

Teaming Agreement Summary Sheet (Non-Legal)

This summary sheet helps businesses evaluate, document, and align on a proposed teaming relationship before engaging attorneys or drafting a formal teaming agreement. It is designed to clarify roles, expectations, and strategic fit early in the process.

Note: This document is for planning and discussion purposes only and does not constitute a legal agreement.

1. Teaming Opportunity Overview

Solicitation/Opportunity Name: _____

Agency/Buyer: _____

Solicitation Number: _____

Contract Type: Prime Sub IDIQ Task Order Commercial Other

Estimated Contract Value: _____

Set-Aside (if any): _____

Submission Deadline: _____

2. Proposed Team Structure

Proposed Prime Contractor: _____

Proposed Subcontractor(s): _____

Role of Each Party:

 Prime responsibilities: _____

 Subcontractor scope(s): _____

 Other: _____

3. Scope Alignment

Workshare Percentage (Estimated): _____

Primary NAICS Code: _____

Secondary NAICS Codes: _____

Key Capabilities Each Party Brings: _____

4. Past Performance Alignment

Relevant Past Performance (Prime): _____

Relevant Past Performance (Sub): _____

Gaps Filled by Teaming: _____

5. Compliance & Certifications

Applicable Certifications (MBE/DBE/8(a), etc.): _____

Utilization Goals (if any): _____

Compliance Considerations (bonding, insurance, security): _____

Buyer or solicitation-specific teaming restrictions reviewed

6. Pricing & Cost Considerations (High-Level)

Pricing Responsibility: Prime Shared

Cost Inputs Provided By: _____

Pricing Risk Considerations: _____

7. Strategic Fit Assessment

Does this teaming arrangement:

Strengthen competitiveness? Yes No

Address experience gaps? Yes No

Align with long-term growth goals? Yes No

Overall Assessment:

Strong Fit Moderate Fit Weak Fit

Conflicts of interest or competing pursuits identified

8. Next Steps

NDA/Confidentiality Discussion

Internal go/no-go decision

Engage legal counsel for formal agreement

Proposal coordination planning

Preliminary Recommendation:

Proceed with teaming

Revisit structure

Do not pursue this teaming arrangement