

Balanced Governance Template

Standards and Guidelines Framework

A companion resource from Agile Meets AI, Chapter 4

Effective governance distinguishes between standards (non-negotiable requirements) and guidelines (helpful but flexible resources). Use this template to define your organization's balanced governance approach.

STANDARDS (*Non-Negotiable*)

Standards cover critical areas where consistency is required. These are not optional — everyone must follow them with clear review processes in place.

Compliance Requirements

Examples: PII handling, ADA accessibility, security protocols, regulatory requirements

Requirement	Review Process

Operational Standards

Examples: Document storage locations, budget thresholds, technical minimums, escalation procedures

Standard	Requirement	Owner

GUIDELINES (*Flexible Resources*)

Guidelines offer support without mandates. They help teams make better choices but assume teams will apply judgment. Unlike "best practices," guidelines are meant to be adapted.

Templates & Tools

Examples: Document templates, meeting agendas, prioritization techniques, communication patterns

Resource	Purpose	Location

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Recommended Practices

Examples: Meeting facilitation techniques, collaboration approaches, retrospective formats

Practice	When It Works Best	Optional?

The Governance Test

For each item, ask: *"If a team ignores this, what's the real consequence?"*

- Legal/security/customer safety risk → **Standard**
- Inefficiency or inconsistency → **Guideline**