

Request for Records Disposition Authority

Records Schedule Number **DAA-0434-2017-0012**
 Schedule Status **Approved**

Agency or Establishment **Department of Energy**
 Record Group / Scheduling Group **General Records of the Department of Energy**
 Records Schedule applies to **Major Subdivision**
 Major Subdivision **Office of Energy Efficiency & Renewable Energy**
 Schedule Subject **Better Buildings Residential (BBR) Customer Relationship Management (CRM) System**

Internal agency concurrences will be provided **No**

Background Information

The Better Buildings Residential (BBR) Customer Relationship Management (CRM) system is used by the BBR Program to capture information about stakeholders across three BBR programs: the Better Buildings Residential Network (BBRN); the Home Performance with ENERGY STAR (HPwES); and, the Better Buildings Neighborhood Program (BBNP). BBRN connects energy efficiency organizations to share best practices and learn from one another. Membership is open to organizations that are committed to accelerating the pace of energy upgrades in existing residential buildings. Members include federal, state, and local sponsors: utilities, universities, and non-profits. Members provide DOE Office of Energy Efficiency & Renewable Energy (EERE) with an annual update of the number of residential energy efficiency upgrades completed by their organization, and share information about the benefits associated with completed upgrades. The HPwES program works in conjunction with the U.S. Environmental Protection Agency (EPA) to support local Sponsors. The HPwES program helps homeowners improve the efficiency and comfort of their homes. Sponsors coordinate with home improvement contractors to assess and complete residential energy savings projects. BBNP relied on partners to coordinate with local residents, governments, and home improvement contractors to assess and complete residential energy savings projects. BBNP created award records granted by EERE beginning in 2010 and ending in 2014 when BBNP also ended.

Item Count

Number of Total Disposition Items	Number of Permanent Disposition Items	Number of Temporary Disposition Items	Number of Withdrawn Disposition Items

1	0	1	0
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GAO Approval

Outline of Records Schedule Items for DAA-0434-2017-0012

Sequence Number

1

Master File

Disposition Authority Number: DAA-0434-2017-0012-0001

Records Schedule Items

Sequence Number	
1	<p data-bbox="358 414 521 457">Master File</p> <p data-bbox="358 468 1136 500">Disposition Authority Number DAA-0434-2017-0012-0001</p> <p data-bbox="358 521 1469 819">The Better Buildings Residential (BBR) Customer Relationship Management (CRM) system contains stakeholder business contact information, which includes, but not limited to: name; email address; phone number; organization information; notes; and, summaries of communication interactions. The system also maintains registration and attendance information from events, including Peer Exchange Calls, webinars, and meetings, as well as, stakeholder data on the number of upgrades, projects, and inspections. Documents are housed in the system libraries, which includes partnership agreements and implementation plans.</p> <p data-bbox="358 829 917 861">Final Disposition Temporary</p> <p data-bbox="358 883 852 915">Item Status Active</p> <p data-bbox="358 936 820 968">Is this item media neutral? Yes</p> <p data-bbox="358 989 820 1106">Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing? Yes</p> <p data-bbox="358 1127 820 1212">Do any of the records covered by this item exist as structured electronic data? Yes</p> <p data-bbox="358 1244 673 1287">Disposition Instruction</p> <p data-bbox="358 1308 1372 1372">Cutoff Instruction Cutoff at the end of the calendar year data is received.</p> <p data-bbox="358 1393 1485 1457">Retention Period Destroy no sooner than 5 year(s) after superseded or obsolete but longer retention is authorized</p> <p data-bbox="358 1500 673 1542">Additional Information</p> <p data-bbox="358 1564 950 1596">GAO Approval Not Required</p>

Agency Certification

I hereby certify that I am authorized to act for this agency in matters pertaining to the disposition of its records and that the records proposed for disposal in this schedule are not now needed for the business of the agency or will not be needed after the retention periods specified.

Signatory Information

Date	Action	By	Title	Organization
09/13/2017	Certify	Troy Manigault	Departmental Records Officer	Office of the Chief Information Officer - Enterprise Records Management Division
01/17/2018	Submit for Concurrence	Steven Rhodes	Senior Appraisal Archivist	National Archives and Records Administration - Records Management Services
01/19/2018	Concur	Margaret Hawkins	Director of Records Management Services	National Records Management Program - ACNR Records Management Services
01/19/2018	Concur	Margaret Hawkins	Director of Records Management Services	National Records Management Program - ACNR Records Management Services
01/23/2018	Approve	David Ferriero	Archivist of the United States	Office of the Archivist - Office of the Archivist