

RECORDS DISPOSITION SCHEDULE 30

SOLAR ENERGY AND ENERGY CONSERVATION RECORDS

This schedule covers records related to the defunct Solar Energy and Energy Conservation Bank (also called the Solar Bank). The records were transferred to Community Planning and Development (CPD) after the Solar Bank was abolished.

This schedule also covers the records related to the Solar Energy Advisory Committee and the Energy Conservation Advisory Committee. The Committees were established on June 30, 1980 to advise the Secretaries of HUD, Agriculture, Commerce, Treasury and Energy on matters related to the Solar Energy and Energy Conservation Bank.

The Solar Bank provided loan subsidies and matching grants for low- and moderate-income individuals to purchase energy conservation and solar energy improvements. The Bank was authorized in June 1980 by the Energy Security Act of 1980, and amended in November 1983 by the Housing and Urban-Rural Recovery Act.

The Solar Bank operated through the States. Eligible consumers applied through a designated State agency which, in turn, drew funds from the Solar Bank through the Treasury Financial Communication Systems (TFCS). Program funding began in 1983.

Five members on each Committee were drawn from the following groups: (1) Consumers, (2) Financial institutions, (3) Builders, (4) Architects/engineers and (5) Producers or installers of solar energy conservation improvements. The Committees were terminated on September 30, 1987.

The program was phased out with the final allocation going to 10 States in 1989. The last three projects closed in 1992, but CPD is awaiting the return of unused funds from Massachusetts.

This schedule will be abolished after the permanent records have been transferred to the National Archives and the remaining temporary records destroyed as required by the disposition instructions in this schedule.

APPENDIX 30

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Item No.	Description of Records	Disposition
*	1. Subject correspondence files.	
	a. Correspondence files consisting of letters and memos to and from Robert W. Karpe, Manager of the Solar Energy and Energy Conservation Bank, dated 4/82 through 5/83. (Vol: less than 1 cu. ft. Arrangement: chronological by type.) (Note: This item also applies to the correspondence files of any other Manager of the Solar Bank, if such records surface in the future.)	Permanent. Retire to the Federal Records Center immediately. Transfer to National Archives in October 1997. (NARA Job N1-207-94-2)
	b. All other subject correspondence files.	Break files annually. Destroy 3 years after files break. (NARA Job N1-207-94-2)
	2. Chronological or reading files.	Break files annually. Destroy 3 years after files break. (NARA Job N1-207-86-1, item 2)
	3. Budget files. Record copy of feeder, budget estimates and justifications.	Use HUD Records Disposition Schedule 3, item 24b.
*	4. Records related to the Solar Energy Advisory Committee and Energy Conservation Advisory Committee, dated 1980 through 1985. Consist of charters and amendments, membership lists,	Permanent. Retire to the Federal Records Center immediately. Transfer to National Archives in October 1997. (NARA Job N1-207-94-2)

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Item No.	Description of Records	Disposition	*
	related legislation and Federal Register notices, minutes of meetings, annual reports to Congress, feasibility study on use of consumer finance companies, correspondence, and other records related to the establishment of the Committees or created by them. (Vol: 1 cu. ft. Arrangement: alphabetical by type.)		
5.	Daily activities files.	Use General Records Schedule 23, item 5a.	*
6.	Financial accounting records-- Accountable Officers' Files.	Use General Records Schedule 6, item 1.	
7.	State/Territorial Files, containing original cooperative agreements, amendments, and related correspondence, proposals, audits, and reports.		
*	a. Original proposals, proposal submissions, and proposal evaluation materials; semi-annual reports; and the program review binder with the audit correspondence file of onsite reviews; dated 1980 through 1988. (Vol: 5 cu. ft. Arrangement: by type.)	Permanent. Retire to the Federal Records Center any time after the last project is closed out that volume warrants. Transfer to National Archives 6 years after the last project is closed out. (NARA Job N1-207-94-2)	*

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Item No.	Description of Records	Disposition
*	b. Cooperative agreements and amendments, Letters of Credit files (including computer printouts), State operating procedures, recapture reports, and all other materials.	Retire to the Federal Records Center any time after the last project is closed out that volume warrants. Destroy 6 years after the last project is closed out. (NARA Job N1-207-94-2)

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