Borehole Drilling Project Planning and Preparation Checklist

STEP 1 | PROJECT INITIATION AND PREPARATION

- ☐ Define the overall project objectives, methods, deliverables and reporting requirements.
- ☐ Develop the scope of work.
- ☐ Identify key stakeholders involved.
- ☐ Verify the budget available.

STEP 2 | COMMUNITY, INSTITUTION AND/OR MUNICIPALITY SELECTION

- ☐ Collaborate with local authorities/government to select the communities and/or institutions that will benefit.
- ☐ Consult communities during early assessments to confirm feasibility and readiness.

STEP 3 | TEAM ASSEMBLY

- ☐ Build a multidisciplinary project team who will be responsible for undertaking technical, financial, legal, operational, and social aspects of the drilling project.
- ☐ Define clear roles, assign responsibilities, decision-making authority, and accountability structures.
- ☐ Establish communication protocols and coordination systems.
- ☐ Ensure there is sufficient budget and time available for all tasks to be completed by the team.

STEP 4 | COMMUNITY ENGAGEMENT AND STAKEHOLDER MANAGEMENT

- ☐ Liaise and collaborate with appropriate local authorities to agree and coordinate community preparation activities.
- ☐ Adhere to national requirements with respect to community engagement and preparation.
- ☐ Ensure that mechanisms are in place for the services to be managed and maintained following construction or rehabilitation.

STEP 5 | HYDROGEOLOGICAL INVESTIGATIONS AND SITE SELECTION

- ☐ Ensure that a thorough hydrogeological investigation and site assessment is undertaken for all planned borehole locations (e.g. villages/institutions).
- ☐ Review hydrogeology/siting reports including recommendations and any potential issues.
- ☐ Provide feedback to communities and local authorities, making adjustments where required.
- ☐ Verify applicable national regulations, permits, and compliance requirements.
- ☐ Ensure the preparation of preliminary borehole designs.

STEP 6 | PROJECT PROCUREMENT AND CONTRACT AWARD

- ☐ Review site reports and address potential issues with communities and local authorities.
- ☐ Verify national regulations, permits, and compliance requirements.
- ☐ Prepare preliminary borehole designs and complete tender documents.
- ☐ Advertise widely to reach qualified drilling contractors.
- ☐ Hold bidder conference to explain requirements and answer questions.
- ☐ Form evaluation committee with transparent criteria.
- ☐ Evaluate bids objectively using documented process.
- ☐ Verify top-ranked bidder's capability through due diligence.
- ☐ Award contract and issue Notice to Proceed.