

**U.S. DEPARTMENT OF ENERGY
RESEARCH & DEVELOPMENT (R&D) RECORDS SCHEDULING QUESTIONNAIRE**

Name of Respondent: **Site:**

Team Development

The R&D Schedule calls for a review team to be formed.

1. Describe how the team was formed at your site, the number of participants and the type of expertise represented.
2. Identify any difficulties that have been encountered in assembling and maintaining a team.

Review Process

3. Describe briefly how the records review process is handled at your site.
4. Are the records reviewed at file cutoff or at project closure to determine the correct disposition?
5. Does the schedule provide sufficient guidance on how to successfully complete a review of the records?

Disposition Levels

The Schedule established three disposition levels. Level I is research of national significance; Level II is first-of-a-kind development; and Level III projects are those that do not fall into categories I and II.

6. Does the schedule provide enough guidance on how to apply the three disposition levels?
7. Are the three levels of disposition sufficient for the R&D records of the Department (i.e., records series that may not fit into categories I and II, but should be retained longer than Level III)?
8. Are the descriptions sufficient for the R&D records of the Department (i.e., are there particular fields of research which are not adequately covered by this schedule)?
9. Describe any problems encountered with (a) using the three disposition levels and (b) implementing the schedule (include only problems not described above).
10. Has this schedule been helpful in identifying permanent records?

Your Comments

Please provide any comments that may improve the current process of scheduling R&D records.