

Joint Venture (JV) Readiness Questionnaire

This questionnaire helps businesses assess whether they are operationally and strategically ready to pursue a Joint Venture for government or corporate contracting.

Note: This questionnaire does not create a JV and does not replace legal or tax advice.

Section I: Business Readiness

1. Are both parties legally registered and in good standing? Yes No
2. Do both parties have active SAM.gov registrations (if gov)? Yes No
3. Are financial statements available and current? Yes No

Section II: Strategic Rationale

Why is a JV being considered instead of prime contracting/subcontracting?

- Contract size
- Experience requirements
- Set-aside eligibility
- Risk sharing
- Market expansion
- Buyer or agency preference for JV identified

Section III: Capability & Resource Alignment

1. Does each party bring distinct, complementary capabilities? Yes No
2. Are roles clearly defined? Yes No
3. Is staffing capacity sufficient for JV performance? Yes No

Section IX: Past Performance Strategy (Critical for JVs)

1. The JV will rely on:

- One partner's past performance
- Both partners' past performance
- Newly developed JV past performance

1. Is past performance allowable under the solicitation's JV rules? Yes No
2. Has responsibility for performance narratives been assigned? Yes No

Section V: Financial & Risk Considerations

1. Are both parties financially stable? Yes No
2. Is capital contribution expected? Yes No
3. Are bonding or financing needs identified? Yes No

Section VI: Governance & Control (Conceptual, Non-Legal)

Expected management structure:

1. Shared management
2. Managing partner model

1. Decision-making clarity exists? Yes No
2. Exit strategy discussed? Yes No

Section VII: Intellectual Property & Data (Awareness)

1. Will either party contribute proprietary methods, data, or tools? Yes No
2. Has ownership/use of contributed IP been discussed conceptually? Yes No
3. Are data rights or confidentiality concerns anticipated? Yes No

Section VIII: Compliance & Eligibility

1. JV eligibility verified for solicitation? Yes No
2. SBA or agency JV rules reviewed? Yes No
3. Certification impacts assessed? Yes No

Section IX: Operational Readiness

1. Accounting systems compatible? Yes No
2. Reporting responsibilities defined? Yes No
3. Contract administration plan exists? Yes No

Section X: Subcontracting & Third Parties

1. Will the JV use subcontractors? Yes No
2. Are flow-down requirements anticipated? Yes No
3. Is responsibility for subcontractor compliance defined? Yes No

Section XI: Overall Readiness Score (Internal)

1. Strategic Fit: High Medium Low
 2. Operational Readiness: High Medium Low
 3. Risk Profile: Acceptable Moderate High
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Readiness Interpretation & Recommendation Guide (Internal)

1. **High readiness across all categories:** Proceed to legal structuring and solicitation review.
2. **Mixed scores:** Address gaps before forming a JV or bidding.
3. **Low readiness or high risk:** Do Not Proceed; JV is likely premature for this opportunity.

Recommendation:

- Proceed to Legal Structuring and solicitation review
- Revise JV Approach
- Do Not Proceed