



Project handbook
for The Business and Economics
Association at Linköping University
ELIN

Version 2021:1

Pre-word

The idea is that this handbook should make it easier for everyone involved to keep track of the rules established within the association as well as point out what is worth thinking about when one is working within ELIN.

The project routines are always open for changes. If you come across something that you consider dysfunctional, you are welcome, and encouraged, to contact any member of the Executive Board, so that improvements can be made.

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1. Contact information

ELIN- Ekonomiföreningen vid Linköpings Universitet

Kårallen, Linköpings Universitet

581 83 Linköping

Org.nr. 8222002-7273

Bankgiro 393-6358

When invoicing via mail: ekonomi@elin.se

Reference: The name of the project

For contact details to a specific member of the board, see the contact list in the folder for active members.

1.1 Tax and value added tax

ELIN is a non-profit organization and therefore tax-exempt.

ELIN's operations are VAT-exempt, which means the association shall not include VAT in sales of goods and services. Nor are we allowed to remove the VAT on purchases made for our operations, consequently the VAT becomes a cost for us. Much like regular individuals we become the final customer. This is of importance when budgeting, since many companies state their prices excluding the Value Added Tax. We are required to budget for all costs including the Value Added Tax, which must be taken into consideration during discussions concerning sponsorship with companies.

2. Start of a project

- Before starting a project this manual should be read and ELIN's Code of Conduct shall be signed.
- Every person active within any ELIN project shall have an active membership with ELIN and the associations union, StuFF.
- The budget for a project shall be presented during one of the board's forums for discussion and subsequently be approved during a board meeting. The budget template for projects shall be used and is found in the folder "startkit"-folder in ELIN's Google Drive, ask your contact person on the board to link this folder to you.
- When booking dates for different events help is available at Google Calender, check both ELIN 2021 and ELIN prel 2021 (ask your chairman of the committee for access)

3. Financial matters

3.1 Budget

3.1.1 Budget step 1 - Establishment of budget

One of the first things you do when a project is started is to establish a budget. Budget templates can be found in the Google Drive folder “Startkit för projektledare och utskottsaktiva”, which your contact person can give you access to.

If a similar project previously has been undertaken, an old budget and its result should be found either in your project folder or in the binder of projects, located in Parrat. Start off with analysing this old budget and result to see what possible misjudgements that have occurred in previous years and what numbers that did not differ from the budget. Investigate, as far going as possible, what costs will be charged to the project this year by, for example, contacting potential suppliers and requesting quotes etc. Budget costs and revenues reasonably to match the expected number of participants. If no old budgets or outcomes are available, contact the treasurer to see if he/she can print project results from previous years. *Always use the annual budget as a point of reference*; this budget is based on previous year’s projects results.

3.1.2 Budget step 2 – Completed budget

The deadline for sending in the budget to styrelsen@elin.se is by latest at 2 pm the day before it is due for presentation. The presentation will take place on one of the board's discussion forums (Mondays uneven weeks), preferably by the project manager, and then the board at a subsequent board meeting approves it. During the presentation, you are expected to present each item as well as explanations for any deviations from the main budget.

When the budget has been approved, the chairman of the responsible committee will contact the project manager. A copy of the budget will be saved by the head of information in the board protocol folder as well as in the project folder. No purchases, binding agreements or orders may be made until the board has approved the budget. This also applies to any marketing of ticket fares. Deviations from the previous statement can be made, but they must be approved by the responsible board member and the treasurer prior to any action.

3.1.3 Budget step 3 - Continuous control

During the project, it is important that the project team note all purchases, orders, sales etc. These expenses shall be compared against the projected budget. If something differs or must deviate, please contact the chairman of the committee and the treasurer for approval.

During the project, a list of all orders, expenses, purchases and driven miles if you have used your own car must be kept. Each committee chairman must keep this list in his/her mailbox in the SEB room and use it to check off incoming invoices and documents. When the chairman of the committee has checked everything off, the list is presented to Treasurer (Vice Treasurer on CLUB Projects), whom calls for a budget follow-up.

3.2 Ordering of iZettle

Ordering of iZettle should be done from the Quartermaster at least 1 week before you need it. When you are done with the sales, a filled out daily report must be inserted into the "Expen" binder in the DELOITTE room.

3.3 Transactions regarding the project

The Treasurer and the responsible board member must approve of all payments and purchases made for the project. The options you have are to pay with your own money and save the receipt, and then receive money from ELIN afterwards, or to request the supplier to send an invoice to ELIN.

- You put out money by yourself and then get money deposited into your account.
To get
- payment for private expenses, a form must be completed and submitted together with receipt, no later than 30 days after posting (A more detailed explanation available under 3.5 Expenses)
- Ask the supplier to invoice ELIN
- You book the association card and trade with it. Then you fill in a form which is filed together with the receipt.

Always save the receipt!

3.4 Payment for hired services

ELIN can only pay a private individual for a rented service (for example DJ/ live performance on an event) without a bill (invoice) of up to SEK 999 per year, as ELIN is not to be classified as the person's employer. If a payment exceeds this amount, this must be resolved in another way, for example, by using the "club" (for example Kollektivet) or Kårservice.

3.5 Expenses

To receive compensation for expenses, you must be able to show a receipt. The person who made the purchase must attach the receipts to a payment slip, which is found in the SEB room in a magazine collector under the mailboxes. Fill in carefully so that the Treasurer sees which project the receipts concern. This slip is then sent to the person responsible for the project or activity, which shall control that the receipts are in

accordance with the amount indicated and that the expenditure is within the budget set for the project.

For the projects the documentation of the expenses is first handed to the project manager for a signature and then they are handed to the responsible board member who must make an approval before a payment can be made. **Receipts on expenses that are older than 1 month are not reimbursed.** Note that banknotes are not approved as a receipt; the receipt must clearly indicate what has been purchased.

To receive mileage the number of miles has to be recorded and written in a mileage template that has to be signed by the project leader and responsible board member, this should then be handed to the treasurer. It should be approved by the board that a private car is going to be used and you can only get compensation for the miles that are relevant for the project.

3.6 Invoice ELIN

A project manager may order items or ask a supplier to invoice ELIN as long as it is within a budget approved by the board. This will then be notified to the Treasurer. If the amount exceeds the budget, this must be approved by the responsible board member and the Treasurer, and depending on the amount of exceeding the budget it might also need to be approved by the board. The easiest way to do this is by sending an e-mail to ekonomi@elin.se with information about which supplier that will invoice, what amount they will invoice, what the invoice refers to and what project it belongs to. When you ask the supplier to invoice, you should also ask them to **enter the project name as a reference.**

Only members of the board can pay by using invoice in the University Book Academy store, if a project group needs to make purchases from the Book Academy store and do not want to pay with their own money, they may ask a member of the board to accompany you. The Book Academy has a list of members of the board who can invoice ELIN.

3.7 Ordering “Kaffe och Klägg” from baljan

To order kaffe and klägg, visit baljan.org after confirmation from the responsible board member. Baljan will send an invoice to ELIN.

3.8 Invoice a customer/sponsor.

When the projects need to invoice a customer or need to claim money for another reason, the project manager fills in an "invoice slip", which is found in the SEB room in a magazine collector under the mailboxes. Here you specify the amount to be invoiced, where the invoice is to be sent and what it concerns. It is also important to fill in which project that the invoice regards at the bottom of the paper. The invoice slip must be approved by the responsible board member, before it can be forwarded to the Deputy Tax Master to ensure that the invoice is sent. It is very important that this is done as soon as possible.

4. Ticket sales including pre-purchase and discounts

The project leader is responsible for the sales of tickets. Count how many tickets you have before you start the selling any. This way you can easily count how many and for how much you have sold, and by doing so you can be sure of the exact number of ticket you have left. A good way to keep track is by number each ticket. The project leader is also responsible for counting the cash register and to write a cashier report.

4.1 “Sittning” tickets and travels

When selling tickets to a “sittning” and travels you need to write a list of all the people to are going to be participating. No name shall be put on the list until that person have paid the exact amount of the event. The list must be deleted as soon as it is no longer needed.

4.2 Pre-purchase and discounts at ELINs events

4.2.1 Pre-purchase

When possible Players should be given pre-purchases when the board is, this is because of the fact that Players is working to receive pre-purchases during their time as active members. Faddrar (ÖF and UF) are not seen as equal and will not be offered pre-purchase as a common group.

Each project group is always offered pre-purchase to their own events, but only to themselves and not to any extra, external parts. Exceptions can be made. If that is the case the project leader shall be notified and request approval from the responsible member of the board.

4.2.2 Discounts

- The Toastmasters always receive a 50% discount on the tickets.
- The project group receives 50% off at a “sittning”. For travels, the project leaders receive a 30% discount.

All discounts needs to be covered in the budget.

5. Guidelines for marketing of an ELIN event

If an event wishes to be advertised at ELIN's homepage you contact our IT-manager at it@elin.se. Write where you want the information to be seen and if the post concerns news, please write an end date of when the news shall be removed.

If one wishes to spread information in ELIN News, you contact Head of Information at info@elin.se at the latest of 08.00 Tuesday mornings. The text shall be short, a maximum of 100 words and start with a headline. If one wants to include a picture it has to be separated from the text, in the format png.

If one wants to share information through our paper Drömmen, it has to be informed a long time before it is printed to drommen@elin.se. Not just the week before, since the content of the paper is set one month before.

If you would like to be promoted on Facebook and Instagram please contact mafo@elin.se. Use the template for facebook posts and instagram posts. Is the marketing business related (Facebook page ELIN Career) you contact naringsliv@elin.se.

If you use different communication channels for a project, remember to send the same message/information through them all and use the same layout. Unanimous gives a more solid and efficient marketing.

All cover images and other digital marketing posters must contain ELIN's logo in the lower left corner. Keep in mind that the project represents ELIN and thus the two MBA programs. All printed material should be before print/publication is approved by the Chairman of the Marketing Committee mafo@elin.se.

5.1 Posters

Projects that have posters must contain ELIN's logo in the lower part left corner. Keep in mind that the project represents the association ELIN and thus they both business economics programs. All printed material must be approved by printing before printing Chairman of the Marketing Committee. If you want to use logos, contact the Chairman of the Marketing Committee, mafo@elin.se so that right logo and format are used. This also applies to digital posters and cover images.

The Marketing Committee has members whose job it is to help put up posters for projects. The group wants you to contact them at least two weeks before the posters should be clear. Contact with these is through Layout Manager in the marketing committee, layout.mafo@elin.se. When to print posters or tickets, you can turn to the Print Academy in Kårallen. They are cheap and have fast delivery. If you choose to use the Printing Academy you should use take care of ELIN's customer number, which is LA2012-10.

Think before printing what is reasonable in the number of posters needed. Usually a maximum of 15 posters are needed to reach the message. When set up there are some restrictions on posters. Should you put up posters on the door to The Deloitte room or inside the room you MUST only use masking tape, all another form of tape is totally prohibited! It is the property manager for Kårallen who definitely to avoid the marks on doors and the like. If you set up posters in the Ecosystem, it is ONE poster per message board that applies. Not followed we risk not putting up posters there anymore. Otherwise, it's common sense which applies to the set of posters.

6. Business Relations

ELIN is a big association at Linköping University and the organization has a strong brand. The brand can become even stronger if all committees and project groups follow some simple guidelines. These guidelines enable us to give a coherent impression towards outside parties of being a serious and organized association, but it also gives us a stronger organizational culture.

Thereby we have put together a couple of guidelines for marketing.

6.1 Administration

When we write documents, contracts (can only be signed by the associations signatories, the president and the treasurer) or certificates the template "how to write a contract" is to be used. This template can be found in the Google Drive belonging to the board, ask your contact person in the board for this.

6.2 ELIN's view on cooperation with recruitment companies

ELIN does not cooperate with recruitment companies, staffing companies or networks as Nova 100 or similar. This is due to the fact that these companies in an indirect way work to diminish our contact with companies since the companies will not come directly to us but rather go through a recruitment company. Another reason is that students employed through recruitment companies get a lower salary than if they go through ELIN.

Examples on recruitment- and staffing companies are Academic Work, Adecco, Nova 100, Starnox, Effso, Manpower etcetera. Universum is not classified as a staffing company.

6.3 Alcohol, tobacco and gambling companies

ELIN does not cooperate with companies that are working with alcohol, tobacco or gambling. This is because of ethical reasons.

6.4 Sponsors

When you contact a company for sponsorship you shall always go through the responsible contact person the Business Committee if the company has one.

It is very important to follow the guidelines below when you look for financial support. If the company wants to sponsor your event you are supposed to use the document "How to write an agreement". This document is available on the Google Drive. Email addresses to the people in the Business Committee are also available on Google Drive.

6.5 Things to think about when contacting companies

6.5.1 Preparations before contacting companies

- Be well in advance, preferably a few months before, to be sure that they can budget the activity.
- Prepare how to present your activity to the company, how should you sell it? What do you offer the company in exchange?
- Prepare a document with information about what collaboration you are offering. Normally, it is good to have two or three different options for collaboration.

In the main collaboration for a project, we take about SEK 10,000. Then the company gets its logo on all printed material and invitations to events or similar. At less collaborations such as sponsoring flowers, the logo can be offered on a songbook or on one bottom page at www.elin.se which is related to the activity. Price lists for main partners, partners and external companies can be found in the board Google Drive. There are also descriptions of ELIN's services. If you have any questions please contact nu@elin.se.

6.5.2 Contact companies

- Always contact our main partners, Deloitte and SEB, first to see if they are interested in sponsoring the event. When doing this you should go through their contact in the Business Committee.
- After that you are free to contact the other partners of ELIN (EY, KPMG, PwC, GT, DanskeBank, Academic Work and other companies we are in current contact with –“Other companies”). When doing this you should go through their contact in the Business Committee.
- Step number three is to contact other companies in the business segments of our partners. Companies that are not in auditing or banking, or a direct competitor to Academic Work, can be contacted simultaneously as you contact our partners.
- When you don't know whom to contact at a company, try to reach out to a student coordinator, a person responsible for student relations or a person responsible for sponsoring. If you feel insecure please reach out to the contact for “other companies” in the Business Committee or the Head of the Business Committee.
- Remember that it takes time to get in touch with the right person at a company, and to get a reply from this person. Be patient and try to call early in the morning or late in the afternoon to avoid times when the person could be busy with meetings or similar.
- Normally one out of ten companies are interested in sponsoring, don't be discouraged by companies declining your offer, but rather continue calling – it

will pay off!

6.5.3 When contact had been made with a company

- Remember to have an open dialogue with companies about what they are interested in and what you can offer.
- Only ask open questions to the companies, i.e. no questions where the answer is *yes or no*. Try to get those you have been targeting to think properly.
- Be careful about inviting companies from the same industry, it may cause problems! This is relevant even if both companies are our partners.
- Be sure to sign standardized agreements according to the document “How to sign an agreement”. Don't forget that only ELIN's company signer (*only the Chairman and the Tax Master can sign valid agreements*).

7. Finishing the project

7.1 Budget follow up

A budget follow-up with a complimentary result report has to be performed. This is conducted by asking the Treasurer to withdraw a project result, which will be compared against the budget. This document shall be signed by the project leader and the responsible board member and later be put in the “Projektpärm” (the folder for projects). If there are large deviations a written explanation shall be provided attached to the result and a complimentary presentation to the board during a discussion forum (D-forum) has to be done to explain why it happened.

7.2 Testament

The project group shall construct a testament. This testament shall include a documentation/description for the new project group, an evaluation of what went well and not, and also preferably some tips, suggestions and ideas for the next-coming project-team. Attach the budget, a result report and a list with contact information. The responsible board member is in charge of handing these documents over to the next person.

7.3 Certificate

If someone in your project group wants a certificate to certify the performed work by the project member, the first step is to talk with the responsible member of the board. Make sure to ask about the certificate in time, while the person is still an active member in the ELIN board. A certificate will only be provided after a complete testament has been delivered!

8. Ending

None of us are professionals. We are all here to learn. Listen to others and take their advices to gather experiences. And also, of course, make sure to have fun!