**Overlapping Measure Consolidation Checklist (Prior to eTRM Placement)[[1]](#footnote-1)**

1. **Identify measure**
   * Define measure case/base case
   * Is measure still active?
   * Is measure high impact measure (HIM)
   * If low-volume, should it be a low-priority for movement into eTRM?
   * Was WP reviewed by ex-ante team?
2. **Identify All Current WPs** Identify the most current Workpaper(s) that characterize measure
   * Consider non-DEER WP, POU TRM, DEER measures
3. **Complete Overlapping Measure WP Template:** Complete Overlapping Workpaper Comparison Template
4. **Identify WP Differences:** Based on WP Template, identify all differences between Workpapers
5. **Check DEER:** Check DEER to see if there is any more current information available for the measure.
6. **Identify Sources for All Measure Parameters:** Are sources of information clearly identified in the WP (key measure parameters like EUL, HOU, IMC, etc.)
7. **Gather/Analyze Sources:** Gather all sources (DEER and non-DEER)
   * Review source and complete brief “Data Source Quality Analysis” template
   * Date of source, any more current studies/sources available
   * Rigor of study, statistically significant
   * Is data applicable to the measure being evaluated (geography, population being applied to)
8. **Compare to Other TRMs:** Review at least three (3) other TRMs. Compare approach/data used in other TRMs (using TRM Analysis Template)

* modeling vs. algorithm
* Compare other measure parameters and sources
* Note key differences and any items that should be considered for CA measure consolidation.

1. **Other Potential Issues**
   * Identify any other concerns or potential issues to investigate or discuss
2. **Challenges to Developing as a Statewide Measure in California**
   * Would any party take exception to offering this as a statewide measure?
3. **Measure Future**
   * Could it become a HIM?
   * Immediate Update: Does it need to be updated prior to placement in eTRM based on age of sources, changes to codes and standards, changes to marketplace, or to meet requirements to make it unilaterally applicable in California (climate zones, delivery strategies, etc.)
   * Future Update:
     + Any expected future updates to codes and standards, market, etc. that would impact measure?
     + When should measure be scheduled for update?
4. **Subcommittee Measure Recommendations**
   * Approach and data to use for measure
   * How to harmonize differences
   * Whether ready for immediate placement in eTRM or needs updating as part of statewide measure consolidation
   * Measure sunset date
5. **Cal TF Peer Review**
6. **Full Cal TF Recommendation**

Templates:

1. Overlapping Workpaper Comparison Template
2. Data Source Quality Analysis Template
3. TRM Analysis Template
4. Cal TF Peer Review Checklist

1. Overlap could include multiple utility WP’s addressing the same measure or utility WP and POU addressing the same measure (either via POU TRM or through independently developed measure). [↑](#footnote-ref-1)