

Escalation & Discretion Framework Template

Founder Support on Sensitive Matters — Sample Template

Purpose

A quick-reference framework for deciding how widely a sensitive matter should be shared, so discretion is applied consistently instead of case-by-case guesswork.

Categories of Sensitive Matters

Category	Example	Typical Handling
Legal	Disputes, contract issues	Coordinate with counsel; founder-only until resolved
Cap Table & Treasury	Equity moves, banking	Founder + Chief of Staff only
Personnel	Sensitive HR matters	Confidential, need-to-know basis

Escalation Principles

- Default to the narrowest possible circle of visibility, expanded only as required
- Every sensitive decision gets a brief written record, even if access is restricted
- Legal or financial matters loop in counsel or auditors at the appropriate trigger point
- Ownership of each category sits with a named internal role, so handling doesn't depend on one outside advisor being available

Review Cadence

Revisit this framework whenever the org chart changes materially (new exec hire, board seat, outside counsel change) — categories and handling routes drift as the company grows.