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NYC Contract Awards vs. Payments: A PE Screening Worksheet

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Executive Summary

NYC contract awards vs payments is a distinction between procurement evidence, contract administration, and recorded cash activity. For a private equity (PE) analyst, an award belongs in the evidence file but cannot establish company revenue. The Comptroller describes **Checkbook NYC** as holding a **majority**, rather than all, of City contract data. **PASSPort Public** separately exposes vendor, solicitation, and contract information. Treat the portals as complementary sources with different record types. (comptroller.nyc.gov) (www.nyc.gov)

The practical sequence is to identify the legal vendor, locate the procurement, verify registration and modifications, and then investigate payments against the same contract. PASSPort Public displays distinct **Award Amount**, **Current Contract Amount**, **Total Encumbered Amount**, and **Total Paid Amount** columns; their presence does not establish that each matches an identically named Checkbook measure. The Comptroller also explains that registration is followed by budget and invoice processes. A registered amount is therefore insufficient evidence of paid work. (a0333-passportpublic.nyc.gov) (comptroller.nyc.gov)

Scale makes those distinctions consequential. The **FY2025** Annual Summary Contracts Report records **12,955** newly registered procurement and revenue contracts totaling approximately **$42.45 billion**, excluding task orders from that headline count. (comptroller.nyc.gov) These are registration statistics, not vendor sales or City cash outlays.

Subcontract and accounting boundaries also matter. The Comptroller says prime vendors must report subcontract payments within **30 days**, and that payments below the direct subcontract tier are not tracked in PASSPort. (comptroller.nyc.gov) Separately, Financial Accounting Standards Board (FASB) guidance ties revenue recognition to transferring promised goods or services. Neither a prime award nor a payment record independently resolves the target's recognized revenue or customer concentration. (fasb.org)

This report provides a source matrix, a blank adjudication worksheet, and a clearly fictional filled row. A **paid-to-registered-amount ratio** is useful only after the contract, amount definitions, and observation cut have been reconciled. Its complement is not remaining backlog. The decision output should be a documented

inclusion status and a specific follow-up question. Evidence should remain relevant to the assertion being made, borrowing an evidence-quality principle from auditing without presenting an origination screen as an audit. (pcaobus.org)

Introduction and Background

The buyer's mandate should precede the portal search. A municipal-services acquisition map might seek operating companies with a defined service capability and credible New York City (NYC) customer exposure. That creates separate questions: does the entity fit the operating thesis, and what exactly supports the claim that it does City work? An analyst should retain separate answers rather than allowing a contract amount to stand in for both.

The public-source starting points have different purposes. PASSPort Public makes procurement information available, while City Record Online (CROL) provides a searchable collection of published notices. A notice, a portal vendor listing, and a payment-related record therefore need different labels in the target file. (www.nyc.gov) (a856-cityrecord.nyc.gov)

This report uses NYC as a worked jurisdiction and **October 2026** as its research cut. It does not estimate demand from search traffic, rank acquisition targets, or infer private-company revenue from municipal totals. The operative accounting boundary is supported by FASB's revenue principle and by International Financial Reporting Standard (IFRS) 15, which links recognition to satisfaction of a performance obligation. The target's actual accounting basis must be established in subsequent diligence. (fasb.org) (www.ifrs.org)

The Congressional Budget Office distinguishes cash accounting from accrual accounting in its federal-budget explanation. That source clarifies the timing concept; it does not supply NYC portal definitions or the accounting policy of a private contractor. (www.cbo.gov)

For the audience served by Docket, the useful deliverable is a reviewable municipal-exposure decision. This is narrower than a general market-mapping guide or an ownership-research methodology: it determines what one procurement or payment record permits an analyst to say about one candidate.

Before collecting amounts, write the mandate's qualifying evidence in plain language. Is a registered contract sufficient to enter the map, or does the buyer require observed City payments? Is a subcontractor eligible? Should entities under common ownership remain separate operating-company records? These are proposed screening choices, not fields supplied by a portal. Set them explicitly so that two analysts can reach comparable decisions from the same documents.

Key Changes

The changes below concern how the research file classifies evidence. They are analytical process changes, not claims of newly released portal functionality.

Separate opportunity, award, registration, and payment

Mayor's Office of Contract Services (MOCS) guidance calls opportunities **RFx** and identifies **Released** as the status accepting vendor responses. An opportunity search can therefore reveal a relevant service category without identifying a vendor that has won or performed the work. PASSPort's description also distinguishes a Request for Information from a procurement. (www.nyc.gov) (a0333-passportpublic.nyc.gov)

An award should advance the candidate's procurement evidence, while registration and payments remain separate tests. The Comptroller describes a registration review period of **30 calendar days** beginning when a complete contract package is submitted. (comptroller.nyc.gov) That is a review-clock definition, not a promise that every procurement moves from solicitation to cash within that period.

Replace a single contract-value cell with amount types

Retain the original source labels. PASSPort's public table separates award, current, encumbered, and paid amounts. The exact formulas and cross-system equivalence of those columns were not verified in the retrieved public documentation. Do not silently rename Current Contract Amount as registered value or treat encumbrances as payments. (a0333-passportpublic.nyc.gov)

Treat source freshness as a field

A refresh date and a retrieval date answer different questions. The Comptroller says PASSPort Public refreshes periodically; the retrieved contract page says its information is updated as of its Last Refreshed Date. Record both the page's displayed date and the analyst's collection time. Neither statement establishes a daily service commitment. (comptroller.nyc.gov) (a0333-passportpublic.nyc.gov)

Catalog metadata is another distinct timestamp. Data.gov's Checkbook entry displayed **July 23, 2026** as Dataset Last Updated. (catalog.data.gov) That establishes what the catalog reported, not when every underlying transaction was published. Keep catalog, portal, record-event, and retrieval dates separate.

Replace missing data with a defined unresolved state

Coverage is incomplete. The Comptroller cautions that PASSPort Public represents only a portion of City contracts, with source-system data available since **January 2020**. (comptroller.nyc.gov) An unsuccessful search is therefore a search outcome, not proof of zero City exposure.

Implementation Considerations and Process Changes

Begin an **NYC contract award search** with procurement context, then move to contract and payment evidence. The public PASSPort entry point supplies vendor, solicitation, and contract information. For a narrower opportunity search, MOCS documents searches by **EPIN**, the procurement identifier used in PASSPort searches, or procurement name. Preserve the identifier exactly as displayed rather than assuming it is the final contract identifier. (www.nyc.gov)

Table 1 maps the sources to the question each should answer. The Docket row represents the publisher's proposed research layer, not an authoritative City data system.

Source or research layer	Record and starting point	Useful screening question	Boundary to retain
PASSPort Public	Public contract table and its data-description index. (a0333-passportpublic.nyc.gov)	Which vendor, procurement, status, and amount fields are displayed?	Pending-registration records exist; do not treat every result as registered. (a0333-passportpublic.nyc.gov)
Checkbook NYC	Follow the Comptroller's Contracts-tab guidance.	What contract and spending evidence can be matched?	Coverage is a majority of City contract data; verify the selected period. (comptroller.nyc.gov)
City Record Online	Published notice database. (a856-cityrecord.nyc.gov)	Is this a solicitation, award notice, or another notice?	A publication event does not itself establish payment.
NYC Open Data Recent Contract Awards	City Record notice dictionary and records. (data.cityofnewyork.us)	Which notice and procurement does this row identify?	StartDate and EndDate describe notice publication. (data.cityofnewyork.us)
DCAS citywide award publications	Department of Citywide Administrative Services (DCAS) recent-award page and portfolio. (www.nyc.gov)	Is the candidate an awarded vendor in this specific citywide collection?	The two publications have different stated refresh cycles.
SBS and PIP	Small Business Services (SBS) contracting guidance and Payee Information Portal (PIP). (www.nyc.gov)	Which NYC Vendor Number should the identity crosswalk retain?	A vendor identifier is separate from contract or payment evidence.
Docket research layer	Proposed adjudication worksheet below.	What conclusion does the retained evidence support?	Preserve source authority, unresolved fields, and the analyst's decision.

The matrix should guide navigation before aggregation. A vendor found through an award notice should still proceed through the identity and payment checks; starting from spending does not eliminate the need to establish the contract and entity match.

Use a repeatable sequence:

- **Search the legal name:** retain spelling variants and the searched portal.
- **Search the procurement:** use the EPIN or procurement name where supported. (www.nyc.gov)
- **Open the record:** capture its URL, displayed status, and source labels.
- **Locate the notice:** classify its type before importing a monetary amount. (a856-cityrecord.nyc.gov)
- **Match the contract:** retain the contract identifier separately from the notice identifier. (data.cityofnewyork.us)
- **Investigate spending:** apply the intended fiscal-year or date-range cut. (comptroller.nyc.gov)
- **Record freshness:** preserve the displayed refresh statement and access date. (a0333-passportpublic.nyc.gov)
- **Assign a next action:** accept the supported assertion or state the missing evidence.

For **NYC vendor payment lookup** and **Checkbook NYC contract payments**, begin with the official Comptroller navigation rather than a search snippet that happens to show a vendor amount. Direct retrieval of Checkbook's FAQ, data feeds, and one contract-detail page was blocked in this research session, including the required fallback. Consequently, this report does not assert a current transaction-refresh schedule or unverified payment-date semantics. The workflow requires those definitions to be checked against the accessible record or export before calculations proceed.

Reconciling Contract IDs, Parties, and Amounts

A reliable join needs more than a similar vendor name and an amount. A historical Open Contracting datamap describes Checkbook's Contract ID as a unique City-assigned identifier for a specific contract. That documentation is useful background, but its age prevents it from certifying today's interface. Retain identifiers literally and verify their present relationship in the source records. (open-contracting.github.io)

The notice dictionary illustrates why field names cannot be interpreted generically. **RequestID** identifies a City Record notice. **StartDate** and **EndDate** describe publication dates, while **DueDate** is a response deadline. Moving those fields into contract commencement, expiry, or payment columns would change their meaning. (data.cityofnewyork.us)

Use the following reconciliation controls:

- **Identity:** compare the legal payee or contractor, not only the trading name.
- **Agency:** retain the contracting agency and the paying agency separately if they differ.
- **Identifier:** distinguish the notice, procurement, base contract, modification, and order.
- **Status:** preserve the source's wording and the date on which it was observed.
- **Amounts:** keep award, current, registered, encumbered, invoiced, and paid fields distinct.
- **Time:** separate publication, registration, performance, payment, and retrieval dates.
- **Lineage:** mark which records amend or sit beneath another record before summing.

New York's Department of State (DOS) registry can help establish entity particulars and is described as updated daily. It also supports the distinction between a true legal name and an assumed name. Use those records to corroborate identity, with a dated link, rather than assigning all similarly named portal results to one target. (dos.ny.gov)

For **NYC contract awards vs actual spending**, the central test is whether the amounts refer to the same underlying activity. The Comptroller explains that certain multiple master agreements do not guarantee a City purchase, with utilization proceeding through task orders. Therefore, a framework amount and the amounts on its related orders cannot be added without first understanding their relationship. (comptroller.nyc.gov)

Likewise, a current contract amount can incorporate changes already represented in modification records. Adding a base row, its updated total, and every amendment can count the same authority repeatedly. The primer documents modification activity, but the deduplication rule here is an analyst control: select a documented amount basis, preserve the change history, and explain the sum. (comptroller.nyc.gov)

When systems disagree, retain both observations. Record the exact field labels, extraction dates, and candidate explanations. Do not choose the larger amount because it makes the target appear more material. A newer observation may help resolve timing, but the supporting record must still establish that it supersedes the earlier figure.

Subvendors, Affiliates, and Screening Decisions

Prime and **subcontractor** roles require separate evidence. A procurement that allows subcontracting does not identify an approved subcontractor or establish a payment. MOCS's opportunity search explicitly supports a filter for RFx allowing subcontractors, which is a capability of the solicitation rather than proof of downstream participation. (www.nyc.gov)

The Comptroller says prime vendors must self-report subcontract payments within **30 days** after paying subcontractors. It also states that PASSPort does not track payments to subcontractors working beneath other subcontractors. A historical FY2024 report describes PASSPort payment records as publicly visible through Checkbook, but that disclosure does not establish a complete, current, independently verified subcontractor cash ledger. (comptroller.nyc.gov)

An analyst should preserve these distinctions:

- **Prime award:** identifies the prime-side procurement relationship.
- **Named subcontractor:** requires a record that actually identifies the subcontracting entity.
- **Reported subcontract payment:** requires a payment-specific record and its reporting period.
- **Lower-tier activity:** remains unresolved when the public system does not track it.
- **Group exposure:** requires a supported entity-to-parent relationship before aggregation.

Affiliate verification has its own limits. DOS does not maintain a complete ownership-personnel record for the entities in its database. For an entity with a Legal Entity Identifier (**LEI**), the Global Legal Entity Identifier Foundation (GLEIF) provides direct and ultimate **accounting-consolidating parent** relationships. That is a defined relationship type, not a universal beneficial-ownership register. (dos.ny.gov) (www.gleif.org)

For a Securities and Exchange Commission (SEC) filing entity, company search provides a Central Index Key (**CIK**) and other company information. Regulation S-K's subsidiary exhibit requirements can support a parent check, including jurisdictions and names under which subsidiaries do business. However, the regulation permits certain subsidiary-name omissions. An absent name does not conclusively settle affiliation. (www.edgarcompany.sec.gov) (www.ecfr.gov)

Apply proposed inclusion and escalation rules consistently:

- **Include as a candidate:** identity and service fit meet the mandate, even if municipal cash remains unresolved.
- **Flag a documented contract:** a matched registration supports contract exposure, with status and dates retained.
- **Flag observed municipal cash:** matched payment evidence supports the stated payee, contract, and period.
- **Escalate concentration:** ask for a company-level revenue bridge before calculating a customer share.

- **Hold an ambiguous join:** retain competing identities or affiliations and assign a resolution question.

No public payment result should silently inherit the revenue, employees, or ownership of an entire corporate group. GLEIF's explicitly defined parent categories and USAspending's separate parent-recipient elements illustrate why grouping is an additional data decision rather than a consequence of a shared name. The federal example is conceptual context only. (www.gleif.org) (www.usaspending.gov)

The NYC Record-Level Adjudication Worksheet

The worksheet should produce a small number of defensible assertions and a visible unresolved question. Its **evidence class** is an analyst designation, separate from the portal's procurement status. Relevant and reliable evidence is the standard being borrowed from Public Company Accounting Oversight Board (PCAOB) audit guidance; applying that principle does not make this worksheet an audit. (pcaobus.org)

Suggested classes are **identity only**, **opportunity**, **award**, **registration**, **payment observed**, and **seller-reconciled financial evidence**. Allow several classes to coexist. A registered contract with no matched payment is a different observation from an unregistered award, even if neither permits a company revenue estimate.

Table 2 is a blank record-level template. Enter “unresolved” when a field has not been established, and reserve “not applicable” for a field whose inapplicability has been explained.

Source / record URL	Vendor legal name	Identifier and namespace	Parent / affiliate check	Agency	Procurement stage	Solicitation / award / registration status	Contract amount and basis	Modifications	Paid amount and basis	Fiscal-year / date cut	Prime / sub role	Refresh / access dates	Evidence class	Unresolved question
[Retained URL]	[Exact legal name]	[Portal and identifier type]	[Source or unresolved]	[Exact agency label]	[Stage observed]	[Status and event date]	[Value, currency, source label]	[Change records and relationship]	[Value, scope, payment definition]	[Window and cutoff]	[Role and source]	[Displayed refresh; retrieval time]	[Analyst classification]	[Specific missing evidence]

The template keeps observation and interpretation together without combining their fields. In particular, “payment observed” should be accompanied by its amount definition and period. A blank paid field is not a zero; a vendor-level total is not automatically a contract-level total.

Table 3 supplies a **Hypothetical Example**. Every vendor, identifier, amount, and date in this row is fictional. The placeholder URLs describe evidence that would be required in a real file; they are not citations or claims of existing records.

Source / record URL	Vendor legal name	Identifier and namespace	Parent / affiliate check	Agency	Procurement stage	Solicitation / award / registration status	Contract amount and basis	Modifications	Paid amount and basis	Fiscal-year / date cut	Prime / subrole	Refresh / access dates	Evidence class	Unresolved question
[Fictional contract URL]; [fictional payment URL]	Harbor Lantern Municipal Services LLC, fictional	NYC contract placeholder HYP-C01; vendor identifier unresolved	Parent unresolved; no aggregation	Agency A, fictional	Registered, fictional assumption	Registration assumed verified at cutoff	$2,500,000 registered amount assumed verified	Base $2,000,000 plus $500,000 modification; current total used once	$1,000,000 cumulative matched payments assumed verified	Inception through September 30, 2026	Prime, fictional assumption	Refresh unknown; collected October 29, 2026	Registration plus payment observed	Obtain revenue bridge and determine payment composition

The row would support an observed cash-exposure flag under the stated assumptions. It would not establish the fictional company's revenue, total City business, profit, or acquisition eligibility. The unresolved question is deliberately financial and specific enough for a later request.

During real data collection, keep a namespace beside every identifier. SBS's NYC Vendor Number and New York State's **ten-digit Vendor ID** arise from different systems. A state identifier should not be pasted into a City identifier field merely because both are called vendor numbers. (www.nyc.gov) (www.osc.ny.gov)

Data Analysis and Evidence

Registration totals establish scale, not revenue

The generic annual-report page retrieved in this session displayed FY2023; use the dated publication when discussing later totals. (comptroller.nyc.gov) The dated FY2025 Comptroller report records **12,955** newly registered procurement and revenue contracts totaling approximately **$42.45 billion**. Task orders are excluded from that headline count. (comptroller.nyc.gov) The distinction prevents a misleading inference: neither dividing the total by vendors nor treating it as annual contractor receipts produces a supported revenue estimate.

Publications also expose different observation windows. DCAS states that its recent citywide award list covers the preceding **30 days** and refreshes weekly on Fridays. (www.nyc.gov) Its citywide contract portfolio states a refresh every **30 days**. (www.nyc.gov) Those disclosures govern those publications, not every City procurement system.

NYC's fiscal year begins **July 1** and ends **June 30**. (council.nyc.gov) Thus a full fiscal-year payment extract and a calendar-year revenue statement need a period bridge before comparison. Retain the actual start and end dates rather than relying on an ambiguous year label.

A paid-to-registered-amount ratio

For one reconciled contract, define the ratio as **matched payments from contract inception through the cutoff, divided by the documented registered amount applicable at that same cutoff**. Verify both amount definitions first. If the spending window cannot be established, the ratio is unavailable rather than zero.

Using only the **Hypothetical Example** above:

- **Registered amount at cutoff:** $2,000,000 plus $500,000 equals $2,500,000.
- **Matched cumulative payments:** $1,000,000 through the same cutoff.
- **Calculated ratio:** $1,000,000 divided by $2,500,000 equals **40%**.
- **Arithmetic difference:** $2,500,000 minus $1,000,000 equals $1,500,000.

All these inputs and calculations are fictional. The difference is **not remaining backlog**: the arithmetic does not establish outstanding performance obligations, collectible balances, or future purchases.

A payment also does not, alone, establish completed performance. The Department of Youth and Community Development's (DYCD) FY2027 manual specifies a **50% initial advance** for contracts other than Discretionary funding. (www.nyc.gov) That agency-specific policy illustrates why the payment's composition matters; it should not be generalized to all NYC contracts.

Bridge to company financial evidence

FASB's principle focuses on transferring promised goods or services. IFRS 15 likewise distinguishes satisfaction of performance obligations, which may occur at a point in time or over time. These accounting sources explain the conceptual boundary; the applicable accounting policy and contract terms still need company-level evidence. (fasb.org) (www.ifrs.org)

To investigate **how to verify NYC contractor revenue**, request the contract schedule, invoices, cash receipts, receivables, relevant deferred balances, and general-ledger revenue mapping for the same legal entities and periods. Those are proposed diligence requests; refer the recognition policy and financial bridge to the transaction's accounting adviser. The Internal Revenue Service's cash-method tax guidance generally follows income receipt, so a tax-return period or income figure should also be labeled by its basis rather than assumed equivalent to financial-statement revenue. (www.irs.gov) When company-produced information is used in an audit, PCAOB guidance calls for testing accuracy and completeness; the corresponding screening lesson is to identify what remains unreconciled rather than label a portal total verified revenue. (pcaobus.org)

Implications and Future Directions

For **NYC municipal contract due diligence**, the handoff should identify what was observed, what was inferred, and what requires company records. Retain the exact amount label, record URL, identifier namespace, source date, extraction cut, and unresolved question. This preserves the connection between evidence and conclusion, consistent with PCAOB's principle of relevance and reliability, while keeping the researcher's proposed process distinct from professional audit work. (pcaobus.org)

Transferability requires particular care in **government contractor acquisition due diligence**. System for Award Management (**SAM.gov**) registration addresses federal prime-award participation; a Unique Entity ID alone can exist without full registration. USAspending describes recipients in terms of funding from the U.S. government. These federal sources cannot substitute for the municipal records used in this NYC worksheet. (sam.gov) (www.usaspending.gov)

The distinction extends to identifiers and ownership grouping. New York State's vendor file uses its own identifier, while GLEIF supplies specifically defined accounting-parent relationships. An analyst transferring the worksheet to another jurisdiction should rebuild the source matrix and field dictionary rather than carry over NYC labels as universal definitions. (www.osc.ny.gov) (www.gleif.org)

For **private equity government contractor screening**, a practical improvement is to maintain independent statuses for operating fit, identity confidence, contract evidence, payment evidence, and financial reconciliation. This is a proposed research design. It prevents an award-only candidate from acquiring a revenue estimate merely because a spreadsheet requires a numeric cell.

Before the next screening batch, establish:

- **Coverage boundaries:** identify which agencies, record types, and periods the chosen sources document.
- **Refresh evidence:** retain source-specific statements rather than one assumed update frequency.
- **Join rules:** specify which identifiers and corroborating particulars establish a match.
- **Aggregation scope:** define the entities, contracts, and periods permitted in each total.
- **Escalation ownership:** name the missing document and the assigned requester.

Future portal changes may improve accessibility or documentation, but this report does not assume them. Recheck blocked documentation when it becomes available and update the affected definitions. Keep earlier observations so that a change in the source can be distinguished from a change in the company's municipal exposure.

Conclusion

The acquisition-screening answer to NYC contract awards vs payments is to preserve each record's evidentiary role. Awards identify procurement outcomes; registration and contract administration supply different information; payment records document a further financial observation. The report's public-source caveats, amount distinctions, and accounting boundaries should travel with the target file.

A vendor belongs in the municipal-services map when it meets the buyer's stated identity and operating criteria. The strength of the municipal-exposure flag should then reflect the records actually matched. An award-only candidate, a registered contractor, and a vendor with observed payments can all warrant attention, but their files support different statements.

The worksheet makes that difference reviewable. It retains legal names, identifier namespaces, agency, stage, status, amount basis, modifications, payment scope, observation window, role, refresh information, evidence class, and an unresolved question. A ratio becomes useful only after those foundations are settled, and its arithmetic complement should never be presented as backlog.

The next decision is a targeted diligence request, not an inferred revenue number. Ask for the evidence needed to bridge the public record to company accounts and customer concentration. Where that bridge remains unavailable, preserve an explicit unknown. The resulting map is more useful because every included vendor carries both the evidence supporting City exposure and the limits on what that evidence establishes.

Source links

Links cited in this article, in order of first appearance. Full addresses are provided for readers using extracted text.

1. https://comptroller.nyc.gov/reports/annual-contracts-report
2. https://www.nyc.gov/site/mocs/passport/passport-public.page
3. https://a0333-passportpublic.nyc.gov/contracts.html
4. https://comptroller.nyc.gov/reports/contract-primer
5. https://comptroller.nyc.gov/wp-content/uploads/2025/10/FY25-AnnualSummaryContractsReport.pdf
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7. https://pcaobus.org/oversight/standards/auditing-standards/details/AS1105
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19. https://dos.ny.gov/node/35461
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26. https://council.nyc.gov/budget/process
27. https://www.nyc.gov/assets/dycd/downloads/pdf/FY27_DYCD_Fiscal_Manual_for_PASSPort_Users_07_27_2026.pdf
28. https://www.irs.gov/publications/p538
29. https://sam.gov/entity-registration

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Research against a defined mandate

A useful target list needs more than company names. Docket focuses on the questions that determine whether a company fits an investment mandate, including the evidence needed to support or qualify each answer. Our research approach makes the connection between screening criteria, source material and conclusions visible to the team reviewing the work.

Triage, Scout and Audit

Docket's three named research agents perform complementary tasks. Triage resolves company identity and screens fit. Scout collects sourced answers against the mandate. Audit checks retained evidence, addresses contradictions and leaves unsupported answers visibly unresolved. This structure helps reviewers distinguish established findings from missing information and questions requiring further investigation.

Evidence that supports investment-team judgment

Our research library covers market mapping, screening criteria, private-company data, succession and ownership, source evaluation and evidence standards. These resources explain the methods and limitations behind origination research. Findings support a team's judgment; they do not establish that a company is for sale or guarantee a transaction or investment outcome.

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