



KING COUNTY AUDITOR'S OFFICE

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Tools and Templates for Project Management and Yellow Book Compliance



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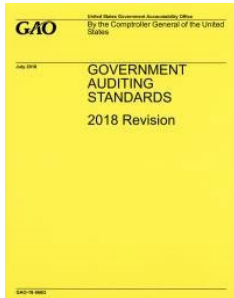
ASSOCIATION OF
LOCAL GOVERNMENT AUDITORS

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Download materials:
bit.ly/ToolsAndTemplates

Why templates are awesome

Make it easy to do the right things.



Reduce cognitive load.



Why templates are awesome

This makes room for creativity and flow.



Why templates are awesome



Johns Hopkins hospital checklist to avoid infections.

Before the checklist: 11% developed infections.

After a year of rigorously following the checklist, infection dropped to 0.

Why templates are awesome

Why not AutoAudit or TeamMate?

- Cost
- Time
- Overkill

Things to consider about these tools

- These have not been peer reviewed
- Your IT system setup may be different
- We use Agile project management
- We are a large shop
- We have ~2 person teams + supervisor
- CUSTOMIZE!



Project Management Workbook

- Centralized coordination for the project

Checklist

- Lays out all the steps
- Know what still needs to be done
- Know what's next
- Know what is yellowbook required

How to use the checklist

- Status box
- Date box
 - Current date highlighted
 - Future dates in gray
- Link/Signature box
- Adding or removing steps

Peer Review

- Peer Review list linked to steps in checklist
- Easy for peer reviewers to find evidence
- View list in 'New Window'

Templates

- Checklist allows staff to have an up-to-date template at their fingertips
- Templates designed to meet GAGAS standards
- Example: Risk Assessment



Updating templates

- How to enter customized templates



Other stuff in the PM workbook

- Status updates
- Scheduling / Calendar



Thank you

Link to templates on ALGA website:

bit.ly/ToolsAndTemplates

Questions?