GE 620 — Teaming, Joint Ventures & Subcontracting (14-week elective syllabus)

No serious pursuit is an island. The capability you lack, the past performance you cannot manufacture, the vehicle you do not hold, the set-aside you do not qualify for — all of it is reachable through a team. This elective teaches the teaming decision as a discipline: how to choose a posture, how to pick a partner, how to structure the agreement, and how to govern the relationship after it is signed.

Course number: GE 620 · **Credits:** 3 · **Format:** 14 weeks, one 75-minute session per week (plus reading and a weekly deliverable). **Audience:** Graduate students in the MS program; capture managers, principals, and small-business owners who will make or take a teaming call. **Prerequisites:** GC 520 (organizational theory) recommended — teaming is governance across a boundary. GC 540 (advanced finance) recommended for the subcontract-pricing weeks. **Texts:** the doctrine and literacy folders of this repository; the course reader on teaming, SBA affiliation, and subcontracting. The course is stack-agnostic by design (doctrine/08).

Learning outcomes

By the end of this course, a student can:

- Explain why teams win: the capability gap, the past-performance gap, the vehicle gap, and the set-aside gate that no solo firm can open alone.
- Choose among the canonical teaming postures — prime solo, prime with subs, subcontractor, joint venture, mentor-protege — from the facts of a pursuit.
- Run a capability-gap analysis that ranks what must be closed (clearances hardest, labor categories easiest) and drives the posture decision.
- Evaluate a potential partner against a defensible rubric: past performance, clearances and certifications, financial stability, cultural alignment, existing relationship, customer relationship, vehicle access — with critical dimensions scored as knockouts.
- Apply the set-aside-aware constraints: small-business participation floors, limitations on subcontracting, and the SBA rules that govern who is "small" in a team.
- Distinguish the legal and structural forms — teaming agreement, joint venture, mentor-protege agreement — and choose the form that fits the strategy.
- Draft the terms of a teaming arrangement: scope, commitment, exclusivity, IP, and the exit.
- Manage the seam after signing: subcontract flow-down, performance risk, and the dispute that ends the relationship.

- Use teaming as a displacement play — team around an entrenched incumbent — and as an entry play into a locked vehicle.

Weekly schedule

Week	Theme	In-session (75 min)	Reading / material	Assignment due next week
1	Why teams win	The capability gap, the past-performance gap, the vehicle gap, the set-aside gate. Teaming as the gap-closure mechanism.	doctrine/07; the teaming canon at concept altitude	One-page memo: for a case pursuit, name the gap that makes teaming necessary and the gap that does not.
2	The posture decision	Prime solo, prime with subs, sub, JV, mentor-protege. What each posture buys, what it costs, and the indicators that point to it.	the teaming-posture canon at concept altitude	Posture memo: recommend a posture for a case pursuit with the indicators that drive it.

Week	Theme	In-session (75 min)	Reading / material	Assignment due next week
3	Capability-gap analysis	Ranking the gaps: clearances, past performance, certifications, labor categories. What can be bought, what must be teamed, what cannot be closed.	the gap-analysis canon at concept altitude	Gap analysis: score the required capabilities of a case solicitation against a case firm and rank the gaps.
4	The partner rubric	Evaluating a partner: past performance, clearances and certs, financial stability, cultural alignment, existing relationship, customer relationship, vehicle access. Critical dimensions as knockouts.	the partner-rubric canon at concept altitude	Scorecard: run three candidate partners through the rubric for a case pursuit; rank them and justify.
5	Set-aside-aware teaming	Small-business participation, limitations on subcontracting, and the floors that govern a team on a set-aside.	the set-aside-aware teaming canon at concept altitude; doctrine/01	Compliance memo: design a team that meets the participation floors for a set-aside case pursuit.

Week	Theme	In-session (75 min)	Reading / material	Assignment due next week
6	Who is "small" in a team	SBA affiliation rules: when two firms are one firm for size purposes, and when a JV is treated as small. The boundary that decides eligibility.	the course reader on SBA affiliation; doctrine/01	Eligibility memo: for a proposed team, determine small-business status and affiliation risk.
7	Forms and structures	Teaming agreement, JV, mentor-protege: the legal forms, the commitments, the seams. Choosing the form that fits the strategy.	the course reader on teaming forms	Form-selection memo: for a case pursuit, choose the teaming form and state the structural reasons.
8	The agreement	Scope, commitment, exclusivity, IP, and exit. What a teaming agreement must say to be worth signing.	the course reader on teaming agreements	Draft the key clauses of a teaming agreement for a case partnership.
9	Midterm	In-class: run a full teaming decision for a case pursuit — gap analysis, posture, partners, form, terms.	(review weeks 1–8)	Midterm submission.

Week	Theme	In-session (75 min)	Reading / material	Assignment due next week
10	Managing the seam	Flow-down, performance risk, and the daily governance of a team. The subcontract as the governance instrument.	the course reader on subcontracting	Subcontract memo: design the flow-down and performance-management structure for a case subcontract.
11	Teaming as a displacement play	Team around the entrenched incumbent; use a partner's vehicle to enter a locked market. When the competitor becomes the teammate.	the incumbent-displacement and teaming canon at concept altitude	Displacement memo: design a team-around play for an entrenched-incumbent case pursuit.
12	Risks: affiliation, OCI, IP	The three seams that break teams: affiliation (size), organizational conflict of interest, and intellectual property.	doctrine/04; the course reader on teaming risk	Risk memo: for a case team, identify the affiliation, OCI, and IP exposures and the mitigation for each.

Week	Theme	In-session (75 min)	Reading / material	Assignment due next week
13	Capstone exercise	Design a full teaming strategy for a real (closed) pursuit: posture, partners, form, terms, set-aside posture, risk.	(exercise)	Draft teaming strategy.
14	Synthesis	The teaming strategist's desk. Final defense of the teaming strategy before a panel that plays the partners.	(course synthesis)	Final teaming strategy, revised after defense.

Assessment summary

- **Weekly deliverables — 40%.** A cumulative teaming dossier: gap analysis, posture, scorecards, terms, risk.
- **Midterm — 20%.** In-class full teaming decision.
- **Capstone teaming strategy — 30%.** A complete teaming design for a real (closed) pursuit, defended before a panel.
- **Participation and peer review — 10%.**

The graduate rubric

Criterion	Excellent	Proficient	Developing
Gap reasoning	Gaps ranked correctly and the posture follows from them	Gaps identified, posture weakly linked	Posture asserted without gap analysis

Criterion	Excellent	Proficient	Developing
Partner discipline	Partners scored against a rubric; knockouts enforced	Rubric applied loosely	Partner chosen by intuition
Set-aside correctness	Size, affiliation, and participation floors handled correctly	Mostly correct	Eligibility errors
Seam governance	Terms, flow-down, and risk are explicit	Seams acknowledged	Seams ignored

Policies

- **Real teaming, safe exercises.** Case teams are real (closed) procurements and real firms' public facts; no live negotiation and no non-public partner information.
- **Integrity.** A teaming design that proposes circumventing size or set-aside rules fails outright.
- **Late work.** An honest early warning beats a silent late submission.

The teaming call is the highest-leverage decision most small firms never study. This course studies it.