

# 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

--	--	--

## 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**

From *Agile Meets AI: A Pragmatic Guide for Modern Teams* by Sheila Eckert  
[Download more resources at thesheilaverse.com/book-companion](https://thesheilaverse.com/book-companion)