

GOVERNMENT PROCUREMENT CHECKLIST

Government Sourcing Requirement Intake Checklist

A practical starting point for a clearer requirement and a more useful market review.

Prepared by: Unparalleled Source

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Purpose

Use this checklist to organize the information a sourcing team, supplier, or delivery partner needs before research and outreach advance.

How to use this checklist

Complete what is known, name the owner of unanswered items, and attach only materials approved for ordinary sharing. A checked item means the information is documented and available for the next review.

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1. Requirement basics

State the need in terms a new reviewer can understand.

- A short requirement name and the organization or program using it are recorded.
- The business or public-service need is stated before a preferred product or provider.
- A requirement owner and a decision contact are named.
- The current stage - early research, budget planning, active sourcing, or response review - is recorded.

Notes / evidence / owner:

2. Desired outcome

Describe the result, not only the item or labor category.

- The intended operational, service, educational, or community outcome is clear.
- Measures of an acceptable result are recorded where they are known.
- Required versus preferred outcomes are separated.

Notes / evidence / owner:

3. Scope and quantities

Define what must be supplied, performed, installed, supported, or coordinated.

- Products, services, tasks, interfaces, and owner-furnished items are listed.
- Quantities, units of measure, option quantities, and expected usage are stated.
- Known dependencies, customer responsibilities, and excluded work are identified.
- Acceptance, testing, training, warranty, or support needs are included where applicable.

Notes / evidence / owner:

4. Schedule and location

Make timing and place-of-performance constraints visible.

- Required delivery, mobilization, performance, and completion dates are recorded.
- Delivery or performance locations, access limits, and operating hours are listed.
- Lead-time assumptions, milestones, renewal periods, and schedule flexibility are stated.

Notes / evidence / owner:

5. Budget and funding boundaries

Record commercial guardrails without disclosing restricted information.

- The available budget range or approval ceiling is documented if it is approved for the review team.
- Funding timing, fiscal-year limits, option structure, and price-evaluation basis are known or assigned.
- Taxes, freight, travel, installation, recurring charges, and contingencies are addressed.

Notes / evidence / owner:

6. Standards and documentation

Identify the evidence a response must include.

- Applicable specifications, standards, drawings, security rules, or agency instructions are referenced.
- Required licenses, insurance, product data, quality records, reports, or certifications are listed only when the requirement calls for them.
- Submission format, naming, version control, and review deadlines are clear.

Notes / evidence / owner:

7. Market research

Build a useful picture of possible sources and open questions.

- Known manufacturers, distributors, service providers, or alternative approaches are recorded.
- Potential sources are screened for apparent capability, capacity, coverage, and response readiness.
- Single-source assumptions and market constraints are identified for further review.
- Questions for suppliers are organized before outreach.

Notes / evidence / owner:

8. Stakeholders and approvals

Make decision authority and review responsibilities explicit.

- Program, technical, procurement, budget, legal, security, and end-user reviewers are identified where applicable.
- The person or body with approval authority is recorded.
- Required internal reviews and their sequence are documented.

Notes / evidence / owner:

9. Risks, exclusions, and open questions

Surface uncertainty before it becomes a scope or schedule problem.

- Operational, supply, schedule, performance, compliance, and transition risks are listed.
- Explicit exclusions and assumptions are recorded.
- Each open question has an owner and a target resolution date.

Notes / evidence / owner:

10. Next-step record

Close the intake with one reviewable action plan.

- The immediate next action, owner, and due date are recorded.
- The approved audience for the requirement package is stated.
- The date and outcome of the next review are documented.

Notes / evidence / owner:

Decision boundary

This checklist supports requirement organization and market research; it does not replace the buyer's procurement rules, evaluation criteria, or approval authority.

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