

Decision Escalation Checklist



Florida
 Department of Financial Services
 TOM GALLAGHER, CHIEF FINANCIAL OFFICER



Introduction

The Decision Escalation Checklist is a tool that Group Managers or Team Leads may use for issues within their jurisdiction to help determine if a decision can be made at the team level. The objective of this checklist is to require a material case be documented in all issue escalation and challenges to decisions. When teams encounter an issue with high sensitivity in any area or medium sensitivity in multiple areas, they should confer with the PMO to determine if it is worthy of escalation. Any issue worthy of escalation will be documented and tracked in PMOnline.

To determine if an issue should be escalated, ask the following questions:

- Is the issue important to the project? Why?
- How politically sensitive is this issue?

Area of Sensitivity	Sensitivity Level		Why?/Comments
Potential Impact to Delivery Schedule		Low Impact (< 2 weeks)	
		Medium Impact (2 to 4 weeks)	
		High Impact (> 4 weeks)	
Cross-Agency Alignment		Low - Major Agencies Are Relatively in Agreement	
		Medium - Major Agencies Are Not In Agreement, But the Project Team Has the Resources On-Hand to Gain Consensus	

Area of Sensitivity	Sensitivity Level		Why?/Comments
		High: Major Agencies Are Not In Agreement, and the Project Team Does Not Have the Resources On-Hand to Gain Consensus	
Importance to a Deputy Secretary Level or Above		Low Importance	
		Medium Importance	
		High Importance	
Potential for Organizational Structural Change		No Change Anticipated	
		Some Degree of Change	
		High Degree of Change	
Potential Impact to the Public, Legislative, or Judicial Branches		Low Impact	
		Medium - At Least One Organization/ Major Constituency Group Impacted	
		High - Multiple Major Impacts	
Legal Impact		No Impact	
		Medium - Impact Is N/A	
		High - Legal changes are necessary	

Area of Sensitivity	Sensitivity Level		Why?/Comments
Scope Impact		No Impact	
		Medium - At least One Organization/Major Constituency Group Impacted	
		High - Multiple Major Impacts	
Degree of Customization, Analysis or Development Required		None Anticipated	
		Some Degree of Customization, Analysis or Development	
		High Degree of Customization, Analysis or Development	
Degree of Technical Architectural Change Required		No Change Anticipated	
		Some Degree of Change	
		High Degree of Change	