EDGE5

SCREENING TOOL

The EDGE5 Post-Handover Viability Screening Tool

A first-pass check of whether a community, environmental or livelihood program will keep working once outside support ends.

For program owners, CSR and ESG managers, funders and government teams — before approval, during delivery or before exit.

WHAT YOU WILL HAVE IN FIFTEEN MINUTES

A rating for each of the five Survival Gates: Pass, At risk or Fail.

The gate that sets the limit for your program — a program is only as strong as its weakest gate.

A clear next step: proceed, strengthen one gate, reduce scale, or hold.

A short list of what you know from evidence, and what you are still assuming.

WHY IT IS WORTH FIFTEEN MINUTES

The earlier a weak gate is found, the cheaper it is to fix

Most programs are judged at delivery. Whether they still work three years later is rarely checked — and by then any weakness has become a cost to the community, the budget and the relationship.

A gate that fails at design stage costs a redesign. A gate that fails after handover costs a community its food or water, and the program is paid for twice: once to build, and again to rescue.

HOW TO USE IT

Five steps

01	**Choose one program.** Screen programs one at a time.
02	**Tick the stage it is at.** Before approval, during delivery or before exit.
03	**Answer from evidence.** Use what you have seen or can verify, not what the reports say.
04	**Tick Yes, Partly, No or Not sure.** "Not sure" is an honest answer, and a useful one.
05	**Rate each gate, then read your result.** The results page shows what your ratings usually mean.

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YOUR PROGRAM

Program details

PROGRAM	
LOCATION	
COMPLETED BY	
DATE	
STAGE	☐ Before approval ☐ During delivery ☐ Before exit

HOW TO RATE EACH GATE

All three answers Yes → Pass

Any Partly or Not sure, and no No → At risk

Any No → Fail

A plan to fix a constraint later is not evidence that it is resolved. Answer for how things stand today.

THE EDGE5 SURVIVAL GATES™

Three questions for each gate

01 WATER — **Will the system work through the dry season without outside supply?**

Water is the fastest failure to surface, and the easiest for a community to point to.

	YES	PARTLY	NO	NOT SURE
Has the water supply been through a full dry season without project or company support?	☐	☐	☐	☐
If the main pump, pipe or source failed, is there a backup and someone local who can fix it?	☐	☐	☐	☐
Is it agreed who controls the water source and who pays to run it after handover?	☐	☐	☐	☐

GATE RATING ☐ **Pass** ☐ **At risk** ☐ **Fail**

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02 SOIL

Is fertility being built up, or used up?

A system that depends on bought compost or fertiliser gets weaker the moment the budget stops.

	YES	PARTLY	NO	NOT SURE
Is fertility built from local materials — mulch, compost, manure, ground cover — rather than bought inputs?	☐	☐	☐	☐
Has anyone checked on the ground, since delivery, whether the land is improving, stable or declining?	☐	☐	☐	☐
Is the ground covered and protected, with no spreading erosion or bare patches?	☐	☐	☐	☐

GATE RATING ☐ **Pass** ☐ **At risk** ☐ **Fail**

03 LABOUR

Can the people who will run it actually carry the work?

Programs are designed around ideal participation. Households live with real workloads.

	YES	PARTLY	NO	NOT SURE
Has someone measured who does the work and how many hours it takes, with women's workload counted separately?	☐	☐	☐	☐
Does the work still fit in the hardest month — harvest, dry season, illness?	☐	☐	☐	☐
If no one touched the system for three days, would it recover without specialist help?	☐	☐	☐	☐

Independence does not require all work to be unpaid. Paid local work counts, as long as there is a local budget to pay for it.

GATE RATING ☐ **Pass** ☐ **At risk** ☐ **Fail**

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04 SKILLS

Can they adapt the system without calling in outsiders?

Training delivered is not capability transferred. Skills take two to three years of practice with someone who stays.

	YES	PARTLY	NO	NOT SURE
When something breaks, can local people work out what is wrong and fix it without outside staff?	☐	☐	☐	☐
Are local trainers in place and already teaching others?	☐	☐	☐	☐
Is a local mentor named, on site and funded for the next two to three years?	☐	☐	☐	☐

GATE RATING ☐ **Pass** ☐ **At risk** ☐ **Fail**

05 AUTHORITY

Who decides what happens when something goes wrong?

If every change needs outside approval, the system cannot adapt in the season it is under stress.

	YES	PARTLY	NO	NOT SURE
Can the people who live with the system change it without approval from the company, NGO or an official?	☐	☐	☐	☐
Is it written down, and held locally, who decides, who settles disputes and who owns the assets?	☐	☐	☐	☐
Would the system keep its standing if your organisation's name and people were no longer attached to it?	☐	☐	☐	☐

GATE RATING ☐ **Pass** ☐ **At risk** ☐ **Fail**

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ONE MORE CHECK

What ends at handover

For each item, do you know who will carry it once the program's support ends?

	KNOWN	NOT YET KNOWN
Water, energy and inputs Pumping, power, seed, compost, fuel	☐	☐
Labour and operating money Wages, allowances, running costs	☐	☐
Training, advice and repairs Trainers, technical visits, spare parts	☐	☐
Decisions and permissions Who approves changes, spending and access	☐	☐

Every "Not yet known" is a cost that will land on someone after handover — usually the community.

A NOTE ON 'NOT SURE'

If most of your ticks are Not sure, the program may well be sound — but nobody can yet show it. That is the cheapest gap to close, and the one to close before a board, a regulator or the community asks.

YOUR RESULT

Gate summary

Copy each gate rating here.

	PASS	AT RISK	FAIL
01 WATER	☐	☐	☐
02 SOIL	☐	☐	☐
03 LABOUR	☐	☐	☐
04 SKILLS	☐	☐	☐
05 AUTHORITY	☐	☐	☐
WEAKEST GATE			

READING YOUR RESULT

Count the gates. Don't average them.

Strength in one gate cannot make up for failure in another. If there is water for fifty households but labour for twenty, the program works for twenty.

IF	WHAT IT USUALLY MEANS	WHAT USUALLY HELPS
All five pass	Likely to survive handover, on the evidence you have.	Confirm the answers on the ground before a major decision, and keep watching the weakest gate through the next dry season.
At risk, none fail	Fragile. It works while support continues. At risk is not a pass.	Close the gaps in evidence first, then strengthen the weakest gate while support is still in place.
One gate fails	One condition will not hold after handover.	Redesign that gate before going further. At this stage it is usually a targeted change, not a rebuild.
Two gates fail	The program is larger than the conditions can carry.	Reduce the scale to what the weakest gate can support, then redesign.
Three or more fail	Not ready to fund or hand over as it stands.	Hold the decision. Redesign from the ground conditions up before committing more money or setting an exit date.

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If the program is already running, a failed screen does not mean abandoning the people who depend on it. It means pausing expansion or handover, agreeing what must change, and protecting essential services in the meantime.

WHERE TO FROM HERE

This screen shows where to look

It will not tell you everything. If a gate came back At risk or Fail, or a question was hard to answer, that is usually the point where an independent view saves the most time and money — while there is still room to change the design.

HOW EDGE5 WORKS ALONGSIDE YOUR TEAM

Before approval	During delivery	Before exit
Test the design against the five gates and get a clear recommendation — proceed, redesign or reduce scale — before money is committed.	A mid-program review that finds weak gates while there is still time and budget to fix them.	Confirm the program is ready for handover, and set out what must be in place so withdrawal is a planned transition, not a risk.

WHAT YOU GET

A gate-by-gate picture of the program, based on what is happening on the ground.
Practical changes sized to your budget, timeline and team.
A clear report you can take to your board, your regulator and the community.
A team that can run this check itself next time.

SEND ME YOUR RESULTS

If you would like a second opinion, email me your gate summary and a few lines about the program. I'll reply personally with what I see and what I would look at first — and I'll tell you if I think your team can handle it without outside help.

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Scope. This tool is a first-pass screen. It does not replace technical, engineering, regulatory or safety assessment, and it is not a substitute for a full Survival Gates assessment on the ground.

The EDGE5 Survival Gates™ framework was developed by Greg Knibbs, founder of EDGE5.

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