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# MEMO

**WX-2025-2**

**TO:** Agency Directors, Weatherization Coordinators, and Auditors/Inspectors.  
**FROM:** Nency Ibarra, ECHO Weatherization Coordinator  
**RE:** Braiding ECHO with USDOE Formula and BIL Funds  
**DATE:** 01/14/2025

Greetings,

Due to the challenges faced in efficiently blending and expending both USDOE/BIL DOE (United States Department of Energy) and ECHO funds, Oregon Housing and Community Services (OHCS) is implementing a new approach to streamline the funding process. To maximize the effectiveness of these resources, OHCS is suspending the Savings-to-Investment Ratio (SIR) requirements for ECHO funds when USDOE funds are utilized to their fullest potential on a project. This means using the maximum allowable funds on energy-saving measures and Health and Safety (H&S) while maintaining the Average Cost Per Unit (ACPU). Once the USDOE funds are maximized, the balance of the project may be paid using ECHO funds. This change aims to ensure that all available resources are employed more effectively, ultimately enhancing the impact and reach of the Weatherization Assistance Program (WAP).

When ECHO funds are used by itself or with other non-USDOE funds, the current protocol requiring a grouped SIR still applies.

When utilizing the ECHO Bulk fuel switching protocol (Memo 22-3) DOE funds may not be used.

Effective immediately, all ECHO qualified projects will require the use of this new protocol.

Here's the detailed process for executing this new approach.

### REM/Design:

1. Run the REM/Design improvement analysis including all individual measures to be completed.
2. Determine the measure buy down if any, by following the process outlined in the [Oregon Single family audit protocol](#).
3. Run a grouped SIR improvement analysis including all USDOE funded measures. Include only the cost-effective portion of bought down measures and any incidental repairs being charged to USDOE. To meet USDOE rules, the group must have an SIR of 1.0 or better.
4. Include a copy of both the individual as well as grouped Improvement analysis in the file.

### OPUS Tracking:

1. All pertinent job information will be entered into OPUS as usual.
2. Enter USDOE and/or ECHO contribution to each measure.
3. Comments will be entered clearly identifying which measures needed to be discounted using ECHO funds and the amount of funds necessary to accomplish the buy-down.

Adding flexibility to ECHO funds for seamless braiding with USDOE funds boosts efficiency and effectiveness in weatherization projects. This ensures smoother project completion and maximizes the use of both funding sources. By integrating these resources, programs achieve greater energy savings, improved home comfort, and broader community benefits, all while expediting the expenditure of available funds. Ultimately, this enhanced flexibility directly benefits clients by providing them with faster, more comprehensive weatherization services, and leading to healthy and more comfortable homes.

If you have any questions, please contact me at (971) 433-7653.

Best Regards,

Nency Ibarra  
ECHO Weatherization Coordinator