

PROJECT MANAGEMENT POLICY

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This is a translation of Föreningen Ekonomerna's Swedish policy "Projekthandledningspolicy". In case of ambiguity in matters of dispute, the Swedish version shall always apply.

Aim and background

This policy document aims to lay down the guidelines for how a project manager for a Föreningen Ekonomerna stand-alone project is appointed. This policy also regulates lines of communication for reporting, planning of marketing and establishment of budget as well as what undertakings project managers have after the project has ended.

Guidelines

- Project manager(s) have ultimate responsibility for a project and project team members are chosen by the project manager(s).
- Project manager(s) for stand-alone projects are elected by the Board and there are normally two managers, but there can be up to a maximum of four project managers for larger projects.
- The project and associated groups shall work on behalf of the Association and follow the Association's policy, statutes, purpose and aim.
- The Head of Marketing from the Board ensures that the Association's logotype is displayed on all material that the project uses.
- The project shall appoint a marketing manager who is responsible for the marketing of the project.
- The marketing plan is developed by the project's marketing manager, appropriately in collaboration with the Head of Marketing at the Board as well as the Marketing Committee.
- The project manager(s) shall be informed of the Association's policies and statutes, and notified of other information that can be of importance.

- The project manager(s) has an ongoing debriefing duty to the Board during the project's life. Reporting continuity is determined by the Board and depends on project design.
- If a project is annually recurrent, project managers shall help search for new project managers as soon as the project is finished for the year.
- During the handover, the previous budget, results, evaluation, inventory list, marketing plan and action plan shall be handed over to the new project manager(s).
- Role description updates shall be kept in a special folder.
- The Board member responsible for the project where new project managers are to be appointed, shall introduce the project managers for a stand-alone project to the Board, upon which the Board decides the appointment of positions. This shall take place during a Board meeting and before the project team has begun its work.
- For project managers to be given certificates, they must hand in an approved and detailed debriefing to their successor(s) or to their contact person at the Board.

Financial aspects

- When a project manager(s) is appointed, the date for reporting the budget to the Board is set at the same time.
- If the budget has not been approved, the project manager can be held personally responsible for any costs. Purchases should therefore be avoided as far as possible before the budget has been approved.
- The budget shall be attached to as far as possible and any eventual deviations shall be reported to the Board immediately. Nevertheless, the Treasurer and the President together with the project manager(s) may revise the budget in accordance with the same principle as in the Financial policy.
- Continual reviewing shall take place in accordance with the payment of expenses policy in effect. Budgets are not approved without a project and marketing plan.
- For those projects with inventories, an inventory list shall be drawn up. This list shall be included in the handover of a project to new project managers. The Treasury should participate in the handover and inform about the list contents. The inventory list shall also, together with other documentation, be presented to the Board.
- Two weeks beforehand, contact the Treasury concerning invoicing if this is needed.