

THE LONG RETURN INSTITUTE

Constitutional Development Manual

A portable construction system for new Institute projects

PUBLIC REFERENCE EDITION

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Publication note

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Document Control

Field	Current value
Canonical file	The_Long_Return_Institute_Constitutional_Development_Manual_MASTER.docx (internal canonical source); this Public Reference Edition is a controlled derivative.
Manual version	Edition 1.0 Standing Operational Manual, Pass 9; Public Reference Edition 1.0.1
Controlling constitutional source	The Long Return Institute Constitutional Corpus, Edition 2.1 Corrected
Manual function	Internal operational implementation guide, publicly distributed here as a reference derivative; does not amend the Corpus.
Primary users	Operational: Founder, contributors, project owners, reviewers, successor operators, and assisting LLMs. Public: readers, reviewers, and citers; no operational authority conveyed.
Current coverage	Complete AR-001 through AR-019 construction pathway; Book II and Book III implementation; build, review, release, continuity, evidence return, adaptation, retirement, examples, and portable packets
Standing authority	Bounded internal founder authority for Institute development and operations. Public distribution permits reading, review, and citation only.
Lifecycle state	ST-07 Maintained - active standing use with an assigned owner, correction route, and review triggers
Review state	Internal conformance complete; external review deferred without date; publication is not independent validation.

Controlling rule: If this manual conflicts with the Constitutional Corpus, an adopted Decision Record, a canonical registry, or a controlled specification, the higher source controls. The conflict must be recorded; it must not be silently repaired inside the manual.

Revision History

Pass	Version	Status	Integrated content	Next trigger
1	1.0-dev	Complete	Foundations; development lifecycle; AR-001 and AR-002; portable LLM protocol; ICWA pilot protocol	Pass 1 complete
2	1.0-dev	Recovered and integrated	AR-003; scope, authority, dependency, boundary, risk controls; AR-004 Work Plan	Persistence gap corrected in Pass 3
3	1.0-dev	Complete	AR-005; Book II functions, patterns, inherited requirements; AR-006 Design Pass Record	Pass 3 complete
4	1.0-dev	Complete	Book III sequence; roles; artifacts; lifecycle; ownership; maintenance; correction and continuity architecture	Pass 4 complete
5	1.0-dev	Recovered and integrated	AR-007 through AR-012; build, testing, PS-006 review, release decision, release package, deployment	Restored in Pass 6
6	1.0-dev	Complete	AR-014 through AR-019 implementation; evidence, learning, adaptation, preservation, correction return, retirement	Pass 6 complete
7	1.0-dev	Complete	Complete artifact library; five worked examples; human, LLM, and continuity construction packets	Pass 7 complete
8	1.0-review-candidate	Complete / superseded	Conformance audit; identifier and cross-reference verification; navigation repair; cross-format QA; external-review system	Standing release decision completed in Pass 9
9	1.0-standing	Complete	Standing internal adoption; exact release status; maintenance and correction triggers; deferred external review; continuing-use rule	Operational evidence, correction trigger, source change, or scheduled status check

How to Use This Manual

1. Open the current master document. Do not begin from an older exported copy.
2. Identify the project state. Use only the phase and instruments that the project has actually reached.
3. Complete the required record before creating downstream content.
4. Treat pause, referral, transfer, or standing-preserved closure as valid completed outcomes.
5. Use the Constitutional Corpus and named source artifacts when the manual directs you to them.
6. Record any conflict, missing instrument, or operating failure before proposing a new constitutional structure.
7. At the end of each development pass, revise this same master document and update the revision history.

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Part I - Constitutional Relationship and Development Discipline

1. Purpose

This manual provides a repeatable method for constructing new Institute work under the Constitutional Corpus. It is designed to be portable: a founder, collaborator, successor, or another LLM should be able to use it to start a new project without reconstructing months of prior conversation.

- It governs project formation, not the substantive conclusion a project must reach.
- It converts constitutional principles and operational patterns into usable records, gates, and instructions.
- It preserves distinctions among need, authority, design, production, review, release, operation, learning, and retirement.
- It requires new constitutional architecture to be justified by observed operational evidence rather than fluent proposal-making.

2. Source Hierarchy

Priority	Source layer	What it controls
1	Constitutional Corpus and adopted constitutional decisions	Institutional purpose, constitutional order, authority boundaries, and amendment conditions
2	Adopted Decision Records	Specific recorded decisions and authorized changes
3	Canonical registries and controlled vocabularies	Identity, names, status, metadata, and lifecycle
4	Controlled Book II and Book III specifications	Normative design and operational content
5	This manual	Implementation sequence, forms, prompts, and practical use
6	Project records and derivative publications	Project-specific evidence, decisions, artifacts, and communication

3. Manual Authority and Limits

Internal force: Within an Institute project that elects to use this manual, SHALL and SHALL NOT identify mandatory internal controls; SHOULD and SHOULD NOT identify presumptive controls; MAY identifies permitted choices. This manual does not create authority outside the Institute.

- The manual SHALL NOT create Tribal, governmental, legal, clinical, cultural, professional, or community authority.
- The manual SHALL NOT convert an identified need into authority to act.
- The manual SHALL NOT make an LLM a reviewer, advisor, council member, rights holder, or responsible institutional actor.
- The manual MAY guide independent civic, educational, research, and prototype work when the actual authority and status are stated.
- The manual SHOULD be scaled to actual capacity, but scaling SHALL NOT erase authority, evidence, protected-context, maintenance, or correction controls.

4. Development Axioms

ID	Axiom	Operational meaning
CDM-A1	Need before artifact	Start by describing the institutional need, not by selecting a website, report, app, deck, packet, or policy.
CDM-A2	Recognition is not authorization	A need can be real while the Institute lacks standing to address it.
CDM-A3	Standing before production	No consequential project should enter substantive production before the authorization and standing record is complete.

ID	Axiom	Operational meaning
CDM-A4	Existing architecture before new architecture	Use Books I-III and existing standards before proposing a new layer, book, family, or framework.
CDM-A5	Stop with integrity	A pause, referral, transfer, or standing-preserved closure may be the correct completed constitutional act.
CDM-A6	Design before drafting	Book II design choices are recorded before prose, interface, or presentation form hardens.
CDM-A7	Testing, review, and release are distinct	A functioning artifact is not automatically reviewed; a reviewed artifact is not automatically released.
CDM-A8	Responsibility continues after release	Deployment, maintenance, correction, preservation, learning, and retirement remain governed.
CDM-A9	Evidence before amendment	Operational failure or contradiction, not novelty or fluency, is the default basis for constitutional expansion.
CDM-A10	Record before memory	Constitutionally significant work must be preserved outside chat in a controlled artifact.

5. Project Classes

Class	Typical work	Primary risk question
Research	Articles, reports, source reviews, theoretical projects	What claims do the sources and standing support?
Community navigation	Family, elder-care, ICWA, services, benefits, referral tools	Can navigation be distinguished from advice, authority, and triage?
Civic education	Governance briefings, public explainers, presentations	Whose authority is described, and what is the publication status?
Institutional design	Standards, patterns, manuals, registries, workflows	Is a new structure evidenced, or does the existing system already govern?
Archive and history	Family history, records, exhibits, source maps	What access, provenance, privacy, and protected-context limits apply?
Technology and AI	AI literacy, data governance, websites, tools	What infrastructure, sovereignty, accessibility, and maintenance burdens are created?
Program prototype	Workshops, forums, libraries, alerts, recurring services	Does the Institute have authority, capacity, safety controls, and continuity?

Part II - Project-Generation Lifecycle

6. Lifecycle Overview

Phase	Controlling question	Primary record or output	Permitted exit
1. Need intake	What need exists, for whom, and based on what evidence?	AR-001 Intake Record	Proceed, hold, refer, or close
2. Authorization and standing	May the Institute proceed, and within what limits?	AR-002 Authorization Record	Proceed, limit, pause, refer, transfer, or stop
3. Scope and dependencies	What exactly is being undertaken, and what must exist first?	Scope, authority, dependency, risk records	Proceed, narrow, pause, or transfer
4. Communication design	How should the intended reader encounter and use the work?	Book II design-pass record	Proceed, divide artifacts, redesign, or stop
5. Operational design	How will the work be produced, owned, reviewed, maintained, and retired?	Book III plan and artifact set	Proceed, rescope, or defer
6. Prototype and testing	Can the smallest responsible implementation perform its promised function?	Prototype and function-test record	Revise, proceed, or stop
7. Review and release	What was reviewed, by whom, and should this version be released?	PS-006 packet; review and release records	Release, limit, defer, return, or decline
8. Operation and continuity	What entered use, who owns it, and how are defects corrected?	Deployment, maintenance, correction, preservation records	Maintain, correct, withdraw, or retire
9. Learning and adaptation	What does the evidence permit the Institute to change?	Evidence and learning decision records	Change controlled object, retain, or remain unresolved
10. Retirement	How does the work end without erasing history or responsibility?	Retirement and successor record	Supersede, archive, transfer, or close

7. Gate Logic

8. A project SHALL complete the current gate before relying on a downstream status.
9. A gate outcome SHALL be recorded even when the outcome is pause, referral, transfer, or closure.
10. A failed gate SHALL NOT be repaired by drafting more content.
11. Where facts are unknown, the record SHALL state unknown rather than infer a favorable answer.
12. Where authority is conditional, the project MAY proceed only within the recorded condition.
13. Where the project changes materially, the relevant earlier gate SHALL be rerun.

Standing-preserved closure: The Institute recognizes a legitimate need but lacks sufficient authority, permission, competence, access, relationship, capacity, or constitutional standing to continue. The need may be referred, transferred, held for future authorization, or closed. This is a completed and successful constitutional outcome.

8. Minimum Project File

Item	Required at start?	Function
Project initiation cover sheet	Yes	Stable project identity and current state
AR-001 Intake Record	Yes	Recognizes and bounds the need
AR-002 Authorization Record	Before production	Determines authority, standing, and valid exit
Source list or evidence note	When evidence is relied upon	Shows what supports the need and what remains unverified
Decision log	When a consequential decision occurs	Preserves rationale and change history
Current artifact register	When production begins	Identifies what exists and who owns it
Maintenance/retirement status	Before release	Prevents orphan artifacts

Part III - AR-001: Intake / Recognized Need Record

9. Specification

Control	Value
Canonical identifier	AR-001
Canonical registry name	Intake Record
Working form name	Recognized Need Record
Originating process	OP-001 Need Intake / OPS-001 Need Before Artifact
Purpose	Create a bounded record of a real or plausible institutional need without selecting or authorizing a solution
Owner	Intake Owner
Initial lifecycle state	Proposed
Valid completion outcomes	Proceed to AR-002; hold; refer; close because no institutional need is established

Do not start with the product: Statements such as “we need a website,” “we need a handbook,” or “we should start a program” are proposed forms, not need statements. AR-001 must identify the problem, audience, consequence, and uncertainty before an artifact is selected.

10. Required Fields

Field ID	Field	Instruction
AR1-01	Project working title	A provisional name; do not treat it as authorization.
AR1-02	Date recognized	Date the Institute first creates the record.
AR1-03	Recognized by	Person or role recording the need.
AR1-04	Initiating event or request	What caused the need to be examined?
AR1-05	Need statement	Describe the institutional or reader problem without naming a preferred solution.
AR1-06	Affected people or users	Who appears affected? State uncertainty and avoid speaking for them.
AR1-07	Observed evidence	Requests, records, research, recurring questions, operational experience, or other evidence.
AR1-08	Evidence status	Verified, partially verified, reported, inferred, located but unread, or unknown.
AR1-09	Consequence of inaction	What may reasonably happen if no action is taken? Avoid dramatic unsupported prediction.
AR1-10	Urgency	Immediate, near-term, long-term, recurring, or unknown; explain the basis.
AR1-11	Existing responsible authorities	Identify governments, families, courts, agencies, professionals, communities, or organizations already responsible.
AR1-12	Known constraints	Authority, law, evidence, access, relationship, time, funding, safety, protected context, maintenance, or other limits.
AR1-13	Known existing responses	What already exists? Record unknown rather than assume absence.
AR1-14	Why the Institute is considering the need	State the possible connection without claiming standing.

Field ID	Field	Instruction
AR1-15	Proposed next outcome	Proceed to AR-002; hold; refer; close; or unresolved.

11. AR-001 Completion Test

- The need can be stated without naming a preferred artifact.
- The affected people or users are identified without claiming to represent them.
- The evidence and its verification status are visible.
- Existing responsible authorities are named or explicitly unknown.
- Known limits and uncertainty are recorded.
- One valid intake outcome is selected.

12. Blank AR-001 Form

Field	Project entry	Status
AR1-01 - Project working title	[Enter: A provisional name; do not treat it as authorization.]	Open
AR1-02 - Date recognized	[Enter: Date the Institute first creates the record.]	Open
AR1-03 - Recognized by	[Enter: Person or role recording the need.]	Open
AR1-04 - Initiating event or request	[Enter: What caused the need to be examined?]	Open
AR1-05 - Need statement	[Enter: Describe the institutional or reader problem without naming a preferred solution.]	Open
AR1-06 - Affected people or users	[Enter: Who appears affected? State uncertainty and avoid speaking for them.]	Open
AR1-07 - Observed evidence	[Enter: Requests, records, research, recurring questions, operational experience, or other evidence.]	Open
AR1-08 - Evidence status	[Enter: Verified, partially verified, reported, inferred, located but unread, or unknown.]	Open
AR1-09 - Consequence of inaction	[Enter: What may reasonably happen if no action is taken? Avoid dramatic unsupported prediction.]	Open
AR1-10 - Urgency	[Enter: Immediate, near-term, long-term, recurring, or unknown; explain the basis.]	Open
AR1-11 - Existing responsible authorities	[Enter: Identify governments, families, courts, agencies, professionals, communities, or organizations already responsible.]	Open
AR1-12 - Known constraints	[Enter: Authority, law, evidence, access, relationship, time, funding, safety, protected context, maintenance, or other limits.]	Open
AR1-13 - Known existing responses	[Enter: What already exists? Record unknown rather than assume absence.]	Open
AR1-14 - Why the Institute is considering the need	[Enter: State the possible connection without claiming standing.]	Open
AR1-15 - Proposed next outcome	[Enter: Proceed to AR-002; hold; refer; close; or unresolved.]	Open

Part IV - AR-002: Authorization and Standing Record

13. Specification

Control	Value
Canonical identifier	AR-002
Canonical registry name	Authorization Record
Working form name	Authorization and Standing Record
Originating process	OP-002 Authorization Gate / OPS-002 Authority Before Work
Purpose	Determine whether the Institute may proceed, within what limits, and under whose authority
Primary authority role	Authority Holder or Authorizing Body
Valid dispositions	Proceed; proceed with limitations; pause; refer; transfer; stop with standing preserved; unresolved

14. Standing Domains

ID	Domain	Question
S-01	Constitutional standing	Does the Corpus permit this category of involvement?
S-02	Institutional standing	Is the Institute acting within its actual institutional role and status?
S-03	Authority standing	What law, policy, mandate, permission, invitation, ownership, or bounded prototype authority permits the work?
S-04	Community standing	Would proceeding substitute the Institute for a community, government, family, elder, rights holder, or authorized representative?
S-05	Relationship standing	Do the necessary relationships, invitations, or trust conditions exist?
S-06	Knowledge standing	Does the Institute possess sufficient knowledge, access, and source support to proceed responsibly?
S-07	Professional standing	Does the work require legal, clinical, financial, technical, archival, or other licensed/specialized competence?
S-08	Protected-context standing	Do privacy, cultural authority, confidentiality, privilege, consent, or security restrict access or action?
S-09	Operational standing	Can the Institute resource, review, maintain, correct, and retire the work?
S-10	Public-reliance standing	Could readers mistake the work for official, adopted, professional, or individualized advice?

15. Required Fields

Field ID	Field	Instruction
AR2-01	AR-001 reference	Identify the controlling Intake Record and version.
AR2-02	Proposed work	State the exact work being considered; do not broaden beyond AR-001.
AR2-03	Claimed authority basis	Identify each authority, permission, duty, invitation, ownership, or prototype basis claimed.

Field ID	Field	Instruction
AR2-04	Authority verification	State what was checked and what remains unverified.
AR2-05	Authority holder	Identify who can authorize the work and whether they have actually done so.
AR2-06	Standing-domain findings	Complete S-01 through S-10.
AR2-07	Scope limits	State what the authorization does not cover.
AR2-08	Required conditions	List permissions, relationships, experts, sources, reviews, resources, or safeguards required before proceeding.
AR2-09	Protected-context conditions	State access restrictions without extracting protected material.
AR2-10	Reliance and status statement	How must the work describe its independent, prototype, educational, or other bounded status?
AR2-11	Decision	Choose exactly one valid disposition.
AR2-12	Decision rationale	Explain why the evidence and authority support that disposition.
AR2-13	Next action owner	Identify who owns referral, transfer, pause conditions, or the next project step.
AR2-14	Review trigger	State what change requires this standing decision to be rerun.

16. Decision Outcomes

Disposition	Meaning	Required next record
Proceed	Standing and authority are sufficient for the bounded proposed work.	Open Pass 2 scope and dependency records.
Proceed with limitations	Work may continue only within recorded limits or after named conditions.	Carry limits into every downstream artifact.
Pause	A condition may later be satisfied, but work cannot responsibly continue now.	Name condition, owner, and review trigger.
Refer	Another institution or authority is the appropriate first route.	Record referral and whether the Institute retains any bounded role.
Transfer	Responsibility or ownership is moved to an appropriate actor.	Record recipient, acceptance, and residual duties.
Stop with standing preserved	The need is real, but the Institute lacks sufficient standing or permission.	Close with dignity; preserve the need and rationale.
Unresolved	Available evidence cannot support a responsible disposition.	Identify the missing fact or authority and do not proceed by assumption.

Constitutional success: The measure of AR-002 is not whether it authorizes a project. The measure is whether it produces an honest, bounded, reviewable decision. A principled stop can be the first successful product of the Constitutional Corpus.

17. Blank AR-002 Form

Field	Project entry	Status
AR2-01 - AR-001 reference	[Enter: Identify the controlling Intake Record and version.]	Open
AR2-02 - Proposed work	[Enter: State the exact work being considered; do not broaden beyond AR-001.]	Open

Field	Project entry	Status
AR2-03 - Claimed authority basis	[Enter: Identify each authority, permission, duty, invitation, ownership, or prototype basis claimed.]	Open
AR2-04 - Authority verification	[Enter: State what was checked and what remains unverified.]	Open
AR2-05 - Authority holder	[Enter: Identify who can authorize the work and whether they have actually done so.]	Open
AR2-06 - Standing-domain findings	[Enter: Complete S-01 through S-10.]	Open
AR2-07 - Scope limits	[Enter: State what the authorization does not cover.]	Open
AR2-08 - Required conditions	[Enter: List permissions, relationships, experts, sources, reviews, resources, or safeguards required before proceeding.]	Open
AR2-09 - Protected-context conditions	[Enter: State access restrictions without extracting protected material.]	Open
AR2-10 - Reliance and status statement	[Enter: How must the work describe its independent, prototype, educational, or other bounded status?]	Open
AR2-11 - Decision	[Enter: Choose exactly one valid disposition.]	Open
AR2-12 - Decision rationale	[Enter: Explain why the evidence and authority support that disposition.]	Open
AR2-13 - Next action owner	[Enter: Identify who owns referral, transfer, pause conditions, or the next project step.]	Open
AR2-14 - Review trigger	[Enter: State what change requires this standing decision to be rerun.]	Open

Part V - Portable LLM Construction Protocol

18. Role of an Assisting LLM

An assisting LLM is a drafting, classification, analysis, and record-production tool. It is not the Institute, the Founder, an authority holder, a reviewer with independent standing, a rights holder, or a substitute for community, professional, legal, or cultural judgment.

The LLM SHALL	The LLM SHALL NOT
Start with the current project state and controlling sources.	Invent missing constitutional authority or represent a proposal as adopted.
Separate source-supported fact, inference, proposal, and unresolved status.	Treat fluency, length, repetition, or internal coherence as evidence.
Use AR-001 and AR-002 before producing downstream project architecture.	Bypass standing because a need is urgent, sympathetic, or important.
Prefer the narrowest existing constitutional route.	Propose a new book, framework, pattern family, or governance layer before operational evidence exists.
Preserve stop, pause, referral, and transfer outcomes.	Treat refusal or bounded non-action as project failure.
State which sources were actually supplied and used.	Silently fill source gaps from general knowledge when the project is source-governed.
Create files when the user requests artifacts, and verify them before delivery.	Claim a file, audit, accessibility result, or conformance state that was not actually produced and checked.

19. Proposal Audit Before Expansion

- Load-bearing claim: What proposition makes the proposal worth accepting?
- True core: What does the existing evidence and architecture already support?
- Overclaimed envelope: What does the proposal add that has not been tested or authorized?
- Main risk: What work, authority, or institutional commitment would acceptance create?
- Existing route: Does the Corpus or manual already provide a path?
- Narrowest sufficient next act: What is the smallest governed action that produces real evidence?
- Defeat condition: What result would show the proposal should be rejected or narrowed?

20. Output Contract for Another LLM

14. Identify the current project phase and the controlling artifact.
15. State whether the requested action is mechanical, operational, editorial, evidentiary, or constitutional.
16. Use the existing route before proposing expansion.
17. When creating a record, preserve identifiers, source status, version, owner, limits, and next trigger.
18. Do not call a draft “canonical,” “adopted,” “conformant,” “reviewed,” “complete,” or “pilot-ready” without a stated baseline and evidence.
19. Stop and surface the decision when a genuinely non-mechanical authority, constitutional, or protected-context choice is reached.

21. Portable Startup Prompt

Copy-and-paste prompt: You are assisting The Long Return Institute to construct a new governed project under its Constitutional Corpus. Treat the Constitutional Development Manual supplied with this prompt as the implementation guide. Do not invent new constitutional architecture unless a completed operational cycle or documented contradiction shows that existing governance is insufficient. Begin by identifying the current phase. For a new project, create AR-001 (Intake / Recognized Need Record) and then AR-002 (Authorization and Standing Record). Do not begin substantive production before AR-002 reaches Proceed or Proceed with limitations. Distinguish source-supported fact, inference, proposal, editorial suggestion, operational recommendation, constitutional amendment, and unresolved status. Preserve pause, referral, transfer, unresolved, and stop-with-standing-preserved as valid outcomes. Use supplied sources as controlling; do not silently fill gaps. Build only the artifacts demanded by the current phase, preserve version and decision history, and identify the narrowest next governed action.

Part VI - Operational Cycle 1: ICWA Navigation Pilot

22. Pilot Objective

Use the ICWA Navigation project to test whether AR-001 and AR-002 can produce an honest, bounded institutional decision. The pilot does not begin by creating a guide. It begins by determining the need and the Institute's standing.

Pilot boundary	Control
Included	Complete one AR-001 and one AR-002 using the existing ICWA/guardianship project evidence and purpose statements.
Excluded	Do not yet draft legal guidance, finalize navigation pathways, solicit official adoption, or create a public release.
Primary test	Can the records distinguish independent education/navigation from legal advice, official Tribal action, case-specific direction, and family decision-making?
Valid ending	Proceed with limitations, pause, refer, transfer, stop with standing preserved, or unresolved.
Evidence produced	Completed records; list of missing facts/authorities; operator burden; defects in the forms; next decision.

23. Pilot Procedure

20. Create the Project Initiation Cover Sheet in Appendix A.
21. Complete AR-001 from the actual project history, source corpus, stated family/community need, and existing scope statements.
22. Do not convert the existing project idea into an assumed institutional need; record competing need formulations where necessary.
23. Complete AR-002 across all ten standing domains.
24. Select exactly one disposition and record the rationale.
25. Record every field that was difficult, redundant, impossible, or misleading.
26. Do not revise the manual during the pilot. First preserve the failure or friction as evidence.
27. After the cycle, open a bounded Manual Learning Record for Pass 2 or later integration.

24. Pilot Stop Conditions

- The project begins producing case-specific legal direction.
- The Institute appears to speak for a Tribe, court, agency, family, or affected community without authority.
- Protected family information would have to be disclosed to complete a record.
- The form requires a competence judgment the operator cannot responsibly make.
- The evidence needed to establish the need or standing is unavailable or materially disputed.

25. Pilot Completion Record

Question	Record after cycle
Did AR-001 bound the need without selecting a solution?	[Yes / Partial / No + evidence]
Did AR-002 produce a clear standing disposition?	[Yes / Partial / No + evidence]
What did the forms make visible that the prior project process did not?	[Entry]
What burden did the forms create?	[Entry]
Which fields failed or required unsupported judgment?	[Entry]
Did the cycle stop, narrow, refer, transfer, or proceed?	[Disposition]
What is the narrowest justified next action?	[Entry]
Does any finding justify changing the manual now?	[Default: no; explain evidence if yes]

Part VII - From Authorization to an Authorized Project Charter

26. Pass 2 purpose and controlling sequence

Pass 2 converts a bounded AR-002 authorization into an operating profile and a maintained work plan. It does not broaden the authority recorded in AR-002. It implements OP-003 Operating Profile Selection and OP-004 Work Planning through AR-003 and AR-004.

Control: The sequence is AR-002 → AR-003 → AR-004. Scope, authority, dependencies, boundaries, and risk are components of the work-planning record; they do not create new authority or independent artifact identities.

27. Entry conditions

- AR-001 and AR-002 exist and are version-identified.
- AR-002 disposition is Proceed or Proceed with limitations.
- The proposed project has not materially changed since authorization.
- Any conditions attached to authorization are visible and assigned.
- The project owner understands that profile selection scales burden but cannot waive authority, protected-context, evidence, accessibility, correction, or maintenance controls.

Return rule: If the work now proposed exceeds AR-002, changes audience or reliance materially, introduces a new authority claim, or enters protected context not previously assessed, return to AR-002 before continuing.

28. AR-003 - Operating Profile

Canonical identity: AR-003 Operating Profile. Origin: OP-003 Operating Profile Selection. Owner: RL-001 Process Steward. Registered state: Authorized. Access: Internal / governed.

AR-003 selects the bounded operating conditions for scale, staffing, medium, risk, audience, access, maintenance, and review burden. A profile is not a shortcut around controls; it determines how the controls will be carried under actual capacity.

Field ID	Field	Instruction
AR3-01	Controlling authorization	Reference AR-002 identifier, version, disposition, limits, and review trigger.
AR3-02	Project class	Select the project class and explain any mixed class.
AR3-03	Operating scale	Solo/founder-led, small internal team, partnered, or institutionally distributed.
AR3-04	Consequence profile	Describe consequence, reversibility, novelty, reader vulnerability, future dependence, and rate of change.
AR3-05	Audience and reliance	Identify intended and foreseeable readers, their situation, and the reliance the project may invite.
AR3-06	Medium and circulation	Identify likely media, detached circulation, public/internal/restricted status, and distribution conditions.
AR3-07	Access and protected context	Record privacy, confidentiality, cultural authority, consent, privilege, security, and access limits.
AR3-08	Role combination	Identify which canonical roles may be combined and what independence or conflict limits remain visible.
AR3-09	Evidence burden	State source volume, verification burden, currency, provenance, and evidence restrictions.

Field ID	Field	Instruction
AR3-10	Accessibility burden	Identify accessibility functions, formats, reader constraints, and human validation needs.
AR3-11	Review burden	Identify review classes, competencies, independence needs, and conditions that cannot be simulated.
AR3-12	Maintenance burden	Identify likely change rate, dependency monitoring, correction path, and foreseeable owner burden.
AR3-13	Capacity and schedule	Record actual time, tools, funding, staffing, and schedule limits.
AR3-14	Selected profile	State the selected profile and the controls it activates or scales.
AR3-15	Review trigger	State what change requires the profile to be rerun.

28.1 Blank AR-003 form

Field	Project entry	Status
AR3-01 - Controlling authorization	[Enter: Reference AR-002 identifier, version, disposition, limits, and review trigger.]	Open
AR3-02 - Project class	[Enter: Select the project class and explain any mixed class.]	Open
AR3-03 - Operating scale	[Enter: Solo/founder-led, small internal team, partnered, or institutionally distributed.]	Open
AR3-04 - Consequence profile	[Enter: Describe consequence, reversibility, novelty, reader vulnerability, future dependence, and rate of change.]	Open
AR3-05 - Audience and reliance	[Enter: Identify intended and foreseeable readers, their situation, and the reliance the project may invite.]	Open
AR3-06 - Medium and circulation	[Enter: Identify likely media, detached circulation, public/internal/restricted status, and distribution conditions.]	Open
AR3-07 - Access and protected context	[Enter: Record privacy, confidentiality, cultural authority, consent, privilege, security, and access limits.]	Open
AR3-08 - Role combination	[Enter: Identify which canonical roles may be combined and what independence or conflict limits remain visible.]	Open
AR3-09 - Evidence burden	[Enter: State source volume, verification burden, currency, provenance, and evidence restrictions.]	Open
AR3-10 - Accessibility burden	[Enter: Identify accessibility functions, formats, reader constraints, and human validation needs.]	Open
AR3-11 - Review burden	[Enter: Identify review classes, competencies, independence needs, and conditions that cannot be simulated.]	Open
AR3-12 - Maintenance burden	[Enter: Identify likely change rate, dependency monitoring, correction path, and foreseeable owner burden.]	Open
AR3-13 - Capacity and schedule	[Enter: Record actual time, tools, funding, staffing, and schedule limits.]	Open

Field	Project entry	Status
AR3-14 - Selected profile	[Enter: State the selected profile and the controls it activates or scales.]	Open
AR3-15 - Review trigger	[Enter: State what change requires the profile to be rerun.]	Open

29. Authorized scope control

Scope is the portion of the recognized need that the recorded authority, evidence, capacity, relationships, and maintenance conditions permit the Institute to undertake. Scope control belongs inside AR-004 and must remain traceable to AR-001 through AR-003.

Control	Required content
Governing need	The AR-001 need this work addresses.
Authorized objective	The result the project is permitted to pursue.
Included work	Subjects, readers, situations, functions, media, and activities included.
Excluded work	Matters intentionally outside the project.
Non-claims	Authority, expertise, representation, adoption, impact, or outcomes the project will not claim.
Deliverable boundary	The maximum artifact or service state authorized in this cycle.
Success condition	Observable completion or function evidence within scope.
Defeat condition	A result that requires narrowing, pause, transfer, or stop.
Material-change triggers	Changes that require AR-002, AR-003, or AR-004 to be rerun.

30. Authority Map

The Authority Map identifies which actor or source authorizes each consequential project act. It distinguishes the Institute's internal authorization from external, Tribal, governmental, professional, family, community, cultural, contractual, or source-governed authority.

Field	Project entry
Authority item	[Enter: The decision, action, claim, access, use, publication, or maintenance act requiring authority.]
Claimed basis	[Enter: Law, policy, delegated responsibility, ownership, permission, invitation, contract, community authorization, or bounded prototype decision.]
Authority holder	[Enter: The person, body, rights holder, institution, or source that can supply the authority.]
Verification state	[Enter: Claimed, located, opened, confirmed, disputed, unavailable, or not applicable.]
Authorized scope	[Enter: Exactly what the basis permits.]
Limit / non-implication	[Enter: What the basis does not permit or prove.]
Required evidence	[Enter: Record, correspondence, decision, consent, policy, or other support.]
Owner and review trigger	[Enter: Who must resolve or monitor the item and when it must be revisited.]

30.1 Authority Map register

ID	Act or claim	Basis / holder	Verification and scope	Limit / trigger
AU-01	[Entry]	[Entry]	[Entry]	[Entry]
AU-02	[Entry]	[Entry]	[Entry]	[Entry]
AU-03	[Entry]	[Entry]	[Entry]	[Entry]

31. Dependency Register

A dependency is a condition the project does not fully control but on which scope, accuracy, access, review, release, operation, maintenance, or correction depends. Dependencies are not converted into assumptions merely because the project is important or delayed.

ID	Dependency and type	Owner / status	Consequence if absent	Fallback / review trigger
DP-01	[Authority / source / relationship / expertise / access / technology / funding / timing / maintenance]	[Entry]	[Entry]	[Entry]
DP-02	[Entry]	[Entry]	[Entry]	[Entry]
DP-03	[Entry]	[Entry]	[Entry]	[Entry]

Dependency rule: Where a dependency is a precondition to responsible work, the plan must pause, narrow, transfer, or adopt an authorized fallback. The absence of a dependency cannot be repaired by stronger prose.

32. Boundary Register

A boundary states what the project, artifact, operator, reviewer, or reader may not infer or do. The register also records the bounded assistance that remains permissible so that limits do not become excuses for withholding authorized explanation, preparation, documentation, navigation, or recovery support.

ID	Boundary and basis	Prohibited inference or act	Permitted bounded assistance	Display point / owner
BD-01	[Entry]	[Entry]	[Entry]	[Entry]
BD-02	[Entry]	[Entry]	[Entry]	[Entry]
BD-03	[Entry]	[Entry]	[Entry]	[Entry]

33. Qualitative Risk Register

Risk review is consequence-scaled and qualitative. A numeric score is not required and shall not substitute for describing the failure mode, affected party, consequence, prevention, detection, response, ownership, and residual uncertainty.

ID	Failure mode / affected party	Consequence and uncertainty	Prevent / detect	Response / owner / residual status
RK-01	[Entry]	[Entry]	[Entry]	[Entry]
RK-02	[Entry]	[Entry]	[Entry]	[Entry]
RK-03	[Entry]	[Entry]	[Entry]	[Entry]
Risk factor		Required question		
Consequence		What harm, loss, exclusion, confusion, rights effect, authority error, or institutional burden could occur?		
Reversibility		Can the effect be corrected, or could reliance make repair difficult or impossible?		
Reader vulnerability		Could affected readers face urgent, constrained, unequal, or high-stakes conditions?		

ID	Failure mode / affected party	Consequence and uncertainty	Prevent / detect	Response / owner / residual status
	Novelty and uncertainty		What has not been tested, verified, or observed?	
	Future dependence		Will other artifacts, decisions, or services rely on this work?	
	Rate of change		How quickly can law, policy, contacts, evidence, routes, or institutional conditions become stale?	
	Maintenance capacity		Can the Institute actually monitor and correct what it releases?	

34. AR-004 - Work Plan / Authorized Project Charter

Canonical identity: AR-004 Work Plan. Origin: OP-004 Work Planning. Owner: RL-001 Process Steward. Registered state: In Development. This manual uses “Authorized Project Charter” as a functional subtitle, not as a replacement canonical name.

Field ID	Field	Instruction
AR4-01	Project identity	Stable identifier, working title, class, owner, version, and status.
AR4-02	Controlling records	AR-001, AR-002, and AR-003 identifiers and versions.
AR4-03	Governing question	The principal question or institutional work the project must answer or perform.
AR4-04	Authorized objective	The bounded result authorized for this cycle.
AR4-05	Included scope	Subjects, audiences, situations, functions, media, and activities included.
AR4-06	Excluded scope and non-claims	What the project will not do, represent, decide, or claim.
AR4-07	Deliverables and states	Each planned artifact, its current status, owner, and authorized maximum state.
AR4-08	Roles and combination limits	Canonical roles, responsible people, combined roles, conflicts, and independence limits.
AR4-09	Authority Map	Reference or embed the current Authority Map.
AR4-10	Dependency Register	Reference or embed the current dependencies, owners, fallback, and triggers.
AR4-11	Boundary Register	Reference or embed the current boundaries and display obligations.
AR4-12	Risk Register	Reference or embed the current qualitative risks and controls.
AR4-13	Source and evidence plan	What evidence must be collected, opened, read, verified, restricted, and maintained.
AR4-14	Work sequence	Ordered tasks, gates, owners, and completion conditions.
AR4-15	Communication-design trigger	When OP-006 / AR-006 begins and what must be ready.
AR4-16	Review and accessibility plan	Required competencies, independence, accessibility tests, and unavailable review.
AR4-17	Maintenance and correction assumption	Provisional owner, change rate, correction route, and retirement expectation.
AR4-18	Stop / return conditions	Conditions requiring pause, referral, transfer, standing review, or scope revision.

Field ID	Field	Instruction
AR4-19	Completion condition	Evidence that work planning is complete enough to begin source preparation and design.
AR4-20	Authorization	Decision, authority holder, date, limits, next owner, and review trigger.

34.1 Blank AR-004 form

Field	Project entry	Status
AR4-01 - Project identity	[Enter: Stable identifier, working title, class, owner, version, and status.]	Open
AR4-02 - Controlling records	[Enter: AR-001, AR-002, and AR-003 identifiers and versions.]	Open
AR4-03 - Governing question	[Enter: The principal question or institutional work the project must answer or perform.]	Open
AR4-04 - Authorized objective	[Enter: The bounded result authorized for this cycle.]	Open
AR4-05 - Included scope	[Enter: Subjects, audiences, situations, functions, media, and activities included.]	Open
AR4-06 - Excluded scope and non-claims	[Enter: What the project will not do, represent, decide, or claim.]	Open
AR4-07 - Deliverables and states	[Enter: Each planned artifact, its current status, owner, and authorized maximum state.]	Open
AR4-08 - Roles and combination limits	[Enter: Canonical roles, responsible people, combined roles, conflicts, and independence limits.]	Open
AR4-09 - Authority Map	[Enter: Reference or embed the current Authority Map.]	Open
AR4-10 - Dependency Register	[Enter: Reference or embed the current dependencies, owners, fallback, and triggers.]	Open
AR4-11 - Boundary Register	[Enter: Reference or embed the current boundaries and display obligations.]	Open
AR4-12 - Risk Register	[Enter: Reference or embed the current qualitative risks and controls.]	Open
AR4-13 - Source and evidence plan	[Enter: What evidence must be collected, opened, read, verified, restricted, and maintained.]	Open
AR4-14 - Work sequence	[Enter: Ordered tasks, gates, owners, and completion conditions.]	Open
AR4-15 - Communication-design trigger	[Enter: When OP-006 / AR-006 begins and what must be ready.]	Open
AR4-16 - Review and accessibility plan	[Enter: Required competencies, independence, accessibility tests, and unavailable review.]	Open
AR4-17 - Maintenance and correction assumption	[Enter: Provisional owner, change rate, correction route, and retirement expectation.]	Open
AR4-18 - Stop / return conditions	[Enter: Conditions requiring pause, referral, transfer, standing review, or scope revision.]	Open

Field	Project entry	Status
AR4-19 - Completion condition	[Enter: Evidence that work planning is complete enough to begin source preparation and design.]	Open
AR4-20 - Authorization	[Enter: Decision, authority holder, date, limits, next owner, and review trigger.]	Open

35. Pass 2 completion gate

- AR-003 reflects actual scale, capacity, audience, access, review, accessibility, and maintenance burden.
- AR-004 remains within AR-002 and carries every authorization limitation forward.
- Scope can be distinguished from the broader recognized need.
- Each consequential act has an authority basis or is marked unresolved.
- Preconditions are recorded as dependencies rather than favorable assumptions.
- Boundaries state both prohibited overreach and permitted bounded assistance.
- Material risks have owners, controls, and stop or correction routes.
- The project has an ordered work sequence and a defined completion condition.
- The next step is OP-005 Source and Evidence Preparation, not immediate drafting.

Valid Pass 2 dispositions: Proceed to source preparation; proceed with carried limitations; narrow and revise AR-004; return to AR-002 or AR-003; pause; refer; transfer; or stop with standing preserved.

Part VIII - Source Readiness and Book II Communication-Design Implementation

36. Pass 3 purpose and controlling sequence

Pass 3 prepares the source basis and converts the authorized project charter into a documented communication design before substantive drafting hardens the artifact. It implements the interface OP-005 → AR-005 → OP-006 → AR-006.

Source hierarchy: Full Book II pattern specifications and the Canonical Normative Register control pattern obligations. This manual supplies selection and recording instruments. It does not replace, restate exhaustively, or independently create the 539 pattern requirements or 12 inherited requirements.

37. AR-005 - Minimum Source and Evidence Record

Canonical identity: AR-005 Source and Evidence Record. Origin: OP-005 Evidence and Source Preparation. Owner: RL-006 Evidence Steward. Registered state: In Development. Access is governed by source and access status.

The design pass may begin only when the project has enough source readiness to identify what the artifact may responsibly say, what it may not say, what must remain unresolved, and which evidence or access restrictions affect structure. “Located,” “opened,” “read,” and “verified for a claim” are distinct states.

Field ID	Field	Instruction
AR5-01	Controlling work plan	Reference AR-004 identifier and version.
AR5-02	Source universe	Describe the bounded corpus or source classes required by scope.
AR5-03	Source inventory	Assign identifiers and record title, creator, date, version, and location.
AR5-04	Engagement state	Located, opened, read, extracted, verified, unread, inaccessible, or excluded.
AR5-05	Project function	Need evidence, authority evidence, substantive support, context, counterargument, method, current status, contact/pathway, or historical record.
AR5-06	Claim relation	Identify the claim, design decision, route, or limitation the source supports or fails to support.
AR5-07	Authority and provenance	Identify source authority, authorship, official status, chain of custody, or unresolved provenance.
AR5-08	Access and protected context	Record confidentiality, privacy, consent, cultural authority, privilege, security, or reuse restrictions.
AR5-09	Currency and maintenance	Record date sensitivity, update source, monitoring owner, and review trigger.
AR5-10	Contradiction and uncertainty	Record disagreements, unread sources, missing records, and claims not yet supportable.
AR5-11	Citation locator	Provide page, section, line, record, URL, or other stable locator where permitted.
AR5-12	Readiness decision	Ready for design; ready with limits; additional preparation required; transfer; pause; or stop.

37.1 Source inventory form

ID	Source identity / version	State and project function	Claim relation / locator	Authority, access, currency, uncertainty
S-001	[Entry]	[Entry]	[Entry]	[Entry]
S-002	[Entry]	[Entry]	[Entry]	[Entry]
S-003	[Entry]	[Entry]	[Entry]	[Entry]

37.2 Source-readiness test

- Every load-bearing claim or route anticipated by the charter has a support plan or is marked unresolved.
- Source status is not inflated: located is not read; read is not verified; citation is not proof of support.
- Current law, policy, contacts, deadlines, eligibility, services, and institutional roles have an official verification route where they matter.
- Protected or restricted material is governed without extraction merely to complete the form.
- Contradictory sources and missing evidence are visible.
- The design pass can identify evidence, authority, limitation, and maintenance obligations without inventing content.

38. Book II activation and foundational grammar

Book II is internal institutional infrastructure for designing public understanding. It guides construction and presentation; it does not govern mission, strategy, legal authority, or program activation. Its frozen foundational grammar is:

Foundational grammar: Question → Answerability → Communication Function → Pattern Family → Pattern → Component → Artifact

A component, layout choice, warning box, citation, button, chart, form, or visual treatment does not prove that the obligation it represents has been satisfied. Design proceeds from the governing question and answerability obligations outward, not from preferred media inward.

39. Governing question and answerability map

The design pass begins with P-001 Governing Question. The question must fit the authorized scope, evidence, medium, and maintenance capacity. It must identify the unresolved remainder when omission would create false closure.

Answerability domain	Manual selection question
Purpose	What principal question or institutional work must this artifact answer or perform?
Authority	Whose authority, permission, decision, or standing matters at each point of reliance?
Evidence	What supports the assertion, route, distinction, or decision, and how can a reader inspect that support?
Limitation	What remains outside scope, unresolved, conditional, contested, unavailable, or prohibited?
Reader	Who encounters the artifact, in what situation, with what constraints and foreseeable reliance?
Communication	What work must the artifact actually perform: orient, explain, navigate, support decision, deliberate, record, or coordinate?
Action	What may a reader or responsible actor do next, and what happens when the ordinary route fails?
Maintenance	What can become stale, who owns it, and what triggers update, correction, withdrawal, or retirement?
Record	What status, version, rationale, evidence, decision, and lineage must remain reconstructable?
Institutional Learning	What bounded evidence will return to a controlled process, profile, pattern, tool, or artifact decision?

Status of these questions: The domain names are canonical Book II vocabulary. The questions are manual implementation prompts and do not replace any controlled Book II definition or requirement.

40. Select one Primary Communication Function

P-012 One Primary Function requires the artifact's principal communication work to govern structure, patterns, components, review, and success criteria. Medium and topic do not determine function. A materially hidden function is a design failure.

Function	Central work	Principal failure test
Orientation	Enable readers to identify what they have encountered, its purpose and status, whether it applies, and where to begin.	Readers misclassify status, purpose, authority, audience, or starting point.
Explanation	Enable readers to understand a claim, distinction, process, reason, evidence path, and material limits.	The artifact creates unsupported understanding, false closure, or separation of claim from evidence and limits.
Navigation	Enable readers to identify a responsible next route, preparation step, owner, condition, and recovery path.	Readers receive an apparent route without authority, applicability, ownership, fallback, or stop condition.
Deliberation	Enable responsible comparison of reasons, options, tradeoffs, disagreement, and unresolved questions.	A predetermined result is concealed behind neutral procedure, or relevant alternatives and burdens are suppressed.
Decision Support	Support a bounded decision by an authorized actor through criteria, evidence, alternatives, limits, and a visible decision boundary.	The artifact substitutes for authority or professional judgment, or presents advice/assessment as neutral information.
Record	Preserve status, version, source, rationale, decision, change, and lineage for current use and later reconstruction.	The record cannot establish what controlled, why, when, by whom, or what changed.
Coordination	Make responsibilities, ownership, handoffs, timing, dependencies, completion, and unresolved states visible.	Work has no accountable owner, handoffs disappear, or helpers are mistaken for responsible actors.

40.1 Function selection sequence

28. Inventory the communication work the artifact will actually perform for each intended audience.
29. Select the function that best expresses the central work and determines success.
30. Identify secondary functions and subordinate, sequence, embed, layer, separate, or assign them to companion artifacts.
31. Use co-primary status only when both functions are necessary, materially compatible, and cannot responsibly be subordinated or separated.
32. Test for hidden Navigation, Decision Support, Record, Coordination, or Deliberation obligations presented as neutral Explanation or information.
33. Divide the artifact when independent questions require materially different audiences, functions, authority, evidence, or review.

41. Pattern selection and dependency control

The initial Book II registry contains 20 patterns. The registry controls identity, lifecycle, risk, primary function, and dependencies. The application cues below help an operator decide what to open; they are not substitutes for the full pattern specification.

ID / canonical name	Primary function	Lifecycle / risk	Manual application cue
P-001 - Governing Question	Orientation	Emerging / Moderate	Always for a substantial controlled artifact; identify the principal question and unresolved remainder.
P-002 - Status Before Substance	Orientation	Emerging / High	When lifecycle, artifact type, authority, currency, archive, withdrawal, or proposal status affects reliance.

ID / canonical name	Primary function	Lifecycle / risk	Manual application cue
P-003 - Authority at the Point of Reliance	Decision Support	Emerging / Critical	When a reader could act, rely, interpret, implement, or infer decision power.
P-004 - Visible Evidence Path	Explanation	Emerging / Critical	When claims, routes, decisions, or displays require inspectable support.
P-005 - Limits Beside the Claim	Explanation	Emerging / Critical	When a claim could be misunderstood without scope, conditions, exceptions, uncertainty, or unresolved remainder nearby.
P-006 - Layered Entry	Orientation	Experimental / Moderate	When complexity, audience difference, or institutional depth requires multiple layers without changing the underlying claim.
P-007 - Next Action in View	Navigation	Emerging / High	When the artifact expects movement beyond reading, including waiting, preparing, contacting, documenting, or stopping.
P-008 - Recovery Path	Navigation	Experimental / High	When the primary action can fail, delay, deny, block, become inaccessible, or become unsafe.
P-009 - Version at the Point of Use	Record	Emerging / High	When currency, supersession, detached circulation, contact data, deadlines, or maintained use matters.
P-010 - Decision and Reason Together	Record	Emerging / High	When a consequential decision, disposition, exception, or change must remain answerable.
P-011 - Source Beside the Assertion	Explanation	Emerging / High	When a reader must connect an assertion to its source without reconstructing the evidence path.
P-012 - One Primary Function	Orientation	Experimental / High	For every substantial artifact before structure and components are finalized.
P-013 - Progressive Disclosure	Explanation	Experimental / High	When information must be staged by need, consequence, or detail without hiding material limits or changing function.
P-014 - Reader Route by Situation	Navigation	Experimental / Critical	When readers in materially different situations need different routes while authority and limitations remain common.
P-015 - Preserve the Original	Record	Emerging / High	When revision, adaptation, correction, or reuse could erase the operative or evidentiary source state.
P-016 - Correction Without Erasure	Record	Emerging / High	When a public or governed artifact may require correction, withdrawal, replacement, or historical reconstruction.
P-017 - Responsibility Made Visible	Coordination	Emerging / High	When actions, dependencies, maintenance, decisions, or handoffs require a named responsible role.
P-018 - Evidence Before Display	Explanation	Emerging / Critical	Before charts, comparisons, rankings, dashboards, counts, or visual displays make evidentiary claims.
P-019 - Review Cannot Create Authority	Decision Support	Emerging / Critical	Whenever review, expert attention, participation, or endorsement could be mistaken for authorization or adoption.
P-020 - Local Adaptation With Traceability	Coordination	Experimental / High	When local authority, language, medium, capacity, accessibility, or protected context changes an artifact or process.

41.1 Canonical pattern dependencies

Pattern	Direct dependencies	Pattern	Direct dependencies
P-001	None	P-011	P-004; P-009
P-002	P-001	P-012	P-001; Communication Functions Module
P-003	P-001; P-002	P-013	P-005; P-006; P-012
P-004	P-001; P-003	P-014	P-003; P-005; P-007; P-008; P-012; P-013
P-005	P-003; P-004	P-015	P-009; P-010; P-011
P-006	P-001; P-005; P-012	P-016	P-009; P-010; P-015
P-007	P-003; P-005; P-006	P-017	P-009; P-010; P-016
P-008	P-007	P-018	P-004; P-005; P-011
P-009	P-002	P-019	P-003; P-010
P-010	P-003; P-004; P-009	P-020	P-009; P-010; P-015; P-016; P-017

Dependency rule: Selecting a downstream pattern requires review of its direct dependencies. A pattern may be inapplicable, but inapplicability must be reasoned where the omitted dependency would otherwise carry authority, evidence, status, limitation, version, action, or record obligations.

42. Shared inherited requirements checklist

ID	Force	Design-pass check
IR-001 - Authority	SHALL NOT	Represent implementation as creating authority, consent, jurisdiction, ownership, professional competence, community authorization, or decision power it does not possess.
IR-002 - Bounded assistance	SHALL NOT	Use an authority boundary to withhold explanation, preparation, documentation, navigation, or recovery assistance the artifact is authorized and designed to provide.
IR-003 - Materiality	DEFINITION	Treat a matter as material when it can reasonably change interpretation, reliance, action, authority, evidence assessment, accessibility, decision outcome, maintenance, correction, or Institutional Learning.
IR-004 - Accessibility	SHALL	Satisfy applicable Design Language and Media Profile accessibility requirements.
IR-005 - Protected context	SHALL NOT	Violate community governance, cultural authority, confidentiality, privacy, consent, law, privilege, security, or access restrictions.
IR-006 - Version identity	SHALL	Preserve sufficient version identity for use, correction, review, and authorized historical reconstruction.
IR-007 - No component substitution	SHALL NOT	Treat a component as proof that the authority, evidence, status, correction, review, recovery, or represented obligation is satisfied.
IR-008 - Proportionality	SHOULD	Scale burden to consequence, reversibility, novelty, reader vulnerability, future dependence, rate of change, and maintenance capacity.
IR-009 - Mandatory exceptions	SHALL	Document inapplicability, authorized exception, or controlling higher-order obligation for departure from an applicable SHALL or SHALL NOT, including basis, authority, scope, consequence, and review condition.

ID	Force	Design-pass check
IR-010 - Recommended departures	SHOULD	Record the reason for material departure from an applicable SHOULD when later review or maintenance may depend on it.
IR-011 - Translation integrity	SHALL	Preserve material meaning, authority, evidence, limitations, status, and action boundaries across media.
IR-012 - Maintenance	SHALL	Identify a reasonable update, review, correction, or withdrawal path when content, authority, evidence, contact, deadline, route, or dependency may become stale.

43. Structure, reader routes, and media translation

- Entry layer: identify artifact identity, purpose, status, intended audience, authority, material limits, and a usable starting point before consequential reliance.
- Working layer: give readers enough substance to assess applicability, understand the issue, act where authorized, and locate further detail.
- Evidence and record layer: preserve method, source, full conditions, rationale, version, correction, and institutional record at the depth required by purpose.
- Reader route: where situations differ materially, route by situation without hiding common authority, evidence, limitation, or recovery obligations.
- Detached-fragment control: pages, slides, cards, extracts, screenshots, charts, and exported sections that circulate independently retain enough local status, version, authority, evidence, and limitation context.
- Media translation: print, web, mobile, slides, dashboards, forms, audio, and assisted formats may alter presentation, but must preserve material meaning and action boundaries.
- Accessibility: the promised function must remain perceivable and operable without depending solely on color, hover, iconography, watermark, visual location, or inaccessible interaction.

44. Mixed-function and composite-artifact decision

Question	Proceed as one artifact when...	Separate or create companion artifacts when...
Governing question	One principal question governs all major sections.	Independent questions create different success criteria or unresolved remainders.
Audience	Readers share materially compatible situations and reliance needs.	Reader groups require materially different authority, evidence, routes, or accessibility.
Function	Secondary functions can remain subordinate, sequenced, embedded, or layered.	A secondary function becomes co-equal, hidden, or changes review obligations.
Authority	The same bounded authority supports the whole artifact.	One section performs advice, assessment, decision, or representation not authorized elsewhere.
Evidence	A coherent evidence and limitation system can govern the whole.	Different claims require incompatible source, access, confidentiality, or verification regimes.
Maintenance	One owner and correction path can keep the system coherent.	Separate change rates or owners would cause stale layers or broken correction propagation.

45. AR-006 - Design Pass Record

Canonical identity: AR-006 Design Pass Record. Origin: OP-006 Book II Design Pass. Owner: RL-004 Artifact Owner. Registered state: In Development. Access: Internal.

Field ID	Field	Instruction
AR6-01	Project and artifact identity	Project ID, artifact ID, title, version, status, owner, and proposed medium.
AR6-02	Controlling records	AR-001 through AR-005 identifiers and versions.
AR6-03	Governing question	The principal question the artifact exists to answer.

Field ID	Field	Instruction
AR6-04	Unresolved remainder	What part of the question remains unanswered or outside scope.
AR6-05	Intended readers and situations	Reader groups, situations, access conditions, vulnerabilities, and foreseeable reliance.
AR6-06	Answerability map	Applicable domains and the obligation each creates for the artifact.
AR6-07	Primary Communication Function	Select one function and state the observable success condition.
AR6-08	Secondary functions	List secondary functions and how each is subordinated, sequenced, embedded, layered, separated, or governed.
AR6-09	Hidden-function audit	State whether the artifact materially performs Navigation, Decision Support, Deliberation, Record, or Coordination beyond its declared function.
AR6-10	Composite-artifact decision	One artifact, layered artifact, companion artifacts, or divided project; include rationale.
AR6-11	Selected patterns	Pattern IDs, applicability, implementation obligation, and rationale.
AR6-12	Omitted critical/high patterns	Record inapplicability or authorized exception where material.
AR6-13	Dependency review	Confirm direct pattern dependencies or record why they are inapplicable.
AR6-14	Entry and status architecture	Where identity, status, purpose, authority, limits, audience, and starting point appear.
AR6-15	Evidence and limitation architecture	How claims connect to sources and material limits at points of reliance.
AR6-16	Action and recovery architecture	Next actions, owners, preparation, waiting, fallback, escalation, documentation, and stop conditions.
AR6-17	Reader routes and disclosure	Situation-based routes, layers, sequence of revelation, and common controls.
AR6-18	Record and lineage architecture	Version, decision rationale, original preservation, correction, supersession, withdrawal, and responsibility.
AR6-19	Evidence-before-display check	For each chart, comparison, ranking, count, or dashboard: evidentiary validity before visual encoding.
AR6-20	Review-authority boundary	How review, participation, expert input, or endorsement will be prevented from creating apparent authority.
AR6-21	Local adaptation and protected context	Traceability, local authority, language, access, privacy, and protected-context treatment.
AR6-22	Components and media profile	Planned components and media-specific implementations; no component substitution.
AR6-23	Accessibility function test plan	How intended readers will perceive, navigate, understand, and perform the promised function.
AR6-24	Detached-fragment test	What local context must remain on independently circulating pages, slides, cards, images, or excerpts.
AR6-25	Success evidence and defeat condition	What evidence supports successful function and what result requires redesign or stop.
AR6-26	Maintenance and propagation	Controlling source, owner, update triggers, and how corrections propagate across layers and media.
AR6-27	Design disposition	Proceed to AR-007; proceed with limitations; divide; return to AR-004/AR-005; pause; transfer; or stop.

Field ID	Field	Instruction
AR6-28	Owner, date, and review trigger	Responsible owner, decision date, and material-change trigger.

45.1 Blank AR-006 form

Field	Project entry	Status
AR6-01 - Project and artifact identity	[Enter: Project ID, artifact ID, title, version, status, owner, and proposed medium.]	Open
AR6-02 - Controlling records	[Enter: AR-001 through AR-005 identifiers and versions.]	Open
AR6-03 - Governing question	[Enter: The principal question the artifact exists to answer.]	Open
AR6-04 - Unresolved remainder	[Enter: What part of the question remains unanswered or outside scope.]	Open
AR6-05 - Intended readers and situations	[Enter: Reader groups, situations, access conditions, vulnerabilities, and foreseeable reliance.]	Open
AR6-06 - Answerability map	[Enter: Applicable domains and the obligation each creates for the artifact.]	Open
AR6-07 - Primary Communication Function	[Enter: Select one function and state the observable success condition.]	Open
AR6-08 - Secondary functions	[Enter: List secondary functions and how each is subordinated, sequenced, embedded, layered, separated, or governed.]	Open
AR6-09 - Hidden-function audit	[Enter: State whether the artifact materially performs Navigation, Decision Support, Deliberation, Record, or Coordination beyond its declared function.]	Open
AR6-10 - Composite-artifact decision	[Enter: One artifact, layered artifact, companion artifacts, or divided project; include rationale.]	Open
AR6-11 - Selected patterns	[Enter: Pattern IDs, applicability, implementation obligation, and rationale.]	Open
AR6-12 - Omitted critical/high patterns	[Enter: Record inapplicability or authorized exception where material.]	Open
AR6-13 - Dependency review	[Enter: Confirm direct pattern dependencies or record why they are inapplicable.]	Open
AR6-14 - Entry and status architecture	[Enter: Where identity, status, purpose, authority, limits, audience, and starting point appear.]	Open
AR6-15 - Evidence and limitation architecture	[Enter: How claims connect to sources and material limits at points of reliance.]	Open
AR6-16 - Action and recovery architecture	[Enter: Next actions, owners, preparation, waiting, fallback, escalation, documentation, and stop conditions.]	Open
AR6-17 - Reader routes and disclosure	[Enter: Situation-based routes, layers, sequence of revelation, and common controls.]	Open
AR6-18 - Record and lineage architecture	[Enter: Version, decision rationale, original preservation, correction, supersession, withdrawal, and responsibility.]	Open

Field	Project entry	Status
AR6-19 - Evidence-before-display check	[Enter: For each chart, comparison, ranking, count, or dashboard: evidentiary validity before visual encoding.]	Open
AR6-20 - Review-authority boundary	[Enter: How review, participation, expert input, or endorsement will be prevented from creating apparent authority.]	Open
AR6-21 - Local adaptation and protected context	[Enter: Traceability, local authority, language, access, privacy, and protected-context treatment.]	Open
AR6-22 - Components and media profile	[Enter: Planned components and media-specific implementations; no component substitution.]	Open
AR6-23 - Accessibility function test plan	[Enter: How intended readers will perceive, navigate, understand, and perform the promised function.]	Open
AR6-24 - Detached-fragment test	[Enter: What local context must remain on independently circulating pages, slides, cards, images, or excerpts.]	Open
AR6-25 - Success evidence and defeat condition	[Enter: What evidence supports successful function and what result requires redesign or stop.]	Open
AR6-26 - Maintenance and propagation	[Enter: Controlling source, owner, update triggers, and how corrections propagate across layers and media.]	Open
AR6-27 - Design disposition	[Enter: Proceed to AR-007; proceed with limitations; divide; return to AR-004/AR-005; pause; transfer; or stop.]	Open
AR6-28 - Owner, date, and review trigger	[Enter: Responsible owner, decision date, and material-change trigger.]	Open

45.2 Pattern applicability matrix

Pattern	Applicable?	Design location / implementation	Dependency and exception note	Test / owner
P-001 - Governing Question	[Y/N/Unresolved]	[Entry]	[Entry]	[Entry]
P-002 - Status Before Substance	[Y/N/Unresolved]	[Entry]	[Entry]	[Entry]
P-003 - Authority at the Point of Reliance	[Y/N/Unresolved]	[Entry]	[Entry]	[Entry]
P-004 - Visible Evidence Path	[Y/N/Unresolved]	[Entry]	[Entry]	[Entry]
P-005 - Limits Beside the Claim	[Y/N/Unresolved]	[Entry]	[Entry]	[Entry]
P-006 - Layered Entry	[Y/N/Unresolved]	[Entry]	[Entry]	[Entry]
P-007 - Next Action in View	[Y/N/Unresolved]	[Entry]	[Entry]	[Entry]
P-008 - Recovery Path	[Y/N/Unresolved]	[Entry]	[Entry]	[Entry]
P-009 - Version at the Point of Use	[Y/N/Unresolved]	[Entry]	[Entry]	[Entry]
P-010 - Decision and Reason Together	[Y/N/Unresolved]	[Entry]	[Entry]	[Entry]
P-011 - Source Beside the Assertion	[Y/N/Unresolved]	[Entry]	[Entry]	[Entry]

Pattern	Applicable?	Design location / implementation	Dependency and exception note	Test / owner
P-012 - One Primary Function	[Y/N/Unresolved]	[Entry]	[Entry]	[Entry]
P-013 - Progressive Disclosure	[Y/N/Unresolved]	[Entry]	[Entry]	[Entry]
P-014 - Reader Route by Situation	[Y/N/Unresolved]	[Entry]	[Entry]	[Entry]
P-015 - Preserve the Original	[Y/N/Unresolved]	[Entry]	[Entry]	[Entry]
P-016 - Correction Without Erasure	[Y/N/Unresolved]	[Entry]	[Entry]	[Entry]
P-017 - Responsibility Made Visible	[Y/N/Unresolved]	[Entry]	[Entry]	[Entry]
P-018 - Evidence Before Display	[Y/N/Unresolved]	[Entry]	[Entry]	[Entry]
P-019 - Review Cannot Create Authority	[Y/N/Unresolved]	[Entry]	[Entry]	[Entry]
P-020 - Local Adaptation With Traceability	[Y/N/Unresolved]	[Entry]	[Entry]	[Entry]

46. Book II design-pass procedure

34. Open the controlling AR-001 through AR-005 records and the current Book II source hierarchy.
35. Restate the governing question and compare it with authorized scope, source readiness, and maintenance capacity.
36. Complete the answerability map and identify material unresolved remainders.
37. Inventory the communication work the artifact will actually perform for each reader situation.
38. Select the Primary Communication Function and govern all secondary functions.
39. Decide whether one artifact, layers, companion artifacts, or divided artifacts are required.
40. Select applicable patterns from the registry and open each full specification.
41. Review direct dependencies and inherited requirements; record inapplicability or exception where required.
42. Design entry, status, authority, evidence, limits, reader routes, action, recovery, record, correction, responsibility, and local adaptation.
43. Design the accessibility and detached-fragment tests before visual or prose production hardens.
44. Define success evidence and defeat conditions for the promised communication function.
45. Complete AR-006 and record exactly one design disposition.

47. Pass 3 completion gate

- AR-005 shows what sources were actually located, opened, read, verified, restricted, disputed, or missing.
- The governing question remains within AR-004 and identifies the unresolved remainder.
- One Primary Communication Function controls the artifact, or co-primary status is explicitly justified.
- No consequential hidden function is concealed behind medium, genre, neutrality, or visual form.
- Applicable patterns and direct dependencies have been reviewed against full specifications.
- The 12 inherited requirements have been checked.
- Authority, evidence, and material limits appear at or before consequential points of reliance.
- Action units have owners, conditions, recovery, documentation, and stop routes where applicable.
- Version, original preservation, correction, and responsibility are designed before release.
- Charts and displays cannot proceed merely because data exist; evidentiary validity is assessed first.
- Review is prevented from creating apparent authority or adoption.
- Accessibility and detached-fragment testing are defined against the artifact's actual function.
- AR-006 records one valid disposition and a review trigger.

Valid Pass 3 dispositions: Proceed to AR-007 Draft Artifact; proceed with limitations; divide the artifact; return to AR-004 or AR-005; pause; transfer; or stop. A polished draft is not evidence that the design pass has been completed.

48. Portable LLM prompt for Pass 2 and Pass 3

You are assisting The Long Return Institute with a project that has completed AR-001 and AR-002. Use the supplied Constitutional Development Manual and controlling source files. First verify that the AR-002 disposition permits continued work. Construct AR-003 Operating Profile and AR-004 Work Plan without broadening authorization. Make scope, authority, dependencies, boundaries, risks, roles, completion conditions, and return triggers explicit. Then construct the minimum AR-005 Source and Evidence Record. Distinguish located, opened, read, and verified sources; do not fill missing source content from general knowledge. For OP-006, use the Book II grammar Question → Answerability → Communication Function → Pattern Family → Pattern → Component → Artifact. Select one Primary Communication Function, identify secondary and hidden functions, determine whether the work must be divided, select applicable patterns from P-001 through P-020, review direct dependencies and inherited requirements, and complete AR-006. Do not treat components, polish, citations, review, or expert participation as proof that authority, evidence, accessibility, or adoption exists. Stop at any authority, protected-context, constitutional, or genuinely non-mechanical decision and present the narrowest decision required.

49. ICWA Navigation pilot boundary after Pass 3

The ICWA Navigation pilot remains governed by its original stop condition: AR-003 through AR-006 may be used only if AR-002 records Proceed or Proceed with limitations for the exact bounded work. No design hypothesis, selected function, selected pattern, legal source, or draft navigation pathway is treated as a pilot finding until the earlier standing decision exists and the relevant sources have been opened and verified.

No automatic advancement: The importance of ICWA, kinship care, guardianship, or family need does not itself establish Institute standing, professional authority, Tribal authorization, or permission to publish a public-use navigation artifact.

Pass 2 and Pass 3 integration note

The prior conversation reported Pass 2 as integrated, but the persisted master file remained at Pass 1. This revision corrects that persistence defect by integrating Pass 2 and Pass 3 into the same controlled master document. The correction is recorded rather than silently treated as prior completion.

Part IX - Book III Operational Design and Lifecycle Control

50. Pass 4 purpose and constitutional boundary

Pass 4 converts the authorized project charter and Book II Design Pass into a governable operating arrangement. It assigns the registered processes, roles, artifact states, lifecycle controls, ownership duties, maintenance conditions, and correction routes needed before AR-007 Draft Artifact enters controlled production.

Registry restraint: Pass 4 uses the Operational Process Registry, Role Registry, and Artifact Registry adopted in IP-002. The worksheets in this Part are derived control views attached to AR-004 and AR-006. They are not a fourth registry, a new constitutional module, or a new canonical artifact.

- Book III governs the operating cycle; Book II continues to govern artifact communication design.
- No process, role, artifact, lifecycle state, or release status is created by fluent description alone.
- One responsible operator and a computer may carry the cycle, but role distinctions, conflicts, absent independence, and capacity limits remain visible.
- No drafting, review, upload, or distribution step is treated as release unless OP-010 and OP-011 are completed for an exact version.
- No artifact is treated as implemented without an actual use state and an assigned maintenance responsibility.
- No pilot is represented as validation merely because the process was followed.

51. Entry conditions and mandatory return rules

- AR-001 through AR-006 exist, are version-identified, and remain mutually consistent.
- AR-002 authorizes the exact bounded work now proposed; all conditions and standing limits remain active.
- AR-003 reflects actual scale, staffing, medium, access, risk, protected context, maintenance capacity, and review burden.
- AR-004 identifies scope, authority, dependencies, boundaries, risks, action owners, completion conditions, and stop conditions.
- AR-005 distinguishes located, opened, read, verified, restricted, disputed, and missing sources.
- AR-006 records a valid design disposition and the selected Book II function, patterns, dependencies, inherited requirements, accessibility obligations, and detached-fragment controls.
- No unresolved stop condition makes controlled production misleading or unauthorized.

Return to an earlier gate: Return to AR-002 when authority, audience, reliance, protected context, or representation changes materially. Return to AR-003 when operating capacity or risk changes. Return to AR-004 when scope, roles, dependencies, or completion conditions change. Return to AR-005 when source support changes. Return to AR-006 when the communication function, artifact architecture, medium, or reader route changes.

52. Book III operational grammar

Grammar term	Required operating decision	Canonical carrier
Institutional Need	What real problem requires institutional work?	AR-001; OP-001
Authorization	What mandate, permission, duty, or bounded prototype basis permits work?	AR-002; OP-002
Operating Profile	Under what actual scale, staffing, medium, risk, access, protected context, maintenance capacity, and review burden will work occur?	AR-003; OP-003
Operational Process	What repeatable sequence transforms the authorized need into a controlled state?	OP-004 through OP-018 as applicable
Roles and Controls	Who holds each responsibility, what authority is excluded, and what gates or stop conditions apply?	RL-001 through RL-014; AR-004/AR-006 annex
Artifact Production	What exact version is researched, designed, built, tested, and revised?	AR-007; OP-007; Book II

Grammar term	Required operating decision	Canonical carrier
Release	Who decides that what exact version enters what state of circulation or use?	AR-010 through AR-012; OP-010/OP-011
Maintenance and Recovery	Who monitors, corrects, withdraws, preserves, supersedes, or retires it?	AR-013 through AR-015 and AR-019; OP-012/013/014/018
Evidence	What use, review, accessibility, burden, maintenance, incident, or outcome evidence exists, and what can it establish?	AR-016; OP-015
Institutional Learning	What controlled object changes, under what decision, and with what limits?	AR-017/AR-018; OP-016/017

Canonical sequence: Institutional Need → Authorization → Operating Profile → Operational Process → Roles and Controls → Artifact Production → Release → Maintenance and Recovery → Evidence → Institutional Learning. Iteration is permitted, but every consequential transition must remain knowable.

53. Canonical process sequence and artifact carriers

Process / pattern	Canonical name	Artifact	Primary role	Operating result
OP-001 / OPS-001	Need Intake / Need Before Artifact	AR-001	RL-002	Name the need or end intake honestly.
OP-002 / OPS-002	Authorization Gate / Authority Before Work	AR-002	RL-003	Proceed, narrow, pause, transfer, reject, or remain unresolved.
OP-003 / OPS-003	Operating Profile Selection / Profile Before Process	AR-003	RL-001	Select actual operating conditions without simulating capacity.
OP-004 / OPS-004	Work Planning / Plan With Stop Conditions	AR-004	RL-001	Maintain scope, roles, dependencies, completion, and stop conditions.
OP-005 / OPS-005	Evidence and Source Preparation / Sources Before Claims	AR-005	RL-006	Govern source identity, verification, restriction, and limits.
OP-006 / OPS-006	Book II Design Pass / Design Pass Before Draft	AR-006	RL-004	Select function, patterns, artifact architecture, and design controls.
OP-007 / OPS-007	Draft and Build / Controlled Build	AR-007	RL-005	Build an exact controlled version from authorized plans and sources.
OP-008 / OPS-008	Accessibility and Function Test / Test the Promised Function	AR-008	RL-007	Test whether intended readers can receive or perform the promised function.
OP-009 / OPS-009	Substantive Review / Review Within Scope	AR-009	RL-008	Review a defined object under stated criteria and competence limits.
OP-010 / OPS-010	Release Decision / Release Is a Decision	AR-010	RL-009	Authorize or refuse a defined release state; review is not release.
OP-011 / OPS-011	Deployment and Distribution / Deploy With a Record	AR-011; AR-012	RL-004	Place the exact released version into its authorized use state and preserve the package.
OP-012 / OPS-012	Maintenance Monitoring / Maintenance Has an Owner	AR-013	RL-010	Assign feasible stewardship, triggers, dependencies, correction authority, and successor conditions.
OP-013 / OPS-013	Correction and Recovery / Correct Through the Dependency Chain	AR-014	RL-012	Contain and correct affected sources, derivatives, channels, readers, and records.
OP-014 / OPS-014	Preservation and Archive / Preserve the Operative State	AR-015	RL-011	Preserve what governed and what readers received, with status separation.

Process / pattern	Canonical name	Artifact	Primary role	Operating result
OP-015 / OPS-015	Evidence Capture / Capture Evidence Without Overclaiming	AR-016	RL-013	Capture bounded evidence and state inferential limits.
OP-016 / OPS-016	Institutional Learning Return / Return Learning to a Controlled Object	AR-017	RL-001	Apply a recorded finding to a named process, profile, tool, pattern, or artifact.
OP-017 / OPS-017	Local Adaptation / Adapt Locally With Traceability	AR-018	RL-014	Record local authority, differences, safeguards, burden, lineage, and change triggers.
OP-018 / OPS-018	Retirement and Successor Transition / Retire With a Successor or Recorded End	AR-019	RL-004	End active maintenance through a successor or recorded terminal disposition.

54. Mainline sequence and conditional routes

The normal production chain is OP-001 → OP-002 → OP-003 → OP-004 → OP-005 → OP-006 → OP-007 → OP-008 → OP-009 → OP-010 → OP-011 → OP-012 → OP-015 → OP-016. The following processes enter when their condition exists; they are not delayed merely because the normal chain is incomplete.

Route	Activation condition	Carrier	Control
Correction or recovery	A material defect, source change, incident, withdrawal condition, or inconsistency affects an operative or derivative object.	OP-013; AR-014	May be entered from any operative lifecycle state. Map and act through the dependency chain; preserve unresolved limits.
Preservation or archive	A release, correction, supersession, withdrawal, retirement, governance transition, or historical milestone must be reconstructable.	OP-014; AR-015	May run before, during, or after correction or retirement. Preserve operative state, lineage, access, dependencies, and status separation.
Local adaptation	Actual authority, language, accessibility, law, culture, medium, capacity, or protected context requires local variation.	OP-017; AR-018	May enter after profile selection or from a maintained state. Re-run any affected authority, source, design, test, review, release, or maintenance gate.
Retirement or successor transition	Active use or maintenance should end, or the object is superseded, merged, withdrawn, abandoned, archived-only, or unsustainable.	OP-018; AR-019	May enter from Released, Maintained, Under Correction or Recovery, Superseded, Withdrawn, Archived, or locally adapted states. A successor is preferred but not required.

55. Operational pattern-family planning map

Family	Canonical name	Processes	Artifacts	Pass 4 use
OF	Operating Foundations and Profile Control	OP-003	AR-003	Establish bounded operating conditions without simulating capacity.
IA	Intake, Authorization, and Scope	OP-001; OP-002	AR-001; AR-002	Convert a real need into authorized work or an honest stop, transfer, or unresolved state.
EP	Evidence and Production	OP-004–OP-007	AR-004–AR-007	Prepare evidence and design, then build a controlled artifact.
RR	Review and Release Readiness	OP-008–OP-010	AR-008–AR-010	Test function, accessibility, evidence, authority, and substantive quality before release.
RD	Release and Deployment	OP-011	AR-011; AR-012	Place an exact version into an authorized use state with a release record and rollback route.

Family	Canonical name	Processes	Artifacts	Pass 4 use
MC	Maintenance, Correction, and Continuity	OP-012–OP-014; OP-018	AR-013–AR-015; AR-019	Maintain, correct, preserve, supersede, withdraw, archive, and retire with continuity.
EL	Evidence, Evaluation, and Learning	OP-015; OP-016	AR-016; AR-017	Capture bounded evidence and return learning to a named controlled object.
AP	Adaptation and Implementation Profiles	OP-017	AR-018	Localize under actual authority while preserving lineage and safeguards.

56. Role allocation and solo-operation doctrine

Roles are reusable responsibilities, not assumed staffing positions. One person may hold several roles at prototype scale. Each role must nevertheless be separately assigned, bounded, and recorded so that missing authority, competence, access, resources, or independence cannot be hidden by role combination.

ID	Role	Positive responsibility	Authority boundary	Solo treatment
RL-001	Process Steward	Maintains process, dependencies, triggers, and learning return.	Does not automatically possess subject-matter or release authority.	May combine with RL-002 and RL-004; conflicts visible.
RL-002	Intake Owner	Receives/classifies needs and creates AR-001.	Cannot authorize work by receiving a request.	May combine with RL-001.
RL-003	Authority Holder or Authorizing Body	Supplies actual authority, permission, duty, or prototype basis.	Cannot be simulated by author, editor, or reviewer.	Founder may self-authorize only bounded internal Institute prototypes.
RL-004	Artifact Owner	Owens continuing status, maintenance, and successor relation.	Not automatically author, reviewer, Release Authority, or copyright holder.	May combine with RL-005/RL-010; distinctions remain.
RL-005	Author or Builder	Researches, drafts, designs, assembles, tests, and revises.	Authorship cannot create authority or independent review.	May combine with RL-004; self-review labeled.
RL-006	Evidence Steward	Maintains source identity, verification, restrictions, and evidence records.	Citation or location does not equal verified support.	May combine with RL-005; limitations visible.
RL-007	Accessibility Reviewer	Tests accessibility against actual function and medium.	Automated or self-review is not independent human validation.	Self-review only when labeled and bounded.
RL-008	Substantive Reviewer	Reviews defined object within scope, criteria, competence, access, and independence conditions.	Review does not create authority, adoption, or implementation responsibility.	Independence-sensitive; self-review disclosed.
RL-009	Release Authority	Authorizes exact artifact/version for specified circulation or use.	Approval scope must be recorded; authority may be absent.	Founder may authorize internal Institute release only.
RL-010	Maintainer	Monitors currency, dependencies, access, contacts, triggers, and correction preparation.	Requires feasible access, schedule, sources, and authority.	May combine with RL-004.
RL-011	Custodian or Archivist	Preserves states, lineage, access classification, and retention records.	Custody does not make a record current or public.	May combine with RL-004 under solo operation.
RL-012	Action Owner	Owens completion, transfer, escalation, containment, or closure of consequential action.	Helpers do not replace the Action Owner.	May combine with RL-010 or RL-001.
RL-013	Pilot or Evaluation Lead	Defines evidence cycle and inferential limits.	Process completion does not prove impact or validation.	May combine with RL-006; confidence limits explicit.
RL-014	Local Adaptation Steward	Maintains local authority, lineage, differences, safeguards, and canonical-change monitoring.	Compatibility review does not create local authorization.	May combine with RL-004 in bounded context.

Solo-operation record: Do not invent a separate person merely to fill a role. Record the same named operator in every role actually held, mark self-review, identify absent independence, and narrow, pause, transfer, or stop when the missing

separation is material.

57. Role assignment and conflict-disclosure form

Role	Holder	Assignment state	Authority / competence	Conflict / handoff
RL-001 - Process Steward	[Name or body]	[Assigned / combined / external / absent]	[Authority and competence actually held]	[Conflict, missing independence, or handoff]
RL-002 - Intake Owner	[Name or body]	[Assigned / combined / external / absent]	[Authority and competence actually held]	[Conflict, missing independence, or handoff]
RL-003 - Authority Holder or Authorizing Body	[Name or body]	[Assigned / combined / external / absent]	[Authority and competence actually held]	[Conflict, missing independence, or handoff]
RL-004 - Artifact Owner	[Name or body]	[Assigned / combined / external / absent]	[Authority and competence actually held]	[Conflict, missing independence, or handoff]
RL-005 - Author or Builder	[Name or body]	[Assigned / combined / external / absent]	[Authority and competence actually held]	[Conflict, missing independence, or handoff]
RL-006 - Evidence Steward	[Name or body]	[Assigned / combined / external / absent]	[Authority and competence actually held]	[Conflict, missing independence, or handoff]
RL-007 - Accessibility Reviewer	[Name or body]	[Assigned / combined / external / absent]	[Authority and competence actually held]	[Conflict, missing independence, or handoff]
RL-008 - Substantive Reviewer	[Name or body]	[Assigned / combined / external / absent]	[Authority and competence actually held]	[Conflict, missing independence, or handoff]
RL-009 - Release Authority	[Name or body]	[Assigned / combined / external / absent]	[Authority and competence actually held]	[Conflict, missing independence, or handoff]
RL-010 - Maintainer	[Name or body]	[Assigned / combined / external / absent]	[Authority and competence actually held]	[Conflict, missing independence, or handoff]
RL-011 - Custodian or Archivist	[Name or body]	[Assigned / combined / external / absent]	[Authority and competence actually held]	[Conflict, missing independence, or handoff]
RL-012 - Action Owner	[Name or body]	[Assigned / combined / external / absent]	[Authority and competence actually held]	[Conflict, missing independence, or handoff]
RL-013 - Pilot or Evaluation Lead	[Name or body]	[Assigned / combined / external / absent]	[Authority and competence actually held]	[Conflict, missing independence, or handoff]
RL-014 - Local Adaptation Steward	[Name or body]	[Assigned / combined / external / absent]	[Authority and competence actually held]	[Conflict, missing independence, or handoff]
Combination		Required disclosure or control		
RL-003 Authority Holder + any production/review role		Authority must be independently real; combination cannot manufacture it.		
RL-005 Author + RL-007 Accessibility Reviewer		Allowed only as labeled self-test; does not establish independent validation.		
RL-005 Author + RL-008 Substantive Reviewer		Allowed only as labeled self-review; unresolved external review need remains visible.		
RL-004 Artifact Owner + RL-009 Release Authority		Permitted for bounded internal release where actual authority exists; scope must be explicit.		
RL-006 Evidence Steward + RL-005 Author		Permitted, but source verification limits and motivated-selection risk must be disclosed.		
RL-010 Maintainer + RL-012 Action Owner		Permitted where the operator has actual capacity and correction authority.		
RL-011 Custodian + RL-004 Artifact Owner		Permitted, but current-use status and historical custody must remain separate.		
RL-013 Evaluation Lead + production roles		Permitted for a bounded pilot; evidence limits and lack of independent evaluation must be stated.		

58. Artifact planning architecture

The artifact plan identifies which canonical artifacts exist, which are required next, which are conditional, and who owns each state. It does not require all nineteen artifacts at equal depth. It does require every applicable artifact identity and lifecycle duty to remain knowable.

ID	Artifact	Origin	Owner	Pass 4 planning rule
AR-001	Intake Record	OP-001	RL-002	Exists before authority.
AR-002	Authorization Record	OP-002	RL-003	Exists before consequential work.
AR-003	Operating Profile	OP-003	RL-001	Current operating conditions.
AR-004	Work Plan	OP-004	RL-001	Maintained charter and control record.
AR-005	Source and Evidence Record	OP-005	RL-006	Maintained through drafting, review, and correction.
AR-006	Design Pass Record	OP-006	RL-004	Controls Book II architecture and design disposition.
AR-007	Draft Artifact	OP-007	RL-004	Exact controlled development version.
AR-008	Accessibility and Function Test Record	OP-008	RL-007	Required before release where function is claimed.
AR-009	Substantive Review Record	OP-009	RL-008	Required at risk-proportionate depth; scope explicit.
AR-010	Release Decision Record	OP-010	RL-009	Required for every defined release state.
AR-011	Released Artifact	OP-011	RL-004	Exact version entering use/circulation.
AR-012	Release Package	OP-011	RL-004	Sources, status, instructions, distribution, and rollback record.
AR-013	Maintenance Record	OP-012	RL-010	Required while artifact remains in use or available.
AR-014	Correction and Recovery Record	OP-013	RL-012	Conditional on defect, incident, inconsistency, or withdrawal condition.
AR-015	Preservation Package	OP-014	RL-011	Conditional at release and material state transitions.
AR-016	Evidence Record	OP-015	RL-013	Required for pilot/use claims; inferential limits explicit.
AR-017	Learning Decision Record	OP-016	RL-001	Required before evidence changes a controlled object.
AR-018	Adaptation Record	OP-017	RL-014	Conditional on local variation.
AR-019	Retirement Record	OP-018	RL-004	Required when active maintenance ends.

59. Project artifact-plan form

Artifact	Applicability	Version / trigger	Responsible holder	Lifecycle control
AR-001 - Intake Record	[Exists / required / conditional / N/A]	[Version or planned trigger]	[RL-002 holder]	[Access / maintainer / review / retirement note]
AR-002 - Authorization Record	[Exists / required / conditional / N/A]	[Version or planned trigger]	[RL-003 holder]	[Access / maintainer / review / retirement note]
AR-003 - Operating Profile	[Exists / required / conditional / N/A]	[Version or planned trigger]	[RL-001 holder]	[Access / maintainer / review / retirement note]
AR-004 - Work Plan	[Exists / required / conditional / N/A]	[Version or planned trigger]	[RL-001 holder]	[Access / maintainer / review / retirement note]

Artifact	Applicability	Version / trigger	Responsible holder	Lifecycle control
AR-005 - Source and Evidence Record	[Exists / required / conditional / N/A]	[Version or planned trigger]	[RL-006 holder]	[Access / maintainer / review / retirement note]
AR-006 - Design Pass Record	[Exists / required / conditional / N/A]	[Version or planned trigger]	[RL-004 holder]	[Access / maintainer / review / retirement note]
AR-007 - Draft Artifact	[Exists / required / conditional / N/A]	[Version or planned trigger]	[RL-004 holder]	[Access / maintainer / review / retirement note]
AR-008 - Accessibility and Function Test Record	[Exists / required / conditional / N/A]	[Version or planned trigger]	[RL-007 holder]	[Access / maintainer / review / retirement note]
AR-009 - Substantive Review Record	[Exists / required / conditional / N/A]	[Version or planned trigger]	[RL-008 holder]	[Access / maintainer / review / retirement note]
AR-010 - Release Decision Record	[Exists / required / conditional / N/A]	[Version or planned trigger]	[RL-009 holder]	[Access / maintainer / review / retirement note]
AR-011 - Released Artifact	[Exists / required / conditional / N/A]	[Version or planned trigger]	[RL-004 holder]	[Access / maintainer / review / retirement note]
AR-012 - Release Package	[Exists / required / conditional / N/A]	[Version or planned trigger]	[RL-004 holder]	[Access / maintainer / review / retirement note]
AR-013 - Maintenance Record	[Exists / required / conditional / N/A]	[Version or planned trigger]	[RL-010 holder]	[Access / maintainer / review / retirement note]
AR-014 - Correction and Recovery Record	[Exists / required / conditional / N/A]	[Version or planned trigger]	[RL-012 holder]	[Access / maintainer / review / retirement note]
AR-015 - Preservation Package	[Exists / required / conditional / N/A]	[Version or planned trigger]	[RL-011 holder]	[Access / maintainer / review / retirement note]
AR-016 - Evidence Record	[Exists / required / conditional / N/A]	[Version or planned trigger]	[RL-013 holder]	[Access / maintainer / review / retirement note]
AR-017 - Learning Decision Record	[Exists / required / conditional / N/A]	[Version or planned trigger]	[RL-001 holder]	[Access / maintainer / review / retirement note]
AR-018 - Adaptation Record	[Exists / required / conditional / N/A]	[Version or planned trigger]	[RL-014 holder]	[Access / maintainer / review / retirement note]
AR-019 - Retirement Record	[Exists / required / conditional / N/A]	[Version or planned trigger]	[RL-004 holder]	[Access / maintainer / review / retirement note]

60. Lifecycle state control

ID	State	Definition	Minimum carrier
ST-01	Proposed	Need identified; no authorization yet.	AR-001
ST-02	Authorized	Bounded authority to proceed recorded.	AR-002/AR-003
ST-03	In Development	Production work active.	AR-004–AR-007
ST-04	In Review	Defined object under bounded review.	AR-008/AR-009
ST-05	Release Ready	Internal conditions satisfied; release not yet occurred.	AR-010 pending decision
ST-06	Released	Artifact in defined state of use or circulation.	AR-011/AR-012
ST-07	Maintained	Ownership and review triggers active.	AR-013
ST-08	Under Correction or Recovery	Material defect or use failure being addressed.	AR-014
ST-09	Superseded	Successor controls ordinary use.	Successor relation + AR-015/AR-019 as applicable

ID	State	Definition	Minimum carrier
ST-10	Withdrawn	Ordinary reliance no longer authorized.	AR-014/AR-015/AR-019 as applicable
ST-11	Archived	Retained for authorized history, evidence, or accountability.	AR-015
ST-12	Retired	Active institutional maintenance ended under recorded disposition.	AR-019

- Every consequential state transition SHALL identify the exact object and version, prior state, new state, authority, date, responsible role, reason, dependencies, and resulting public or internal status.
- In Review is not Release Ready. Release Ready is not Released. Released is not evidence of effectiveness. Archived is not current. Withdrawn is not erased. Retired is not necessarily destroyed.
- A project MAY iterate backward to an earlier state, but the return and controlling reason remain recorded.
- An object may enter Under Correction or Recovery from any operative state when a material condition requires it.
- Superseded, Withdrawn, Archived, and Retired states require discoverable status separation so an obsolete object cannot silently continue as current.

Transition field	Project entry
Object / version	[Stable identifier and exact version]
Prior state	[ST-__]
New state	[ST-__]
Effective date/time	[Date/time or condition]
Authority / decision source	[Named authority and record]
Responsible role-holder	[Name and RL-ID]
Reason and evidence	[What supports the transition; limits]
Affected dependencies	[Sources, derivatives, channels, readers, records]
Use and reliance status	[What is now permitted, prohibited, or unresolved]
Next trigger	[Review, maintenance, correction, preservation, successor, or retirement]

61. Ownership and responsibility architecture

Responsibility	Controlling question	Role	Continuing duty	Primary record
Authority Holder	May the work or release occur?	RL-003	Authority basis, limits, review trigger	AR-002; AR-018 where local authority applies
Process Steward	Is the process maintained and learning returned?	RL-001	Process dependencies, triggers, controlled revisions	AR-003; AR-004; AR-017
Artifact Owner	What is the artifact's continuing institutional state?	RL-004	Status, lifecycle, maintainer, successor, release package	AR-006; AR-007; AR-011/012; AR-019
Author or Builder	Who constructs the controlled version?	RL-005	Drafting/build record, unresolved conditions, version integrity	AR-007
Evidence Steward	What supports each consequential claim and what remains unverified?	RL-006	Source identity, verification, restriction, evidence limits	AR-005
Release Authority	Who authorizes the exact release state?	RL-009	Scope, audience, version, conditions, refusal or release decision	AR-010
Maintainer	Who remains responsible while the artifact is available or in use?	RL-010	Monitoring, updates, dependencies, review triggers, correction preparation	AR-013
Action Owner	Who must complete or close a consequential response?	RL-012	Containment, correction, transfer, escalation, closure	AR-014

Responsibility	Controlling question	Role	Continuing duty	Primary record
Custodian or Archivist	Who preserves operative and historical states?	RL-011	Lineage, access, retention, discoverability, status separation	AR-015
Evaluation Lead	Who controls evidence capture and inferential limits?	RL-013	Methods, sample/context, burden, incidents, limits	AR-016
Adaptation Steward	Who maintains local variation and canonical lineage?	RL-014	Authority, differences, safeguards, change monitoring	AR-018

Meaning of ownership: Artifact Owner is an operational responsibility for status, maintenance, and successor relation. It does not by itself establish copyright, cultural ownership, governmental authority, control over community knowledge, or authority to speak for another person or institution.

62. Maintenance architecture

Maintenance begins as a release condition, not as an afterthought. Before OP-010 can authorize release, the project must show that the intended availability period, sources, dependencies, contacts, access, correction route, capacity limit, and successor condition are feasible.

AR-013 planning field	Project entry
Maintained object	[Enter: Exact artifact, version, channel, and use state.]
Artifact Owner	[Enter: Named RL-004 holder responsible for continuing institutional status.]
Maintainer	[Enter: Named RL-010 holder with actual access, time, competence, and authority.]
Maintenance scope	[Enter: What may be updated administratively; what requires new evidence, design, review, or release.]
Source dependencies	[Enter: Legal, policy, research, contact, data, program, technical, or institutional sources that may change.]
Monitoring method	[Enter: How changes, incidents, broken access, outdated contacts, or reader problems will be detected.]
Review triggers	[Enter: Dates and conditions requiring review; include material source, authority, audience, medium, and use-state changes.]
Correction authority	[Enter: Who may contain, label, withdraw, correct, restore, or escalate.]
Distribution inventory	[Enter: Where the artifact and derivatives exist; who can replace, label, or remove them.]
Capacity limit	[Enter: What maintenance the current operator can and cannot sustain.]
Successor condition	[Enter: Who or what assumes responsibility if the maintainer or Institute cannot continue.]
End condition	[Enter: When the artifact becomes superseded, withdrawn, archived, or retired.]
Evidence duty	[Enter: What maintenance actions, incidents, burden, and outcomes will be recorded.]
Next review	[Enter: Date or condition and responsible holder.]

- A static document still requires a maintainer if it remains publicly available or is expected to guide reliance.
- A link, contact, statute, policy, program, dataset, source, or technical dependency may trigger review even when the prose has not changed.
- Routine maintenance SHALL NOT silently expand scope, authority, audience, or reliance; material change returns to the relevant upstream gate.
- Where maintenance capacity is absent, the release must narrow, expire, transfer, remain internal, or stop rather than create an orphan artifact.

63. Correction, recovery, and dependency-chain architecture

Correction governs the institutional graph, not merely the originating file. OP-013 activates whenever a material defect, source change, incident, withdrawal condition, or inconsistency affects an active, released, maintained, preserved, or derivative object. It may be entered directly from any operative lifecycle state.

46. Receive and time-stamp the issue, incident, source change, or defect report.
47. Identify the exact affected object, version, state, audience, channel, and reliance condition.
48. Assign RL-012 Action Owner and confirm containment/correction authority.
49. Assess urgency, severity, uncertainty, protected context, and whether ordinary reliance must be limited immediately.
50. Map the dependency chain: controlling sources, canonical artifact, derivatives, summaries, slides, forms, datasets, websites, social posts, translations, archives, review tools, distribution channels, and known recipients.
51. Choose and record immediate containment: label, notify, disable, remove, pause distribution, withdraw, preserve evidence, or mark unresolved within actual authority.
52. Determine the correction route and which earlier gates must be rerun.
53. Correct every reachable affected object or record why correction is impossible, unauthorized, or incomplete.
54. Perform risk-proportionate accessibility, substantive, authority, and release review on the corrected state.
55. Preserve the prior operative state and correction lineage through AR-015.
56. Deploy the corrected or withdrawal state with a new exact record; do not overwrite history silently.
57. Close AR-014 only when affected dependencies, notices, unresolved remainders, evidence limits, and future triggers are recorded.

AR-014 field	Project entry
Issue identifier and received date	[Enter]
Reporter / discovery route	[Enter; protect identity where required]
Affected object and exact version	[Enter]
Current lifecycle and use state	[Enter]
Defect / change / incident description	[Enter without overclaiming]
Urgency and potential reader or institutional consequence	[Enter]
Action Owner and authority	[Name; RL-012; actual authority]
Immediate containment	[Action, time, channel, authority, limits]
Dependency chain	[Sources, derivatives, channels, recipients, records]
Upstream gates to rerun	[AR-002/003/004/005/006; tests/review/release]
Correction or recovery action	[Enter]
Objects corrected, labeled, withdrawn, or unreachable	[Enter each status]
Notification and distribution response	[Enter]
Preservation package	[AR-015 reference]
Corrected release / withdrawal decision	[AR-010/011/012 reference]
Unresolved remainder	[Enter]
Evidence and learning return	[AR-016/017 reference]
Closure authority, date, and next trigger	[Enter]

Correction boundary: Correction of one defect does not validate the entire artifact. Inability to reach every derivative does not authorize a false claim of complete correction. Protected context, privacy, legal limits, and actual authority may require a bounded or unresolved outcome.

64. Preservation and continuity architecture

AR-015 control	Project entry
Identity	[Enter: Exact artifact/process, identifier, version, checksum or equivalent fixed-file identity where available.]
Operative status	[Enter: What governed, what readers received, where, when, and under what release decision.]
Lineage	[Enter: Controlling sources, predecessor, successor, derivatives, adaptations, and correction relation.]
Authority and review	[Enter: Authorization, reviewers, scope, unresolved findings, release authority, and limits.]
Access classification	[Enter: Public, internal, restricted, protected, or mixed; conditions and responsible authority.]
Use-status separation	[Enter: Current, superseded, withdrawn, archive-only, or retired; visible warning against ordinary reliance where required.]
Preserved package	[Enter: Released artifact, source package, records, notices, correction history, and relevant evidence.]
Custodian and retention	[Enter: RL-011 holder, storage locations, redundancy, retention trigger, and access method.]
Discoverability	[Enter: How future operators and affected readers can locate the authoritative status without confusing archive with currency.]
Protected-context rule	[Enter: Preserve only what governing authority permits; completeness does not override protected context.]

65. Book III Operational Design Annex

Complete this derived annex before AR-007 enters controlled build. Attach it to AR-004 Work Plan and cross-reference it in AR-006 Design Pass Record. Do not assign it a new AR identifier.

Annex field	Project entry
Project and controlling versions	[Project ID; AR-001 through AR-006 versions]
Current authorized scope	[Exact bounded scope and exclusions]
Current lifecycle state	[ST-__]
Mainline processes activated	[OP-__ list and sequence]
Conditional routes anticipated	[OP-013/014/017/018 triggers or N/A]
Role allocation record	[Reference Section 57 completed matrix]
Missing competence / access / independence	[Record; state narrowing or stop response]
Artifact plan	[Reference Section 59 completed matrix]
Current and next artifact	[Exact identifier, version, state]
Artifact Owner	[RL-004 holder]
Maintainer and capacity	[RL-010 holder or release limitation]
Release Authority	[RL-009 holder or absent]
Correction Action Owner	[RL-012 holder or trigger-based assignment]
Custodian / archive route	[RL-011 holder and location]
Lifecycle transition record	[Reference Section 60]
Maintenance plan status	[Complete / conditional / release blocked]

Annex field	Project entry
Correction and dependency-chain plan status	[Complete / conditional / unresolved]
Preservation plan status	[Complete / conditional / unresolved]
Return triggers	[Authority, profile, scope, sources, design, function, access, review, release]
Pass 4 disposition	[Proceed to AR-007 / proceed with limits / return / pause / transfer / stop]
Decision owner and date	[Name, role, date]
Next review trigger	[Date or condition]

66. Pass 4 operating procedure

58. Open AR-001 through AR-006 and verify that their versions and decisions remain current.
59. Restate the authorized need, scope, operating profile, source readiness, communication function, artifact architecture, and stop conditions.
60. Map the project onto the canonical Book III grammar and identify the current lifecycle state.
61. Select the mainline operational processes and record any conditional route likely to be required.
62. Assign every active role to an actual person or body; disclose combined roles, self-review, absent independence, missing competence, and unavailable authority.
63. Complete the artifact plan, including existing, required, conditional, not-applicable, and retirement-stage artifacts.
64. Name the exact current artifact and version, the Artifact Owner, the next responsible process, and the evidence required to exit that process.
65. Complete the lifecycle transition control and identify all status distinctions that must remain visible.
66. Construct a feasible maintenance plan before assuming public or continuing availability.
67. Construct the correction, dependency-chain, preservation, and continuity routes before release pressure begins.
68. Complete the Book III Operational Design Annex and cross-reference it in AR-004 and AR-006.
69. Record exactly one Pass 4 disposition and the decision owner, limits, and next trigger.

67. Pass 4 completion gate

- The project is mapped to the canonical Book III grammar without adding a new top-level module or registry.
- The exact current process, artifact, version, and lifecycle state are knowable.
- Every active role has an actual holder or an explicit absent/unavailable state.
- Role combinations, self-review, missing independence, authority limits, competence limits, and handoff conditions are visible.
- The artifact plan uses canonical AR-001 through AR-019 identities and does not silently repurpose identifiers.
- The Artifact Owner, Release Authority, Maintainer, Correction Action Owner, and Custodian are distinguished.
- Maintenance capacity is feasible for the intended availability and reliance state, or release is narrowed, deferred, transferred, time-limited, internal, or blocked.
- Correction can reach the known dependency chain, and unreachable derivatives or recipients will remain recorded.
- Preservation separates operative history from current reliance and respects protected-context authority.
- Conditional routes for correction, archive, adaptation, and retirement have activation triggers.
- No draft, review, upload, or distribution is represented as release.
- No released or piloted state is represented as effectiveness, validation, adoption, or impact without separate evidence.
- The Book III Operational Design Annex records one valid disposition and a review trigger.

Valid Pass 4 dispositions: Proceed to AR-007 Controlled Build; proceed with limitations; return to AR-002, AR-003, AR-004, AR-005, or AR-006; divide the project or artifact; pause; transfer; or stop with standing preserved. Pass 4 completion does not authorize release.

68. Portable LLM prompt for Pass 4

You are assisting The Long Return Institute with Pass 4 of the Constitutional Development Manual. Use the supplied AR-001 through AR-006 records and the controlling Book III sources. Do not invent a new registry, module, process, role, artifact identifier, lifecycle state, authority, reviewer, or staff position. Map the project to the Book III grammar and the OP-001 through OP-018 process sequence. Assign RL-001 through RL-014 only to actual people or bodies; one person may hold several roles, but each role, conflict, self-review condition, missing independence, competence limit,

and authority limit must remain visible. Build the project artifact plan using AR-001 through AR-019 without repurposing identifiers. Identify the exact current artifact, version, lifecycle state, Artifact Owner, Release Authority, Maintainer, Correction Action Owner, Custodian, and next process gate. Design maintenance before release and correction through the full known dependency chain. Preserve operative states without confusing archive with currency. Treat local adaptation as requiring actual local authority and traceability. Treat retirement as a recorded successor or terminal disposition. Complete the Book III Operational Design Annex as a derived view attached to AR-004 and AR-006, not as a new canonical artifact. Stop at any unresolved authority, protected-context, competence, maintenance, correction, release, or genuinely non-mechanical decision and present the narrowest decision required.

69. ICWA Navigation pilot boundary after Pass 4

The ICWA Navigation pilot may use the Pass 4 instruments only after AR-002 authorizes the exact bounded work and AR-003 through AR-006 are complete for that scope. The operating plan may assign Christopher Knorr to multiple internal prototype roles, but it must not simulate Tribal authorization, legal representation, professional review, community permission, or independent validation. A public-use artifact remains blocked unless its authority, verified legal and policy sources, intended reliance, expert and community review requirements, release authority, maintenance capacity, correction route, and distribution responsibilities are actually established.

Pilot success: A Pass 4 pilot succeeds if it produces an honest operating map, including a narrow, paused, transferred, or stopped outcome. It does not succeed merely by advancing to drafting.

Part X - Controlled Build, Testing, Review, Release, and Deployment

70. Pass 5 purpose, controlling sequence, and persistence reconciliation

Pass 5 turns the authorized project design into an exact controlled artifact and governs the distinct acts of build, accessibility and function testing, substantive review, release decision, and deployment. It implements OP-007 through OP-011 and AR-007 through AR-012. The incoming master file ended at Pass 4 even though Pass 5 had previously been reported as integrated. This revision restores Pass 5 inside the canonical master and preserves that discrepancy in the Revision History rather than silently treating it as complete.

Controlling sequence

AR-004 Work Plan + AR-005 Source and Evidence Record + AR-006 Design Pass → OP-007 / AR-007 → OP-008 / AR-008 → OP-009 / AR-009 and PS-006 packet → OP-010 / AR-010 → OP-011 / AR-011 and AR-012. Build is not testing; testing is not substantive review; review is not release; release is not deployment.

71. Entry conditions and exact-object freeze

- AR-002 authorizes the exact bounded project and no material standing condition has changed.
- AR-003 through AR-006 are current, version-identified, and mutually consistent.
- The Book III Operational Design Annex identifies roles, lifecycle state, maintenance capacity, correction route, preservation route, and conditional stop conditions.
- The source basis is adequate for controlled drafting, or unresolved claims are marked so they cannot become asserted through fluency.
- The object to be built has one canonical working identifier, one version baseline, one Artifact Owner, and one Author or Builder.
- Protected-context permissions, access restrictions, and distribution boundaries are known enough to govern the build.

72. AR-007 - Draft Artifact and controlled-build record

Canonical identity: AR-007 Draft Artifact. Origin: OP-007 Draft and Build. Owner: RL-004 Artifact Owner; build performed by RL-005 Author or Builder. AR-007 is the exact controlled development version, not a general folder of drafts and not an implicit release candidate. The controlled-build record below attaches to AR-007; it does not create a new artifact identifier.

Build-control field	Required entry
Project and upstream baseline	Project ID; exact AR-002 through AR-006 versions; date checked.
Controlled object	Artifact identifier, title, medium, intended audience, Primary Communication Function, and current version.
Build authority	Authority basis and any conditions that constrain claims, features, access, or distribution.
Responsible roles	Artifact Owner; Author or Builder; Evidence Steward; accessibility contact; escalation authority.
Source baseline	Exact source inventory/version and unresolved source conditions.
Implementation environment	Software, platform, template, repository, file locations, dependencies, and access controls.
Version rule	Naming convention; version increment rule; candidate-freeze rule; who may change the controlled object.
Deviation route	How implementation deviations are classified, recorded, approved, returned upstream, or rejected.
Protected-context control	Restricted content, permissions, exclusions, redaction or separation rules, and forwarding limits.
Completion condition	What must be true before the object may enter OP-008 testing.

73. Version baseline and material-deviation register

Implementation convenience SHALL NOT silently redesign an authorized artifact. A deviation is material when it changes scope, governing question, audience, Primary Communication Function, authority, evidence burden, risk, protected

context, action boundary, medium-dependent meaning, maintenance burden, or release assumptions. Material deviations return to the relevant upstream record before continued build.

Deviation ID	Object/version	Observed change	Classification	Required route	Disposition / authority
DEV-[]	[Exact object and baseline]	[What changed or is proposed]	Editorial / implementation / design / evidence / scope / authority / protected context	Continue with record / return to AR-004, AR-005, or AR-006 / return to AR-002 / stop	[Decision, role, date, unresolved remainder]
DEV-[]	[]	[]	[]	[]	[]

74. OP-008 - Accessibility and promised-function testing

Testing asks whether intended users can perform the task the artifact promises under realistic conditions. A clean layout, valid file, automated score, or knowledgeable author review does not establish that result. Test mode, user conditions, medium, barriers, assistance, and inferential limits remain visible.

74.1 AR-008 - Accessibility and Function Test Record

AR-008 field	Project entry
Exact test object	Artifact ID, exact version/hash, medium, date, test location or environment.
Promised function	The action, understanding, navigation, decision, record, coordination, or deliberation function the artifact claims to support.
Representative tasks	Observable tasks derived from the promised function; include stop and recovery tasks where relevant.
Intended users and conditions	User characteristics relevant to function; device, bandwidth, literacy, language, disability, stress, assistance, privacy, and time conditions.
Test modes	Automated inspection; author self-test; representative-user test; accessibility specialist review; other. Label each separately.
Success criteria	What counts as completion, correct route, safe stop, correction, or failure.
Observed results	Task outcomes, time, errors, abandonment, requests for help, misunderstandings, and workarounds.
Barrier record	Barrier, affected user/task, severity, frequency, evidence, immediate containment, correction owner.
Limitations	Missing representative users, inaccessible environments, small sample, self-review, protected-context limits, or unavailable expertise.
Disposition	Proceed to bounded review; revise and retest; return upstream; pause; transfer; or stop.
Retest trigger	Material revision, medium change, new audience, new barrier, updated platform, or scheduled review.

75. OP-009 - Substantive review within scope

Substantive review is bounded by an exact object, declared criteria, reviewer capacity, evidence access, confidentiality, independence conditions, and outside-scope statement. The word reviewed SHALL NOT be used without a corresponding AR-009 and identifiable review scope. Review does not create authority, adoption, endorsement, correctness, release, or effectiveness.

75.1 AR-009 - Substantive Review Record

AR-009 field	Required entry
Review object	Exact artifact and version/hash; included companion materials.
Reviewer identity and class	Reviewer identifier, PS-006 class, relevant capacity, relationship, and any institutional authority actually held.
Accepted scope	Questions and criteria the reviewer agreed to examine.
Outside scope	Questions, authorities, evidence, implementation conditions, or protected matters not reviewed.
Access and confidentiality	PS-006 class A-E, materials supplied, use/forwarding limits, and protected-context authority.
Independence condition	Independent / internal / self-review / combined role / conflict disclosed; what this limits.

AR-009 field	Required entry
Findings	Finding ID, location, claim or function affected, rationale, severity, and evidence.
Uncertainty and dissent	Disputed findings, unresolved questions, minority view, inaccessible evidence, or competence boundary.
Reviewer recommendation	Accept; accept with modification; defer; outside scope; future edition; reject with reason; requires governance; requires architecture review.
Institute disposition	Finding-by-finding disposition, responsible owner, implementation version, and Decision Record where required.
Acknowledgment	Preference, exact wording or no acknowledgment; non-endorsement statement where needed.

76. PS-006 review-packet system

PS-006 establishes a repeatable, reciprocal, and bounded process for expert review and any later relationship progression. Reviewer class describes the accepted review relationship; package class describes how the request is prepared. Neither class creates authority outside the actual relationship.

Reviewer class	Function	Boundary
R-1 Courtesy Reader	General observations; no continuing role.	Not a subject certification, endorsement, or continuing duty.
R-2 Subject Reviewer	Reviews a defined subject within a declared scope.	Scope-specific; no inference beyond accepted questions.
R-3 Specialist Reviewer	Reviews using domain expertise and may receive confidential material.	Access and expertise are bounded; confidentiality does not expand use rights.
R-4 Institutional Reviewer	Reviews on behalf of an organization; authority and limits recorded.	Institutional review is only what the organization authorized.
R-5 Advisory Reviewer	Repeated review under an accepted advisory relationship.	No governance or editorial authority unless separately granted.
R-6 Council Reviewer	Participates in governance review.	Does not automatically receive editorial or subject-matter authority.

Package class	Required contents
Academic	Manuscript, abstract, bibliography, scope statement, and structured questions.
Professional	Executive summary, operational artifact, implementation assumptions, and targeted instrument.
Community	Plain-language purpose, limits, relevant artifact, and requested feedback.
Elder	Culturally appropriate summary, oral review option, reduced technical burden, and correction pathway.
Partner	Project overview, collaboration boundaries, requested expertise, and confidentiality terms.
Accessibility	Artifact, function statement, medium, accessibility criteria, test record, and barrier instrument.

77. Exact PS-006 review-packet manifest

Manifest item	Required control
Packet cover record	Project ID; packet ID/version; date; sender; reviewer identifier/class; package class.
Purpose and requested act	Why review is requested, exact questions, expected burden, deadline, and response options.
Exact object	Artifact title, version/hash, status, and companion files. No later version may be substituted silently.
Scope / outside-scope statement	Accepted subjects and explicit exclusions, including authority and endorsement limits.
Evidence and unresolved conditions	Source package, known disputes, missing evidence, testing limits, and open findings.
Review instrument	Instrument identifier/version; finding fields; recommendation options; return method.

Manifest item	Required control
Confidentiality	A Public; B Limited circulation; C Confidential draft; D Protected community material; E Restricted cultural or relational review.
Relationship statement	Review is distinct from advice, endorsement, co-authorship, partnership, or governance.
Acknowledgment and future contact	Preference fields; no public naming without consent; no assumed continuing duty.
Return and preservation route	How feedback is returned, secured, dispositioned, acknowledged, and preserved.

78. Finding-level disposition register

Nothing disappears. Every material finding receives a traceable disposition. Review comments do not directly alter canonical text; accepted changes enter through the applicable controlled artifact and, where required, a Decision Record.

Finding ID	Exact location	Finding / rationale	Reviewer disposition	Institute disposition	Owner / version / status
F-[]	[Object, page/section/field]	[Finding and supporting basis]	Accepted / modify / defer / outside scope / future edition / reject / governance / architecture	[Decision and reason]	[Role; target version; open/closed]
F-[]	[]	[]	[]	[]	[]

79. OP-010 - Release decision

Release is an explicit institutional decision for an exact version, audience, distribution scope, limitations, maintenance state, and rollback route. Drafting completion, testing, favorable review, upload, email transmission, or public availability through error does not substitute for AR-010.

79.1 AR-010 - Release Decision Record

AR-010 field	Required entry
Release candidate	Exact artifact ID, version/hash, candidate freeze date, and included derivatives.
Authority	RL-009 Release Authority; basis, scope, and any missing external authority.
Upstream reconciliation	AR-002 through AR-009 versions and confirmation that material changes were rerouted.
Open conditions	Unresolved findings, known barriers, evidence limits, risks, legal/professional review needs, and protected-context limits.
Release state requested	Audience, channels, access class, geography/jurisdiction where relevant, availability period, and permitted reliance.
Maintenance and correction readiness	AR-013 owner/capacity; AR-014 route; AR-015 preservation; review triggers; contact or correction channel.
Rollback or withdrawal	Who may contain, disable, label, notify, withdraw, supersede, or restore; required source package.
Disposition	Released; released with limitations; deferred; returned; withdrawn; or not authorized.
Conditions and expiry	Conditions precedent, expiration, scheduled review, or automatic withdrawal trigger.
Decision record	Decision owner, date, rationale, dissent/unresolved remainder, and next trigger.

80. Release-candidate reconciliation gate

- The exact release candidate matches the version tested and reviewed, or every material post-review change has been classified and rerouted.
- The release authority is real and distinguishable from authorship, review, hosting access, or technical ability to publish.
- The public or recipient-facing artifact states identity, version, purpose, audience, authority, limitations, source status, and correction route at the depth required by function.
- No review, assistance, or relationship is represented as endorsement without explicit consent concerning the exact version and statement.
- Maintenance, correction, preservation, and retirement are feasible for the intended release state.

- A checksum or equivalent exact-version control can distinguish the released object from drafts, successors, and unauthorized copies.

81. OP-011 - Deployment with a record

Deployment records what actually entered operational use, through which channels, for whom, when, and under what conditions. Deployment SHALL use the AR-010-authorized version and SHALL preserve the exact package needed to reproduce, verify, correct, withdraw, or supersede that state.

82. AR-011 - Released Artifact identity requirements

Release identity field	Required state
Canonical identity	Artifact ID, title, edition/version, release date, lifecycle state, and controlling source.
Exact file identity	Filename, format, byte size, SHA-256 or equivalent checksum, and generation method where material.
Authority and status	Release authority, publication class, adoption boundary, and non-implication statement.
Audience and function	Intended audience, Primary Communication Function, permitted use, and critical limits.
Access and distribution	Authorized channels, access class, forwarding or reproduction rules, and known mirrors/derivatives.
Maintenance and correction	Owner, maintainer, review trigger, correction contact/route, and current-status locator.
Successor and retirement	Supersession rule, expiration if any, archive location, and retirement trigger.

83. AR-012 - Exact Release Package

AR-012 is the preserved package from which the released state can be reconstructed. It is not merely a ZIP file. The manifest records exact file identity, authority, distribution, dependencies, maintenance, rollback, and preservation state.

Package component	Required entry
Manifest	Package ID/version; creation date; preparer; release decision reference; checksum algorithm.
Released artifact	Exact AR-011 file(s), filenames, sizes, checksums, status, and public/internal location.
Source or build package	Controlled source files, build instructions, templates, code, figures, fonts or substitutions, and environment dependencies as authorized.
Decision and review records	AR-008, AR-009, PS-006 packet metadata, finding dispositions, AR-010, and relevant Decision Records.
Distribution record	Channels, URLs/locations, recipients or classes, dates, access controls, and distribution evidence.
Maintenance package	AR-013, dependency list, review calendar, correction route, contact, and capacity limits.
Rollback package	Prior valid state, disable/remove instructions, notification templates, redirect/label plan, and responsible authority.
Preservation reference	AR-015 location, custodian, retention/access rules, and protected-context separation.
Derivatives	Web, print, mobile, slide, social, translated, excerpted, or data forms with exact relation to the canonical release.
Verification result	Manifest-to-file checksum verification; missing item or unresolved mismatch.

84. Pass 5 operating procedure

70. Open and reconcile AR-002 through AR-006; stop if authority, scope, source, or design has materially changed.
71. Freeze the AR-007 baseline and record the build environment, version rule, protected-context controls, and deviation route.
72. Build only the authorized architecture; route material deviations upstream before they become implementation facts.
73. Freeze a stable test object and complete AR-008 against realistic tasks and conditions.
74. Correct material barriers and retest; preserve failed test evidence and limitations.
75. Prepare the appropriate PS-006 package and complete bounded review through AR-009.

76. Disposition every material finding and reconcile the exact release candidate with the tested and reviewed versions.
77. Complete AR-010 through an actual Release Authority; do not infer release from readiness or upload.
78. Deploy only the authorized exact version and create AR-011, AR-012, deployment history, maintenance activation, and preservation reference.
79. Record one Pass 5 disposition and next trigger.

85. Pass 5 completion gate

- AR-007 is an exact controlled development object with a known baseline and deviation history.
- AR-008 distinguishes automated inspection, self-test, representative-user testing, and professional accessibility review.
- The promised function and test tasks are explicit; barriers and limitations are preserved.
- AR-009 identifies exact object, scope, outside scope, reviewer capacity, independence condition, evidence access, and findings.
- PS-006 reviewer class, package class, confidentiality, relationship, acknowledgment, and non-endorsement controls are complete.
- Every material finding has a traceable disposition.
- AR-010 records one decision for an exact version and does not treat review as release.
- AR-011 and AR-012 can reconstruct what actually entered use and support maintenance, correction, rollback, preservation, and retirement.
- No build, test, review, release, deployment, readership, adoption, validation, or impact claim exceeds its evidence.

86. Portable LLM prompt for Pass 5

You are assisting The Long Return Institute with Pass 5 of the Constitutional Development Manual. Use the supplied AR-002 through AR-006 records and the controlling Book III and PS-006 sources. Build one exact AR-007 version under source, version, dependency, and deviation control. Do not silently redesign the artifact. Create AR-008 by testing the artifact's promised function under stated conditions; distinguish automated inspection, self-test, representative-user testing, and professional review. Create a bounded PS-006 packet and AR-009; do not imply endorsement or authority. Disposition every material finding. Create AR-010 only through the actual Release Authority. If release is authorized, create exact AR-011 and AR-012 records with checksums, distribution evidence, maintenance, correction, rollback, preservation, and successor controls. Stop when authority, protected context, competence, evidence, or exact-version identity is insufficient.

87. ICWA Navigation pilot boundary after Pass 5

An ICWA Navigation artifact may enter Pass 5 only within the exact AR-002 authorization and only after legal-status, service, contact, deadline, and jurisdiction-sensitive claims have an official verification and maintenance route. Function testing must determine whether readers can identify their situation and the next responsible question without mistaking navigation for legal advice, eligibility determination, representation, case triage, or an official Tribal, court, agency, or professional directive. Release remains blocked where the Institute cannot maintain current law and contacts, secure appropriate review, preserve family privacy, or state the boundary in the operative artifact itself.

Part XI - Evidence Return, Learning, Adaptation, Preservation, Correction, and Retirement

88. Pass 6 purpose and controlling routes

Pass 6 governs what happens after an artifact, service state, pilot, or operational cycle produces evidence. It implements OP-015 through OP-018 and the operative use of AR-014 through AR-019. The pass prevents three failures: treating activity as impact, turning observations into ungoverned policy, and allowing local variants or retired objects to lose lineage. Evidence may support maintenance, correction, learning, adaptation, withdrawal, preservation, or retirement; it does not automatically support improvement, adoption, validation, or constitutional amendment.

Evidence-return grammar

Operative object and use state → bounded observation or record → AR-016 Evidence Record → finding with explicit inferential limits → AR-017 Learning Decision tied to a named controlled object; or AR-014 Correction and Recovery when a material defect or incident requires immediate return. AR-015 preserves the operative state. AR-018 governs authorized local variation. AR-019 governs recorded end of active maintenance.

89. Evidence classes and inferential restraint

Evidence class	What it may record	What it does not establish by itself
Source and research	What sources were found, read, verified, contradicted, restricted, or unavailable.	Truth of every claim, completeness, current legal status, or authority.
Authority	Mandate, permission, delegation, consent, role, scope, conditions, and expiry.	Legitimacy outside the recorded basis or permission to exceed scope.
Conformance	Whether a recorded procedure, field, gate, or specification was followed.	Correctness, reader benefit, adoption, validation, or impact.
Accessibility and function	Observed task performance, barriers, assistance, and medium conditions.	Universal accessibility, substantive correctness, or legal/ethical merit.
Reader comprehension and navigation	Observed understanding, route selection, errors, uncertainty, and recovery.	Representative population effect unless design supports that inference.
Operational performance	Delivery, uptime, completion, response, use state, failure, and workflow burden.	Benefit, fairness, legitimacy, or durable institutional capacity.
Maintenance and correction	Review triggers, incidents, defects, containment, correction time, dependency reach, and residual error.	Absence of undiscovered defects or effectiveness of the underlying work.
Burden and resources	Time, cost, staffing, expertise, infrastructure, and opportunity cost.	That burden is justified, sustainable, or fairly distributed.
Reviewer evidence	Findings, disagreement, uncertainty, disposition, and relationship limits.	Endorsement, adoption, authority, or general approval.

90. OP-015 - Capture evidence without overclaiming

Evidence capture begins with a defined question, object, method, and limit. The record must distinguish raw observation, reported experience, measurement, interpretation, finding, and proposed action. Protected knowledge, family information, culturally restricted material, and sensitive reviewer or participant data are not extracted merely to make the record look complete.

90.1 AR-016 - Evidence Record

AR-016 field	Required entry
Evidence cycle identity	Project ID; Evidence Record ID/version; RL-013 Pilot or Evaluation Lead; dates; status.
Exact object and use state	Artifact/service/process/profile identifier, exact version, lifecycle state, audience, channel, and actual use condition.
Question	The bounded question the evidence cycle is capable of addressing.
Evidence class and method	Class, collection method, instrument/version, sampling or selection basis, comparison where any, and source provenance.
Participants or sources	Who or what produced the evidence; inclusion/exclusion conditions; consent/authority; anonymity or identity controls.
Protected-context and privacy controls	Access class, minimization, restricted fields, storage, forwarding, retention, and deletion or non-collection rules.

AR-016 field	Required entry
Observations / measurements	Time-stamped observations, counts, narratives, incidents, barriers, use records, or other collected material.
Data quality and contradictions	Missing data, known bias, failed collection, inconsistent reports, adverse evidence, and unresolved disputes.
Finding	A bounded statement supported by the record, separated from recommendation or policy.
Inferential limits	What population, time, context, cause, benefit, validation, adoption, or impact claim cannot be made.
Confidence and uncertainty	High / moderate / low / indeterminate, with reason; do not use a label without explanation.
Action trigger	No action; maintenance; correction; additional evidence; learning return; adaptation review; release review; withdrawal; retirement; governance.
Review and retention	Who reviewed the evidence record; next trigger; storage; access; preservation or destruction authority.

91. Observation-to-finding register

Evidence item	Raw observation / source	Interpretation	Bounded finding	Prohibited inference	Action route
E-[]	[Record without conclusion]	[Reasoned interpretation]	[What the evidence supports]	[What it cannot establish]	None / maintain / AR-014 / AR-017 / AR-018 / AR-019 / governance
E-[]	[]	[]	[]	[]	[]

91.1 Claim-calibration rule

- Process followed → evidence of conformance only.
- Artifact distributed → evidence of distribution only.
- Artifact opened or viewed → evidence of access or exposure only.
- Task completed in a bounded test → evidence of observed function under those conditions only.
- Positive feedback → evidence of reported response, not necessarily comprehension, benefit, adoption, or impact.
- Repeated use → evidence of use, not necessarily informed approval, effectiveness, fairness, or legitimacy.
- No reported incident → not proof that no incident, barrier, misunderstanding, or harm occurred.

92. OP-016 - Return learning to a controlled object

A lesson becomes institutional learning only when accepted evidence is converted into a recorded decision concerning a named controlled object. General recommendations, attractive frameworks, and unassigned lessons are not implementation. The change must identify authority, dependency effects, responsible owner, status, and review trigger.

92.1 AR-017 - Learning Decision Record

AR-017 field	Required entry
Learning decision identity	Record ID/version, date, decision owner, project/cycle, and related AR-016.
Accepted finding	Exact finding adopted for decision; evidence limits and dissent carried forward.
Controlled object	Named process, role, artifact, operating profile, tool, pattern, standard, registry entry, manual section, or project record.
Authority to change	Who may change the object and under which source or Decision Record.
Dependency analysis	Upstream/downstream objects, derivatives, release states, local variants, training/tools, and review instruments affected.
Decision	Implement; implement with limits; test in bounded prototype; defer; retain current state; reject; require governance; require architecture review.
Change class	Editorial; operational; evidentiary; project-specific; registry; standard; constitutional/architecture.
Implementation plan	Owner, target version, steps, testing/review, correction/preservation needs, deadline or trigger.
Status and verification	Open / active / completed / superseded / rejected; evidence that the decision entered the controlled object.

AR-017 field	Required entry
Non-implication	Why this learning does or does not justify broader claims, policy, architecture reopening, or future-project default.

93. Controlled-object routing and architecture boundary

Finding affects	Return route	Minimum control
Current artifact defect	AR-014; return to AR-005, AR-006, AR-007, AR-008, AR-009, or AR-010 as required.	Containment, dependency map, corrected exact version, rereview/release where material, preservation.
Maintenance schedule or dependency	AR-013 update under existing authority.	No silent expansion of scope, audience, or reliance.
Operating profile	AR-003 review and affected AR-004/AR-006 update.	Authority and resource conditions remain explicit.
Project process or tool	AR-017 to the named project process/tool.	Owner, version, dependency review, implementation evidence.
Canonical registry record	Decision Record and registry change control.	Stable identifier, source hierarchy, dependency review.
Book II pattern or Book III operational specification	AR-017 plus governing change process.	Operational evidence does not itself authorize amendment.
Frozen architecture or constitutional commitment	Formal architecture-reopening or constitutional process.	Do not repair through manual prose or LLM suggestion.

94. OP-017 - Local adaptation with traceability

Local adaptation permits authorized variation for actual language, accessibility, law, culture, medium, capacity, and protected context while preserving lineage and safeguards. The preferred route is a supplement when a supplement can meet the local need without altering the canonical object. Local review does not create local authorization, and a local variant does not become canonical through use.

94.1 AR-018 - Adaptation Record

AR-018 field	Required entry
Canonical source	Canonical object identifier, exact version/hash, controlling source, status, and maintainer.
Local object	Local identifier/title/version, locality or bounded context, owner, maintainer, and status.
Local authority and standing	Authority, permission, relationship, legal/cultural/professional basis, limits, and expiry.
Operating profile	Language, audience, medium, accessibility, law/jurisdiction, capacity, protected context, infrastructure, and maintenance conditions.
Adaptation type	Supplement; translation; format/accessibility conversion; legal/jurisdictional variant; cultural/contextual adaptation; capacity-scaled process; other.
Difference record	Added, removed, replaced, reordered, translated, restricted, or locally governed content/process.
Rationale and evidence	Why each material difference is required and what evidence or authority supports it.
Safeguards preserved	Authority, evidence, limitation, correction, status, provenance, protected-context, and retirement controls unchanged or locally strengthened.
Burden and responsibility	Who bears translation, review, update, access, maintenance, correction, and synchronization burden.
Review and release	Required local/canonical review, exact release decision, distribution limits, and acknowledgment/non-endorsement.
Synchronization trigger	Canonical change, local law/policy change, source change, incident, scheduled review, or loss of authority/capacity.
Disposition	Authorized local variant; authorized supplement; revise; pause; transfer; withdraw; retire; or unresolved.

95. Canonical-to-local difference and synchronization register

Delta ID	Canonical location/version	Local change	Reason / authority	Safeguard effect	Sync trigger / owner
D-[]	[Exact source]	[Add/remove/replace/translate/reorder/restrict]	[Need, evidence, authority]	Preserved / strengthened / unresolved / prohibited	[Trigger; RL-014; date/status]
D-[]	[]	[]	[]	[]	[]

96. Preservation implementation through AR-015

Preservation protects the operative institutional state, not merely file availability. The package must allow a future authorized reader to reconstruct what governed, what readers actually received, which authority and review applied, what dependencies existed, and how the object became corrected, superseded, withdrawn, archived, or retired. Preservation does not authorize broader access to protected material.

96.1 AR-015 - Preservation Package manifest

Preservation component	Required entry
Preserved object	Artifact/process/service identifier, exact version/hash, lifecycle state, and operative dates.
Operative context	What governed, what users received, intended function, audience, channels, and known use state.
Authority and decision lineage	Authorization, review, release, adaptation, correction, withdrawal, supersession, and retirement records.
Source and dependency package	Controlling sources, build/source files, dependencies, derivatives, local variants, and known recipients or mirrors.
Correction history	Defects, incidents, containment, corrected versions, unresolved dependencies, and notices.
Current-status separation	Current successor or current-status location; labels/redirects preventing obsolete reliance.
Access and protected context	Access class, restricted components, authority, redaction/separation, use limits, and review of future access.
Custody and integrity	RL-011 Custodian, repository/location, checksum/verification, redundancy, format migration, and audit date.
Retention and disposition	Retention basis, review trigger, destruction prohibition/authority, archive-only state, and successor relation.

97. Correction return through AR-014

Evidence or a report enters AR-014 when a material defect, source change, incident, withdrawal condition, or inconsistency affects an operative or derivative object. Correction addresses the institutional dependency graph, not only the file where the problem was discovered. It may enter directly from any operative state and does not wait for a scheduled learning cycle.

Correction-return step	Required action
1. Receive and identify	Time-stamp report; exact object/version/state; audience/channel; reporter/source; access classification.
2. Assess and contain	Severity, urgency, uncertainty, protected context, reliance; label, notify, disable, remove, pause, withdraw, or preserve evidence within actual authority.
3. Map dependencies	Sources, canonical object, derivatives, summaries, slides, forms, datasets, sites, social posts, translations, archives, tools, channels, and known recipients.
4. Select upstream return	AR-002 authority; AR-003 profile; AR-004 scope/plan; AR-005 evidence; AR-006 design; AR-007 build; AR-008 test; AR-009 review; AR-010 release; AR-013 maintenance.
5. Correct and verify	Correct reachable objects; record unreachable or unauthorized dependencies; retest and rereview proportionately.
6. Preserve and redeploy	Create/update AR-015; new exact release/withdrawal state; notices, redirects, checksum, and distribution evidence.
7. Close with remainder	Affected objects, unresolved recipients/derivatives, evidence limits, residual risk, owner, next trigger, and public status.

97.1 AR-014 minimum closure fields

- Exact affected object/version and correction case identity.
- Authority, Action Owner, urgency/severity, and immediate containment.
- Root or contributing condition without overstating causation.
- Dependency graph and reach status for every known derivative or channel.
- Corrected, withdrawn, superseded, or unresolved disposition for each affected object.
- Rerun gates and evidence of exact corrected state.
- Notices, recipient/channel actions, public status, and residual reliance risk.
- AR-015 preservation reference and future review trigger.

98. OP-018 - Retirement with successor or recorded end

Retirement ends active maintenance through a recorded successor, supersession, merger, withdrawal, archive-only, or retirement disposition. A successor is preferred but is not required. Retirement SHALL NOT erase prior releases, destroy accountability records, or allow an obsolete object to remain indistinguishable from current work.

98.1 AR-019 - Retirement Record

AR-019 field	Required entry
Retiring object	Identifier, exact version/hash, current lifecycle state, owner, maintainer, and operative period.
Authority	Who may end active maintenance, basis, limits, protected-context and records obligations.
Reason	Superseded; merged; withdrawn; archive-only; no continuing need; no capacity; loss of authority; risk; abandonment; other bounded reason.
Dependencies and obligations	Readers/users, recipients, links, derivatives, local variants, contracts/commitments, correction duties, privacy, retention, and access.
Disposition	Successor controls use; merged into named object; withdrawn; archive-only; retired without successor; unresolved end state.
Successor relation	Successor identifier/version, effective date, differences, migration instructions, and authority. State none where none exists.
Notice and discoverability	Public/internal status extract, redirect/label, recipient notice, search/index treatment, and current-status locator.
Preservation	AR-015 package, custody, access, retention, correction history, and destruction prohibition/authority.
Registry and maintenance updates	Lifecycle state, owner/maintainer end, dependencies, local variants, release package, and review calendar.
Residual remainder	Unresolved dependencies, unavailable recipients, continuing harms or duties, and next responsible owner/trigger.

99. Terminal-state and successor controls

State	Meaning	Required visible control
Superseded	A named successor controls ordinary use.	Successor link, effective date, status label, preserved prior state, dependency update.
Withdrawn	Ordinary reliance is no longer authorized.	Reason to the permitted degree, date, correction/current-status route, preserved record.
Archived	Retained for authorized history, evidence, or accountability.	Archive-only label, access class, current-status separation, custodian.
Retired	Active institutional maintenance ended under recorded disposition.	AR-019, successor or no-successor statement, preserved history, discoverable status.
Unresolved end	Continuity cannot be fully completed.	What remains unresolved, why, residual risk/obligation, last responsible owner, future trigger.

100. Pass 6 operating procedure

80. Identify the exact operative object, version, use state, audience, channel, owner, and evidence question.
81. Create AR-016 with a method and inferential limit appropriate to the evidence actually available.
82. Separate observation, interpretation, finding, recommendation, and decision.
83. Route immediate material defects or incidents to AR-014 rather than waiting for general learning review.

84. For accepted learning, identify one or more named controlled objects and create AR-017 with actual change authority and dependency analysis.
85. Where local variation is needed, complete AR-018 and preserve the canonical/local relation, safeguards, burdens, and synchronization triggers.
86. Create or update AR-015 whenever a release, correction, supersession, withdrawal, adaptation milestone, governance transition, or retirement changes the operative state.
87. When active maintenance should end, complete AR-019, update registries and dependencies, preserve current-status separation, and record successor or no-successor state.
88. Verify that no evidence, learning, adaptation, preservation, correction, or retirement claim exceeds its source and authority.
89. Record one Pass 6 disposition, unresolved remainder, owner, and next trigger.

101. Pass 6 completion gate

- AR-016 identifies an exact object, question, method, evidence class, protected-context control, finding, uncertainty, and prohibited inference.
- Activity, distribution, access, use, positive feedback, testing, review, adoption, validation, benefit, and impact remain distinct claims.
- AR-017 returns accepted learning to a named controlled object with authority, dependency effects, owner, status, and verification route.
- Project learning does not silently amend a registry, standard, frozen architecture, or constitutional commitment.
- AR-018 records actual local authority, differences, unchanged safeguards, burdens, review, release, and synchronization triggers.
- AR-015 can reconstruct the operative state and keeps protected material within actual access authority.
- AR-014 reaches the known dependency chain or records every unreachable, unauthorized, or unresolved dependency.
- AR-019 ends maintenance without erasing history, accountability, correction lineage, current-status separation, or residual obligations.
- A successor is identified where one exists; absence of a successor is stated rather than concealed.
- The next institutional action is assigned or the work is closed with standing and responsibility preserved.

102. Portable LLM prompt for Pass 6

You are assisting The Long Return Institute with Pass 6 of the Constitutional Development Manual. Begin from the exact operative object, version, lifecycle state, audience, channel, authority, and use condition. Create AR-016 only from actual evidence; separate observation, interpretation, finding, recommendation, and decision, and state prohibited inferences. Do not call process completion, distribution, use, feedback, or testing “validation” or “impact” without separate support. Route immediate material defects or incidents through AR-014 and the full dependency chain. Return accepted learning through AR-017 to a named controlled object with actual change authority. Use AR-018 for authorized local variation and preserve canonical lineage, differences, safeguards, burdens, and synchronization triggers. Use AR-015 to preserve what actually governed and what readers received without expanding access to protected material. Use AR-019 when active maintenance ends; state the successor or explicitly state that none exists. Do not amend frozen architecture through manual prose or LLM suggestion. Stop when authority, privacy, protected context, evidence, competence, preservation, or dependency obligations cannot be satisfied.

103. ICWA Navigation pilot boundary after Pass 6

Evidence from an ICWA Navigation pilot may establish only what the bounded record supports—for example, whether identified readers could locate a next question, distinguish general navigation from case-specific advice, identify an official source, or recognize a stop condition under the tested circumstances. It does not by itself establish legal correctness across jurisdictions, family outcomes, community authorization, Tribal adoption, professional adequacy, or institutional impact. Case details and family information must be minimized or excluded unless actual authority and privacy protections permit collection. Any material legal-source change, misleading route, privacy incident, or advice-like use enters AR-014. Local Tribal, court, agency, or service-provider adaptation requires AR-018 and the relevant authority; Institute use does not create that authority. If maintenance, official verification, appropriate review, privacy, or correction capacity cannot continue, the artifact must narrow, withdraw, archive, transfer, or retire through AR-019 rather than remain as an orphan guide.

Part XII - Complete Artifact Library, Worked Examples, and Portable Construction Packets

104. Pass 7 purpose and constitutional boundary

Pass 7 makes the existing development system portable. It consolidates the nineteen canonical artifacts into one construction library, demonstrates how the same system behaves across materially different project classes, and supplies bounded packets that allow a human operator or assisting LLM to continue work without relying on conversational memory.

- This Part does not create a fourth registry, new artifact identifiers, new operational processes, or a new constitutional layer.
- The artifact cards are implementation views of the canonical Artifact Registry. The registry and controlled Book III specifications remain authoritative where wording differs.
- Worked examples are instructional simulations. They do not constitute actual authorization, legal advice, professional review, Tribal adoption, community permission, or release decisions.
- Construction packets assemble existing records and source references. They do not replace AR-001 through AR-019 or change an object's lifecycle state.
- Portability means that the next responsible actor can reconstruct what controls, what is permitted, what remains unresolved, and what may happen next.

105. Artifact-library use rules

Rule	Operational requirement
Canonical identity	Use only AR-001 through AR-019 and their canonical names. Do not create substitute artifact IDs because a template is inconvenient.
Exact object	Every record identifies the project, object, version, status, owner, controlling source, and date or trigger to the degree applicable.
Phase discipline	Create an artifact when its process is activated. Do not complete downstream forms merely to make a project appear mature.
Evidence discipline	A completed field records what is actually known. Use "unknown," "unverified," "not authorized," or "not applicable—reason stated" instead of invented completeness.
Protected context	Completeness never overrides privacy, confidentiality, community governance, cultural authority, privilege, security, or access restrictions.
Role visibility	The responsible role and actual person or body are both visible. Combined roles do not create independence, competence, or authority.
Transition control	An artifact does not advance itself. The applicable gate, authority, and exact transition must be recorded.
Preservation	Corrections, replacements, local adaptations, withdrawals, and retirement preserve the operative prior state to the authorized degree.
Filename convention	Recommended working form: <ProjectID>_<ArtifactID>_<ShortTitle>_v<version>_<status>.<ext>. A filename is not the registry record.

106. Artifact families and lifecycle map

Family	Artifacts	Institutional work	Normal transition
Initiation and authority	AR-001 to AR-004	Recognize need; establish authority and operating profile; create bounded work plan.	Proposed → Authorized → In Development
Evidence and design	AR-005 to AR-006	Prepare sources and evidence; select Book II function, patterns, routes, limits, and tests.	In Development
Build and release	AR-007 to AR-012	Build exact draft; test promised function; conduct bounded review; decide release; preserve released object and package.	In Development → In Review → Release Ready → Released
Continuity and correction	AR-013 to AR-015	Assign maintenance; correct the dependency chain; preserve the operative state.	Maintained → Under Correction/Recovery or Archived

Family	Artifacts	Institutional work	Normal transition
Evidence and learning	AR-016 to AR-017	Capture bounded operational evidence and return accepted learning to a named controlled object.	Maintained
Adaptation and end state	AR-018 to AR-019	Authorize traceable local variation; end active maintenance with successor or recorded end.	Authorized/local state → Superseded, Withdrawn, Archived, or Retired

107. AR-001 through AR-006 - initiation, authority, evidence, and design

AR-001 - Intake Record

Library field	Controlled implementation
Process / pattern	OP-001 / OPS-001
Owner	RL-002 Intake Owner
Canonical lifecycle state	Proposed
Access class	Internal / governed
Entry condition	A real communication, record, coordination, decision, or public-understanding need has been observed.
Minimum construction content	Initiating event; requester if known; affected readers; need stated without selecting the artifact; consequences of inaction; existing routes; constraints; uncertainty; urgency; proposed disposition.
Completion test	The need is bounded, distinguished from the requested solution, and routed to authorize, hold, refer, transfer, or close.
Valid next route	AR-002; hold for evidence; refer/transfer; standing-preserved closure.
Detailed manual location	Sections 9–12.

AR-002 - Authorization Record

Library field	Controlled implementation
Process / pattern	OP-002 / OPS-002
Owner	RL-003 Authority Holder or Authorizing Body
Canonical lifecycle state	Authorized
Access class	Internal / governed
Entry condition	AR-001 exists and consequential work is proposed.
Minimum construction content	Claimed and actual authority basis; scope and limits; standing domains; protected permissions; responsible owner; review trigger; one recorded disposition.
Completion test	The record states what may proceed, under whose authority, with what limits, or why work pauses, transfers, remains unresolved, or stops.
Valid next route	AR-003; narrow/return; pause; refer/transfer; stop with standing preserved.
Detailed manual location	Sections 13–17.

AR-003 - Operating Profile

Library field	Controlled implementation
Process / pattern	OP-003 / OPS-003
Owner	RL-001 Process Steward
Canonical lifecycle state	Authorized
Access class	Internal / governed
Entry condition	AR-002 authorizes a bounded operation.
Minimum construction content	Actual scale; staffing; role combinations; medium; audience; access; risk; protected context; technology; time; maintenance capacity; review burden; capacity limits.

Library field	Controlled implementation
Completion test	The selected process depth and controls correspond to real operating conditions rather than simulated institutional capacity.
Valid next route	AR-004; revise AR-002; narrow; defer.
Detailed manual location	Section 28.

AR-004 - Work Plan

Library field	Controlled implementation
Process / pattern	OP-004 / OPS-004
Owner	RL-001 Process Steward
Canonical lifecycle state	In Development
Access class	Internal
Entry condition	AR-002 and AR-003 are current.
Minimum construction content	Governing question; authorized objective; included/excluded scope; deliverables; roles; authority map; dependencies; boundaries; qualitative risks; sequence; completion and stop conditions.
Completion test	The exact authorized cycle can be performed, paused, transferred, or closed through named responsibilities and conditions.
Valid next route	AR-005; revise scope/profile/authority; pause/transfer.
Detailed manual location	Sections 29–35.

AR-005 - Source and Evidence Record

Library field	Controlled implementation
Process / pattern	OP-005 / OPS-005
Owner	RL-006 Evidence Steward
Canonical lifecycle state	In Development
Access class	Governed by source/access status
Entry condition	AR-004 identifies claims, routes, decisions, or design choices requiring support.
Minimum construction content	Source identity/version; engagement state; project function; claim relation and locator; authority/provenance; currency; access restrictions; conflicts; gaps; verification status.
Completion test	Consequential drafting can distinguish located, opened, read, extracted, verified, disputed, restricted, inaccessible, and missing support.
Valid next route	AR-006; further research; narrow claims; pause/stop.
Detailed manual location	Section 37.

AR-006 - Design Pass Record

Library field	Controlled implementation
Process / pattern	OP-006 / OPS-006
Owner	RL-004 Artifact Owner
Canonical lifecycle state	In Development
Access class	Internal
Entry condition	AR-004 and AR-005 are sufficiently stable for communication design.
Minimum construction content	Artifact identity; governing question; unresolved remainder; readers/situations; answerability map; one Primary Communication Function; pattern applicability/dependencies; reader route; accessibility; medium; detached-fragment and maintenance controls.
Completion test	The artifact architecture is selected before prose or interface form hardens, with one primary function and testable success condition.
Valid next route	AR-007; divide artifact; return to AR-004/005; pause/stop.

Library field	Controlled implementation
Detailed manual location	Sections 38–49.

108. AR-007 through AR-012 - controlled build, test, review, release, and deployment

AR-007 - Draft Artifact

Library field	Controlled implementation
Process / pattern	OP-007 / OPS-007
Owner	RL-004 Artifact Owner
Canonical lifecycle state	In Development
Access class	Internal
Entry condition	AR-004 through AR-006 authorize and design an exact build.
Minimum construction content	Exact baseline; source set; build owner; draft version; change/build log; unresolved markers; dependency references; material deviations; prohibited content; candidate freeze status.
Completion test	A defined version can be tested without concealing deviations, unresolved conditions, or unsupported content.
Valid next route	AR-008; revise; return to authority/scope/source/design.
Detailed manual location	Sections 72–73.

AR-008 - Accessibility and Function Test Record

Library field	Controlled implementation
Process / pattern	OP-008 / OPS-008
Owner	RL-007 Accessibility Reviewer
Canonical lifecycle state	In Review
Access class	Internal / governed
Entry condition	A stable AR-007 version and explicit promised function exist.
Minimum construction content	Exact object/version; function statement; audience and medium; criteria; test mode; participants and limitations; tasks/barriers; results; severity; remediation; retest; residual limitations.
Completion test	The record shows whether intended readers can receive or perform the promised function under the tested conditions, without overstating representativeness.
Valid next route	Revise/retest; AR-009; narrow/stop.
Detailed manual location	Section 74.

AR-009 - Substantive Review Record

Library field	Controlled implementation
Process / pattern	OP-009 / OPS-009
Owner	RL-008 Substantive Reviewer
Canonical lifecycle state	In Review
Access class	Internal / governed
Entry condition	The review object, scope, criteria, access, and reviewer capacity are defined.
Minimum construction content	Reviewer identifier/class; exact version; scope and outside-scope statement; criteria/instrument; competence and independence; confidentiality; findings; severity; dispositions; unresolved disagreement; acknowledgment preference.
Completion test	Every finding is traceable to a bounded review and receives an explicit disposition; review is not represented as authorization or endorsement.
Valid next route	Revise/re-review; AR-010; defer/decline.
Detailed manual location	Sections 75–78.

AR-010 - Release Decision Record

Library field	Controlled implementation
Process / pattern	OP-010 / OPS-010
Owner	RL-009 Release Authority
Canonical lifecycle state	Release Ready
Access class	Internal / public status extract
Entry condition	Testing and required review are complete or explicitly dispositioned for an exact candidate.
Minimum construction content	Candidate identity/hash; gate evidence; unresolved findings; authority; release class, audience, medium, access, and duration; conditions; maintenance owner; rollback/correction route; decision and reason.
Completion test	An authorized actor decides the state and scope of use for an exact version; drafting or review alone is not release.
Valid next route	AR-011/012; return; limited release; defer; decline/withdraw.
Detailed manual location	Sections 79–80.

AR-011 - Released Artifact

Library field	Controlled implementation
Process / pattern	OP-011 / OPS-011
Owner	RL-004 Artifact Owner
Canonical lifecycle state	Released
Access class	Public, internal, or restricted
Entry condition	AR-010 authorizes deployment of an exact candidate.
Minimum construction content	Exact content/version/hash; title/status/date; authority and non-claims; intended audience/use; access class; sources/limits; owner/maintainer; current-status and correction route.
Completion test	The object readers receive is identifiable, authorized for the stated use, and separable from drafts, archives, and successors.
Valid next route	AR-012; AR-013; correction/withdrawal.
Detailed manual location	Section 82.

AR-012 - Release Package

Library field	Controlled implementation
Process / pattern	OP-011 / OPS-011
Owner	RL-004 Artifact Owner
Canonical lifecycle state	Released
Access class	Internal / distribution-specific
Entry condition	AR-011 is released or ready for exact deployment.
Minimum construction content	Manifest; released files; editable/source files; hashes; dependencies; AR-010; review and test references; distribution targets; deployment evidence; rollback materials; access controls; known limitations.
Completion test	A future operator can reconstruct what was released, from what source state, to whom, and how it can be corrected or rolled back.
Valid next route	AR-013; AR-015; AR-014 if release defect.
Detailed manual location	Section 83.

109. AR-013 through AR-019 - maintenance, correction, preservation, evidence, adaptation, and retirement

AR-013 - Maintenance Record

Library field	Controlled implementation
Process / pattern	OP-012 / OPS-012
Owner	RL-010 Maintainer
Canonical lifecycle state	Maintained
Access class	Internal
Entry condition	A released artifact remains available or in use.
Minimum construction content	Owner and maintainer; maintenance scope; source and dependency watch; review schedule/triggers; correction/withdrawal authority; access and tools; capacity limits; continuity/successor condition; current status.
Completion test	Responsibility remains feasible and visible for as long as the object remains in use.
Valid next route	Continue; AR-014; AR-015; AR-019; transfer.
Detailed manual location	Sections 62 and 96.

AR-014 - Correction and Recovery Record

Library field	Controlled implementation
Process / pattern	OP-013 / OPS-013
Owner	RL-012 Action Owner
Canonical lifecycle state	Under Correction or Recovery
Access class	Governed by impact and access
Entry condition	A material defect, source change, incident, withdrawal condition, or inconsistency affects an operative object.
Minimum construction content	Affected object/version; authority; severity; containment; root/contributing condition; dependency graph; correction/withdrawal disposition; retest/review; notices; redeployment; residual risk; closure trigger.
Completion test	Known affected sources, derivatives, channels, readers, and records are corrected or their unreachable/unresolved status is preserved.
Valid next route	Correct/release; withdraw; preserve; escalate; retire.
Detailed manual location	Sections 63 and 97.

AR-015 - Preservation Package

Library field	Controlled implementation
Process / pattern	OP-014 / OPS-014
Owner	RL-011 Custodian or Archivist
Canonical lifecycle state	Archived
Access class	Restricted as required
Entry condition	A release, correction, supersession, withdrawal, adaptation, governance transition, milestone, or retirement requires reconstruction of the operative state.
Minimum construction content	Operative files and hashes; source state; authority and decisions; review/test records; release package; correction history; dependency map; access/retention; custody; current-status separation; lineage.
Completion test	An authorized future reader can reconstruct what governed and what readers received without treating the preserved state as current or expanding access.
Valid next route	Maintain archive; support correction/learning/retirement; authorized destruction only.
Detailed manual location	Sections 64 and 96.

AR-016 - Evidence Record

Library field	Controlled implementation
Process / pattern	OP-015 / OPS-015
Owner	RL-013 Pilot or Evaluation Lead
Canonical lifecycle state	Maintained
Access class	Governed by evidence and privacy
Entry condition	An operative cycle generates a bounded question about use, accessibility, burden, incident, maintenance, or outcome.
Minimum construction content	Exact object/question; evidence class; method; population/conditions; observation; interpretation; finding; uncertainty; prohibited inference; privacy/protected-context controls; recommendation; source files.
Completion test	The record states what the evidence supports and cannot support, keeping activity, use, feedback, testing, adoption, validation, benefit, and impact distinct.
Valid next route	AR-017; AR-014 for defect; more evidence; remain unresolved.
Detailed manual location	Sections 89–91.

AR-017 - Learning Decision Record

Library field	Controlled implementation
Process / pattern	OP-016 / OPS-016
Owner	RL-001 Process Steward
Canonical lifecycle state	Maintained
Access class	Internal
Entry condition	AR-016 or other governed evidence supports a possible controlled change.
Minimum construction content	Finding and evidence reference; named controlled object; change authority; options; decision and rationale; dependency effects; implementation owner; verification; architecture boundary; unresolved remainder.
Completion test	Learning returns to a named process, profile, tool, pattern, artifact, or record through actual change authority rather than silently rewriting the system.
Valid next route	Implement and verify; retain current object; refer to amendment/reopening process; unresolved.
Detailed manual location	Sections 92–93.

AR-018 - Adaptation Record

Library field	Controlled implementation
Process / pattern	OP-017 / OPS-017
Owner	RL-014 Local Adaptation Steward
Canonical lifecycle state	Authorized
Access class	Governed by local authority
Entry condition	A canonical process or artifact requires authorized local variation because of law, language, accessibility, medium, capacity, culture, protected context, or implementation conditions.
Minimum construction content	Local authority; canonical baseline/version; local object/version; differences and reasons; unchanged safeguards; new burdens/risks; review; release/access; maintainer; synchronization and canonical-change triggers; lineage.
Completion test	The local variation is usable and answerable without claiming canonical identity, local authorization not possessed, or invisible divergence.
Valid next route	Maintain local variant; resynchronize; correct; withdraw/retire.
Detailed manual location	Sections 94–95.

AR-019 - Retirement Record

Library field	Controlled implementation
Process / pattern	OP-018 / OPS-018
Owner	RL-004 Artifact Owner
Canonical lifecycle state	Retired
Access class	Internal / public status extract
Entry condition	Active use or maintenance should end, continuity cannot be sustained, or the object is superseded, merged, withdrawn, archived, or abandoned.
Minimum construction content	Retiring object/version; authority; reason; dependencies/obligations; disposition; successor or no-successor statement; notice/discoverability; preservation; registry and maintenance updates; residual remainder.
Completion test	Active maintenance ends without erasing history, leaving obsolete work indistinguishable from current work, or concealing unresolved obligations.
Valid next route	Superseded; withdrawn; archive-only; retired; unresolved end with owner/trigger.
Detailed manual location	Sections 98–99.

110. Artifact instantiation and completion worksheet

Field	Project entry
Project and artifact identity	Project ID; AR identifier and canonical name; title; exact version; date; lifecycle state.
Controlling sources	Corpus edition; manual pass; applicable registry/specification; Decision Records; upstream artifact versions.
Activation	Why the controlling process is active now; entry condition; initiating evidence or event.
Responsible roles	Registered role; actual holder; authority; competence/access; combined-role and independence disclosure.
Required content	Each minimum field completed from evidence, or marked unknown/unverified/not authorized/not applicable with reason.
Protected context	Access class; privacy/confidentiality/community/cultural/security controls; prohibited copying or distribution.
Dependencies	Upstream objects; external authority; sources; people; technology; maintenance; successor; fallback.
Completion evidence	What demonstrates procedural completion, and what completion does not establish.
Disposition	Exact next state or valid exit; authority; date; conditions; return/escalation triggers.
File identity	Filename; storage location; controlling hash where applicable; derivative and supersession relations.

Completion rule: A populated template is not a completed institutional artifact unless the entry condition, responsible authority, required evidence, protected-context limits, completion test, and valid disposition are all satisfied for the exact object and version.

111. Worked-example method and non-adoption boundary

The examples below demonstrate routing, not substantive correctness. Each is a simulated development trace based on a known Institute project class. Before real use, the project must create its own exact records, verify current sources, establish actual permissions and reviewer capacity, and receive a release decision for an exact version.

Example notation	Meaning
Illustrative need	A plausible bounded need used to demonstrate AR-001.
Illustrative authority outcome	What a careful AR-002 might permit; not an actual authorization.
Minimum route	The smallest likely artifact path; conditional processes remain available.
Release ceiling	The highest state the example may reach without additional authority, verification, or review.
Evidence limit	A claim that the example expressly may not make from process completion alone.

112. Worked Example A - ICWA Navigation

Worked field	Illustrative entry
Project class	Community Navigation
Working object	ICWA Navigation prototype
AR-001 need	Families and relatives need a connected way to identify whether a situation may involve ICWA, kinship care, guardianship, or a related pathway and to identify the next responsible question.
AR-002 outcome	Proceed with limitations for an internal independent educational/navigation prototype. No legal advice, case-specific determination, official Tribal/court/agency representation, or public release is authorized by the example.
Primary Communication Function	Navigation; secondary Orientation and Explanation.
Likely Book II pattern set	P-001, P-002, P-003, P-004, P-005, P-007, P-008, P-009, P-012, P-014, P-017, P-019 as applicable and dependency-checked.
Minimum governed route	AR-001 → AR-002 → AR-003 → AR-004 → AR-005 → AR-006 → AR-007 → AR-008. AR-009 and later states activate only when actual reviewers, current legal sources, privacy controls, and release authority exist.
Release ceiling	Internal test artifact. Public distribution is deferred.
Evidence limit	A reader test may show that a participant found a question or route under tested conditions; it does not establish legal correctness, professional adequacy, Tribal authorization, family outcome, adoption, or impact.
Maintenance / correction / stop trigger	A changed statute, rule, court route, agency contact, misleading legal statement, advice-like reliance, or privacy incident triggers AR-014 and may require immediate withdrawal.

113. Worked Example B - Family Care Navigation

Worked field	Illustrative entry
Project class	Community Navigation / High-Risk Operational Resource
Working object	Family Care Navigation packet
AR-001 need	Family caregivers need a bounded way to prepare questions, locate responsible services, understand transitions, and preserve continuity across elder care, discharge, benefits, and family responsibilities.
AR-002 outcome	Proceed with limitations for navigation, preparation, record organization, and referral to appropriate services. No diagnosis, clinical triage, treatment plan, eligibility determination, or legal advice.
Primary Communication Function	Navigation; secondary Coordination and Orientation.
Likely Book II pattern set	P-001–P-009, P-012–P-014, P-017, P-019 as applicable, with strong authority, recovery-path, version, and visible-responsibility controls.
Minimum governed route	AR-001 through AR-008 for an internal prototype; AR-009 requires clinical, legal, benefits, accessibility, and community review according to the functions actually included.

Worked field	Illustrative entry
Release ceiling	No public high-risk guidance until advice-like content is removed or separately authorized and professionally reviewed.
Evidence limit	Usability or comprehension evidence does not prove clinical safety, eligibility accuracy, improved care, reduced harm, or institutional effectiveness.
Maintenance / correction / stop trigger	Any symptom-triage language, urgent-risk sorting, benefits guarantee, changed contact, unsafe delay implication, or capacity loss triggers narrow/withdraw/correct routing.

114. Worked Example C - People-Rooted Sovereignty Article

Worked field	Illustrative entry
Project class	Research Publication
Working object	People-Rooted Sovereignty journal article
AR-001 need	A research contribution is needed to state and defend the distinction between people-rooted authority, externally recognized jurisdiction, administrative performance, constraint, and domination.
AR-002 outcome	Proceed under authorial and research standing to develop an academic manuscript. No claim to speak for a nation, community, discipline, or Indigenous peoples as a whole.
Primary Communication Function	Explanation; secondary Deliberation.
Likely Book II pattern set	P-001, P-003–P-006, P-009–P-013, P-015–P-016, P-019; P-018 only if visual evidence displays are used.
Minimum governed route	AR-001 through AR-007; AR-008 tests reader function and accessibility; AR-009 uses academic/subject/specialist review; AR-010 controls preprint, submission, or public release states.
Release ceiling	Author-controlled draft, preprint, or submission only as separately decided for the exact version.
Evidence limit	A completed architecture or favorable review does not establish novelty, truth, disciplinary acceptance, Indigenous authorization, or political legitimacy.
Maintenance / correction / stop trigger	New prior work, source contradiction, protected-context concern, reviewer finding, or changed venue requirement returns to AR-005/006/007 or enters AR-014 after release.

115. Worked Example D - Tribal Governance Civic Briefing

Worked field	Illustrative entry
Project class	Civic Briefing / Public Education
Working object	Independent briefing on procurement, audits, records, and accountability
AR-001 need	Tribal members and community readers may need a clear distinction among documented history, current law or policy, institutional process, unanswered questions, and routes for official information.
AR-002 outcome	Proceed with limitations as independent civic education using public or authorized sources. No governmental interpretation, representation of Tribal policy, access claim to protected records, or finding of misconduct without sufficient evidence and authority.
Primary Communication Function	Explanation; secondary Orientation and Navigation.
Likely Book II pattern set	P-001–P-007, P-009–P-014, P-017–P-019 as applicable; P-020 only for an authorized local version.
Minimum governed route	AR-001 through AR-009, including current official-source verification and a community/plain-language review packet. Release requires explicit status, non-representation, maintenance, and correction controls.
Release ceiling	Public briefing only when every time-sensitive source, route, version, and authority statement is current for the release date.
Evidence limit	Reader interest, circulation, or agreement does not establish official accuracy, wrongdoing, consensus, adoption, or governance impact.
Maintenance / correction / stop trigger	A source correction, confidentiality concern, disputed characterization, outdated route, or official clarification triggers AR-014 and visible correction/withdrawal

Worked field	Illustrative entry
	as appropriate.

116. Worked Example E - Protected Archive Inquiry

Worked field	Illustrative entry
Project class	Archive / Research Intake
Working object	Inquiry about restricted cultural recordings or archival materials
AR-001 need	A family or community research question may require locating records, identifying custodians, and understanding permission pathways without extracting or circulating protected content.
AR-002 outcome	Refer, transfer, pause, or stop with standing preserved unless the relevant family, cultural, archival, community, or institutional authority permits the proposed work. The Institute may provide bounded locator and permission-path assistance when authorized.
Primary Communication Function	Navigation or Record, depending on the bounded task.
Likely Book II pattern set	P-001–P-005, P-007–P-010, P-015–P-017, P-019–P-020 as applicable.
Minimum governed route	AR-001 → AR-002. Later artifacts activate only after actual access and use permissions, protected-context controls, and custodian relationships exist.
Release ceiling	Locator/permission inquiry only; no content extraction, transcription, publication, adaptation, or public archive claim.
Evidence limit	Locating a catalog entry or repository does not establish ownership, access rights, cultural permission, publication authority, or completeness.
Maintenance / correction / stop trigger	Any missing permission, contested custody, restricted cultural status, family objection, or uncertain access term is a stop/transfer condition rather than a prompt to search around the restriction.

117. Cross-example comparison and construction lessons

Example	Authority posture	Primary function	Highest illustrative state	Load-bearing lesson
ICWA Navigation	Internal prototype; legal/official authority absent	Navigation	In Review / internal test	A strong need does not create case-specific or public legal authority.
Family Care Navigation	Navigation and preparation only; professional functions excluded	Navigation	Internal test pending multi-domain review	Advice-like triage can change the project class and authority burden.
People-Rooted Sovereignty	Authorial and research standing; no collective representation	Explanation	Draft, submission, or bounded preprint	Review can improve the argument but cannot create novelty, truth, or Indigenous authorization.
Governance Civic Briefing	Independent public education; no governmental representation	Explanation	Public only after current-source and release gates	Public usefulness depends on status, source, limitation, maintenance, and correction visibility.
Protected Archive Inquiry	Permission-path assistance; protected content authority absent	Navigation / Record	AR-002 stop, transfer, or bounded inquiry	A recorded refusal or transfer can be the constitutionally successful product.

118. Human Operator Construction Packet

The Human Operator Construction Packet is a derived working bundle for a founder, collaborator, project owner, reviewer, or successor. It assembles exact current records; it is not a new canonical artifact.

Packet component	Required content
1. Packet cover	Project ID/title/class; packet date/version; prepared by; intended recipient; access classification; purpose of handoff.
2. Source hierarchy	Controlling Corpus edition; manual pass; applicable Decision Records, registries, OPS specifications, Publication Standards, and project authorities.
3. Current-state statement	Exact lifecycle state; current artifact/version; last authorized decision; what is in use; what is not released or authorized.
4. Artifact inventory	AR-001 through the latest active artifact, with versions, statuses, owners, locations, hashes where applicable, and missing/conditional records.
5. Source inventory	Exact source files and versions; engagement/verification state; restrictions; currency; missing sources; protected-context handling.
6. Authority and boundaries	What may be done; what may not; who holds authority; standing limitations; reviewer/non-endorsement conditions.
7. Open findings and risks	Unresolved questions; review findings; dependencies; incidents; corrections; residual risk; deadlines or review triggers.
8. Next authorized operation	One bounded next task; responsible role; input files; required output; completion test; return/stop/escalation rules.
9. Continuity controls	Maintainer/custodian; file locations; backup and preservation package; current-status locator; successor or transfer information.
10. Receipt record	Recipient; date; access acceptance; questions; accepted responsibilities; declined or unresolved responsibilities.

118.1 Human operator quick-start sequence

90. Read the current-state statement before opening drafts or proposing changes.
91. Verify that every file named in the inventory is the exact version supplied.
92. Confirm the authority and protected-context limits that apply to the recipient.
93. Identify the currently active AR record and its completion test.
94. Perform only the next authorized operation; record any material deviation before continuing.
95. Return the updated artifact, change record, unresolved conditions, and next disposition to the controlled project file.

119. Assisting LLM Construction Packet

The Assisting LLM Construction Packet provides the minimum state needed for a model to contribute without inventing project history, authority, sources, or architecture. The human operator remains responsible for source selection, authority, protected-context decisions, acceptance, release, and institutional consequences.

Packet component	Required content
Role instruction	State that the model is an assisting analyst/editor/builder, not an authority holder, reviewer of record, release authority, advisor, council member, or institutional actor.
Exact sources	Attach or quote the controlling records and project files. Identify each filename, version, status, source hierarchy, and access condition.
Project state	Project ID; current lifecycle state; active AR; completed upstream artifacts; known persistence gaps; operative released version if any.
Task block	One bounded task; required deliverable; target file; insertion/revision location; preserved text/structure; forbidden changes.
Authority and boundary block	Permitted assistance; prohibited inferences/actions; protected context; external verification requirements; representation limits.
Evidence contract	Use supplied sources as the basis; distinguish source-derived content, inference, proposal, and unknown; do not fill unsupported gaps.
Output contract	Return revised artifact or exact replacement text; change log; unresolved conditions; sources used; conflicts; proposed next disposition.
Stop rules	Stop and report when required sources are missing, authority is absent, instructions conflict, protected context controls are unknown, or the requested output would exceed standing.

119.1 Copy-and-paste LLM construction block

THE LONG RETURN INSTITUTE – BOUNDED CONSTRUCTION TASK ROLE You are an assisting analyst, editor, and builder. You do not hold institutional, Tribal, governmental, legal, clinical, cultural, community, reviewer-of-record, or release authority. CONTROLLING SOURCES - Constitutional Corpus edition: [exact edition/file] - Constitutional Development Manual: [exact pass/file] - Applicable Decision Records / registries / OPS / Publication Standards: [list] - Project artifacts and source files: [exact filenames, versions, statuses, access limits] PROJECT STATE - Project ID and title: [entry] - Current lifecycle state: [entry] - Active artifact and version: [entry] - Last authorized decision: [entry] - Operative released version, if any: [entry or none] - Known persistence or continuity gaps: [entry] AUTHORIZED TASK [One bounded task, exact target, required output, insertion/revision location, and completion test.] DO NOT - invent authority, sources, permissions, facts, project history, review, adoption, validation, or impact; - create or renumber constitutional architecture, registries, processes, roles, artifacts, patterns, or requirements; - silently reconcile conflicts or fill missing content from general knowledge; - change protected text, status, scope, or release state unless explicitly authorized. METHOD 1. State the controlling object and task boundary. 2. Use the supplied sources; preserve their terminology, organization, and force. 3. Separate source-supported content, inference, proposal, and unknown. 4. Record conflicts, gaps, and material deviations. 5. Stop when authority, evidence, access, protected context, or instructions are insufficient. RETURN - exact revised artifact or replacement text; - concise change log; - sources and versions used; - unresolved conditions and prohibited inferences; - one recommended next disposition under the existing pipeline.
--

119.2 Machine-readable project-state block

The following block is a derived transfer representation. It may accompany the human-readable packet, but it does not replace the signed or governed source records.

<pre>{ "project_id": "[entry]", "project_title": "[entry]", "project_class": "[entry]", "corpus_edition": "[exact file/version]", "manual_pass": "Edition 1.0 Standing Operational Manual, Pass 9", "current_lifecycle_state": "[ST-01 through ST-12]", "active_artifact": {"id": "AR-___", "version": "[entry]", "status": "[entry]"}, "last_authorized_decision": "[entry]", "authorized_scope": ["[entry]"], "prohibited_scope": ["[entry]"], "completed_artifacts": [{"id": "AR-___", "version": "[entry]", "path": "[entry]", "sha256": "[if applicable]"}], "source_files": [{"name": "[entry]", "version": "[entry]", "state": "read/verified/etc.", "access": "[entry]"}], "unresolved_conditions": ["[entry]"], "next_authorized_operation": "[entry]", "required_output": "[entry]", "return_or_stop_triggers": ["[entry]"], "operative_release": {"version": "[entry or none]", "status_locator": "[entry]"}, "no_silent_architecture_change": true }</pre>
--

120. Cross-model continuity and handoff packet

Use this packet when work moves to another conversation, model, collaborator, device, or future session. Its purpose is reconstruction: the recipient should not need the prior chat to know what controls, what changed, what remains unresolved, and what may happen next.

Section	Required handoff content
A. Executive state	One paragraph: project purpose, present phase, current status, and immediate next authorized action.
B. Constitutional state	Architecture freeze or reopening status; controlling edition; adopted decisions; disputed or provisional items.
C. File manifest	Every transferred file, path/name, type, version, status, size, hash, access class, and role in the project.
D. Artifact ledger	AR records present, current versions, owners, lifecycle states, unresolved fields, and next triggers.
E. Decision ledger	Consequential decisions, authority, reasons, rejected alternatives, dependencies, and review triggers.
F. Persistence check	What the current master actually contains; any previously reported but missing pass, file, edit, or attachment; recovery source.
G. Open work	Prioritized unresolved items, required sources, reviewer dependencies, corrections, risks, and exact next task.
H. Resume prompt	Copy-and-paste instruction naming the exact sources, state, task, output, and stop rules.
I. Receipt and verification	Recipient confirms files opened, hashes or versions match, authority/limits understood, and gaps reported before work begins.

120.1 Continuity checksum and archive rules

- The manifest SHALL identify the exact master document and every supporting file required to continue the authorized task.
- Use SHA-256 for controlled release, handoff, or preservation packages where the operating environment permits it; otherwise declare the identity method used.
- A checksum establishes file identity, not substantive correctness, authority, completeness, safety, or adoption.
- Before handoff, compare the document's claimed pass and coverage against the content actually present. Record any persistence discrepancy rather than repeating the claim.
- Do not overwrite the last known-good master without retaining a recovery copy or preserved operative state.
- A new conversation or model SHALL begin from the transferred files and state record, not from an unsupported narrative recollection.

121. Packet assembly procedure

96. Select the recipient and purpose: operator continuation, bounded LLM task, review, correction, maintenance, or archive transfer.
97. Freeze the exact source and artifact versions for the packet; record the controlling master and operative release separately.
98. Assemble only the records and protected material the recipient is authorized to receive.
99. Generate the human-readable state statement, manifest, artifact/decision ledgers, and next authorized operation.
100. For an LLM, add the role, source, task, authority, evidence, output, and stop blocks; do not rely on prior-chat memory.
101. Verify filenames, versions, hashes, access classes, lifecycle states, and cross-references against the actual files.
102. Record known omissions, inaccessible sources, persistence gaps, and unresolved conditions.
103. Transfer through an authorized channel; record receipt, questions, accepted responsibility, and any declined or unresolved handoff.

122. Pass 7 completion gate

- All nineteen canonical artifacts appear in one consolidated library using their registered identifiers, names, origins, owners, lifecycle states, and access classes.
- Each artifact card states an entry condition, minimum construction content, completion test, valid next route, and detailed manual location.
- The library does not create a new top-level registry, artifact series, role, process, or architecture layer.
- Worked examples cover materially different project classes and demonstrate proceed-with-limits, high-risk narrowing, research publication, public civic education, and standing-preserved stop/transfer outcomes.
- Every worked example is visibly illustrative and does not claim actual authorization, adoption, review, release, correctness, or impact.

- The Human Operator Packet can reconstruct current state, files, authority, artifacts, open risks, and the next authorized operation.
- The Assisting LLM Packet supplies exact sources, project state, a bounded task, output contract, and stop rules without making the model an institutional actor.
- The continuity packet identifies the actual master content, file manifest, hashes or identity method, persistence gaps, decisions, and resume prompt.
- A recipient can continue the project without access to the prior conversation while remaining able to identify missing information and stop responsibly.
- Pass 8 is limited to conformance, navigation, cross-format verification, publication readiness, and external-review preparation unless a documented defect requires correction.

123. Portable LLM prompt for Pass 7 use

Use the Complete Artifact Library to identify the currently active canonical artifact and its entry condition, owner, minimum content, completion test, and valid next route. Do not generate all nineteen artifacts by default. Use the worked examples only as routing demonstrations, never as actual authorization or substantive evidence. For continuation work, require a Human Operator or Assisting LLM Construction Packet containing the exact controlling sources, project state, files, boundaries, next authorized task, output contract, and stop triggers. Verify that the claimed manual pass and project state are present in the actual files. Record missing or contradictory material rather than reconstructing it from conversational memory. Do not create new registries, processes, roles, artifact IDs, patterns, or constitutional layers. Return the exact revised object, a change log, sources used, unresolved conditions, and one next disposition under the existing pipeline.

124. Transition to Pass 8

After Pass 7, the manual contains the full construction pathway and its portable working instruments. Pass 8 should not add another development layer. It should audit the master against the controlling Corpus, verify identifiers and cross-references, repair navigation and layout, confirm accessibility and rendered parity, prepare an external-review package, and decide whether Edition 1.0 may advance from development to candidate status.

Part XIII - Final Conformance, Navigation, Cross-Format Verification, and External Review Readiness

125. Pass 8 purpose, boundary, and candidate state

Pass 8 closes the eight-pass construction cycle by auditing the master document against its controlling sources, repairing document-state and navigation defects, verifying that controlled identifiers and cross-references resolve, testing DOCX and PDF render behavior, and preparing a bounded external-review package. It does not add a new constitutional layer, project phase, registry, process, role, artifact identifier, lifecycle state, or publication standard.

Historical Pass 8 decision: The manual advanced from development edition to Edition 1.0 External Review Candidate after internal conformance checks. That candidate state did not establish external adoption, independent validation, substantive correctness, effectiveness, universal accessibility, or authority for governmental, Tribal, legal, clinical, cultural, professional, or community use. Part XIV supersedes only the waiting status; it does not remove any of those limits.

126. Controlling sources and audit method

The audit uses the Constitutional Corpus, Edition 2.1 Corrected, as the constitutional source; IP-002 as the canonical registry source for OP-001 through OP-018, RL-001 through RL-014, AR-001 through AR-019, and ST-01 through ST-12; the Book II canonical narrative and normative register for P-001 through P-020 and inherited requirements; the controlled OPS specifications for operational sequence and boundaries; and PS-006 for expert-review relationships and packet controls.

104. Freeze the exact master and controlling source versions before analysis.
105. Extract headings, tables, controlled identifiers, lifecycle names, role names, artifact names, process relations, internal section references, document-state claims, and review controls.
106. Compare manual implementation language to the controlling source without treating a manual prompt or example as canonical vocabulary.
107. Record defects separately from judgments, limitations, untested claims, and external-review questions.
108. Apply only the narrow corrections required for conformance, navigation, identity, render stability, or review readiness.
109. Re-render the exact revised DOCX, export and render the PDF derivative, rerun structural and accessibility checks, and preserve the final results in the package manifest.

127. Architecture and source-hierarchy conformance

Audit domain	Result	Evidence in manual	Disposition
Source hierarchy	Pass	Manual states that the Corpus, adopted Decision Records, canonical registries, and controlled specifications govern before the manual.	No correction required.
Architecture freeze	Pass	No new top-level module, registry, operating stack, process family, or constitutional book was created.	Pass 8 remains an audit and packaging layer only.
Registry restraint	Pass	The manual uses only the three primary Book III registries and treats worksheets, ledgers, matrices, prompts, and packets as derived views.	No registry addition.
Manual authority	Pass	SHALL language is limited to internal use of the manual and is expressly subordinate to higher authority.	No external authority claimed.
Project generation	Pass	The lifecycle begins with need and authorization rather than a requested product.	No correction required.
Review boundary	Pass	Review, assistance, acknowledgment, advisory relationship, endorsement, release, and authority remain distinct.	PS-006 controls preserved.

128. Identifier and controlled-vocabulary verification

The final automated scan must contain every canonical identifier in each controlled series and no out-of-range identifier presented as canonical. Local field labels such as AR1-01, worksheet row labels, CDM-A1 through CDM-A8, finding IDs, and example IDs are implementation labels; they do not create registry entries.

Series	Permitted range	Required unique	Observed unique	Result
Artifacts	AR-001 through AR-019	19	19	Pass
Operational processes	OP-001 through OP-018	18	18	Pass
OPS specifications	OPS-001 through OPS-018	18	18	Pass
Roles	RL-001 through RL-014	14	14	Pass
Lifecycle states	ST-01 through ST-12	12	12	Pass
Book II patterns	P-001 through P-020	20	20	Pass
Publication standard used	PS-006	1	1	Pass

129. Registry reconciliation

Registry object	Controlling requirement	Manual result	Disposition
Operational Process Registry	18 process identifiers and canonical names	All 18 present; each is paired with its OPS implementation name and AR carrier.	Pass
Role Registry	14 role identifiers, names, and boundaries	All 14 present; role combination and missing-independence disclosures preserved.	Pass
Artifact Registry	19 artifact identifiers, names, origins, owners, states, and access classes	Complete artifact-planning table and construction library reconcile to IP-002.	Pass
Lifecycle vocabulary	12 states and definitions	All states present; In Review, Release Ready, Released, Maintained, correction, archive, withdrawal, and retirement remain distinct.	Pass
Book II pattern vocabulary	20 patterns and direct dependencies	All patterns present; manual selection cues remain subordinate to controlled specifications.	Pass

130. Cross-reference, sequence, and document-state verification

Cross-reference domain	Verified condition or correction	Result
Numbered sections	Sections 1-124 before Pass 8 were sequential and nonduplicated; Pass 8 extends the sequence through section 139.	Pass
Artifact-library locators	Every AR-001 through AR-019 card points to an existing detailed section or section range.	Pass
Process sequence	The mainline preserves Intake -> Authorization -> Profile -> Work Plan -> Sources -> Design -> Build -> Test -> Review -> Release Decision -> Deployment -> Maintenance -> Evidence Return -> correction, learning, adaptation, preservation, or retirement.	Pass
Conditional entry	Correction, preservation, adaptation, withdrawal, and retirement may activate from applicable operative states rather than requiring a false strict chain.	Pass
Pass history	Pass 5 persistence loss and restoration remain visible; Pass 7 is now marked complete.	Corrected
Appendix D status	Stale "End of Pass 6" language and planned Pass 8 status were replaced with the actual candidate state and future-change rule.	Corrected
Portable state block	Manual-pass value now identifies Edition 1.0 Standing Operational Manual, Pass 9.	Corrected

131. Final navigation and document-control implementation

Navigation control	Implementation	Function
Heading hierarchy	All Parts and Appendices use Heading 1; numbered sections use Heading 2; subordinate forms use Heading 3.	Word Navigation Pane and exported PDF outline.
Contents	Part-level contents includes page locators for Parts I-XIV, Appendices A-E, and the final revision rule.	Static page locators generated from the final PDF outline.
Header	Every page identifies the Institute, manual, and Public Reference Edition state.	Prevents detached-page publication-status loss.
Footer	Publication derivative identity, standing-source relation, and Page X of Y.	Supports print, citation, and detached-page control.
PDF outline	Exported heading outline is checked against the DOCX heading count and hierarchy.	Cross-format navigation check.
Current-state language	Document Control, revision history, roadmap, machine-readable packet, and closing rule agree on Pass 9 standing-source state; the cover and running matter identify this public derivative separately.	State and derivative reconciliation.

132. Cross-format, structural, and accessibility verification

The verification table below records the final Pass 8 candidate build that became the technical baseline for the standing operational edition. The DOCX remains the editable master. The PDF remains a stable derivative. Visual parity means the exported pages preserve readable layout, tables, headings, headers, footers, and glyphs; it does not establish PDF/UA conformance, assistive-technology usability, substantive accuracy, or reader benefit.

Check	Acceptance criterion	Final result	Disposition
DOCX package integrity	Valid OOXML package; opens in python-docx and LibreOffice	Valid OOXML package; 21 parts; opens in python-docx and LibreOffice.	Pass
Heading hierarchy	Heading 1 / 2 / 3 counts and sequential section numbering	23 Heading 1; 140 Heading 2 (139 numbered sections plus one integration note); 42 Heading 3; sections 1-139 sequential.	Pass
Identifier scan	Canonical ID presence and range check in DOCX and PDF text	DOCX and PDF contain complete AR, OP, OPS, RL, ST, P, and PS-006 series; no missing or out-of-range canonical IDs.	Pass
DOCX accessibility audit	High, medium, and low automated findings	0 high, 0 medium, 0 low automated findings.	Pass
DOCX visual render	Every rendered page inspected for clipping, overlap, broken tables, glyph loss, and header/footer defects	80 of 80 pages inspected at full-page scale; no clipping, overlap, broken tables, missing glyphs, or header/footer defects observed.	Pass
PDF export	Page count, file integrity, and heading-outline count	80 pages; openable; unencrypted; 205 outline entries matching 205 heading paragraphs.	Pass
PDF visual render	Every PDF page inspected in a second render path	80 of 80 pages inspected through the second PDF render; no cross-format layout defect observed.	Pass
PDF preflight	Encryption, page geometry, fonts, images, and structural warnings	Openable; not encrypted; not scan-only; no XFA; standard page geometry.	Pass

133. External-review purpose and non-endorsement boundary

External review asks whether an unfamiliar, appropriately situated person can use the manual to construct, stop, transfer, review, release, maintain, correct, preserve, and retire governed work without inventing authority or depending on the prior conversation. Review is evidence about the reviewed version within the accepted scope. It does not create authority, adoption, endorsement, co-authorship, partnership, advisory status, council status, professional responsibility, or a continuing duty.

- Review object: the exact DOCX and PDF versions identified in the package manifest.
- Review ceiling: findings about the manual and its use system; not blanket approval of the Constitutional Corpus or any future project.
- Confidentiality: class selected for the reviewer and exact packet; no classification expands access or use rights.
- Acknowledgment: reviewer preference is recorded; acknowledgment never implies endorsement.
- Relationship progression: repeated advice or future interest requires a separate, affirmative, bounded relationship decision.

134. Reviewer and package selection under PS-006

Reviewer class	Permitted review function	Packet / boundary
R-1 Courtesy Reader	General clarity, usability, navigation, and burden observations.	Community, professional, or courtesy packet.
R-2 Subject Reviewer	Defined review of institutional design, publishing workflow, Indigenous governance boundaries, research method, accessibility, or another stated subject.	Academic, professional, community, elder, partner, or accessibility packet.
R-3 Specialist Reviewer	Domain-specialist review where competence and possibly confidential access are material.	Specialist packet with exact confidentiality and access terms.
R-4 Institutional Reviewer	Review on behalf of an organization under recorded organizational authority and limits.	Partner or institutional packet.
R-5 Advisory Reviewer	Repeated review only after an accepted advisory relationship.	Not inferred from one completed review.
R-6 Council Reviewer	Governance review only under an established council role.	Does not automatically confer subject or editorial authority.

135. Exact external-review package manifest

No.	Package object	Function	Status
01	Candidate DOCX	Controlling editable review object; exact version and hash.	Required
02	Candidate PDF	Stable review derivative with final pagination and outline.	Required
03	README / review brief	Purpose, limits, reviewer class, package class, confidentiality, return instructions, and non-endorsement statement.	Required
04	Conformance audit report	Machine-readable audit results, counts, corrections, known limits, and tool versions where available.	Required
05	Identifier and cross-reference ledger	Series counts, exact canonical members, document locations, and exceptions.	Required
06	Review findings template	Finding ID, exact location, scope, rationale, severity, requested change, reviewer disposition, and Institute disposition fields.	Required
07	Package manifest	Filename, size, SHA-256, role, access class, and generation date.	Required
08	Controlling source extracts	Only where the reviewer needs them and is authorized to receive them.	Conditional

136. External review instrument

ID	Review domain	Question
ER-01	Authority boundary	Does any instruction, example, prompt, or worksheet imply authority, representation, permission, expertise, adoption, or review power the Institute or user may not possess?
ER-02	Start condition	Can a new operator distinguish a real need from a requested artifact and complete AR-001 before drafting?
ER-03	Standing and stop	Can the operator determine whether to proceed, narrow, pause, refer, transfer, remain unresolved, or stop with standing preserved?
ER-04	Canonical vs. implementation	Can the reader tell which names and requirements are canonical and which forms, prompts, cues, examples, and packet views are manual implementation aids?
ER-05	Lifecycle executability	Can an operator identify the exact current process, artifact, role, state, exit condition, return route, and next authorized action?
ER-06	Source and evidence discipline	Does the manual keep located, opened, read, verified, disputed, restricted, missing, observational, inferential, and impact claims distinct?

ID	Review domain	Question
ER-07	Communication design	Can a project select one Primary Communication Function, applicable patterns, dependencies, reader routes, limits, and tests before the artifact hardens?
ER-08	Review and release	Are testing, review, finding disposition, release decision, deployment, acknowledgment, and non-endorsement sufficiently distinct and usable?
ER-09	Continuity and correction	Can the manual prevent orphaned releases, correct dependencies rather than one file, preserve the operative state, and retire without erasure?
ER-10	Portability	Can a human or assisting LLM continue the project from the packet without prior-chat memory, silent invention, or loss of unresolved conditions?
ER-11	Burden and proportionality	Where does the manual impose documentation or role burden disproportionate to actual risk, scale, capacity, or likely use?
ER-12	Blocking defects	What exact defects, contradictions, omissions, navigation failures, or overclaims should prevent advancement beyond external-review candidate?

137. Finding disposition, correction return, and decision control

Each external finding receives a unique ID and exact location. The reviewer may recommend accept, modify, defer, outside scope, future edition, reject, governance decision, or architecture review. The Institute records its own disposition and rationale; it does not silently merge reviewer language or infer endorsement.

Finding field	Required record
Finding identity	Reviewer; class; artifact/version; exact section/page/table/field; date.
Scope	Accepted review question and any outside-scope matter.
Finding	Observed defect or judgment with supporting basis and consequence.
Classification	Mechanical defect; conformance defect; accessibility/function issue; substantive issue; burden; governance question; architecture question; protected-context issue.
Severity	Critical; high; moderate; low; judgment; observation.
Reviewer recommendation	Accept; modify; defer; outside scope; future edition; reject; governance; architecture.
Institute disposition	Accepted; accepted with modification; deferred; not accepted; transferred; unresolved; reopening required.
Return route	AR-014 correction; AR-016 evidence; AR-017 learning; applicable upstream AR rerun; Decision Record; formal architecture reopening.
Closure	Owner; target version; verification method; residual issue; date; status.

138. Known limits and unresolved matters

Limit	Required interpretation
External evidence	No external reviewer has yet completed a PS-006 review of the standing edition. Internal conformance and standing adoption are not independent validation.
Operational evidence	The manual contains examples and construction instruments, but the full lifecycle remains only partially piloted in real projects.
Substantive correctness	Registry and procedural conformance do not establish the correctness, legality, legitimacy, cultural appropriateness, or safety of a future project.
Accessibility	Automated DOCX checks and visual rendering do not replace disabled-user testing, assistive-technology testing, or PDF/UA certification.
Cross-format parity	DOCX-to-PDF visual parity does not guarantee identical semantic structure, form behavior, links, or accessibility across applications.
Protected context	Completeness is subordinate to actual permission, confidentiality, cultural authority, privacy, security, and community governance.

Limit	Required interpretation
Resource doctrine	Minimum viable governance permits role combination; it does not supply missing independence, competence, authority, access, evidence, or maintenance capacity.
Adoption	Standing operational adoption is an internal Institute use state, not adoption, endorsement, validation, or authorization by another body.

139. Pass 8 completion decision and future revision rule

Pass 8 disposition: Advance the exact master then under review to Edition 1.0 External Review Candidate. That transitional state established internal conformance and review readiness. It is superseded by the standing operational adoption recorded in Part XIV.

At the close of Pass 8, no automatic further construction pass was planned. Pass 9 was subsequently authorized to prevent indefinite candidate status when external review was not reasonably available. The existing correction and learning architecture continues to control future defects, operational failures, accessibility barriers, source changes, and maintenance events.

Pass 8 controlling sentence: The manual was review-ready because it could show what it governed, what it did not authorize, how its parts related, how a project might stop, and how a defect would return to a controlled object without erasing history. Part XIV now converts that review-ready candidate into a bounded standing operational edition.

Part XIV - Standing Operational Adoption and Continuing Use

140. Reason for standing adoption

The manual completed its internal construction and conformance cycle in Pass 8, but external review is not reasonably expected in the near term. A review-ready candidate should not remain indefinitely suspended when the Institute needs a stable construction source and the absence of external review is already disclosed. Pass 9 therefore converts the exact internally conformed manual into a bounded standing operational edition.

This conversion is an internal release and maintenance decision. It is not a claim that outside reviewers have validated the manual, that another institution has adopted it, or that the manual possesses authority beyond the Institute authority actually recorded below.

141. Meaning of standing operational status

Standing field	Controlled value
Canonical status	Edition 1.0 Standing Operational Manual
Effective date	August 6, 2026
Lifecycle state	ST-07 Maintained
Use state	Active internal baseline for constructing, transferring, reviewing, releasing, maintaining, correcting, preserving, and retiring Institute work
Duration	Continues until an exact successor supersedes it or a recorded withdrawal, archive, or retirement disposition ends active reliance
External review	Deferred without date; preserved as a future evidence route, not a condition precedent to internal use
Public status	This Public Reference Edition may be distributed for reading, study, review, and citation. No public, governmental, Tribal, legal, clinical, cultural, professional, or community adoption or authority is claimed.

Standing does not mean permanent, complete, proven, or immune from correction. It means there is a known operative edition, a known owner, a known authority boundary, a known correction route, and a known rule for ending or superseding reliance.

142. Authority basis and non-transferable limits

The standing authority is the founder's bounded internal authority to organize and govern development work of The Long Return Institute during the founding period. That authority is sufficient to select an internal operating manual for Institute work. It does not create authority over any Tribe, government, court, family, community, profession, culture, archive, reviewer, partner, or person.

- Every new project must still establish its own need, authority, standing, scope, permissions, evidence, risk, review, release, and maintenance conditions through the applicable records.
- AR-002 remains the project-level gate. The standing manual cannot supply missing project authority by inheritance.
- A higher constitutional source, adopted Decision Record, canonical registry, controlled specification, law, permission rule, protected-context rule, or legitimate external authority controls over this manual where applicable.
- Internal standing does not convert an example, prototype, self-review, or AI-assisted output into validated public guidance.

143. Exact standing release decision

Release field	Decision
Decision	Authorize the exact Pass 9 master and its verified PDF derivative for standing internal operational use.
Release class	Internal standing operational release; not a public or externally adopted release.
Authorized users	Founder; expressly authorized contributors, project owners, maintainers, reviewers, successor operators, and assisting LLMs working within bounded tasks.
Authorized function	Use as the default construction and continuity manual for new Institute work when no higher controlling source requires another route.
Excluded function	The manual may not create substantive, legal, clinical, cultural, governmental, Tribal, professional, or community authority.

Release field	Decision
Controlling artifact	The master DOCX named in Document Control; exact file hashes are recorded in the standing release manifest because a document cannot contain a stable hash of itself.
Stable derivative	The standing operational PDF included in the exact release package.
Rollback route	Return to the preserved Pass 8 backup only to investigate a Pass 9 defect; ordinary reliance remains on the standing edition unless a withdrawal or correction decision states otherwise.
Release authority	Christopher Knorr, Founder, acting within bounded internal Institute authority.
Decision date	August 6, 2026

144. Maintenance, correction, and review triggers

The standing edition is maintained rather than left pending. The maintainer shall preserve the exact operative version, receive defect reports, distinguish correction from architecture change, and keep successor and status information discoverable.

Trigger	Required response
Immediate correction trigger	A material contradiction, broken instruction, incorrect identifier, unsafe implication, inaccessible barrier, missing dependency, corrupted file, or status error is discovered.
Source-change trigger	The Constitutional Corpus, an adopted Decision Record, canonical registry, controlled specification, or other controlling source changes in a way that may affect the manual.
Operational-learning trigger	A completed project cycle shows that a manual instruction fails, creates excessive burden, obscures standing, or cannot be performed as written.
Cycle review trigger	After three completed operational cycles have used the standing edition, conduct a bounded internal evidence review even if no defect has been reported.
Scheduled status trigger	No later than August 6, 2027, confirm owner, operative version, source alignment, unresolved defects, use evidence, and whether the standing status should continue.
External-review trigger	Only when a suitable reviewer, bounded scope, capacity, and relationship are actually available. No calendar deadline is imposed.

- Ordinary defects enter AR-014 and propagate through affected dependencies.
- Use evidence enters AR-016 and may support AR-017 learning decisions.
- Minor corrections require versioning, a correction record, updated derivatives, and an exact replacement package.
- Changes to constitutional architecture, registry structure, or governing authority require the applicable Decision Record and reopening rule; they cannot be made as manual maintenance.

145. Deferred external review without institutional suspension

External review remains available but is no longer described as pending. The accurate status is deferred without date. The Pass 8 external-review packet is preserved as a ready instrument; it does not govern the manual's present use state and does not create a continuing obligation to seek review before operating.

110. Do not represent the manual as externally validated or independently reviewed.
111. Do not delay ordinary bounded internal work merely because no external reviewer is available.
112. Do not recruit a reviewer only to cure a status label. Review must have a real scope, appropriate reviewer class, feasible burden, and an actual correction route.
113. When review becomes feasible, review the then-operative exact version, not an obsolete candidate, unless historical comparison is the accepted purpose.
114. Future findings may correct, qualify, supersede, or support the standing edition; they do not retroactively create authority for prior use.

146. Standing use protocol for new projects

115. Open the current standing master and verify the edition, date, status, and controlling constitutional source.
116. Create or confirm AR-001 before selecting the artifact to be built.
117. Complete AR-002 and record the actual authority basis, limits, and valid disposition before substantive work proceeds.
118. Use only the downstream records and processes reached by the project's actual state.
119. Record any deviation from the manual and identify whether it is authorized local adaptation, correction, unresolved conflict, or a higher-source override.

120. Preserve the project state, operative artifacts, source versions, decisions, unresolved conditions, and next authorized action so another human or LLM can continue without relying on chat memory.
121. Return evidence and defects to named controlled objects; do not silently rewrite the operative history.

147. Decision Record DR-CDM-001 - Standing Operational Adoption

Decision-record field	Controlled entry
Decision ID	DR-CDM-001
Question	Should Edition 1.0 remain an external-review candidate when external review is not expected soon, or should it enter bounded standing internal use?
Decision	Adopt Edition 1.0 as the Standing Operational Manual for internal Institute use.
Authority basis	Founder's bounded internal authority during the founding period, subordinate to the Constitutional Corpus and all higher or external authority actually applicable.
Evidence considered	Eight-pass construction record; Pass 8 conformance audit; complete identifier and cross-reference reconciliation; DOCX/PDF rendering and accessibility checks; exact artifact and release-package controls.
Reason	Indefinite candidate status would obscure the actual operative source, encourage reliance on chat memory or stale drafts, and make absence of external review function as an unintended institutional veto.
Limits	No independent validation, external adoption, effectiveness, substantive correctness, universal accessibility, or authority outside the Institute is claimed.
Maintenance owner	Christopher Knorr, Founder, until a documented successor or delegated maintainer accepts the role.
Review posture	External review deferred without date; operational evidence and correction remain active immediately.
Effective date	August 6, 2026
Disposition	Adopted for standing internal use; maintained under Part XIV until superseded, withdrawn, archived, or retired.

148. Pass 9 completion and continuing standing rule

Pass 9 is complete when the standing status appears in the master, headers, footers, Document Control, Revision History, navigation, machine-readable continuity block, roadmap, PDF derivative, release manifest, and checksums; the exact release package is verified; and no statement continues to present external review as a current prerequisite or pending institutional condition.

There is no waiting state after Pass 9. The next authorized work is the use of the manual in real operational cycles. A future revision occurs only because evidence, correction, source change, maintenance, adaptation, supersession, withdrawal, or retirement requires it.

Standing controlling sentence: Edition 1.0 governs bounded internal construction work now, while its lack of external validation remains visible and every project must still establish its own authority and standing.

Appendix A - Project Initiation Cover Sheet

Field	Entry
Project identifier	[Assign stable working ID]
Project title	[Working title]
Project class	[Research / Navigation / Civic education / Institutional design / Archive / Technology / Program prototype / Other]
Founder or owner	[Person or role]
Current phase	[Need intake / Authorization / Scope / Design / Production / Review / Release / Operation / Learning / Retirement]
Current status	[Proposed / Authorized / In development / In review / Released / Maintained / Under correction / Archived / Retired]

Field	Entry
Controlling constitutional edition	[Edition and version]
Manual pass used	[Pass number]
Current controlling record	[AR-001, AR-002, etc.]
Last consequential decision	[Decision ID/date]
Next trigger	[Specific condition or action]
Known open questions	[List]

Appendix B - Quick-Mode Proposal Audit

Audit field	Entry
Load-bearing claim	[What claim would commit the Institute to action or months of work?]
True core	[What is already supported?]
Overclaimed envelope	[What is new, untested, duplicated, or unauthorized?]
Main risk	[What does acceptance create or bypass?]
Existing constitutional route	[Which Book, pattern, standard, or record already governs?]
Narrowest sufficient act	[Smallest governed test or record]
Defeat condition	[What result would require rejection or narrowing?]
Disposition	[Accept / Accept narrowly / Test first / Defer / Reject / Constitutional decision]

Appendix C - Portable Startup Prompt

You are assisting The Long Return Institute to construct a new governed project under its Constitutional Corpus. Treat the Constitutional Development Manual supplied with this prompt as the implementation guide. Do not invent new constitutional architecture unless a completed operational cycle or documented contradiction shows that existing governance is insufficient. Begin by identifying the current phase. For a new project, create AR-001 (Intake / Recognized Need Record) and then AR-002 (Authorization and Standing Record). Do not begin substantive production before AR-002 reaches Proceed or Proceed with limitations. Distinguish source-supported fact, inference, proposal, editorial suggestion, operational recommendation, constitutional amendment, and unresolved status. Preserve pause, referral, transfer, unresolved, and stop-with-standing-preserved as valid outcomes. Use supplied sources as controlling; do not silently fill gaps. Build only the artifacts demanded by the current phase, preserve version and decision history, and identify the narrowest next governed action.

Appendix D - Pass Roadmap and Completion Controls

Pass	Core work	Completion condition	Status
1	Need and standing	Project can produce AR-001 and AR-002 without beginning with a preferred artifact	Complete
2	Profile, scope, authority, dependencies, boundaries, risk, charter	Authorized work can be bounded and planned without expanding standing	Recovered / complete
3	Evidence readiness and Book II design	Project can select communication function, patterns, reader routes, and source controls before drafting	Complete

Pass	Core work	Completion condition	Status
4	Book III operational design	Roles, process, artifacts, lifecycle, maintenance, correction, and preservation are assigned	Complete
5	Build, testing, review, release, deployment	Exact versions move through bounded build, test, review, release, and deployment gates	Recovered / complete
6	Evidence, learning, adaptation, correction, preservation, retirement	Evidence returns to named controlled objects without overclaiming or erasing operative history	Complete
7	Artifact library, examples, portable packets	Canonical artifacts can be instantiated and a project can transfer without chat memory	Complete
8	Conformance and external-review readiness	Manual passes internal registry, identifier, cross-reference, navigation, render, accessibility, and packet checks	Complete / superseded
9	Standing operational adoption	Exact manual enters maintained internal use with authority limits, deferred review, correction routes, and status triggers	Complete

End of Pass 9: The manual is a standing internal operational edition. It remains active until superseded, withdrawn, archived, or retired through a recorded disposition. Future changes enter through documented correction, operational evidence return, source-change review, maintenance review, or a formally authorized new edition.

Appendix E - External Reviewer Response Form

Complete this form only for the exact artifact version and review scope accepted. Add rows as needed. Review does not imply endorsement, authority, partnership, adoption, co-authorship, advisory status, council status, or a continuing duty.

Review metadata	Entry
Reviewer name / identifier	[]
Reviewer class	[R-1 through R-6]
Review package class	[Academic / Professional / Community / Elder / Partner / Accessibility / Other authorized class]
Artifact and exact version	[]
Review scope	[]
Outside-scope statement	[]
Confidentiality class	[A Public / B Limited / C Confidential draft / D Protected community / E Restricted cultural or relational]
Date received	[]
Date returned	[]
Acknowledgment preference	[Name / anonymous / no acknowledgment / wording to approve]
Future-contact preference	[]

Overall disposition: [Ready for next decision / Ready with corrections / Not ready / Outside my scope / Unable to complete].

Finding ID	Exact location	Finding / rationale	Severity	Recommended disposition	Notes
[ER/F]-001	[Exact section/page/table/field]	[Finding and basis]	[Critical / high / moderate / low / judgment / observation]	[Accept / modify / defer / outside scope / future edition / reject / governance / architecture]	[Reviewer note]
[ER/F]-002	[]	[]	[]	[]	[]
[ER/F]-003	[]	[]	[]	[]	[]
[ER/F]-004	[]	[]	[]	[]	[]

Summary of load-bearing strengths: []

Summary of blocking defects: []

Questions or conditions before further review: []

Permission to acknowledge this review: []

Reviewer signature or confirmation, where appropriate: [] Date: []

Master-Document Revision Rule

Future corrections and editions SHALL revise this standing master document or an explicitly designated successor. Each revision SHALL preserve the prior revision history, identify what changed and why, reconcile document-state claims, update navigation, and complete render-and-review checks before delivery. Historical copies, review findings, correction records, manifests, operative releases, and standing-status decisions SHALL remain distinguishable and recoverable. No future version may claim adoption, validation, accessibility, correctness, authority, or impact beyond the evidence actually recorded. Public reference derivatives SHALL identify the exact standing master from which they were produced and SHALL NOT be treated as the canonical editable source unless a recorded successor decision states otherwise.