

**City of San Antonio  
Joint Venture Information Form**

This form must be completed if responding to this solicitation as a joint venture for purposes of the Local Preference Program (LPP), Veteran Owned Small Business (VOSB) and/or SBEDA Joint Venture Programs. All information requested by this document must be answered in the spaces provided; do not simply indicate "Refer to Joint Venture Agreement". If additional space is required, additional sheets may be attached.

I. Name of joint venture: \_\_\_\_\_  
Address of joint venture: \_\_\_\_\_  
Phone number of joint venture: \_\_\_\_\_

II. Identify each business entity that makes up the joint venture. For each, state the following:

Name of Firm: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Whether the business entity is a (1) SBE/MBE/WBE; (2) Veteran Owned Small Business (VOSB); or (3) City Business (LPP): \_\_\_\_\_  
Contact person for matters concerning S/M/WBE, VOSB, LPP compliance: \_\_\_\_\_  
Percentage of Ownership in the Joint Venture: \_\_\_\_\_

Name of Firm: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Whether the business entity is a (1) SBE/MBE/WBE; (2) Veteran Owned Small Business (VOSB); or (3) City Business (LPP): \_\_\_\_\_  
Contact person for matters concerning S/M/WBE, VOSB, LPP compliance: \_\_\_\_\_  
Percentage of Ownership in the Joint Venture: \_\_\_\_\_

Name of Firm: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Whether the business entity is a (1) SBE/MBE/WBE; (2) Veteran Owned Small Business (VOSB); or (3) City Business (LPP): \_\_\_\_\_  
Contact person for matters concerning S/M/WBE, VOSB, LPP compliance: \_\_\_\_\_  
Percentage of Ownership in the Joint Venture: \_\_\_\_\_

III. Describe the role(s) of each business entity that comprises the joint venture: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

IV. **Attach an executed copy of the joint venture agreement to your proposal.** In order to demonstrate each venturer's share in the ownership, control, management responsibilities, risks and profits of the joint venture, the proposed joint venture agreement must include specific details related to:

- A. the initial capital investment of each joint venture partner;
- B. the proportional allocation of profits and losses to each joint venture partner;
- C. the sharing of the right to control the ownership and management of the joint venture;
- D. actual participation of the joint venture partners on the project;
- E. the method of, and responsibility for, accounting;
- F. the method by which disputes are resolved; and
- G. responsibilities for insurance coverage.

V. For each S/M/WBE, VOSB, and City Business, specify the percentages for each of the following (provide narrative descriptions and other detail as applicable):

A. Profit and loss sharing: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

B. Capital contributions: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

(1) Dollar amounts of initial contribution: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

(2) Dollar amounts of anticipated on-going contributions: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

C. Contributions of equipment (Specify types, quality and quantities of equipment to be provided by each venturer): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

D. Other applicable ownership interests, including ownership options or other agreements which restrict or limit ownership and/or control: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

E. Provide copies of all written agreements between venturers concerning this project.

VI. Control of and Participation in the Joint Venture - Identify (by name and firm) those individuals who are, or will be, responsible for and have the authority to engage in the following management functions and policy decisions. Indicate any limitations to their authority, such as dollar limits and co-signatory requirements.

A. Joint venture check signing: \_\_\_\_\_  
\_\_\_\_\_

B. Authority to enter into contracts on behalf of the joint venture: \_\_\_\_\_  
\_\_\_\_\_

C. Signing, co-signing and/or collateralizing loans: \_\_\_\_\_  
\_\_\_\_\_

D. Acquisition of lines of credit: \_\_\_\_\_  
\_\_\_\_\_

E. Acquisition and indemnification of payment and performance bonds: \_\_\_\_\_  
\_\_\_\_\_

F. Negotiating and signing labor agreements: \_\_\_\_\_  
\_\_\_\_\_

G. Management of contract performance. (Identify by name and firm only): \_\_\_\_\_  
\_\_\_\_\_

(1) Supervision of field operations: \_\_\_\_\_  
\_\_\_\_\_

(2) Major purchases: \_\_\_\_\_  
\_\_\_\_\_

(3) Estimating: \_\_\_\_\_  
\_\_\_\_\_

(4) Engineering (if applicable): \_\_\_\_\_  
\_\_\_\_\_

VII. Financial Controls of Joint Venture

A. Which firm and/or individual will be responsible for keeping the books of account? \_\_\_\_\_  
\_\_\_\_\_

B. Identify the managing partner, if any, and describe the means and measure of their compensation: \_\_\_\_\_  
\_\_\_\_\_

C. What authority does each venturer have to commit or obligate the other to insurance and bonding companies, financing institutions, suppliers, subcontractors, and/or other parties participating in the performance of this contract or the work of this project? \_\_\_\_\_

VIII. State the approximate number of operative personnel (by trade) needed to perform the joint venture's work under this contract. Indicate whether they will be employees of the non-S/M/WBE firm, the S/M/WBE firm, the VOSB firm, the City Business or the joint venture.

Trade	Non-S/MBE/WBE Firm (Number)	S/MBE/WBE Firm (Number)	VOSB Firm (Number)	City Business (Number)	Joint Venture (Number)

If any personnel proposed for this project will be employees of the joint venture:

A. Are any proposed joint venture employees currently employed by any of the business entities making up the joint venture? \_\_\_\_\_ If so, indicate which business entity (name) and the number of personnel:

Number currently employed by: Non-S/M/WBE venturer(s) \_\_\_\_\_  
 S/M/WBE venturer(s) \_\_\_\_\_ VOSB venturer(s) \_\_\_\_\_ City Business(es) \_\_\_\_\_

B. Identify (by name and firm) the individual who will be responsible for hiring joint venture employees: \_\_\_\_\_  
 \_\_\_\_\_

C. Which venturer will be responsible for the preparation of joint venture payrolls: \_\_\_\_\_  
 \_\_\_\_\_

IX. Please state any material facts of additional information pertinent to the control and structure of this joint venture.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

The undersigned affirms that the foregoing statements are correct and include all material information necessary to identify and explain the terms and operations of our joint venture and the intended participation of each venturer in the undertaking. Further, the undersigned agree to provide the City current, complete and accurate information regarding actual joint venture work and the payment therefore, and any proposed changes in any provision of the joint venture agreement, and to permit the site visits, audit and examination of the books, records and files of the joint venture, or those of each venturer relevant to the joint venture by authorized representatives of the City. Any material misrepresentation will be grounds for rejecting our proposal, terminating any contract which may be awarded, grounds for debarment, and for initiating action under federal or state laws concerning false statements.

Note: If, after submitting this form, and before the completion on the joint venture's work on the project, there is any change in the information submitted, the joint venture must inform the City of San Antonio.

If the joint venture consists of more than one VOSB, S/M/WBE, City Business, and/or non S/M/WBE partner entity, additional signature pages should be submitted. In the space provided, indicate the name of the business entity joining the Joint Venture.

_____	_____	_____
Business Entity	Business Entity	Business Entity
_____	_____	_____
Signature	Signature	Signature
_____	_____	_____
Printed Name	Printed Name	Printed Name
_____	_____	_____
Title	Title	Title
_____	_____	_____
Date	Date	Date