THE COMMUNITY READINESS KIT

CRK-800

Community Implementation Manual

From a county resolution to a working institution: the process, the gates, and the documents.



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COMMUNITY READINESS KIT

CRK-800 — COMMUNITY IMPLEMENTATION MANUAL

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EXECUTIVE SUMMARY

What the Kit does

The Community Readiness Kit provides a standardized process through which a host county and its residents can establish an independent community institution, prepare for data center development, engage a Developer, execute a Community Benefits Agreement, and administer long-term Community Revenue Participation.

This manual is the master document of the Kit. It says what must be done, in what order, who does it, and what each step must produce. The other documents in the Kit — the resolutions, instruments, forms and letters it refers to by number — are the tools for doing it. Communities receive all of them at no cost.

What the community receives

The proposed economic standard is **1% of defined gross campus revenue, or an approved rent-equivalent for owner-operated campuses, for the operating life of each covered Phase**.

The Kit is intended to create a durable community participation right rather than a one-time contribution.

Where the money goes

The standard Community Revenue Participation allocation is:

- **60%** household dividends.
- **25%** resident-approved community projects.
- **10%** reserve.
- **5%** administration.

The household share is a protected minimum that the Resident Board cannot lower without the required resident vote.

The standard also provides for signing payments, monthly construction payments, a ramp-up floor, payment security, audit rights, and successor protections. Numerical payment scales remain subject to final publication.

How it is done

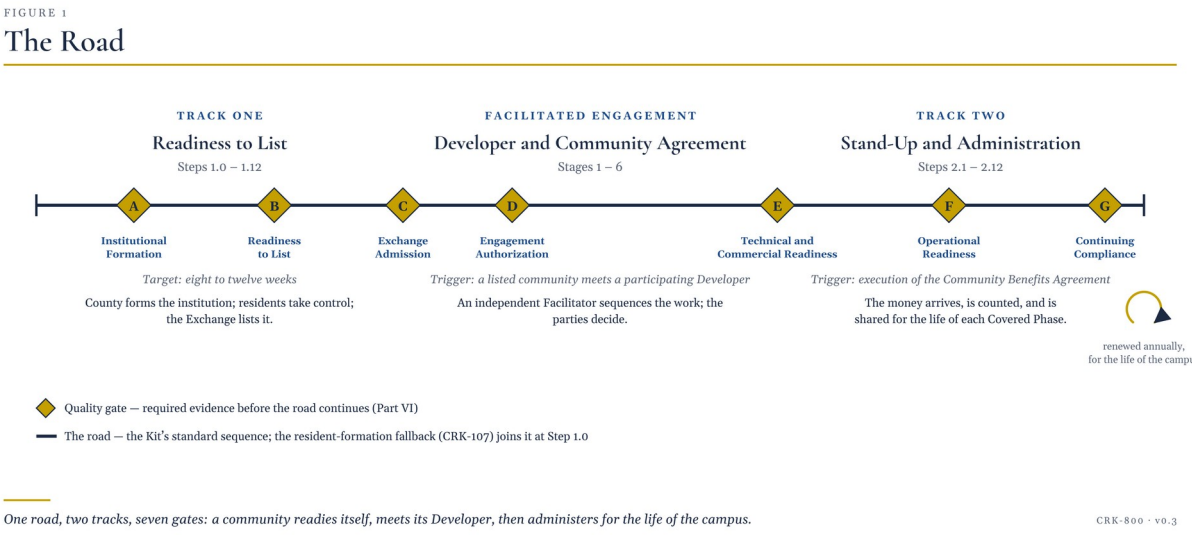
The implementation architecture consists of:

Track One — Readiness to List

Facilitated Engagement — Developer and Community Agreement

Track Two — Operational Stand-Up and Long-Term Administration

The target for Track One is **eight to twelve weeks**, to be tested in the pilot.



Who controls it

The County forms the institution; residents control it; the County oversees through publication only. Once formed, no County, Developer or outside party may spend

the community's money, suspend household distributions, change the allocation, or remove the trustees. The community chooses its own counsel, advisers and fiduciary, and decides for itself whether to enter any engagement with a Developer.

What it costs and who pays

Readiness (Track One) is paid for by civic backers, a readiness fund, local philanthropy, or other sources the community controls — never by the Developer. Eligible readiness costs may be reimbursed from the signing payment once an agreement is executed. The Developer pays the independent Facilitator and its own adviser; neither cost is taken from the community's share. The community pays none of the entities that publish, license or operate the Kit.

What this manual is not

It is a process, not a legal opinion or a governmental approval. The legal structure must be validated under the applicable State Supplement and by counsel before use in any jurisdiction, and the eight-to-twelve-week target and the cost benchmarks will be measured in the pilot, not assumed. The open questions are listed in Part VIII.

HOW TO USE THIS MANUAL

Who it is written for

The people who will do the work: county officials and the County Attorney; the first resident trustees and the Resident Board that follows them; the community's counsel, technical advisers and fiduciary; and the civic organizations that fund readiness. A Developer will find the engagement sequence in Part II, but the Kit's guidance for Developers is a separate document.

How it is organized

Part I describes the participants and the rules that keep them independent of one another. Part II is the process itself: Track One (thirteen steps to a listing), the Facilitated Engagement (six stages to a signed agreement), and Track Two (twelve steps to a working institution that runs for the life of the campus). Part III says who is responsible for each function. Part IV is the timeline. Part V is funding and cost. Part VI lists the seven quality gates. Part VII is document control, including who publishes and licenses the Kit. Part VIII is the register of decisions and open questions. Part IX is what the pilot must record.

How to read a Step

Every Step in Part II has the same shape: a number and a name; the instruction; the Deliverable; and, where one applies, the Kit document it points to (for example, CRK-101 is the County formation resolution). A Step is complete when its Deliverable exists and is on the evidence register. Nothing else counts. The Steps are numbered so that the evidence register, the responsibility matrix in Part III and the gates in Part VI all refer to the same thing.

How to read the gates

A gate is a list of evidence. Gates A, B and C fall in Track One; D and E in the engagement; F and G in Track Two. You pass a gate by producing the evidence, not by argument. Gate G is passed every year. Figure 9 shows all seven on one page.

The figures

Thirteen figures carry the argument of the manual. Each one states its point in its caption. A reader with ten minutes should read the thirteen captions in order; a reader with an hour should read the figures and the Executive Summary; everyone else reads the Steps.

Where you will need help

Some of this a community can do for itself: the civic nominating slate (Step 1.3), the one-page Stated-Limits Form (1.7), accepting the published standard (1.8), the self-certification (1.10), and the Board's own policies. Some of it requires counsel: the County resolution (1.0), the Trust and the Revenue Vehicle (1.1, 1.2), the counsel opinion (1.11), and legal review of the Community Benefits Agreement (Stage 6). Some of it requires a financial professional: everything in Track Two that touches money (2.1 to 2.5, 2.7 to 2.9, 2.11). The engagement with a Developer is run by an independent Facilitator whom the County and the Board must accept in writing. Part III, the responsibility matrix, says who is responsible for each function.

Terms used in this manual

Community Trust (the Trust): the body the County forms to own the Revenue Vehicle and protect the community's long-term interest.

Community Revenue Vehicle (CRV, the Vehicle): the entity that holds the agreement with the Developer, receives the money and shares it out.

Resident Board (the Board): the elected residents who govern the institution.

Independent Fiduciary: the professional who keeps the accounts, controls the payments and runs the distributions.

Independent Facilitator: the professional, paid by the Developer but representing no one, who sequences the engagement.

The Exchange: the listing platform where ready communities and participating Developers find each other.

Article 8: the published Revenue Participation standard; one Article within the larger agreement.

Community Benefits Agreement (CBA): the whole agreement between the Developer and the Vehicle.

Community Revenue Participation (CRP): the money the community receives under Article 8.

Covered Phase: a phase of the campus to which the standard applies, for its operating life.

Impact Zone: the two-tier area whose households are eligible for dividends.

Toll gates: the four technical findings — electricity and ratepayers, water, air, noise — required before an agreement.

Schedule G: the record of any departure from the published standard.

State Supplement (CRK-900): the adaptations required by each state's law.

Where to start

If you are a County official, read Part I §2 (the County line) and Step 1.0. If you are organizing residents, read Figure 1, Figure 4 and Step 1.3. If you are community counsel, read Part I, Steps 1.0 to 1.2 and 1.11, and Part VII. If you are a Developer, read the Facilitated Engagement in Part II and Part I §§5–6. If you are a civic backer, read Step 1.9 and Part V.

PART I — INSTITUTIONAL ARCHITECTURE

1. Principal Participants

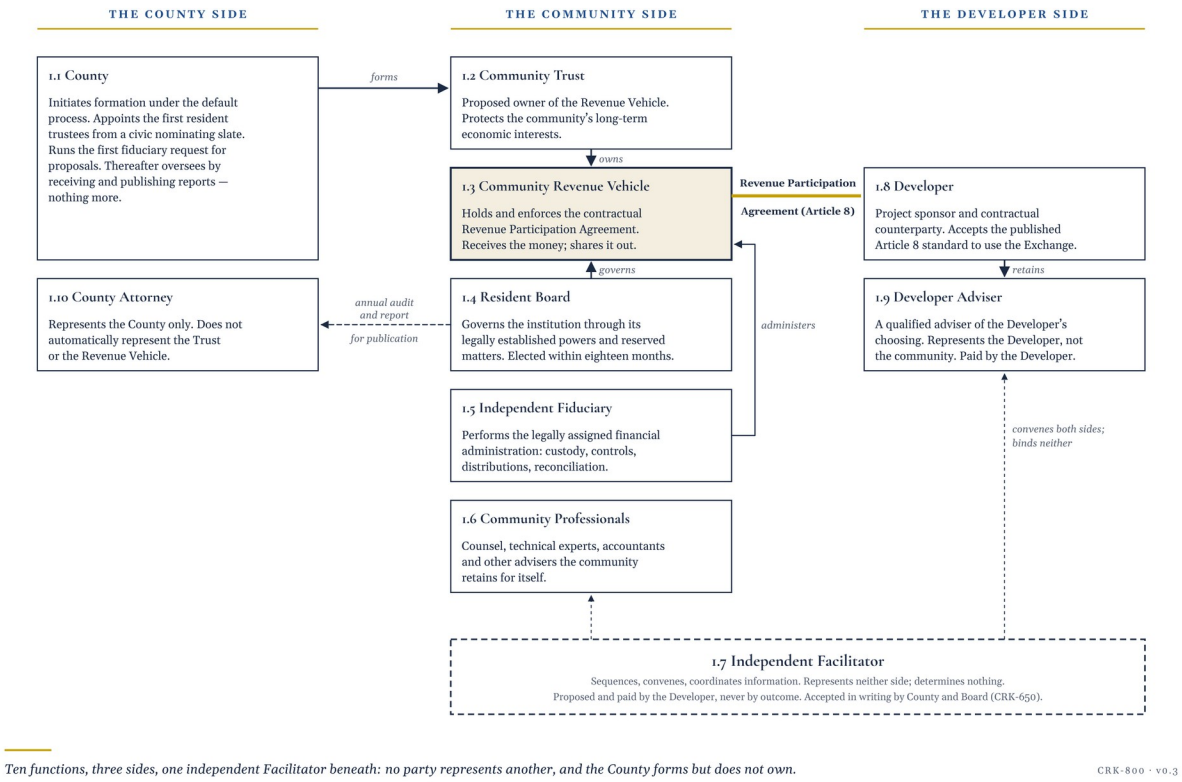
The Kit recognizes the following independent functions.

1.1 County

The County initiates formation of the Community Trust and Community Revenue Vehicle under the default process.

FIGURE 2

The Participants



Ten functions, three sides, one independent Facilitator beneath: no party represents another, and the County forms but does not own.

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It appoints the first resident trustees from a qualified civic nominating slate and conducts the initial fiduciary selection through a public request for proposals.

Its continuing oversight is through receipt and publication of required reports.

1.2 Community Trust

The Trust is the proposed owner of the CRV and protects the community's long-term economic interests.

1.3 Community Revenue Vehicle

The CRV holds and enforces the contractual Revenue Participation Agreement.

1.4 Resident Board

The Resident Board governs the institution through the legally established powers and reserved matters.

1.5 Independent Fiduciary

The independent fiduciary performs the legally assigned financial administration functions.

1.6 Independent Community Professionals

The community may retain its own counsel, technical experts, accountants, and other advisers.

1.7 Independent Facilitator

The Facilitator manages the engagement sequence, coordinates information flow, and maintains the process.

The Facilitator represents neither the Developer nor the community.

1.8 Developer

The Developer is the project sponsor and contractual counterparty.

1.9 Developer Adviser

The Developer may retain a qualified adviser. VMS Advisory Group, a developer-side practice under common ownership with the Institute, is one such adviser; the relationship is disclosed in Part VII.

The developer-side adviser represents the Developer, not the community.

1.10 County Attorney

The County Attorney represents the County.

The County Attorney does not automatically represent the CRV or Trust.

The standard, the templates, the listing platform, and the parties that publish and operate them are described in Part VII.

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2. Foundational Institutional Principle

The County forms the institution; residents control it; the County oversees through publication only.

The County shall not retain authority to:

a. Spend or redirect CRV funds.

b. Suspend household distributions.

c. Change the protected allocation formula.

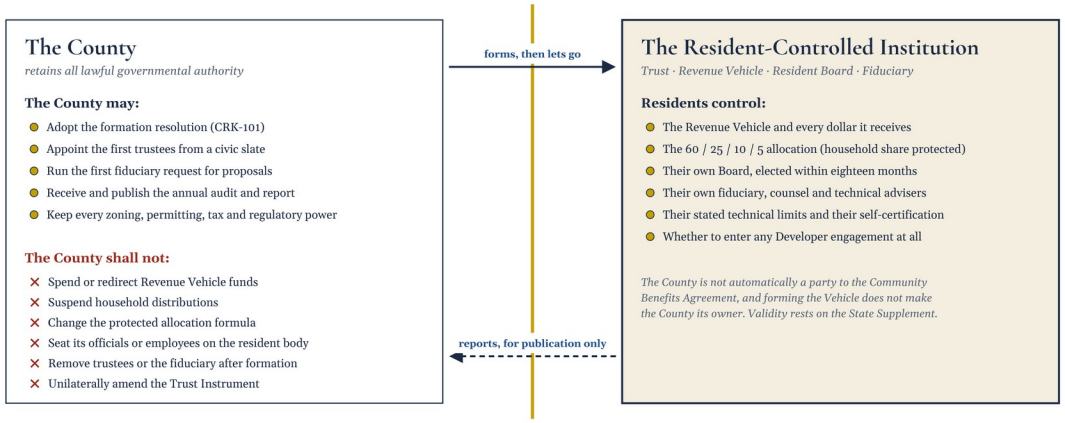
d. Appoint County officials or employees to the resident governing body.

e. Remove resident trustees or the independent fiduciary after formation.

f. Unilaterally amend the Trust Instrument.

FIGURE 3

The County Line



Fallback (Part I §4): where the County declines to act, residents may form the Trust and Vehicle themselves under CRK-107 and seek recognition. Recognition transfers nothing to the County.

The County forms the institution; residents control it; the County oversees through publication only.

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The legal validity of this structure shall be established through the applicable State Supplement and counsel review.

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3. Relationship to Government

The County retains all lawful governmental authority.

The CRV does not exercise zoning, permitting, taxation, or regulatory powers.

The County is not automatically a party to the CRV's CBA.

The County's participation in formation does not give it ownership of the CRV.

The County may receive annual audits and reports for publication without controlling expenditures.

Any County development agreement and any private CBA shall be separately reviewed for legal authority and enforceability.

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4. Resident Formation Fallback

Where the County declines to initiate formation, residents may establish the Trust and CRV through the approved lawful fallback procedure.

The resulting institution may seek County recognition.

Recognition shall not automatically transfer governance or ownership to the County.

The fallback is not the default track.

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5. Relationship to the Developer

The Developer is a separate contractual counterparty.

The Developer may participate in the standardized Exchange process by accepting the published Article 8 standard.

The Developer may fund independent community technical and legal review through appropriately structured arrangements.

Such funding shall not create Developer control over the community's advisers.

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6. Relationship to the Facilitator

The Facilitator is a separate, independent professional.

The Developer proposes, retains, and pays the Facilitator.

The County and community Board must each accept the proposed Facilitator in writing before work begins.

Acceptance shall be documented through CRK-650.

The Facilitator shall:

1. Establish the engagement sequence.
2. Convene the appropriate parties.
3. Coordinate information flow.

4. Identify task dependencies.
5. Maintain procedural milestones.
6. Help the parties understand one another's interests.
7. Preserve an orderly process toward agreement.

The Facilitator shall not:

a. Represent or negotiate for any party.

b. Lobby.

c. Attend public hearings as an advocate for a party.

d. Determine substantive transaction terms.

e. Administer community funds.

f. Exercise governance authority.

g. Receive outcome-contingent compensation.

The Developer’s adviser shall never serve as the independent Facilitator in the same engagement.

The Exchange maintains a qualified Facilitator roster but does not run engagements.

PART II — IMPLEMENTATION PROCESS

TRACK ONE — READINESS TO LIST

Target duration: eight to twelve weeks

Objective: Establish a legally recognizable, resident-controlled community institution with sufficient governance and professional readiness to seek listing.

Track One does not require a fully operational dividend distribution system.

Step 1.0 — County Formation Resolution

The County initiates the default process by adopting the CRK-101 formation resolution.

The resolution shall authorize the legally appropriate steps toward formation of the Community Trust and CRV.

FIGURE 4

The First Track



Thirteen steps and three gates carry a community from a County resolution to an Exchange listing in a target of eight to twelve weeks. CRK-800 · v0.3

The County shall obtain necessary legal review concerning its authority and the proposed institutional structure.

Fallback variant: Where the County declines or cannot lawfully act, residents may use CRK-107.

Deliverable: County resolution or documented fallback record.

Step 1.1 — Formation of Community Trust

The authorized parties shall establish the Community Trust under CRK-200.

The Trust shall be structured to preserve resident control and limit the County's continuing powers.

Deliverable: Executed Trust Instrument and evidence of initial funding.

Step 1.2 — Formation of Community Revenue Vehicle

The CRV shall ordinarily be formed under the host state's law.

Host-state formation reinforces the institution's local character and avoids unnecessary concerns that the community vehicle is an outside entity imposed upon residents.

Alternative formation shall require a documented rationale and legal review.

Deliverable: Formation filing and adopted operating agreement.

Step 1.3 — Civic Nominating Slate

The County shall implement CRK-102.

Qualified civic institutions shall participate in a transparent process to identify eligible initial resident trustees.

Deliverable: Qualified slate and nomination record.

Step 1.4 — Initial Resident Appointments

The County shall appoint the initial resident trustees from the qualified slate under the approved procedure.

The initial Board shall be seated and oriented.

The first resident election shall be scheduled within eighteen months.

Deliverable: Appointment instruments and transition schedule.

Step 1.5 — Governing Instruments

The initial governing body shall adopt the necessary bylaws, operating policies, and protected-matters provisions.

Deliverable: Adopted governing instruments.

Step 1.6 — Preliminary Fiduciary Engagement

The County shall initiate the initial fiduciary selection process through a public RFP.

For readiness to list, a qualifying engagement letter or preliminary commitment shall suffice.

Full operational procurement and financial systems shall be completed in Track Two.

The Exchange may provide a qualified fiduciary panel, but the County may select from or beyond that panel under the applicable procedures.

Deliverable: Fiduciary engagement letter or qualifying commitment.

Step 1.7 — Community Technical Limits

The Board shall adopt CRK-401, the one-page Community Stated-Limits Form.

The form addresses:

a. Electricity and ratepayer impacts.

b. Water.

c. Air.

d. Noise.

No project-specific technical assessment is required at this stage.

Deliverable: Adopted Stated-Limits Statement.

Step 1.8 — Acceptance of Article 8

The Board shall adopt a resolution accepting the Institute's published Revenue Participation Agreement standard.

The standard includes:

- 1% of defined gross campus revenue or the applicable rent-equivalent.
- Participation for the operating life of each Covered Phase.
- Published signing and construction payments.
- Published ramp-up floor.
- Payment security.
- Audit rights.
- Successor obligations.

Deliverable: Board resolution accepting the published standard.

Step 1.9 — Readiness Funding

Track One shall be financed by independent civic backers, a readiness fund, or other approved community-controlled resources.

Potential civic participants may include the Chamber of Commerce, TEDCO, CREEJ, and equivalent organizations in other states, subject to actual participation and eligibility.

The institution shall disclose its funding sources.

A County organized under the Developer's financial control has not established the independence required by the standard.

Eligible readiness expenditures may be reimbursed from the signing payment under the approved rules.

Deliverable: Readiness funding and independence disclosure.

Step 1.10 — Community Self-Certification

The authorized institution shall complete CRK-702.

Deliverable: Executed self-certification.

Step 1.11 — Counsel Opinion

Independent community counsel shall complete the required CRK-703 opinion.

Deliverable: Counsel opinion identifying any material conditions or qualifications.

Step 1.12 — Exchange Listing

The community shall submit its readiness evidence under CRK-700.

The Exchange shall determine admission using published criteria.

The Exchange does not independently certify the community's legal status or technical compliance.

Deliverable: Listing determination and public profile.

FACILITATED ENGAGEMENT — DEVELOPER AND COMMUNITY AGREEMENT

Trigger: A listed community and participating Developer initiate a project-specific engagement.

Process leader: Independent Facilitator.

Decision-makers: The respective authorized parties.

The Facilitator shall sequence the process; the Facilitator shall not determine the parties' positions or bind them.

Stage 1 — Developer Preparation

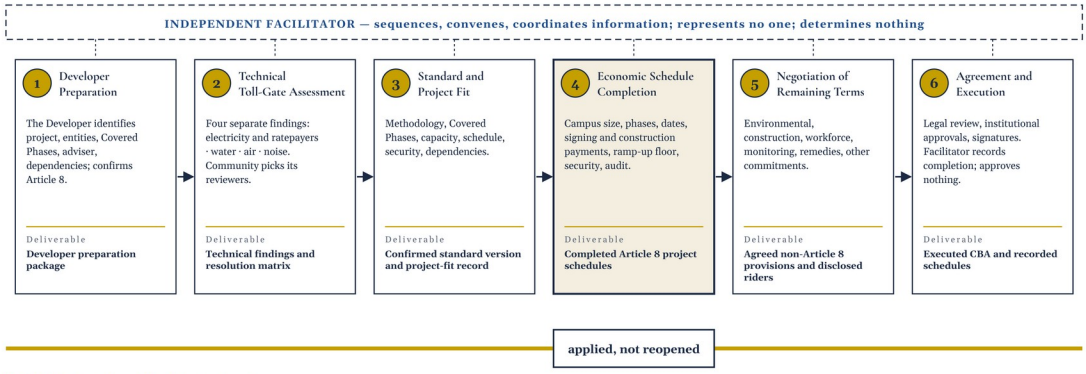
The Developer shall:

1. Identify the project and relevant legal entities.
2. Identify the Covered Phases.
3. Prepare required project disclosures.
4. Identify its adviser.
5. Confirm acceptance of the published Article 8 standard.
6. Identify material project dependencies.

Deliverable: Developer preparation package.

FIGURE 5

The Engagement



Six stages run on a single rail, the Facilitator sequences them, and the published Article 8 standard passes through untouched.

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Stage 2 — Technical Toll-Gate Assessment

The Facilitator shall coordinate the project-specific technical assessment under CRK-400.

The community shall independently select qualified technical advisers.

The Developer shall provide the required project information.

The reviewers shall assess:

a. Electricity and ratepayer impacts.

b. Water.

c. Air.

d. Noise.

Each toll gate shall receive a separate finding.

Deliverable: Technical findings and resolution matrix.

Stage 3 — Standard Confirmation and Project Fit

The parties shall confirm the published Article 8 standard.

The Facilitator shall coordinate the exchange of information needed to determine how the standard applies to the proposed Campus.

The parties shall identify:

1. Applicable revenue methodology.
2. Covered Phases.
3. Relevant capacity.
4. Project schedule.
5. Required security.
6. Technical and institutional dependencies.

Deliverable: Confirmed standard version and project-fit record.

Stage 4 — Economic Schedule Completion

The parties shall complete the applicable project-specific economic schedules using the Institute's published standard.

The process shall establish:

a. Campus size.

b. Covered Phases.

c. Revenue commencement dates.

d. Signing payment under the published scale.

e. Construction payments under the published scale.

f. Ramp-up floor.

g. Applicable revenue or rent-equivalent methodology.

h. Metered-load implementation where appropriate.

i. Payment security.

j. Reporting and audit procedures.

The participation rate, operating-life term, and other standard Article 8 terms shall not be reopened as ordinary negotiating items.

Any proposed departure shall be disclosed and recorded in Schedule G.

Deliverable: Completed Article 8 project schedules.

Stage 5 — Negotiation of Remaining CBA Terms

The parties may negotiate the remaining CBA provisions, including:

1. Project-specific environmental commitments.
2. Construction and operational protections.
3. Workforce and procurement commitments.
4. Monitoring arrangements.
5. Technical remedies.
6. Other appropriate community commitments.
7. Disclosed riders.

The Facilitator shall coordinate the process.

The Developer and community shall determine their own positions.

Deliverable: Agreed non-Article 8 provisions and disclosed riders.

Stage 6 — Agreement and Execution

The parties shall complete legal review, institutional approvals, and execution.

The agreement shall record the commitments established through the process.

The Facilitator may document process completion but shall not approve the substance of the transaction.

Deliverable: Executed CBA and recorded schedules.

Standardization Principle

The Revenue Participation Agreement is one Article in a broader agreement the parties are already signing.

Reopening the published economic standard can eliminate the speed and predictability that the Exchange is designed to provide.

Parties wishing to negotiate participation from the beginning remain free to do so outside the standardized Exchange process.

Six-Stage Source Reconciliation

The sequence above is the operational interpretation of the analyst's description of Working Paper No. 3.

The precise stage names and boundaries shall be reconciled against the complete Working Paper before final publication.

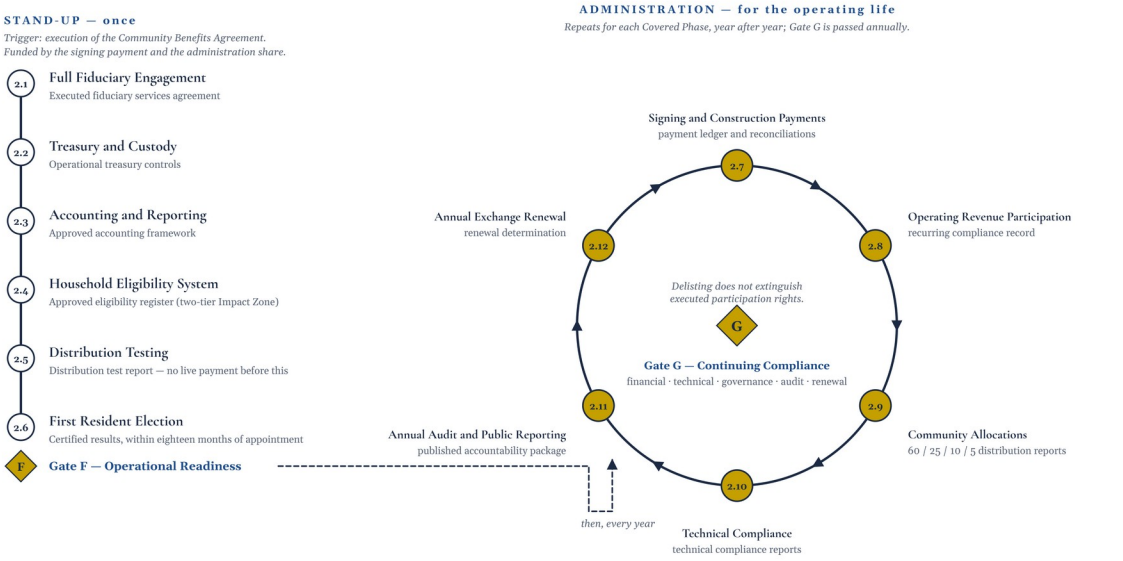
TRACK TWO — OPERATIONAL STAND-UP AND LONG-TERM ADMINISTRATION

Trigger: Execution of the Community Benefits Agreement.

Funding: Signing payment, approved administration resources, and other lawful institutional funds.

FIGURE 6

The Second Track



Six steps stand the institution up once; six more repeat for the operating life of every Covered Phase.

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Step 2.1 — Full Fiduciary Engagement

The community institution shall complete the full fiduciary engagement.

The agreement shall identify:

a. Duties.

b. Authority.

c. Compensation.

d. Conflicts.

e. Reporting.

f. Termination and replacement.

g. Insurance.

h. Professional standards.

Deliverable: Executed fiduciary services agreement.

Step 2.2 — Treasury and Custody

The institution shall establish:

1. Approved bank and custody accounts.
2. Authorized signatories.
3. Segregation of duties.
4. Payment approval controls.
5. Reconciliation procedures.
6. Liquidity policies.
7. Investment restrictions.

Deliverable: Operational treasury controls.

Step 2.3 — Accounting and Reporting

The institution shall implement accounting procedures sufficient to distinguish:

a. Amounts contractually due.

b. Amounts actually collected.

c. Restricted receipts.

d. Distributable receipts.

e. Reserve balances.

f. Administrative expenditures.

g. Community-project expenditures.

h. Household distributions.

Deliverable: Approved accounting and reporting framework.

Step 2.4 — Household Eligibility System

The institution shall implement the approved two-tier Impact Zone policy.

Tier One households shall receive a larger dividend than Tier Two households.

The eligibility system shall provide:

1. Residency verification.
2. Household identification.
3. Privacy protection.
4. Duplicate-payment controls.
5. Appeals.
6. Periodic updates.

Deliverable: Approved eligibility register and procedures.

Step 2.5 — Distribution Testing

The Fiduciary Manager shall test:

a. Calculation accuracy.

b. Payment authorization.

c. Banking interfaces.

d. Reconciliation.

e. Exception handling.

f. Reporting.

No live distribution shall occur until the required controls are operational.

Deliverable: Distribution test report.

Step 2.6 — First Resident Election

The first independently administered resident election shall occur within eighteen months after initial trustee appointments, subject to legally valid transition arrangements.

The election shall follow CRK-300.

Deliverable: Certified election results under the approved community election process.

Step 2.7 — Signing and Construction Payments

The CRV shall receive and account for payments required under Article 8.

The payments shall not be treated as advances recoverable against future CRP.

Deliverable: Payment ledger and reconciliations.

Step 2.8 — Operational Revenue Participation

When a Covered Phase begins qualifying revenue operations, the CRV shall administer the applicable operating-life CRP.

The institution shall verify:

1. Revenue statements.
2. Rent-equivalent calculations.
3. Metered-load data where applicable.
4. Ramp-up floors.
5. Payment receipts.
6. True-ups.
7. Audit exceptions.

Deliverable: Recurring CRP compliance record.

Step 2.9 — Community Allocations

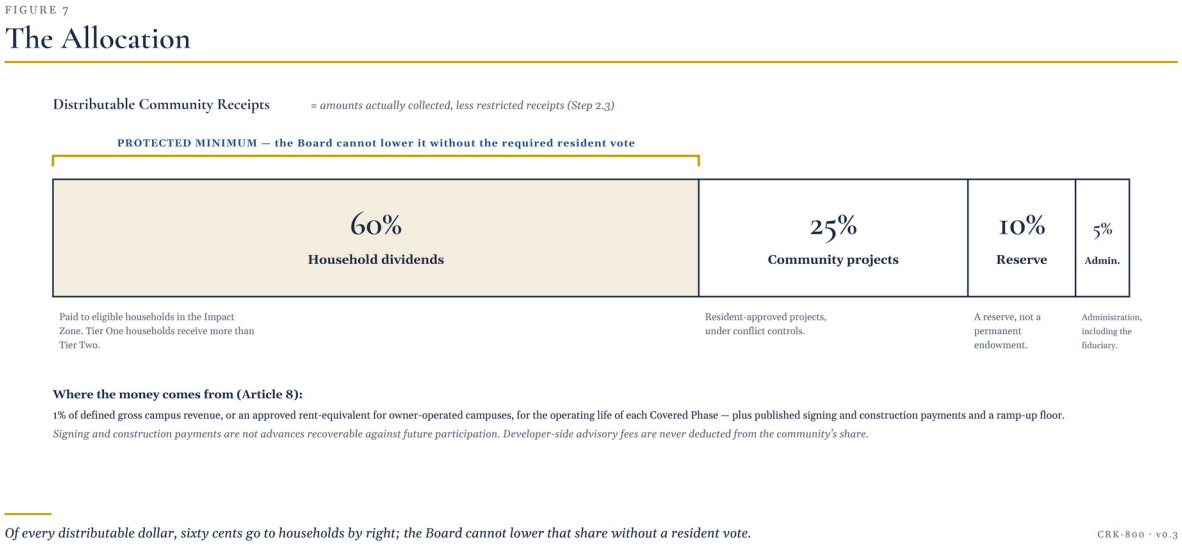
Distributable Community Receipts shall be allocated under the approved framework:

Allocation	Standard

	share
Household dividends	60%
Community projects	25%
Reserve	10%
Administration	5%

The household share is protected.

The reserve is a reserve, not a permanent endowment.



Deliverable: Approved allocation and distribution reports.

Step 2.10 — Technical Compliance

The CRV shall monitor the Developer's technical commitments under the CBA.

Independent technical review shall be conducted as required.

Deliverable: Technical compliance reports.

Step 2.11 — Annual Audit and Public Reporting

The institution shall prepare and publish:

a. Annual audited financial statements.

b. Annual activity report.

c. Aggregate household distribution information.

d. Community-project expenditures.

e. Reserve information.

f. Material governance changes.

g. Material contractual compliance matters.

The County shall receive the annual audit and report for publication.

Deliverable: Published annual accountability package.

Step 2.12 — Annual Exchange Renewal

The institution shall complete the annual listing renewal under CRK-700.

Material failure to satisfy continuing obligations may result in visible suspension or delisting.

Delisting shall not automatically extinguish executed CRP rights.

Deliverable: Renewal determination.

PART III — RESPONSIBILITY MATRIX

Function	Primary responsible party	Independence requirement
County formation resolution	County	Legal authority required
Trust formation	Authorized formation parties	Independent legal validation
CRV formation	Authorized organizer	Host-state default
Civic nominating slate	Qualified civic institutions	Transparent process
Initial trustee appointment	County	Qualified resident slate
First resident election	Independent election administrator	Resident voting control

Initial fiduciary procurement	County	Public RFP
Fiduciary appointment	Authorized community institution	Exchange does not appoint
Subsequent fiduciary replacement	Resident-controlled institution	Governing documents
Stated technical limits	Resident Board	Independent community decision
Self-certification	Community institution	Authorized attestation
Counsel opinion	Independent community counsel	Professional independence
Listing admission	Exchange	Published criteria
Developer preparation	Developer and its adviser	Developer-side representation
Process sequencing and information flow	Independent Facilitator	Accepted by County and community
Project technical review	Independent technical professionals	Community-client independence
Article 8 adoption	Community and Developer	Voluntary standard acceptance
Non-Article 8 negotiation	Authorized parties and their advisers	Facilitator does not represent
CBA execution	Developer and CRV	Proper authority
Treasury and distributions	Fiduciary Manager and authorized institution	Independent controls
Household eligibility	Authorized community institution	Objective criteria
Community-project approval	Resident governance body	Conflict controls

Annual audit	Independent auditor	Professional independence
Annual reporting	CRV and Trust	Public accountability
Exchange renewal	Exchange	Published rules

PART IV — IMPLEMENTATION TIMELINE

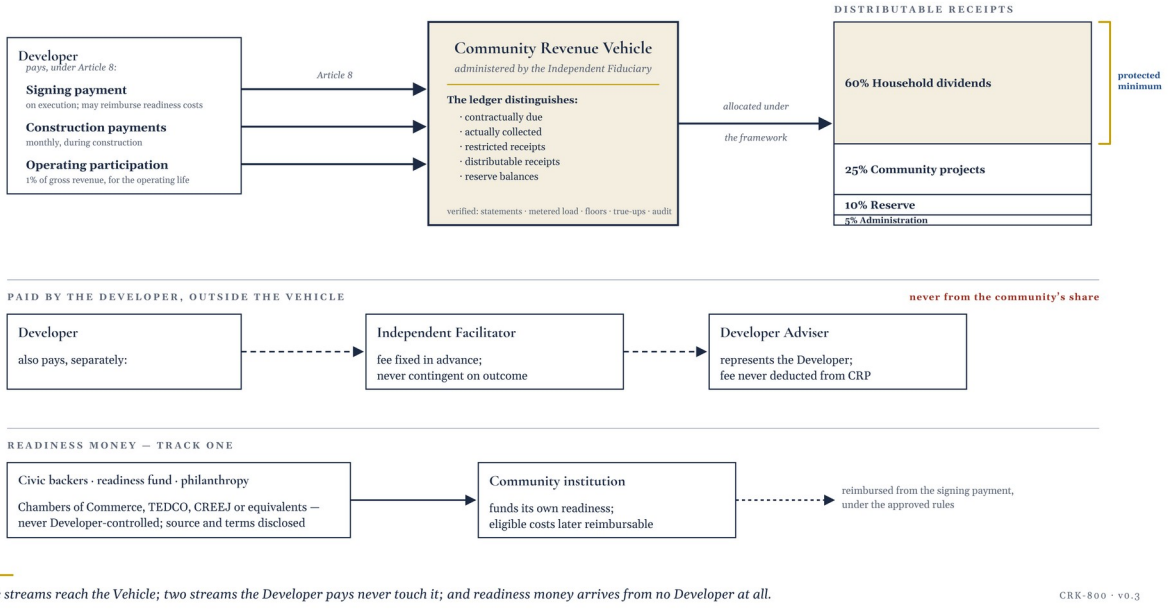
Stage	Target or trigger	Required outcome
Track One — Readiness to List	8–12 weeks	Self-certification and Exchange listing
Facilitator selection	Before facilitated engagement	Executed CRK-650
Developer preparation	Engagement sequence	Complete Developer package
Technical assessment	Engagement sequence	Four toll-gate findings
Article 8 confirmation	Engagement sequence	Standard and project schedules completed
Non-Article 8 negotiation	Engagement sequence	Agreed CBA terms
CBA execution	Upon required approvals	Signed agreement
Track Two activation	Following CBA execution	Full operational stand-up
First resident election	Within 18 months of initial appointments	Elected resident governance
CRP commencement	Revenue commencement for each Covered Phase	Operating-life participation
Annual audit	Annually under governing documents	Published audit
Exchange renewal	Annually	Continued listing determination

The engagement and operational periods shall be measured during the pilot rather than assigned unsupported national durations.

PART V — FUNDING AND COST CONTROL

FIGURE 8

The Money



Three streams reach the Vehicle; two streams the Developer pays never touch it; and readiness money arrives from no Developer at all.

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1. Track One Funding

Track One shall be funded independently of Developer control.

Potential sources include:

a. Community civic backers.

b. An independent readiness fund.

c. Local philanthropic support.

d. Other approved non-developer-controlled funding.

Potential civic participants may include Chambers of Commerce, TEDCO, CREEJ, and their counterparts in other jurisdictions.

No participation or funding commitment by those organizations shall be presumed.

2. Readiness Independence

A community institution organized under Developer financial control shall not satisfy the independence standard.

The source, amount, and conditions of readiness funding shall be disclosed.

3. Reimbursement

The approved standard may permit reimbursement of eligible readiness costs from the signing payment.

The reimbursement procedure shall identify:

1. Eligible expenses.
2. Supporting records.
3. Approval authority.
4. Payment priority.
5. Conflict controls.
6. Public reporting.

4. Facilitator Compensation

The Developer shall retain and pay the independent Facilitator.

Compensation shall not depend on execution or the economic outcome.

5. Developer Advisory Fees

The Developer shall pay any adviser it retains.

Those fees shall not be deducted from the community's CRP.

6. Independent Community Advisers

The community may retain its own legal, technical, financial, and other advisers.

Developer funding of community professional review shall be structured to preserve client independence.

7. Track Two Funding

The signing payment and approved administration share may support operational stand-up under the governing financial policies.

8. Pilot Cost Benchmark

The pilot shall record:

a. Formation costs.

b. Legal costs.

c. Initial governance costs.

d. Preliminary fiduciary costs.

e. Self-certification costs.

f. Exchange listing costs.

g. Facilitator costs.

h. Project technical assessment costs.

i. CBA negotiation costs.

j. Full fiduciary stand-up costs.

k. Distribution-system costs.

l. Audit costs.

The pilot shall establish actual cost benchmarks rather than assume unsupported national averages.

PART VI — QUALITY GATES

Gate A — Institutional Formation

Required evidence:

- County resolution or lawful fallback record.
- Trust formation.
- CRV formation.
- Adopted governing instruments.
- Initial resident appointments.

Gate B — Readiness to List

Required evidence:

- Preliminary fiduciary engagement.
- Stated technical limits.
- Article 8 acceptance resolution.

- Community self-certification.
- Counsel opinion.
- Completed evidence register.

FIGURE 9

The Gates



Seven gates, each opened only by evidence: nothing is asserted that is not on the register.

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Gate C — Exchange Admission

Required evidence:

- Completed listing review.
- Public profile.
- Accepted standard version.
- Recorded qualifications.

Gate D — Facilitated Engagement Authorization

Required evidence:

- Developer identification.
- Developer standard acceptance.

- Independent Facilitator selection.
- CRK-650 acceptance letter signed by the Developer, County, and CRV.
- Facilitator independence disclosure.
- Engagement plan.

Gate E — Technical and Commercial Readiness

Required evidence:

- Four technical toll-gate findings.
- Completed Article 8 project schedules.
- Required security arrangements.
- Disclosed riders.
- Draft CBA.
- Required legal reviews.

Gate F — Operational Readiness

Required evidence:

- Full fiduciary engagement.
- Accounts and controls.
- Eligibility system.
- Distribution testing.
- Audit arrangements.
- Reporting procedures.

Gate G — Continuing Compliance

Required evidence:

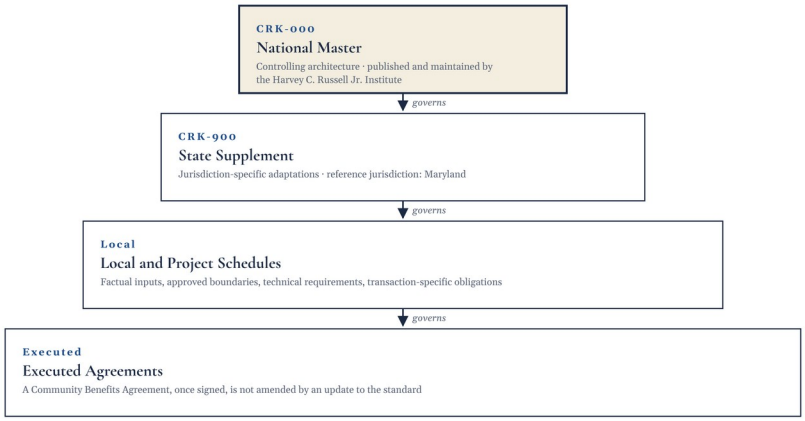
- Financial reporting.
- Technical compliance reporting.
- Resident governance compliance.
- Annual audit.

- Annual Exchange renewal.

PART VII — DOCUMENT CONTROL AND PUBLICATION

FIGURE 10

The Documents



Every module carries: document number · version · effective date · owner · status · applicable State Supplement · material revisions
Departures from the standard go on the Deviation Register; Article 8 departures go on Schedule G.

THE KIT'S MODULES, AS CITED HERE

CRK-000	National Master — controlling architecture
CRK-100	Formation (series)
101	County formation resolution
102	Civic nominating slate
107	Resident-formation fallback
CRK-200	Community Trust instrument
CRK-300	Resident election process
CRK-400	Project technical assessment (four toll gates)
401	One-page Community Stated-Limits Form
CRK-500	Article 8 — Revenue Participation standard
CRK-650	Facilitator acceptance letter
CRK-700	Exchange listing and annual renewal
702	Community self-certification
703	Independent counsel opinion
CRK-800	This manual — implementation process
CRK-900	State Supplement

WHO PUBLISHES, LICENSES, OPERATES

Harvey C. Russell Jr. Institute
publishes and maintains the standard: Article 8 terms, bands, listing rules, limits forms

Vanguard Management Strategies
licenses the methodology and templates to communities, perpetually and royalty-free

Host Exchange Holdings
operates the listing platform; admits under published criteria; governs and appoints nothing

Related parties (Part VII §7)
the four entities share common ownership; the community pays none of them

One national master governs; a state supplement adapts it; local schedules fill in the facts; executed agreements stand still when the standard moves.

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1. National Master

CRK-000 establishes the controlling architecture.

2. State Supplement

CRK-900 establishes the required jurisdiction-specific adaptations.

3. Local and Project Schedules

Local and project documents establish factual inputs, approved boundaries, technical requirements, and transaction-specific obligations.

4. Institute Standards

The Harvey C. Russell Jr. Institute publishes and maintains the standard: the Article 8 participation terms, the economic bands and payment scales, the listing standards, and the technical stated-limits forms. The Institute owns the published standard.

5. Vanguard License

Vanguard Management Strategies LLC licenses the original methodologies and templates for community use, perpetually and royalty-free.

Vanguard retains ownership of those materials, subject to legally documented rights.

The Institute publishes the licensed materials alongside its own standards.

6. Exchange

Host Exchange Holdings LLC operates the listing platform under its applicable agreements and licenses. It admits communities under published criteria, maintains professional panels, and administers listing status. It does not govern local CRVs or appoint their fiduciaries.

7. Related Parties

The Harvey C. Russell Jr. Institute, Vanguard Management Strategies LLC, VMS Advisory Group, and Host Exchange Holdings LLC are under common ownership.

That relationship is disclosed here, in one place, and governed by the following rules.

a. The community is not required to retain or pay any of these entities.

b. Community use of the standard and the templates is licensed perpetually and royalty-free.

c. Developer-side advisory fees are paid by the Developer and shall not be deducted from the community's CRP.

d. VMS Advisory Group, when representing a Developer, shall never serve as the independent Facilitator in the same engagement.

e. The Exchange maintains a Facilitator roster and a fiduciary panel but does not run engagements, govern local CRVs, or appoint fiduciaries.

8. Version Control

Each module shall identify:

a. Document number.

b. Version.

c. Effective date.

d. Owner or publisher.

e. Status.

f. Applicable State Supplement.

g. Material revisions.

9. Deviation Register

Material departures from the published standard shall be recorded.

Article 8 departures shall be documented in Schedule G.

10. Executed Agreements

An update to the published standard shall not automatically amend an executed CBA.

Changes to executed agreements shall require the applicable contractual and institutional approvals.

PART VIII — INTEGRATION AND OPEN DECISION REGISTER

ID	Matter	Status
INT-01	County-formation default	Incorporated
INT-02	County as settlor, not continuing owner	Incorporated; legal validation pending
INT-03	Resident-formation fallback	Incorporated
INT-04	Initial civic nominating slate	Incorporated
INT-05	First resident election within eighteen months	Incorporated
INT-06	Initial County fiduciary RFP	Incorporated

INT-07	Exchange fiduciary panel without appointment authority	Incorporated
INT-08	Community self-certification	Incorporated
INT-09	Independent counsel opinion	Incorporated
INT-10	Eight-to-twelve-week readiness target	Incorporated; pilot test pending
INT-11	Two-track implementation	Incorporated
INT-12	Independent Facilitator	Incorporated
INT-13	CRK-650 acceptance letter	Incorporated
INT-14	Developer-paid, noncontingent Facilitator	Incorporated
INT-15	VMS Advisory Group as developer-side adviser	Incorporated
INT-16	Four technical toll gates	Incorporated
INT-17	One-page pre-listing limits	Incorporated
INT-18	Project-specific technical review during engagement	Incorporated
INT-19	Article 8 adopted as published	Incorporated
INT-20	Operating-life CRP	Incorporated
INT-21	Thirty years illustrative only	Incorporated

INT-22	Rent-equivalent for owner-operated campuses	Incorporated
INT-23	Metered-load implementation	Framework incorporated; validation pending
INT-24	Signing and construction payments	Framework incorporated; published scales pending
INT-25	Greater-of ramp-up floor	Framework incorporated; published floor pending
INT-26	60/25/10/5 allocation	Incorporated
INT-27	Protected household floor	Incorporated
INT-28	Reserve rather than endowment	Incorporated
INT-29	Two-tier Impact Zone	Incorporated
INT-30	Annual listing renewal	Incorporated
INT-31	Visible delisting	Incorporated
INT-32	Public disclosure of recorded terms	Incorporated
INT-33	Institute ownership of standard	Incorporated
INT-34	Vanguard Management Strategies LLC ownership of methodology/templates	Incorporated
INT-35	Perpetual royalty-free community-use license	Incorporated; documentation pending
INT-36	Host-state formation default	Incorporated

INT-37	Working Paper No. 3 six-stage crosswalk	Source reconciliation pending
INT-38	Maryland Trust and County authority	Legal validation pending
INT-39	Household tax treatment	Legal/tax validation pending
INT-40	Article 8 lease and lender enforceability	Specialist review pending
INT-41	Competition-law review	Pending
INT-42	Pilot cost benchmark	Pending
INT-43	Pilot readiness timing validation	Pending
INT-44	Blue Owl pilot Facilitator candidate	Identification pending
INT-45	Related-party disclosure	Incorporated

PART IX — PILOT ACCEPTANCE RECORD

The pilot shall produce a documented evaluation of:

1. Actual readiness-to-list duration.
2. Actual readiness-to-list cost.
3. Legal feasibility of the formation structure.
4. Resident governance legitimacy.
5. Independent Facilitator effectiveness.
6. Technical review effectiveness.
7. Article 8 schedule completion.
8. Transaction efficiency.

9. Operational stand-up requirements.
10. Community and Developer feedback.
11. Material deviations.
12. Required national standard revisions.

The pilot shall not be described as successfully validated until the applicable criteria have been measured and reviewed.

FIGURE 11

The Open Items



Forty-five decisions are on the register; thirty-one are closed, and the fourteen still open fall into four kinds of validation.

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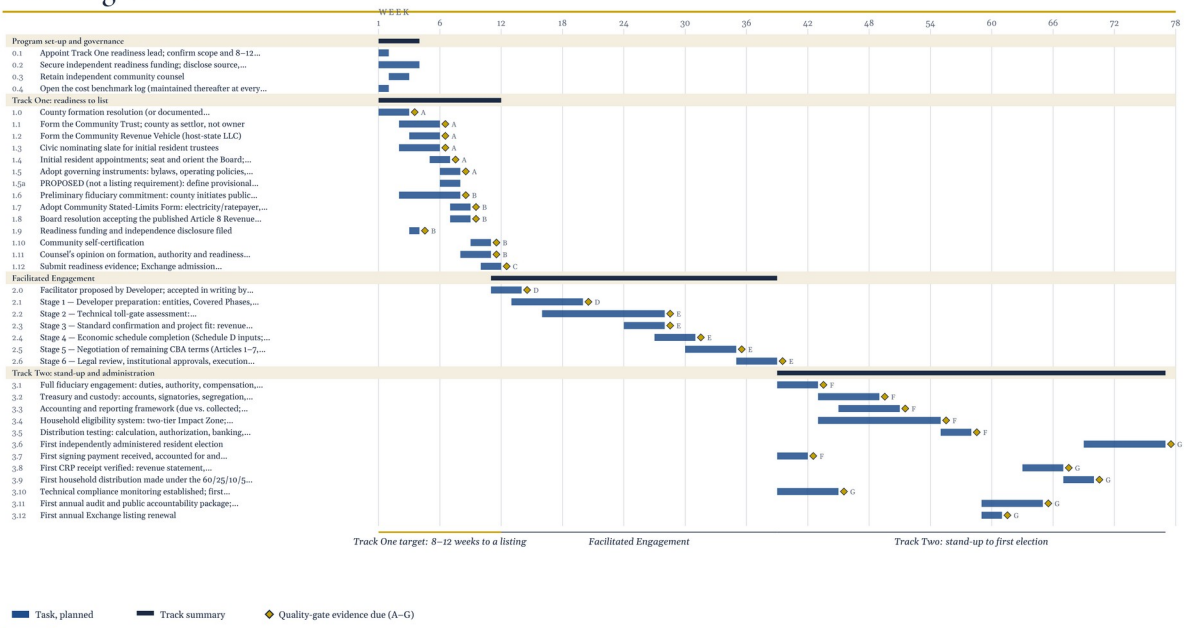
APPENDIX — THE PROGRAM WORKBOOK

The Kit includes a program workbook that turns this manual into a plan a county can run. It is one file with seven sheets. The Work Breakdown Structure holds the forty-five tasks in Part II as rows, each with its CRK reference, deliverable, owner, predecessors and duration; the Gantt, the quality-gate register, the responsibility matrix, the risk and decision register, and the cost log are all drawn from it. Edit the yellow cells; everything else calculates.

Figure 12 is the plan as the workbook draws it from a start date of 4 January 2027. The diamonds are the evidence each gate requires, and they fall where the Steps in Part II place them. Figure 13 is the dashboard sheet: the eight measures the readiness lead reads every week, the planned dates of the seven milestones, and the seven sheets of the workbook.

FIGURE 12

The Program Plan



Forty-five tasks across three tracks, drawn from the Kit's program workbook. Diamonds mark the evidence each quality gate requires.

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FIGURE 13

The Dashboard



One sheet answers the weekly question: what is late, blocked, unfunded, unresolved, or awaiting a decision.

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The workbook is provided, with the other instruments in the Kit, to communities that engage. It is not published separately.

APPROVAL AND VALIDATION

Design decision approver: Loren R. Douglass

Community-side reviewer before publication: to be designated

Designated legal validation: to be designated

The identification of these persons does not imply that review or approval has occurred.

END OF CRK-800 — VERSION 0.3

This Manual establishes the proposed implementation process. It is not a legal opinion, governmental approval, or guarantee that a particular county or project can complete the process within the target period.