

| | | | |
|--|--|---|---|
| REQUEST FOR RECORDS DISPOSITION AUTHORITY <i>(See Instructions on reverse)</i> | | LEAVE BLANK | |
| TO: GENERAL SERVICES ADMINISTRATION NATIONAL ARCHIVES AND RECORDS SERVICE, WASHINGTON, DC 20408 | | JOB NO. NI-142-87-3 | DATE RECEIVED 11/10/86 |
| 1. FROM (Agency or establishment) TENNESSEE VALLEY AUTHORITY | | NOTIFICATION TO AGENCY | |
| 2. MAJOR SUBDIVISION OFFICE OF POWER | | In accordance with the provisions of 44 U.S.C. 3303a the disposal request, including amendments, is approved except for items that may be marked "disposition not approved" or "withdrawn" in column 10. If no records are proposed for disposal, the signature of the Archivist is not required. | |
| 3. MINOR SUBDIVISION Division of Conservation & Energy Management Division of Energy Use & Distributor Relations | | | |
| 4. NAME OF PERSON WITH WHOM TO CONFER Ronald E. Brewer | 5. TELEPHONE EXT. (615) 751-2520 | DATE 2-26-87 | ARCHIVIST OF THE UNITED STATES <i>Frank S. Bunde</i> |
| 6. CERTIFICATE OF AGENCY REPRESENTATIVE | | | |

I hereby certify that I am authorized to act for this agency in matters pertaining to the disposal of the agency's records; that the records proposed for disposal in this Request of 4 page(s) are not now needed for the business of this agency or will not be needed after the retention periods specified; and that written concurrence from the General Accounting Office, if required under the provisions of Title 8 of the GAO Manual for Guidance of Federal Agencies, is attached.

A. GAO concurrence: is attached; or is unnecessary.

| B. DATE | C. SIGNATURE OF AGENCY REPRESENTATIVE | D. TITLE | |
|-------------|---|-------------------------|--|
| 11-4-86 | <i>Ronald E. Brewer</i> | ASSISTANT TVA ARCHIVIST | |
| 7. ITEM NO. | 8. DESCRIPTION OF ITEM <i>(With Inclusive Dates or Retention Periods)</i> | | 9. GRS OR SUPERSEDED JOB CITATION |
| | <u>Energy Package Records</u> See attached description and evaluation. | | |
| | | | 10. ACTION TAKEN <i>(NARS USE ONLY)</i> |
| | | | |

Request for Records Disposition Authority - Continuation

JOB NO.

PAGE OF
2 OF 4

| 7. ITEM NO | 8. DESCRIPTION OF ITEM (With Inclusive Dates or Retention Periods) | 9. SAMPLE OR JOB NO | 10. ACTION TAKEN |
|---------------|---|----------------------------------|---------------------|
| | <p>In August 1977, TVA developed the nation's largest home insulation program, producing impressive energy savings to the consumers through improved insulation and weatherization. Conducted in cooperation with TVA power distributors, the program provides for energy inspections and interest free loans to finance various kinds of weatherization measures. Upon request, a free home inspection is given by a TVA trained energy advisor who assists in identifying areas of the home which contribute to energy waste. The advisor recommends improvements and provides an estimate of the cost and potential savings, along with a listing of local contractors which agreed to meet TVA installation specifications. The Home Insulation Program Records Disposition was approved 7-13-82 under <u>Job. No. NCI-142-82-16.</u></p> <p>The Energy Package is a collection of services provided for residential customers. This package consolidated existing program surveys and financing arrangements into a single, unified, cost-effective package on October 1, 1982. Prior to implementation of this package, the programs were handled on individual surveys and program financing. A single energy survey is now performed to qualify consumers for any of the options offered by an individual power distributor. The Energy Package consolidated the following individual programs:</p> <ul style="list-style-type: none"> o Home Weatherization Program o Heat Pump Program o Heat Pump Water Heater Program o Solar Water Heater Program o Wood Heater Program <p>All forms necessary for the consumer's options are prepared by an energy advisor. Upon completion of the survey, the forms are returned to the district office involved. Included are forms, such as the Survey Report Energy Package (Form 1, sheet 1 & 2), Detailed Heat Pump Analysis (Form 4), Installer's Work Completion Form (Home Weatherization Improvements-Energy Package (Form 3), Installer's Work Completion Form-Energy Package (Form 5), Repayment Agreement, Participant Survey Questionnaire-Long Form, Agreement to Cycle, Heat</p> | NCI-142-82-16 (copy attached) | |

115-203

Four copies, including original, to be submitted to the National Archives

STANDARD FORM 115-A
Revised July 1974
Prescribed by General Services
Administration
FPMR (41 CFR) 101-11.4

GPO : 1975 O - 579-387

Request for Records Disposition Authority - Continuation

JOB NO.

PAGE OF
3 of 4

| 7. ITEM NO. | 8. DESCRIPTION OF ITEM (With Inclusive Dates or Retention Periods) | 9. SAMPLE OR JOB NO. | 10. ACTION TAKEN |
|----------------|--|----------------------------|---------------------|
| | <p>Pump, Heat Pump Water or Solar Water Heater, Security Agreement and Agreement to Participate.</p> <p>Data from most of these forms are entered into an automated data base:</p> <p><u>Residential Energy Conservation Information System (RECIS)</u></p> <p>This machine-readable file contains data elements, such as customer name, address, survey date, options selected by power distributor addressed by advisor upon consumer's request, type housing, type structure, age of residence, primary fuel for heating, type heating and cooling system, square foot of heated/or cooled space, list of measures eligible for financing, distributor number, survey number, advisor number, number of buildings, consumer account number, total cost of program improvements, contractor number, date of final inspection, financial data, date installed, labor costs, CAA funds used, security, heat pump installation information, performance information for energy saver home items, and various miscellaneous personal data on individual consumer. The data relates to all energy package programs <u>EXCEPT</u> the Cycle and Save Program. After data input by the district office personnel the forms are forwarded to the Data Acquisition and Processing Unit, Division of C&EM for microfilming.</p> <p>RIMS maintains the original microfilm copy. The Engineering & Computer Services Branch, Data Acquisition & Processing Unit, C&EM maintains a duplicate microfilm copy. Duplicate microfilm copies (7) are retained for reference in the district offices of EU&DR.</p> <p>Filming will be done on a weekly basis. Paper copies will be destroyed when acceptable microfilm is obtained.</p> | | |

| 7. ITEM NO | 8. DESCRIPTION OF ITEM (With Inclusive Dates or Retention Periods) | 9. SAMPLE OR JOB NO. | 10. ACTION TAKEN |
|---------------|---|----------------------------|---------------------|
| | <p>The following dispositions are requested for program administrative and reference needs.</p> <p>DISPOSITION:</p> <p>(1) Paper Copies: Destroy in Agency when microfilm is verified. (NC1-142-82-16)</p> <p>(2) Microfilm (original) copy: Destroy in Agency 10 years after program is discontinued.</p> <p>(3) Microfilm (duplicate) copy: Destroy in Agency when no longer needed for administrative purposes.</p> <p>(4) Computer-generated reports: Destroy in Agency when superseded or no longer needed for reference. (NC1-142-82-16)</p> <p>(5) RECIS Data Base: Replaces the master history tape and the computerized index. Destroy data elements when program is discontinued or when no longer needed for administrative purposes.</p> | | |