating maintenance diagnostics reports to target and prioritize remote and onsite service

Software Subscription Service – Desigo CC

Siemens will provide you with software upgrades to your existing Siemens Desigo CC software as they are released. These upgrades include both Service Releases and all New Version Releases of Software, up to the Frequency shown in the Equipment Related Services table. Siemens will also provide corresponding support documentation outlining the features of the releases. Included is training to help to familiarize you with the new features along with their associated benefits. These updates will act to deliver the benefits of Siemens' commitment to compatibility by design, a commitment unique in our industry. Workstations covered under this service are itemized in the List of Equipment Related Services. (Upgrades to PC's and related workstation hardware are excluded unless expressly included in this Agreement.)

Additional Services

Onsite Equipment Inspection

We will provide physical inspection and preventive maintenance in accordance with a program of routines as determined by our experience, equipment application and location. The list of field panels and/or devices included under this service are identified in the List of Equipment Related Services in this service agreement. This service will extend equipment life, reduce energy consumption, and reduce the risk of costly and disruptive breakdowns.

Firmware Updates

We will provide you with firmware and documentation updates to your existing field panels upon development. The included training will familiarize you with the new features and their associated benefits. These updates deliver the benefits of Siemens commitment to compatibility by design; a commitment unique in our industry. Field panels included under this service are itemized in the List of Equipment Related Services. (Upgrades to Field Panel hardware, processors, memory boards, and related hardware are excluded unless specified elsewhere.)

Preventive Maintenance – Automation

We will provide preventive maintenance in accordance with a program of routines as determined by our experience, equipment application and location. The list of field panels and/or devices included under this service are identified in the List of Equipment Related Services in this service agreement.

Automation controls can drift out of calibration with changes in HVAC component performance characteristics, building use, and climatic conditions. This service will extend equipment life, reduce energy consumption, and reduce the risk of costly and disruptive breakdowns.

Software Maintenance

Using appropriate tools from Siemens' suite of diagnostic tools, we periodically perform system diagnostics and then take corrective actions to ensure that the Building Automation System is performing at peak efficiency or to customer requirements. We make sure that software changes are clear and consistent, address any failed points, points in alarm, points in operator priority and take corrective action. We identify and correct software corruption and inconsistencies; eliminate duplicate points, redundant loops and causes of unnecessary traffic; and address unresolved points and alarm reporting problems. This will ensure that the system operates quickly, accurately and efficiently as originally designed and installed or as determined by current standards or requirements.

Emergency Response Times – Automation

Emergency Online/Phone Response

Billable Service

Online system and software troubleshooting and diagnostics and phone support will not be provided under the coverage of this agreement. Siemens will respond to your request for emergency on-line/phone support, 24 Hours per Day, excluding holidays, upon receiving notification of an emergency, as determined by your staff and Siemens, but all service performed will be provided as a billable service. If remote diagnostics determine a site visit is required to resolve the problem, a technician can be dispatched. Depending on your contract coverage, the on-site dispatch will be covered or will be a billable service call.

Emergency On-site Response

Billable Service

Emergency Onsite Response is not included within the coverage of this agreement. Siemens will respond to your request for emergency on-site service as soon as staff is available. An emergency is determined by your staff and Siemens. All service performed will be provided as a billable service. Siemens will respond to your request for emergency onsite support, 24 hours per day, excluding holidays, upon receiving notification of an emergency, as determined by your staff and Siemens, but all service performed will be provided as a billable service.

Connectivity and Communications

Siemens Service Portal

The Service Portal complements the personalized services you will receive from your local Siemens office by providing greater visibility into equipment and services delivered by Siemens. This web-based portal allows you the ability to submit service requests, confirm and modify schedules, track repairs, manage agreements, generate reports, and access critical information; then share it across your entire enterprise quickly and efficiently. The Service Portal is a user-friendly way to increase your productivity and the value of your service program.

Data security as a basic requirement

We value confidentiality and long-term partnerships. That is why we give the security of your data the highest priority. Before we implement an enhanced service package with remote support, we conduct an in-depth analysis of the situation, taking into account national and international regulations, technical infrastructures and industry specifics. Our service employees carefully evaluate your needs on an individual basis with a view toward information security.

Service Agreement Contract Characteristics

| Description | AUTOMATION |
|-----------------------------------|------------|
| Hours of Coverage | 24 x 7 |
| Response Times (Phone/Online) | Billable |
| Response Times (Onsite/Emergency) | Billable |
| Remote Services | No |
| Third Party Systems | No |
| Monitoring | No |
| Additional Labor Discount | 0.0% |
| Additional Material Discount | 0.0% |

Labor and material discounts are applicable for sites identified in this agreement and are only available for the disciplines included in this agreement. Material discounts do not apply to 3rd party or non-Siemens Building Products manufactured components.

Equipment Related Services

| Automation | | | | | | |
|-------------------------|-------------------------------------|-----|-----------|-------|------------------|-----------------|
| Equipment | Service Description | Qty | Frequency | Year | Service Location | Repair Coverage |
| PXC Compact APOGEE 36PT | | | | | | |
| | Onsite Equipment Inspection | 16 | 1 | 1,2,3 | Onsite | N/A |
| | Software Maintenance | 16 | 1 | 1,2,3 | Onsite | N/A |
| | Preventive Maintenance - Automation | 16 | 1 | 1,2,3 | Onsite | N/A |
| PXC Modular | | | | | | |
| | Onsite Equipment Inspection | 3 | 1 | 1,2,3 | Onsite | N/A |
| | Software Maintenance | 3 | 1 | 1,2,3 | Onsite | N/A |
| | Preventive Maintenance - Automation | 3 | 1 | 1,2,3 | Onsite | N/A |

General Services

| Service Description | Qty | Frequency | Year |
|---|-----|-----------|-------|
| Software Subscription Service - Desigo CC | 1 | 1 | 1,2,3 |
| Firmware Updates | 19 | 1 | 1,2,3 |

Service Team

An important benefit of your Service Agreement derives from having the trained building service personnel of Siemens Industry, Inc. familiar with your building systems. Our implementation team of local experts provides thorough, reliable service and scheduling for the support of your system.

Added to the team is a team of building experts at our Digital Service Center. The benefits you receive are less disruption to your employees at the site, less intrusive on the system at peak hours, fewer emissions for trucks rolled, and real time analytics with digital workspace hours.

The following list outlines the service team that will be assigned to the service agreement for your facility

Your Assigned Team of Service Professionals will include:

Sales Executive manages the overall strategic service plan based upon your current and future service requirements.

Remote Services Specialist is responsible for the execution of remote services including proactive planned tasks, in-depth fault analysis and identification of corrective actions.

Client Services Manager is responsible for ensuring that our contractual obligations are delivered, your expectations are being met and you are satisfied with the delivery of our services.

Service Operations Manager is responsible for managing the delivery of your entire support program and service requirements.

Primary Service Specialist is responsible for performing the ongoing service of your system.

Service Coordinator is responsible for scheduling your planned maintenance visits, and handling your emergency situations by taking the appropriate action.

Secondary Service Specialist who will be familiarized with your building systems to provide in-depth backup coverage.

Service Administrator is responsible for all service invoicing including both service agreement and service projects.

Terms and Conditions

Terms and Conditions (Click to download)

[Terms & Conditions](#)

(www.siemens.com/standard-terms-service)

Price Escalation. If, during the term of this Contract, the price of various materials or labor or logistics are increased as reflected by CRU, CMAI, COMEX market indexes or IHS Markit, then Siemens may increase the applicable yearly Investment or apply a surcharge accordingly.

To the extent applicable, the following Addendum(s) are incorporated and made part of the Siemens Standard Terms and Conditions:

Click on addendum below to read/download

[Software License Warranty](#)

(www.siemens.com/software-license-addendum)

[Web-Based Offering](#)

(www.siemens.com/rider-enl-web-offering)

[Enlighted Data Processing Agreement](#)

(www.siemens.com/enl-data-process)

[Enlighted Service Level Agreement](#)

(www.siemens.com/enl-sla)

[Enlighted Acceptable Use Policy](#)

(www.siemens.com/enl-accept-use)

[Exclusions and Clarifications](#)

(www.siemens.com/clarification-addendum)

Agreement Terms for Investments

Services shall be provided at:

River Trail, Spaulding, Prairie Trail, & Viking Schools

Siemens Industry, Inc. shall provide the services as identified in this Proposal and pursuant to the associated terms and conditions contained within.

Duration (Initial Term and Renewal): This Agreement shall remain in effect for an Initial Term of 3 Periods beginning July 1, 2023. After the expiration of the Initial Term, this Agreement shall automatically renew for successive one year periods. The Investments for each year after the Initial Term of the Agreement and each year of each renewal of this Agreement shall be determined as the immediate prior year's Investment plus an escalator of 5.5% or as allowed per this proposal. In addition, each renewal term pricing shall be adjusted for any additions or deletions to services selected for the renewal term.

Initial Term Investments:

| Period | Period Range | Billing Frequency | Annual Price |
|-------------------------------|--------------------------|-----------------------|--------------|
| 1 | Jul 1,2025 - Jun 30,2026 | Annually (In Advance) | \$27,420.00 |
| 2 | Jul 1,2026 - Jun 30,2027 | Annually (In Advance) | \$28,790.00 |
| 3 | Jul 1,2027 - Jun 30,2028 | Annually (In Advance) | \$30,375.00 |
| Multi-Period Investment Total | | | \$86,585.00* |

Amount Due In Advance Based On Billing Frequency

Estimated sales taxes have been included in the investment amount. The exact amount will be calculated based on local requirements at the time of invoicing. The pricing quoted in this Proposal are firm for 30 days.

Siemens Industry, Inc. invoices paid by credit card may be subject to a surcharge of up to 2%.

****Siemens' pricing is subject to adjustment for any direct or indirect new or modified taxes, duties, tariffs, or equivalent measures imposed by any U.S. or foreign governmental authority that are applicable to our offering, including any hardware, software, or service components contained therein. Siemens shall be entitled to an equitable adjustment in pricing to reflect the impacts of any such measures. Please note that the aforementioned measures specifically include any price adjustments required as a result of increased costs incurred by Siemens due to tariffs imposed by any governmental authority (including, without limitation, increased costs due to tariffs imposed by any governmental authority on Siemens' vendors).***

Signature Page

The Buyer acknowledges that when accepted by the Buyer as proposed by Siemens Industry, Inc., this Proposal and the Standard Terms and Conditions of Sale for Services, (together with any other documents, including any applicable Rider(s), incorporated herein) shall constitute the entire agreement of the parties with respect to its subject matter.

BY EXECUTION HEREOF, THE SIGNER CERTIFIES THAT (S)HE HAS READ ALL OF THE TERMS AND CONDITIONS AND DOCUMENTS, THAT SIEMENS INDUSTRY, INC. OR ITS REPRESENTATIVES HAVE MADE NO AGREEMENTS OR REPRESENTATIONS EXCEPT AS SET FORTH THEREIN, AND THAT (S)HE IS DULY AUTHORIZED TO EXECUTE THE SIGNATURE PAGE ON BEHALF OF THE BUYER.

Initial Term Investments

| Period | Period Range | Billing Frequency | Annual Price |
|--------|--------------------------|-----------------------|--------------|
| 1 | Jul 1,2025 - Jun 30,2026 | Annually (In Advance) | \$27,420.00 |
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| 3 | Jul 1,2027 - Jun 30,2028 | Annually (In Advance) | \$30,375.00 |

Proposed by:

Siemens Industry, Inc.

Company

AJ DeGeorge

Name

9807319

Proposal #

\$86,585.00

Proposal Amount

June 03, 2025

Date

Accepted by:

GURNEE SCHOOL DISTRICT 56

Company

Name (Printed)

Signature

Title

Date

Purchase Order # ☐ PO for billing/pmnt only ☐ PO not required

Siemens Service Portfolio

Advisory and Performance Services



| | | | |
|--|---|--|--|
| | | | |
| <p>Manage System Operation & Compliance</p> <p>Services that keep systems performing at their best, as designed and intended to operate, help you achieve:</p> <ul style="list-style-type: none"> • Optimized comfort, safety, and security • Fulfilled regulatory requirements • Greater transparency into critical systems • Reduced operating risk <p>Facility Assessment & Planning In-depth building system assessment and recommendations, definition of relevant KPIs, and development of your service program</p> <p>Test & Inspection Regular check-ups to measure system performance compared to your defined facility and regulation requirements and risks</p> <p>Preventive Services Services performed on a regular schedule or based on data analytics to verify and improve system state</p> <p>Documentation Management Management of critical building system and compliance information, with organization and access determined by your needs</p> <p>Corrective Services Immediate response to system failures or faults to restore functionality and integrity to desired state</p> | <p>Optimize Performance & Productivity</p> <p>Enhance building performance with improvement measures that increase productivity and efficiency; common outcomes include:</p> <ul style="list-style-type: none"> • Enhanced system performance • Streamlined operational processes • Improved decision-making through data analytics <p>Optimization Planning Planning and prioritization of improvement measures to increase building and/or process performance and efficiencies</p> <p>Predictive Services Systems are audited and monitored to detect abnormalities or faults, with recommendations provided and/or corrective actions taken</p> <p>System Improvements & Integration Enhancements or additions to your current system to increase staff productivity, system performance, and operational energy efficiencies</p> <p>Training & Operational Support Training, coaching, and on-site support to increase staff productivity and knowledge</p> <p>Managed Services On-site and/or remote resources monitor system events and alarms, and take appropriate action</p> | <p>Protect Lifecycle Investment</p> <p>Leverage past investments and address future requirements with advanced and proven technology, to achieve outcomes such as:</p> <ul style="list-style-type: none"> • Extended system life • Maximized return on investment • Realized benefits of new technology <p>Technology Planning Consulting services identify technology improvement opportunities that help achieve performance goals while leveraging past investments</p> <p>System Updates / Upgrades Software upgrades and firmware updates are provided, delivering the most current technology and functionality</p> <p>System Migration / Modernization Enhancements to your systems by elevating them to the most current hardware and software platforms, resulting in increased functionality and performance levels</p> <p>Retrofits & Extensions Modifications are made to existing systems to accommodate changes to your facility usage and footprint</p> <p>New Installation Services Startup, commissioning, and other installation services are completed to ensure new equipment operates at maximum performance</p> | <p>Enhance Energy Management & Sustainability</p> <p>Increase the value and competitiveness of buildings and infrastructure by delivering solutions that:</p> <ul style="list-style-type: none"> • Conserve energy • Maximize efficiency • Minimize operating costs • Reduce environmental impact <p>Energy & Sustainability Master Planning Strategy and planning services provide a detailed master plan to provide budget transparency, enable improved performance and sustainability, reduce energy consumption, and minimize operational costs</p> <p>Energy Conservation Implementing energy conservation strategies reduces total carbon emissions through efficiency measures and minimizes energy spend by optimizing consumption</p> <p>Energy Production & Storage Using innovative design and simulation tools, energy production and storage solutions improve energy efficiency, energy availability, security of supply, and carbon reduction</p> <p>Energy Procurement With advanced procurement technologies and beneficial contract terms, these tailored procurement and supply services reduce costs, reduce risks, and create certainty</p> |
| Digital Services | | | |

